Address Verification Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
3/30/31	Enable Address Standardization and Address Verification	Updated screenshot
7/8/20	Enable Address Standardization and Address Verification	Updated screenshot
4/20/20	Entire document	Review and update

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Address Verification: *The following steps must be completed to enable and set up Address Standardization and Verification. Once enabled, Address Standardization will run on most Address fields, while Address Verification will run on Student Registration and Student Profile Address fields.*

Unless otherwise noted, see the SI Getting Started Guide for details.

Address Standardization is the process of converting an entered address to standardized USPS address format: removing punctuation, using standard abbreviations, and using the correct Zip+4 Code. Address Standardization has additional benefits, such as easier and more accurate mailing labels, consistency across the application, and enhanced search capabilities.

Address Verification is the process of checking a standardized address against a database of addresses defined as being within a given school district, to make sure that students living in those addresses are attending the correct district. To use Address Verification, you must have enabled Address Standardization. **Note:** Address Standardization/Verification is optional, and does not function until you have enabled it at both the District and Building levels.

When Address Standardization/Verification is enabled, address fields on the Edit Student Profile and Registration Wizard will display a **caution** icon and **Validate** button next to the address fields after a user enters a new address in any set of address fields. Address fields on the Contact and Staff pages will process the address when you enter a Zip Code and leave the Zip Code field by clicking elsewhere on the screen, or by hitting the Tab key to advance to the next field. Address fields that use Address Standardization/Verification also include a Bypass Address Standardization or Bypass Address Standardization/Verification checkbox nearby. Clicking on this checkbox will disable Standardization/Verification for that address only. This should only be used if you are certain that an address is accurate, but the address will not Standardize or Verify correctly.

☐ **View District Addresses** (District Level) - Enter all addresses which are considered valid for the District. The fields in the top portion of this screen act as Search criteria for the Local Search and State Search buttons. Enter any criteria you wish (you must enter a Zip Code) and click either Search button to see a list of addresses matching those criteria.

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses

Once addresses are viewable, you can select individual addresses with the checkboxes, or select all addresses with the checkbox in the grid title bar, and click the **Edit Selected** or **Delete Selected** buttons to edit or delete all entries with their checkboxes selected. You can view and edit selected information for a single entry by clicking the **magnifying glass** icon next to that entry, or delete an entry by clicking the **trash can** icon next to that entry.

View/Edit District Addresses - List

From this screen, you can search the list of valid district addresses.

Local/State Search Criteria

Start Number: [ ]	**Stop Number:** [ ]	
Pattern: [Every Number ▾]		
Pre-Direction: [▾]	**Street Name:** [ ]	**Post-Direction:** [▾]
Zip Code: * [44833]	**Street Type:** [▾]	
Voting Area/Place: [▾]	**Progression Track:** [▾]	

[Local Search] [State Search]

[Add New Address Range] [Add New Single Address]

☐ Check All			Address ▲	City	State	Zip Code
☐	🔍	🗑	100 main St	galion	OH	44833
☐	🔍	🗑	102 main St	galion	OH	44833
☐	🔍	🗑	104 main St	galion	OH	44833
☐	🔍	🗑	106 main St	galion	OH	44833
☐	🔍	🗑	108 main St	galion	OH	44833
☐	🔍	🗑	110 main St	galion	OH	44833

✔ Show Active Only

[Edit Selected] [Delete Selected]

☐ **Enter a Range of District Addresses** (District Level) - Click the **Add New Single Address** button or the **Add New Address Range** button to enter an address or range of addresses. The Add New Address Range button will generate single entries for every address number in the range. For ranges, you can select a pattern of address numbers: Every Number, Even Numbers, Odd Numbers, or Other (which displays an extra field: Every, with a number-entry field, so you could enter, for example, Every 4).

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses – Add New Address Range button

View/Edit District Addresses - Add Range

From this screen, you can add addresses to the list of valid district addresses.

Start Number:	[ ]	**Stop Number:** [ ]
Pattern:	Every Number ▾	
Street Pre-Direction:	▾	
Street Name:＊	[ ]	
Street Type:	▾	**Street Post-Direction:** ▾
City:＊	[ ]	
State:	OH ▾	
Zip Code:＊	[ ]	

Building Progression Track:	▾	
Voting Area/Place:	▾	
Date Added to District:	[ ] 🗓	
Date Removed from District:	[ ] 🗓	
Comments:	[ ]	

[Save] [Save and New] [Cancel]

☐ **Enter a District Address** (District Level) - As Add Range, above, but only permits a single address number.

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses – Add New Single Address button

View/Edit District Addresses - Add

From this screen, you can add addresses to the list of valid district addresses.

Street Number: [   ]

Street Pre-Direction: [▼]

Street Name:* [   ]

Street Type: [▼]   Street Post-Direction: [▼]

City:* [   ]

State: [OH ▼]

Zip Code:* [   ]

Building Progression Track: [▼]

Voting Area/Place: [▼]

Date Added to District: [   ] 📅

Date Removed from District: [   ] 📅

Comments: [   ]

[Save]   [Save and New]   [Cancel]

☐ **Edit Information on Address Entries** (District Level) - By clicking on the **magnifying glass** icon next to an Address entry, you can view and edit some information about that address: the associated Building Progression Track, Voting Area/Place, Date Added, Date Removed, and any Comments associated with that Address entry.

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses – magnifying glass icon

View/Edit District Addresses - Edit

From this screen, you can edit individual valid district addresses.

100 main St
galion, OH 44833

Building Progression Track: ▼

Voting Area/Place: ▼

Date Added: 📅

Date Removed: 📅

Comments:

Save   Cancel

Once District Addresses are entered, Address Verification should process correctly.

☐ **Enable Address Standardization and Address Verification** (District and Building Levels) - You must enable Address Standardization and Address Verification at the District and Building Levels. If either option is enabled at the Building Level, but not at the District Level, that feature will not function. You must have Address Standardization enabled to use Address Verification.

Navigation: StudentInformation – Management – School Administration – School Building Administration – School Demographics

Note: Also, the web.config file needs to have the VerificationEnabled key set to "true" as shown in bold in the example below:

```
<AddressVerification>
    <add key="ServiceObjectsLicenseKey" value="XXX-XXXX-XXXX"/>
    <add key="StandardizationEnabled" value="true"/>
    <add key="VerificationEnabled" value="true"/>
</AddressVerification>
```

☐ **Register Students** - See the Student Registration Procedural Checklist for the pre-registration process. When you register each student, a **caution** icon and **Validate** button will display next to the address fields after a user enters a new address in any set of address fields. Address Standardization/Verification will process on that student's Residence Address when you click the **Validate** button.

Navigation: StudentInformation – SIS – Registration Wizard

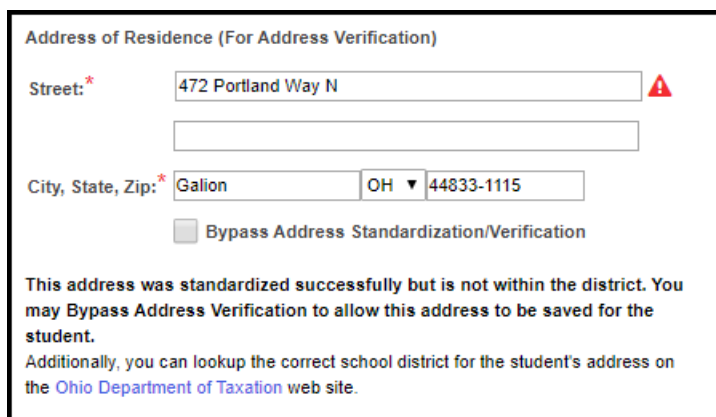| Address of Residence (For Address Verification)		
Street:*	PO Box 100	⚠
City, State, Zip:*	GALION OH ▼ 44833	**Validate**
	☐ Bypass Address Standardization/Verification	

If you check the Bypass Address Standardization/Verification checkbox, a new Bypass Comments field will display, and require you to enter the reason you bypassed Address Verification for the student.

✔ Bypass Address Standardization/Verification		☐ Bypass Address Standardization
Bypass Comments:		

☐ **Check Individual Address Standardization/Verification Errors for a Student -**
Once the Registration Wizard screen processes Address
Standardization/Verification, an icon will display beside the Address fields
indicating the success of the process. A **red caution** icon indicates a
Standardization or Verification error, and a green checkmark indicates successful
Standardization and Verification. Errors and reasons for errors will display.

Navigation: StudentInformation – SIS – Registration Wizard

Address of Residence (For Address Verification)

Street:*	472 Portland Way N	⚠
City, State, Zip:*	Galion	OH ▼ 44833-1115

☐ Bypass Address Standardization/Verification

This address was standardized successfully but is not within the district. You
may Bypass Address Verification to allow this address to be saved for the
student.
Additionally, you can lookup the correct school district for the student's address on
the Ohio Department of Taxation web site.

This is a Verification error (… standardized successfully but is not within the
district.). To fix this, you can:

- Add this address to the District Addresses screen (see above);
- Check the **Bypass Address Standardization/Verification** checkbox
  on the Registration Wizard screen, entering a reason for the bypass in
  the **Bypass Comment** field; or
- Click the **Ohio Department of Taxation** link to search for this address
  at the Ohio Department of Taxation's website, to determine the correct
  school district for this address.

☐ **Review Students Failing Address Verification -** Once students are registered, you can review all students who failed Address Verification by navigating to this screen. You can uncheck the **Ignore Bypassed Addresses** checkbox to see all unverified addresses. Clicking on an individual student name will take you to that student's Edit Profile screen, so you can change or Bypass that student's address.

Navigation: StudentInformation – SIS – School – Address Verification – Failing Students

☐ **Check Verification on Existing Students -** If a student is already enrolled, and Address Standardization and Verification have not yet been performed on that student's address, edit that student's profile, a **caution** icon and **Validate** button will display next to the address fields. Address Standardization and Verification will process on that student's Residence Address when you click the Validate button.

Navigation: StudentInformation – SIS – Student – Edit Profile – General tab

☐ **View Bypass Log** (optional) - If a student is already enrolled, you can view any Bypass Comments that were entered when the student was registered, or any time that address verification and standardization were bypassed for a student's address. Check the Bypass checkbox if it is not checked, and click the "View Log" link (this will pop up a window showing all Bypass Comments entered).

Navigation: StudentInformation – SIS – Student – Edit Profile – General tab – View Log link

Address of Residence (For Address Verification)		Mailing Address ☐ Use Address of Residence	
Street:*	2262 DAY Road	Street:*	2262 DAY Road
City, State, Zip:*	GALION OH ▼ 44833	City, State, Zip:*	GALION OH ▼ 44833
	✔ Bypass Address Standardization		✔ Bypass Address Standardization
Bypass Comments:			View Log

From this screen, you can view the log of comments from bypassing verification of the students address.
Date: 4/20/2020 2:32:00 PM   User:Recker, Amy (amy)
Address: 2262 DAY Road
City, State, Zip: GALION OH 44833
Bypass Comments:valid address

aSc Scheduler Step by Step Checklist

Change Log

Date	Section Number/Name	Change Description
4/16/15	Appendix F	Added Scheduling Worksheet back
3/6/15	Entire doc	2015/2016 school yr updates
10/15/14	Entire doc	Update screenshots/breadcrumb trail

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Connecting to aSc

1. Ensure aSc Bridge software is installed at your ITC on the webserver
2. Install aSc application on your computer
   a. Each building in your district will need a separate license
   b. Each computer you install the aSc application on will need a separate license, even if it is within the same building
3. Install the Webini file on your C drive in the "Timetables" folder. The webini file tells aSc what SI environment to pull from.
   a. File extension should be *.asc*
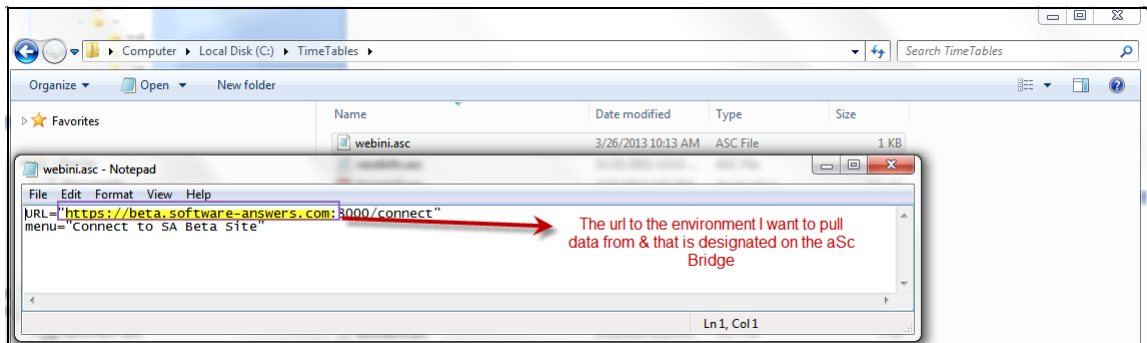
4. Edit your SI User Account and ensure the Default School on tab 1 is the school you want to pull data from and/or load data into for aSc.
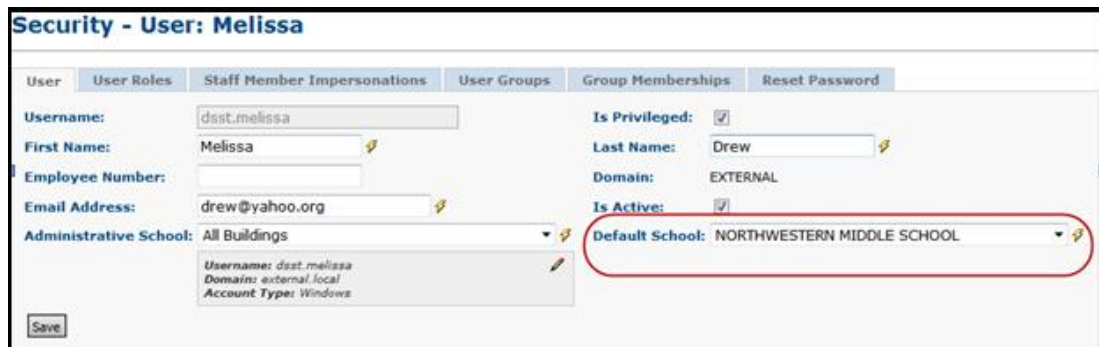
5. Next edit tab 2 of your user account assign the aSc role designated on the Bridge for the building you want to pull data from and/or load data into.
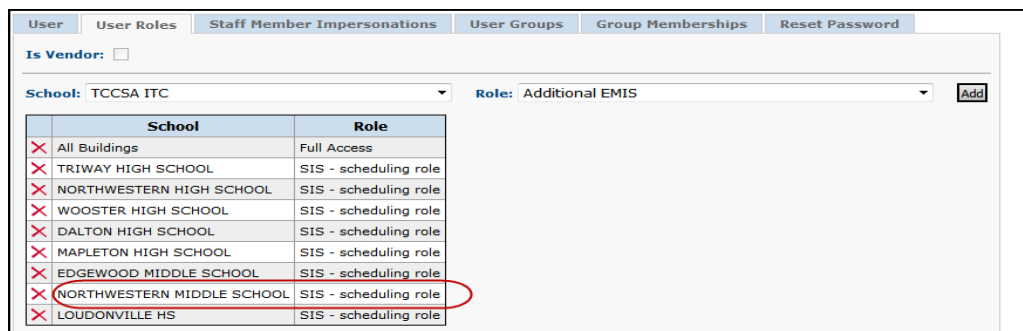
Pre-aSc: Things to do in SI prior to extracting to aSc

1. Complete SYI for the future school year.
2. Complete Promo/Bulk Enroll in the future school year.
   a. New students can't be added to aSc
   b. If you whack a student in SI, you must delete the student from aSc
3. Determine Lunch periods
   a. If lunch doesn't appear on student's schedules – continue to #4
   b. If lunch is designated for a certain period for all students (Example: period 5 or period 7) – continue to #4
   c. If students have lunch either period 5,6, or 7 (as an example) – continue to #4
   d. If lunch is 5a, 5b, 5c continue to #4. (Example: Geometry is 5a,5c and lunch is 5b)
   e. If lunch is any other scenario, STOP and contact your ITC before continuing.
4. Verify schedule is named "Default Schedule" on the Master Schedule Maintenance page in SI. aSc will only pull from the "Default Schedule".
5. Go to Course Terms Maintenance page in SI
   a. Add new course terms
   b. Inactivate outdated course terms
   c. Course terms shouldn't be added or deleted in aSc
6. Go to Staff Member Maintenance page in SI
   a. Add new teachers, ensure they have a 15/16 job function of Teacher on tab 2
   b. Remove 15/16 Teacher job function from any retired or former Teacher
   c. Teachers shouldn't be added or deleted in aSc
7. Go to Room/Location Maintenance page in SI
   a. Add new rooms in 15/16
   b. Unmark "Is Schedulable" for any rooms you don't want to go over into aSc.
8. Go to Course Maintenance page in 15/16 in SI
   a. Inactivate courses you no longer need
   b. Add new courses
   c. Change any course info on existing courses
   d. Verify course priority is correct on tab 1 (1-3=Low, 4-6=Med, 7-9=High in aSc)
   e. Change Course Type to PSEO for any course that will have not any requests in 15/16 but that you still want to use in 15/16. These sections will not come over into aSc since they don't have requests. Once scheduling is complete in aSc and schedule is loaded into SI, please send a ticket to your ITC to have the PSEO sections copied from the original "Default Schedule" into the aSc schedule.
   f. Courses shouldn't be added in aSc

9. Go to Course Section Maintenance in 15/16 in SI
   a. Verify capacities are adequate enough to meet student demand
   b. Add sections to meet student demand. aSc doesn't have the option to automatically overfill.
   c. Inactivate any section you no longer need, including sections where capacity grossly outweighs student demand.
   d. Verify sections have Teacher assigned & at least one period marked on the Meeting Times tab.
   e. Sections can be added in aSc but don't forget to put a room, teacher, & period
10. Go to Course Group Maintenance in 15/16 in SI
   a. Inactivate any outdated groups you will no longer be using
   b. Add new groups
   c. Verify "Is Locked" is marked on tab 1 of each group.
   d. Verify tab 2 is completely filled out, including ensuring there is at least one group section
   e. Groups should not be added/deleted/changed in aSc
11. Go to Periods of the Day Maintenance in 15/16 in SI
   a. Add any new periods
   b. Temporarily inactivate any periods that aren't part of the typical day
   c. Periods should not be removed or added in aSc
12. Create a list of courses that are only offered certain periods (Example: Band is 9th period)
13. Create a list of courses that are currently assigned to a designated course term, but are flexible and be scheduled into another course term
14. Create a list of Teachers that can only teach certain periods
15. Create a list of Teachers who teach more than one subject during the same period. Run R411 in SI with option checked to *Only Display Schedules For Teachers With Conflicts*. (Example: Art Teacher instructs Drawing & Painting the same period as Art II and Art III)
16. Do Teachers need free periods for lunch & planning? If no, continue to #17
   a. If yes, does the planning period need to be the same within the department? (Example: Math Dept. staff needs a common planning period)
17. Create a list of Course Sequencing Rules
18. Create a list of Teacher Link Groups
19. Enter student course requests in SI
   a. Requests can be added in aSc, but it is a tedious process
20. Create a list of students that need hand scheduling into course sections before you run the scheduler for the entire school

Once you pull into aSc please make sure you have following, do not proceed and contact support if the following items didn't load into aSc:

1. Students
2. Student Requests
3. Rooms
4. Teachers
5. Courses Sections, including assigned teacher and room

Please do not make changes to course groups in aSc. If you have to correct, add, delete, change course groups – please do it in StudentInformation and repull into aSc.

Running the aSc scheduler

STOP If your building is planning on schedule 5a,5b,5c lunch in aSc please read Appendix A **before** you begin.

1. Clean up data in SI
2. Open aSc Timetables application.
3. Click [Connect to DASL].
4. Next, choose [Create New Schedule:].
5. Click OK when you get the message
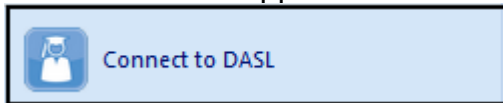
   [aSc Timetables — New timetable OK! — OK].
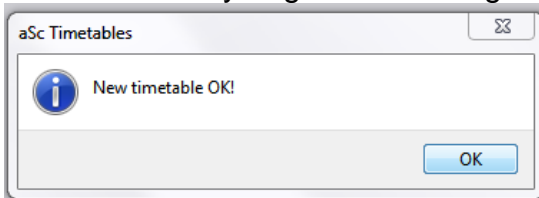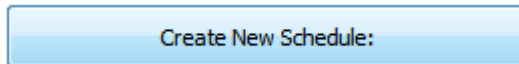
6. First, go to Student/Courses under the Main menu tab. Make sure you have students, requests, and sections.
7. Any course in red in the lower right-hand pane is a course that has requests but no sections. This is an impossible scheduling scenario. Your options are:
   a. Create a section
   b. Delete the request
   c. Ignore
8. Add sections in StudentInformation and reload. You will need to start back at Step 3 if you reload.
9. To add sections in aSc, if you haven't already added them in StudentInformation. Remember: Add sections in aSc with caution. See disclaimer in #1 of Things to do in StudentInformation before you load into aSc.
   a. Go to Courses.
   b. Select the course and click [Sections].
   c. Click [New section] in the bottom left corner.
   d. Select a teacher, room, days of the week, # of periods per day, course term.

10. [OK].
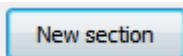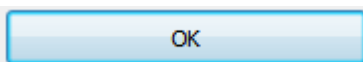
11. Next, go into School Details on the **Main** tab.
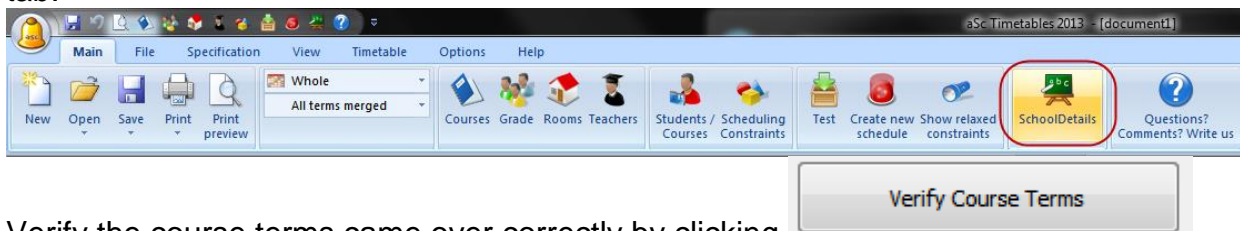
12. Verify the course terms came over correctly by clicking **Verify Course Terms**

Terms

Verify course terms have come over from StudentInformation correctly

Terms: 5   Help

Here you can rename individual terms using button Edit or create new parts of the school year if you have for example sections that have to be in T1 AND T3 or sections that have to be in T1 OR T3 Or T4:

Name	Code	Name
1st 9 wks only	9wk1	
2nd 9 wks only	9wk2	
3rd 9 wks only	9wk3	
4th 9 wks only	9wk4	
234	234	
Schedule in any term	Any	These courses can meet any term
All Year	YR	All Year Courses
1st Semester	1SEM	9wk1 AND 9wk2
2nd Semester	2SEM	9wk3 AND 9wk4

Edit
Combine
Delete
OK

13. aSc has the ability to schedule a section in any term. (Example Keyboarding can be 1st Sem or 2nd Sem)
   a. Click 1st Sem
   b. Hold down the Ctrl key and select 2nd Sem
   c. Click Combine

Terms

Verify course terms have come over from StudentInformation correctly

Terms: 2   Help

Here you can rename individual terms using button Edit or create new parts of the school year if you have for example sections that have to be in T1 AND T3 or sections that have to be in T1 OR T3 Or T4:

Name	Code	Name
1st Semester Only	SEM1	
2nd Semester Only	SEM2	
Schedule in any term	Any	These courses can meet any term
All Year	YR	All Year Courses

Edit
Combine
Delete
OK

   d. Choose 1st Semester only OR 2nd Semester Only
   e. Change the wording in the Name and Course ID fields if desired and click OK.

Object

Name : SEM1 or SEM2

Course ID : SEM1 or SEM2

OK   Cancel
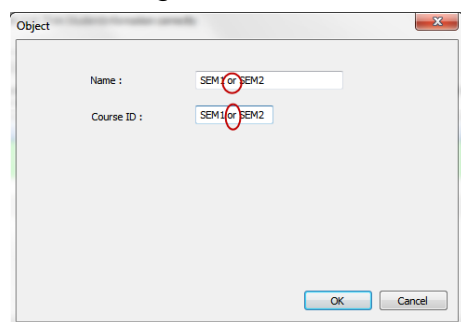
f. Now go to the `Specification` tab.

g. To designate which courses can be scheduled into any term, click Edit on the far right of the tool bar.
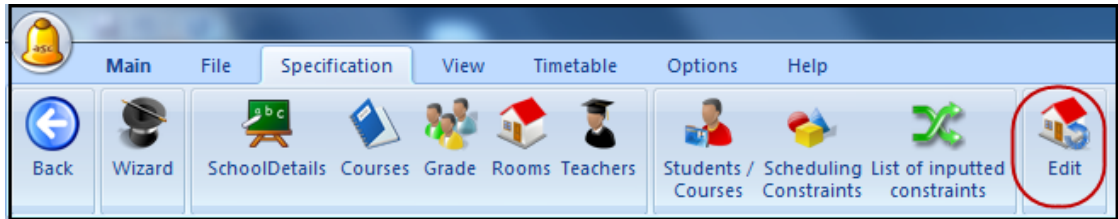
h. In section 1 – Courses choose the `Select courses` button

i. Move any courses that can be scheduled in the new term over to the right and hit OK.

j. In section 4 – choose the following

k.
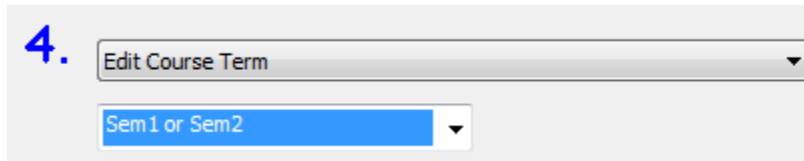
l. Click `Change`.

14. Go to Options tab and click "Show Quick access toolbar.
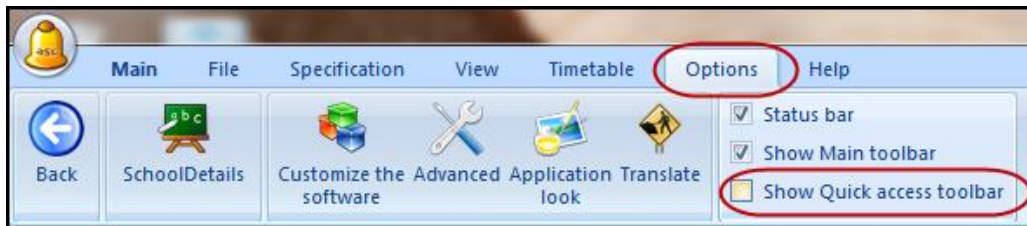
15. Now your toolbar will display as follows:
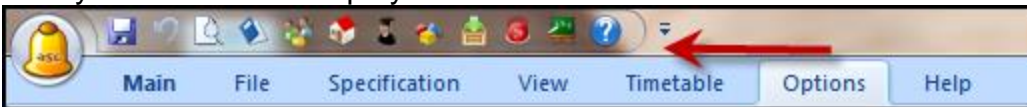
16. Next click on the View tabs and choose the option to "Show tabs on scheduling grid".

17. While still on the View tab select Define. A new window will pop up.

18. Choose Teachers and click `Edit`.

19. A new window will open. Choose Course and or Teacher in the Text: dropdown.

20. Repeat the process with Rooms, Courses, and Students.

21. Click `OK` when finished and the pop up will close.
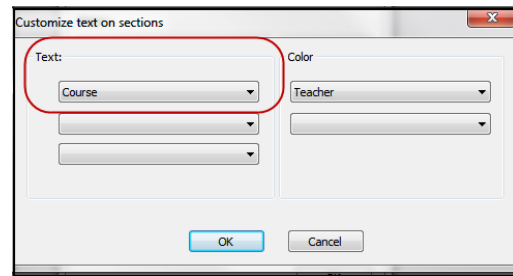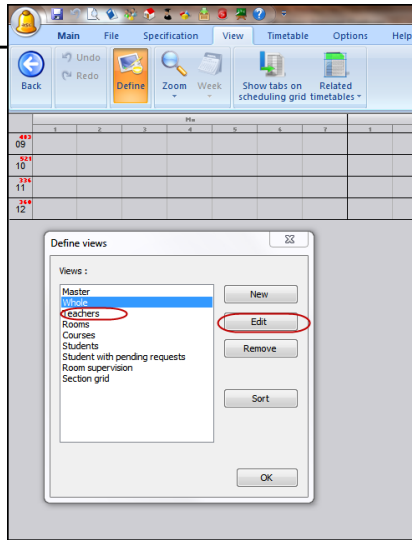
22. If the building only has courses that meet every day of the week, you can simplify the schedule view by clicking on `Options` menu at the top.
    a. Next, choose "Customize the Software".
    b. Put a check in the box next to Show days picker on the main toolbar.
    c. Finally, back on the Main menu choose change the All Days separately dropdown to say All days merged.
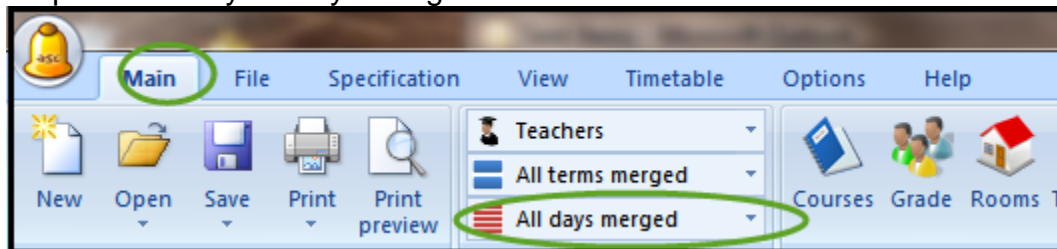
23. Set up time off for courses & teachers by going into Courses on the `Main` tab.

F.Y.I. NOTE: You will only need to "Time Off" courses that have requests. Do not mark Time Off for any course that you will schedule in StudentInformation, like Study Halls, PSEO, Special Ed courses, etc.

24. Select the course by clicking on it and then choose [Time off] .
25. A new window will open.
26. Double click the periods or day of the week so a Red X appears to signify the time is blocked from being scheduled. Click [OK] .
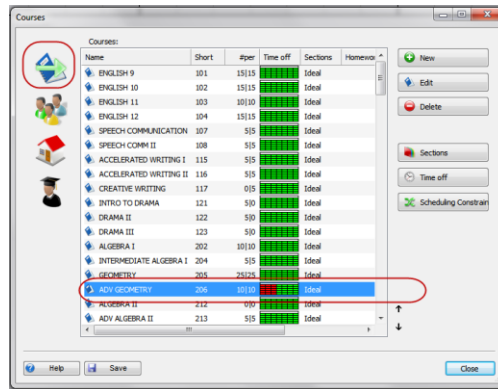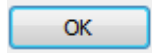
27. Repeat the process for any teachers with time constraints
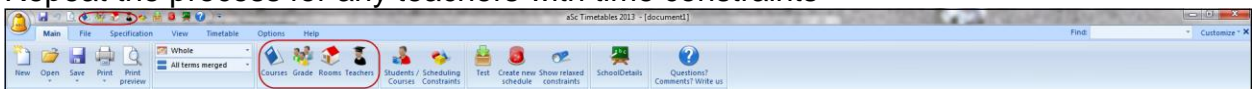
28. Set up course sequencing rules by going to Scheduling Constraints on the [Main] tab.
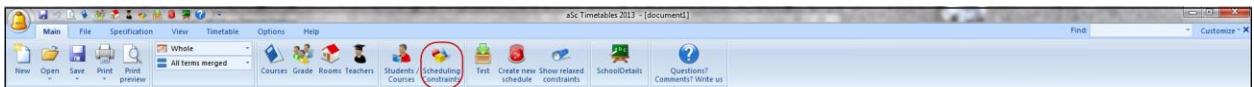
29. A new window will open, select Advanced.
30. In the dropdown at the top, select the parameter you need and finish set up and click OK.
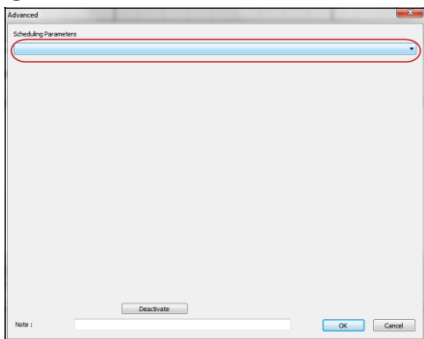
31. The most common scheduling constraints are:
    a. #44, #45, #46, #47 Pre-reqs
    b. #35 Teacher Link Groups
    c. #10 Max Periods per day teacher can be scheduled(give teacher a lunch or planning period) If building is using a department wide planning period – see Appendix B.
32. Now is a good time to click SAVE, if you haven't already.

33. Next, run a test to pinpoint possible scheduling issues. Remember the errors on the test should correspond to the teachers, courses, rooms, etc you listed on your worksheet (teachers that are double-booked, rooms that are double booked, etc).
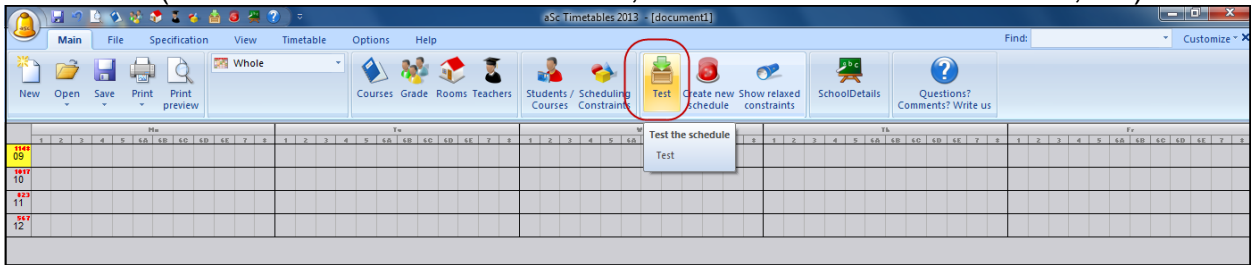
34. Any student that has more requests than available timeslots will show as an error on the test also, you can ignore these errors. SI State Support recommends you write down the errors and check them when the entire test is done. If you leave the test to check an error, the entire test will need to be restarted.
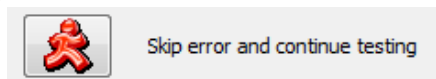
35. When an error pops up, right down the error and click [icon] Skip error and continue testing to continue the test.

36. Example errors:
    a. The error below probably is a result of the teacher being assigned more sections then their time slots to teach them in. (Example: Art teacher teaches Art 2, Art 3, & Art 4 during the same period)
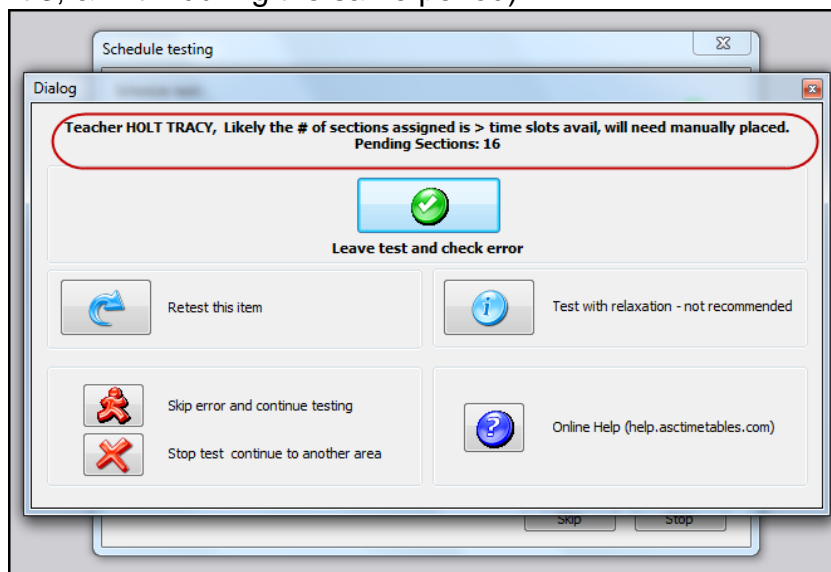
b. The next error typically means that the course sections don't have enough capacity to accommodate all the students who requested the course. In the example error below 24 students requested *English 11AC, but will not be scheduled into the course because there is not enough capacity.
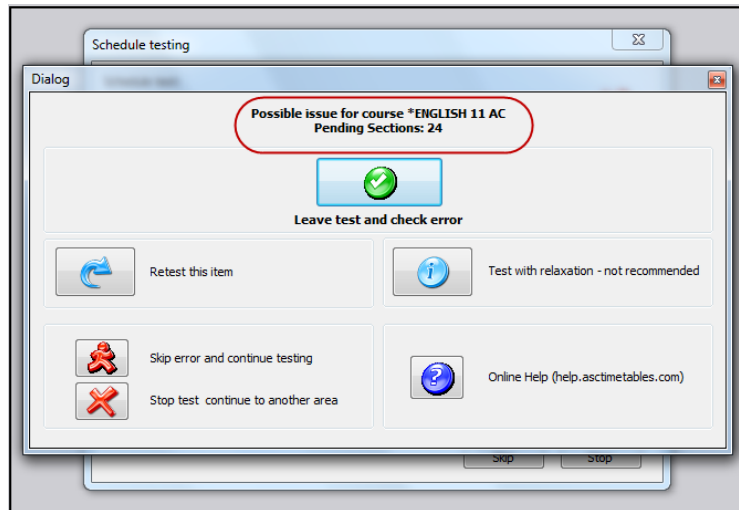
c. If the student requested more courses than timeslots available or a course they requested doesn't have enough capacity, the following error will appear. The student has 4 course requests that won't be scheduled in the error below:
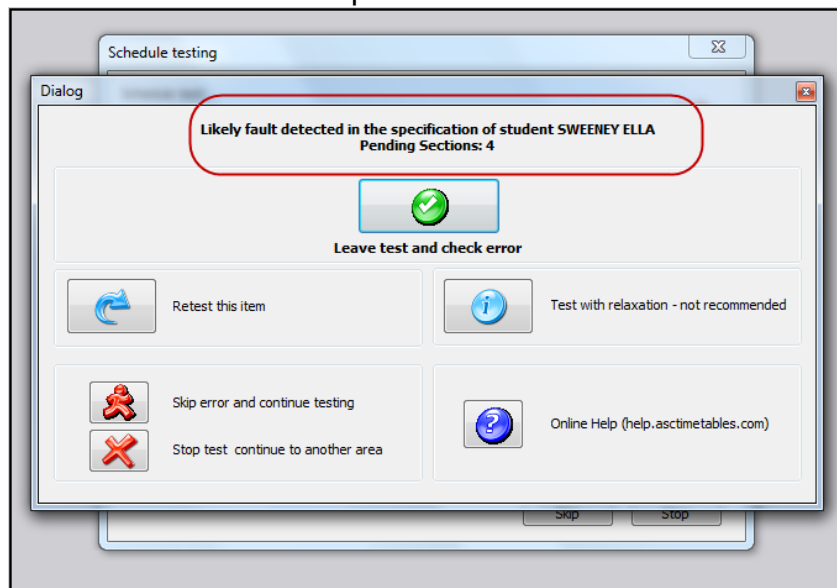
d. Rooms that have more designated course sections than available timeslots will appear with the following error:
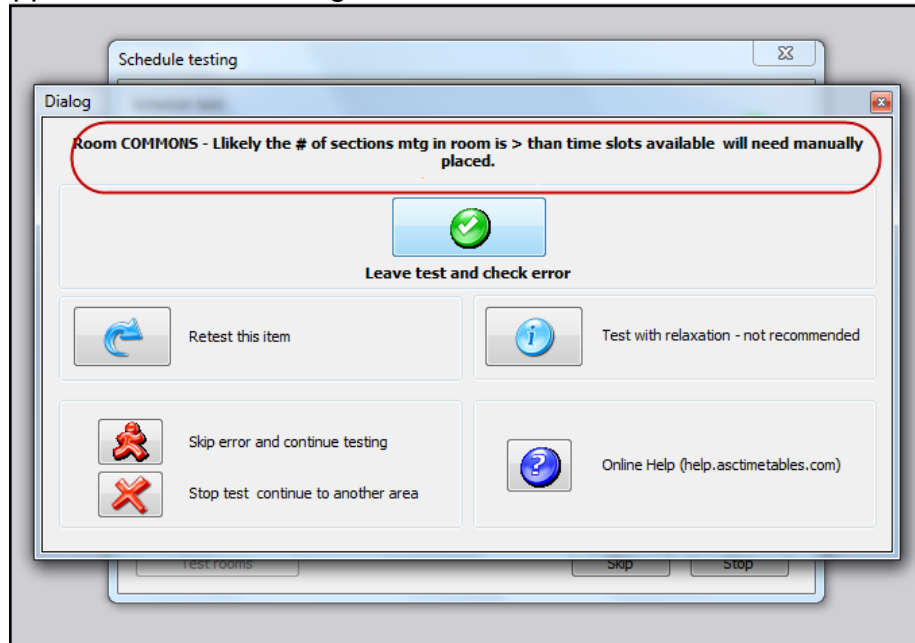
37. Now we are ready to start building a schedule.

38. Go to the **Main** tab and click Create new schedule button.

39. In the **Please choose what you want to generate:** dropdown select **Schedule - w/out students (sch specials)**.
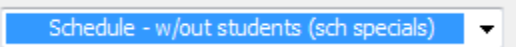
40. Do not change anything else and click **Execute**.
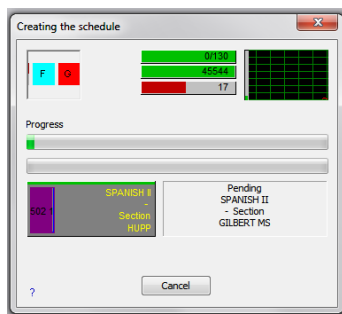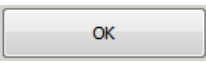
41. When the scheduler is finished you will either get a happy face or a sad face. A sad face means there were some sections that couldn't be placed on the scheduling grid because the teacher or room was double-booked.
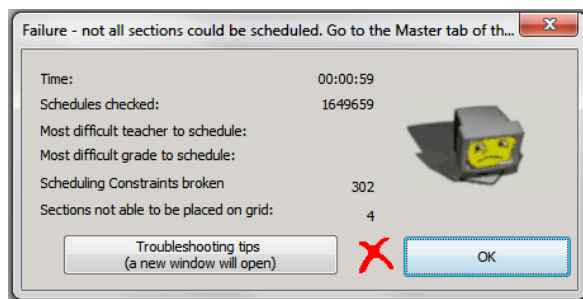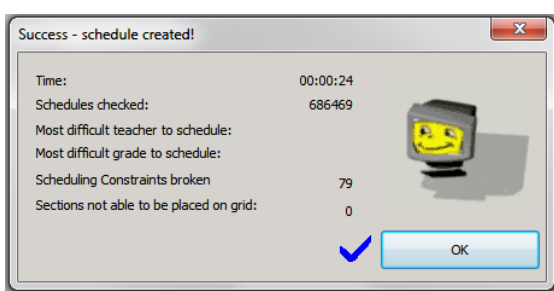
42.   If you received the happy face continue to step 51 to hand schedule specials.
43. If you received the sad face you will need to manually place some sections on the scheduling grid.
    NOTE: If you have teachers and or rooms that are double booked, you will never get the happy face, which is acceptable.

44. Click OK .

45. On the Main tab click the Courses tab along the left side of the screen.
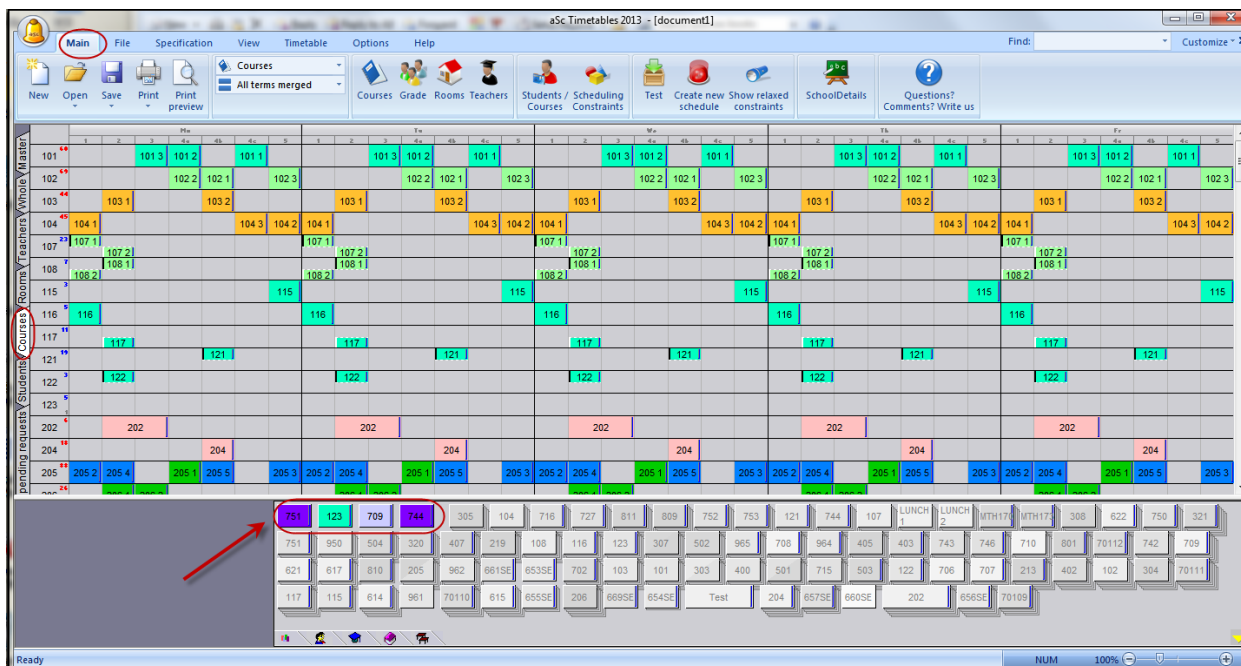
46. The courses shown at the bottom in color still need placed on the scheduling grid. Remember these are courses taught by teachers that teach more sections then there are timeslots.
47. Click on one of the colored courses and move it to the appropriate position on the grid.

48. When you drop the course on the grid a small window will pop up telling you there is a scheduling conflict. Click Ignore conflicts and place the section anyway.
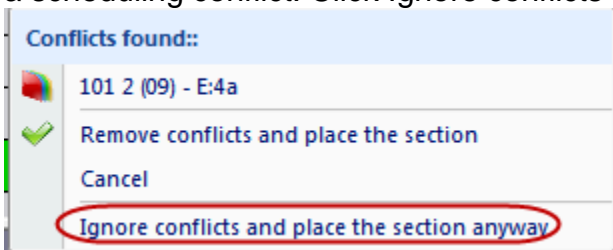
NOTE: If you have a card that won't "stay" on the scheduling grid, even after you choose Ignore conflicts and place the section anyway, you can hold down the Shift key on your keyboard and click the card to place it on the grid.

49. If you lose track of which course you grabbed click the [icon] clear your selection.

50. Repeat the process until all colored courses are placed on the scheduling grid.
51. Now is a good time to click SAVE AS.

NOTE: You can stop and load the course sections into StudentInformation and then run the Batch Scheduler in StudentInformation to actually schedule the students into the course sections, or you can continue on and finish scheduling in aSc.

52. Now we are ready to hand schedule specials, remember – these are the courses we want to make sure the student gets and we want the rest of their schedule built around.
53. While still on the Courses tab of the scheduling grid, right-click the course you want to bulk-assign kids into.
54. Choose Students – Assign
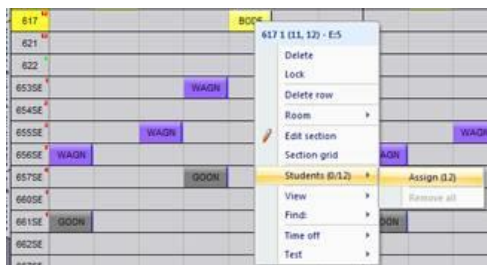
55. Repeat the process for any course that needs manually assigned.
56. If you plan on running the scheduler again without students you will need to right-click the course again and choose Lock so it is not overwritten when you rerun the scheduler to shuffle the courses around.
57. Now is a good time to click SAVE AS.
58. If you need to hand schedule individual students click on the Students tab (it is directly under the Courses tab).
59. Click on a student and notice the student's course requests appear at the bottom.
60. Click on a course and drag it up to the student's line on the grid.
61. Notice the periods that you can place the course in will light-up in green
62. Drop the course in the appropriate slot
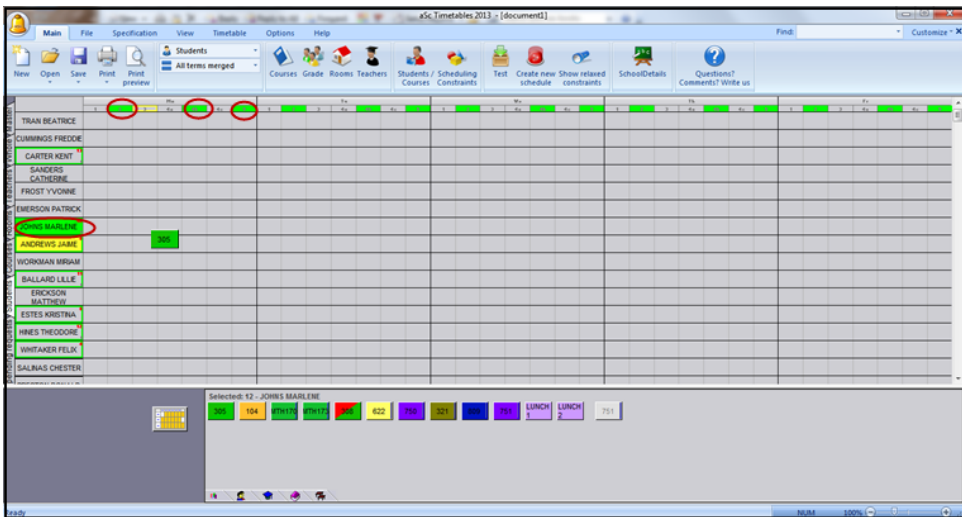
63. Right-click the assignment and Lock. Now when you run the timetable to finish scheduling all the students the assignment will not be overwritten.
64. Continue this process for any courses that need manually placed.
65. Now we are ready to run the scheduler to schedule any requests that are outstanding for the entire school.
66. Go to the **Main** tab and click Create new schedule button.

67. In the Please choose what you want to generate: dropdown select
Only students .
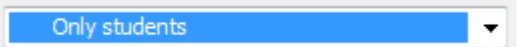
68. The following message will display when the scheduler is done:

Success - schedule created!

Time:	00:00:16
Schedules checked:	507722
Most difficult teacher to schedule:	
Most difficult grade to schedule:	
Scheduling Constraints broken	308
Sections not able to be placed on grid:	0

OK

69. Once you click [OK], the following message will be displayed:

Relaxed constraints

The schedule was successfully created, however some scheduling constraints had to be relaxed in order for the scheduler to finish.

OK. Show me the relaxed scheduling constraints.   Help

70. Click [OK. Show me the relaxed scheduling constraints.].

71. The scheduling grid will refresh and the unmet constraints will show at the bottom. You can click on the plus sign to expand the errors or the minus sign to collapse the errors.

Object	Name
288x	Student still needs scheduled into section
9x	Student scheduled into alternate request
11x	Needs investigating: Students' requests conflict
10 - HOOVER ...	Course has no sections -> Student still needs scheduled into section
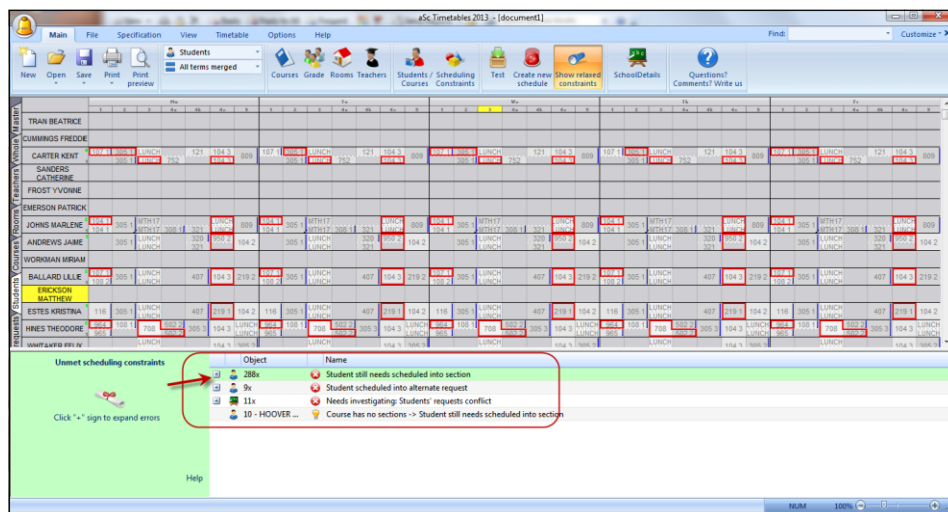
72. If you click in the scheduling grid the unmet constraints will disappear. To get them back click on Show Relaxed Constraints on the Main menu.
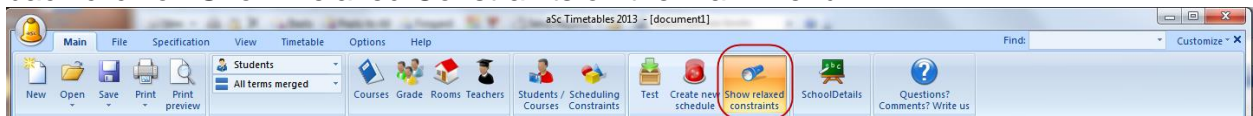
73. Any request that wasn't scheduled will appear in the Relaxed Constraint in red.
74. Now is a good time to click SAVE AS.
75. We are ready to load the schedules back into StudentInformation and clean up the schedules in SI and also run the Study Hall Wizard in SI.

76. Go to the **File** tab and choose Connect to StudentInformation (Your icon may say Connect to SI).
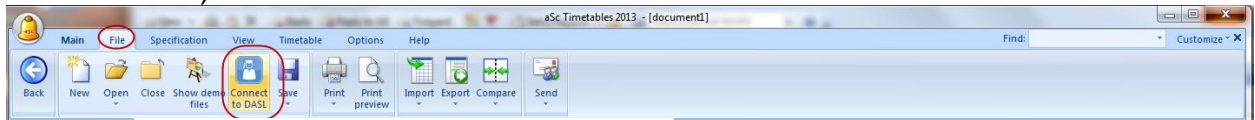
77. Choose **Upload scheduling results into StudentInformation** .

78. Give your schedule a descriptive name. After the results are loaded into SI you will see the name you entered in the Schedule dropdown of the SI scheduling pages.
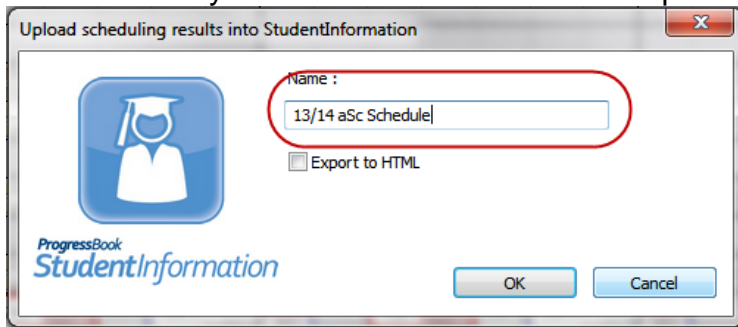
NOTE: Do not reuse the same name – this will only cause issues. Each time you load a schedule from aSc, you should give it a unique name.

79. Be patient while aSc works to load the scheduling results in StudentInformation. A window will pop-up telling you what percentage of the process is complete.
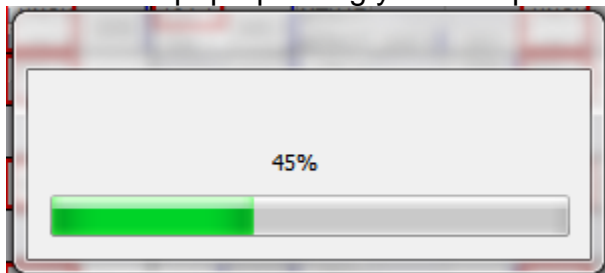
80. When the upload is complete you will see the following message:
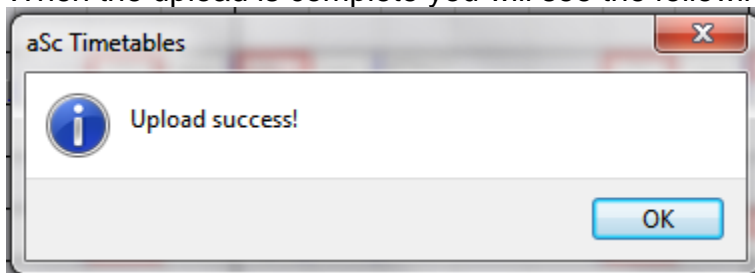
81. Login to StudentInformation and begin adjusting schedules.

82. Sections can be created without a room or a teacher in aSc. When they load into SI they get loaded with no meeting time. Run the R807 and sort by teacher to see which sections don't have a teacher and/or room.
83. Once the assignments have been cleaned up run the Study Hall Wizard.

Appendix A: How to schedule 4a, 4b, 4c lunch periods

Before you begin ensure:
- Students have request for lunch in StudentInformation
- Lunch courses have sections for each period lunch can be scheduled in Student Information
- Lunch sections have enough capacity
- Courses that were scheduled in SI over lunch periods will need edited and changed to one period of the day. (Example: Algebra-9 met 4a & 4c in SI, edit the section so it only meets one period)

1. Complete steps 1-39 above.
2. Go into Courses and highlight Lunch course and click Sections.
3. Edit each lunch section and remove the teacher by choosing No teacher assigned in the Teacher dropdown.
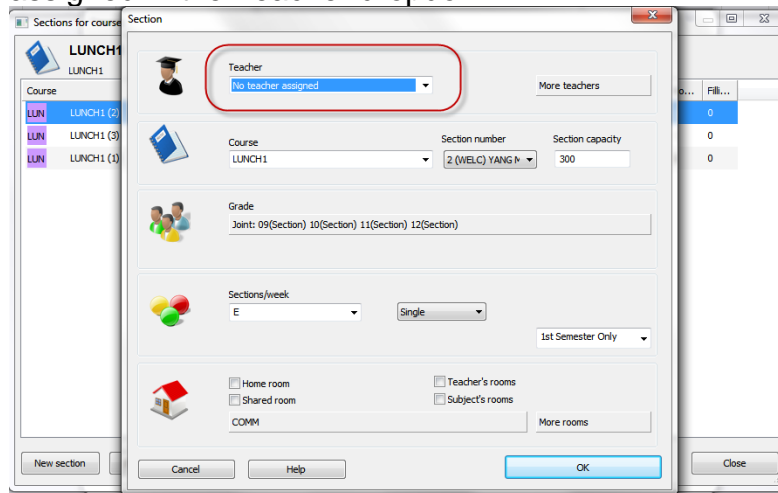
4. Go back to SchoolDetails.
5. Click on Advanced Parameters.
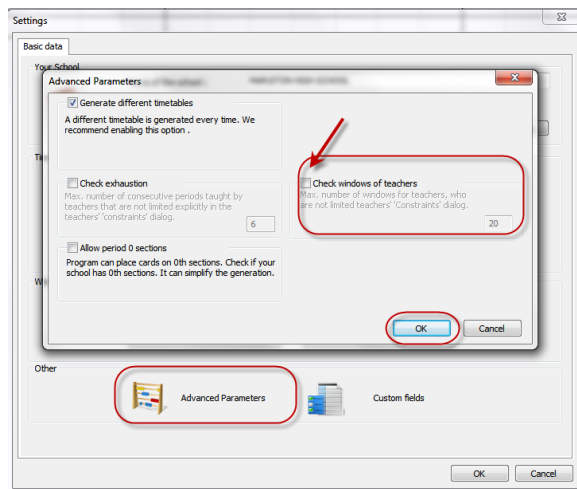
6. Unmark Check window of teacher and click OK.

7. Click on Period times / Rename periods.
8. Hold Shift key and highlight periods 4a,4b,4c.
9. Click Merge.
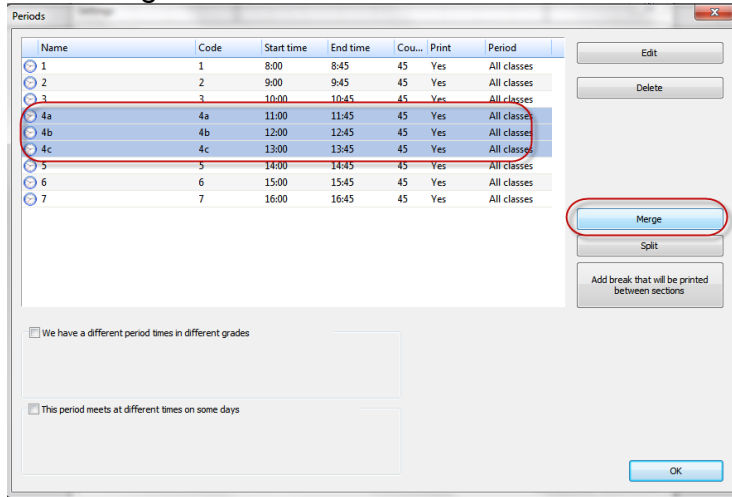
10. On the next prompt select Yes.
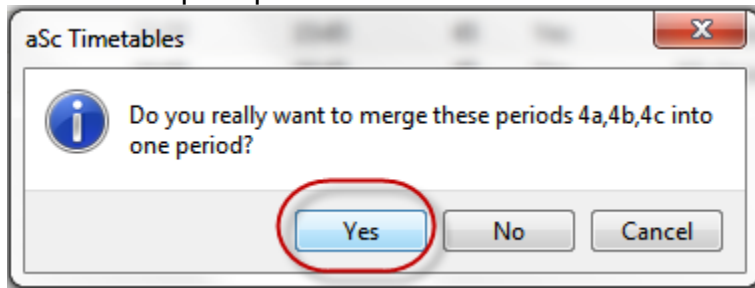
11. On the next prompt select Yes again to disable lunch requests.
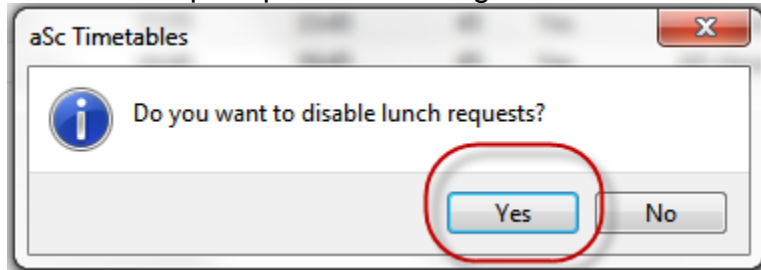
12. In the Selection window move any lunch course to the right and click OK.
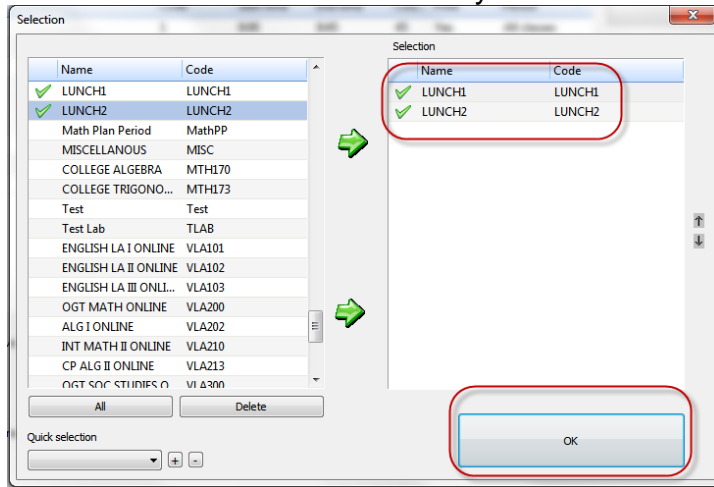
13. Click OK until you return to the main aSc screen.
14. Go back to Scheduling Constraints.
15. Click on Advanced.
16. In the dropdown select #13: Max Periods Per Week.
17. Choose Apply globally.
18. Select Change: Courses A.
19. Move all courses over to the right by clicking All but then bring the lunch courses back to the left by double clicking them.
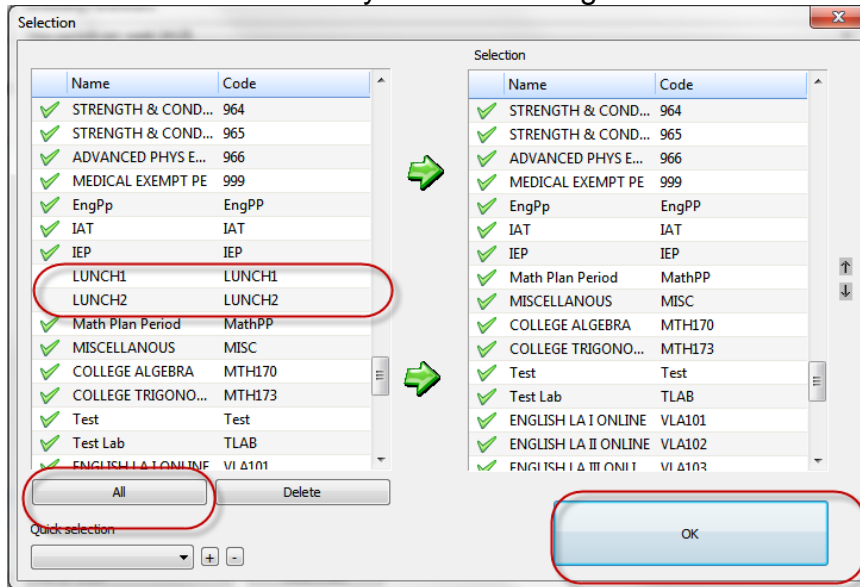
20. Click OK.
21. Next uncheck all periods except the period you merged.
22. Select Options A – Course Length – 2.
23. In the Importance of this card relationship dropdown select Strict.
24. Double check your selections. Lunch will not be scheduled correctly if these exact options aren't selected.

25. Add an optional Note.

26. Click OK.
27. Click OK again to exit the Scheduling Constraints window.
28. Now go back to the original steps and continue with steps 40-76.
29. NOTE – you will need to put all lunch sections onto one period for now(manually put the cards on the scheduling grid).
30. Now is a good time to Save as.
31. We have just scheduled all courses and kids except for lunch.
32. Now we need to schedule lunches.
33. Go back into Scheduling Constraints.
34. Click the constraint you set up in steps 16-28 and press deactivate.
35. Click OK to exit the Scheduling Constraints window.
36. Go back into School Details.
37. Click Period times / Rename periods.

38. Highlight the period you previous merge and click Split.
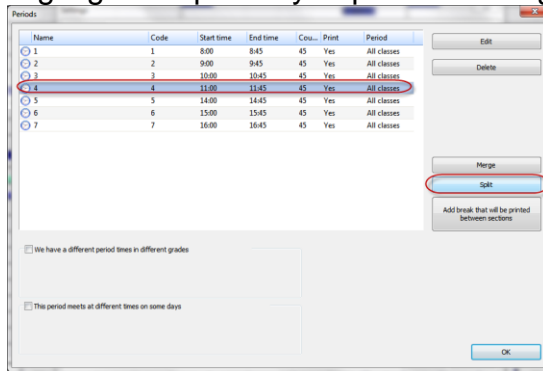
39. Click Yes on the next three prompts.
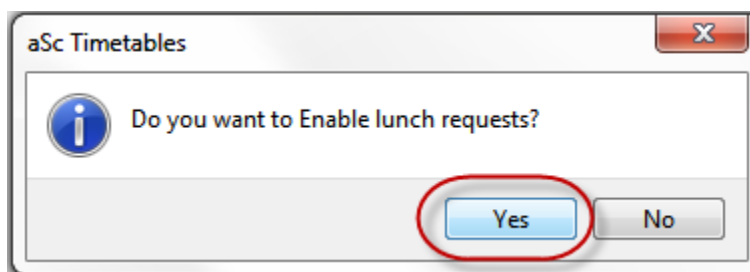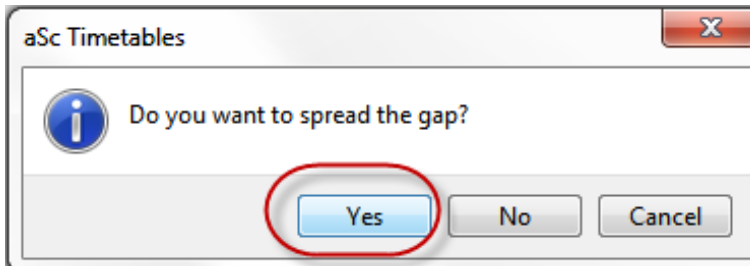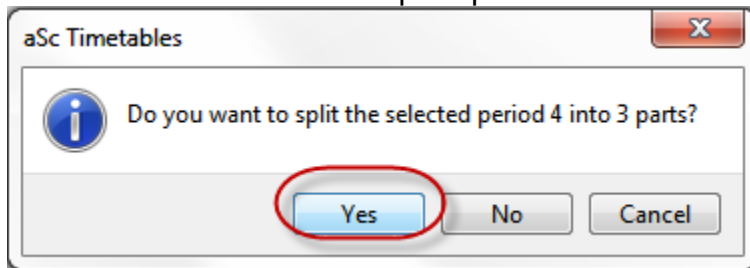
40. In the Selection window that pops up move any lunch courses to the right.
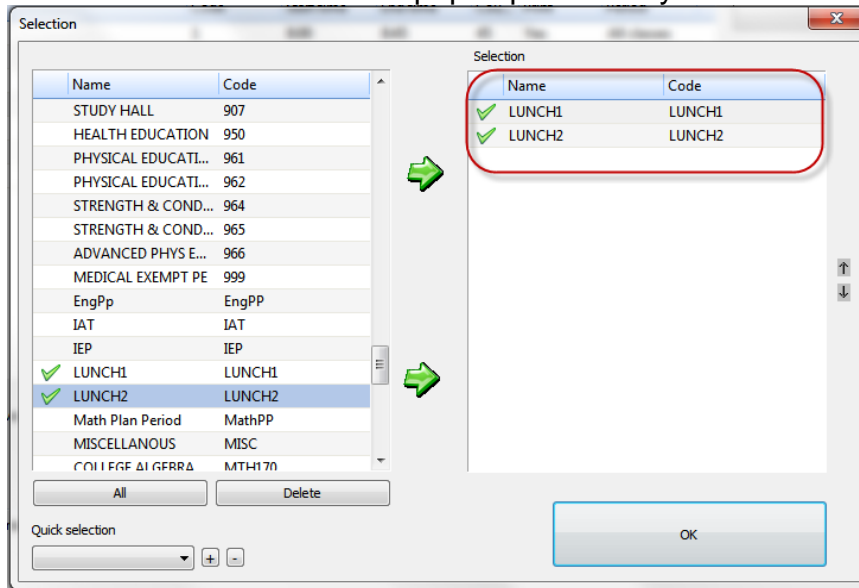
41. Click OK.
42. Click OK again until you are back to the Main screen.
43. Go back into Scheduling Constraints and choose Advanced.
44. In the dropdown select #54: Max different courses per day.
45. In the next dropdown select 1.
46. Then choose Apply to students in selected courses.
47. Select Change: Courses A.
48. Move all courses over to the right by clicking All but then bring the lunch courses back to the left by double clicking them.
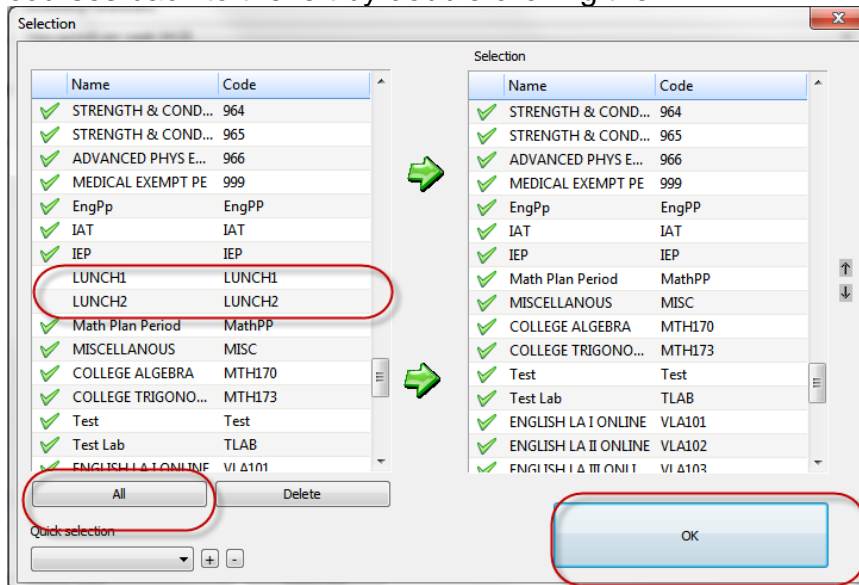
49. Click OK.
50. Next uncheck all periods except the lunch periods.
51. In the Importance of this card relationship dropdown select Strict.
52. Double check your selections. Lunch will not be scheduled correctly if these exact options aren't selected.

53. Add an optional Note.
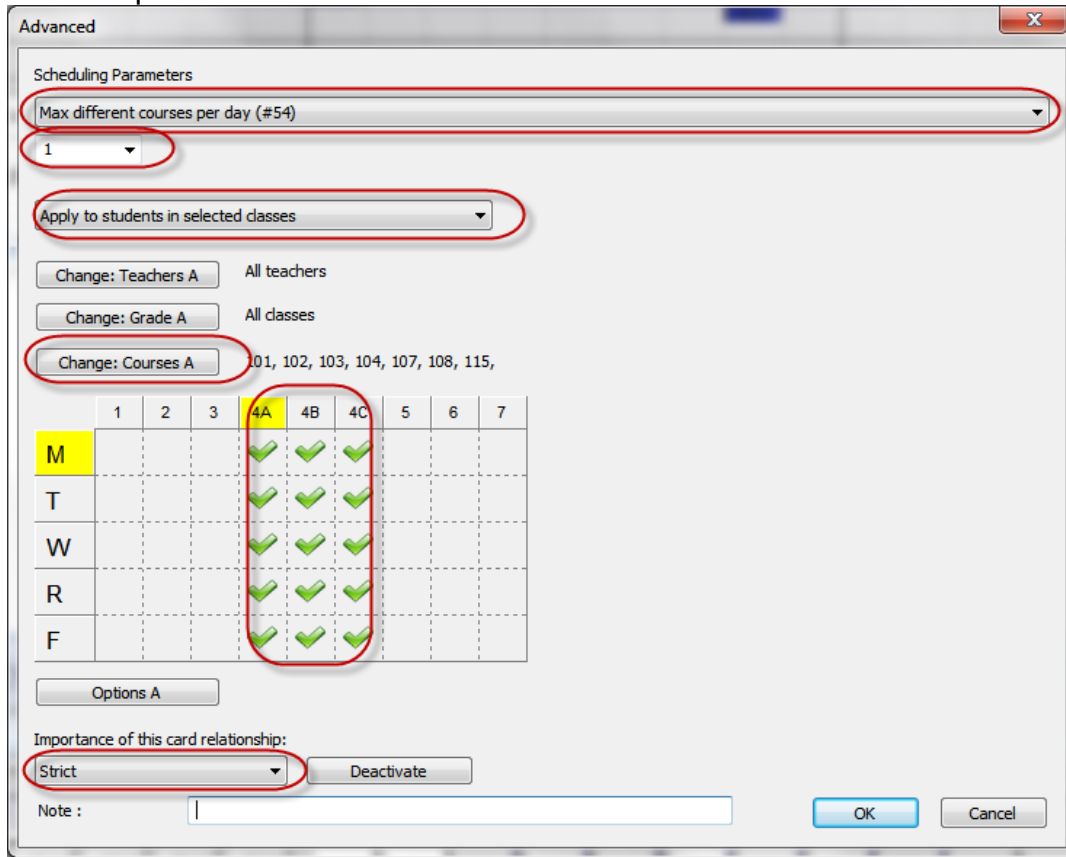
54. Click OK until you return to the Main screen.
55. Now on the scheduling grid click the Courses tab on the left.
56. Find your lunch courses and manually move the sections so there is one on each lunch period.
57. Now start at the top of the grid and click the first course while holding down the Shift key, scroll down to the last course and click the last course.
58. All course codes on the grid should be highlighted on the left.
59. Right click on any course code and choose Lock Row – this will prevent any courses from being moved around on the grid.
60. Now click on the Students tab and repeat the process to lock in all course section assignments.
61. NOTE: You can tell the courses are locked because they have a small / in the bottom right corner.

62. Go to Students / Courses and find the lunch courses in the bottom right pane.

63. Right click each lunch course and choose Priority = Strict.
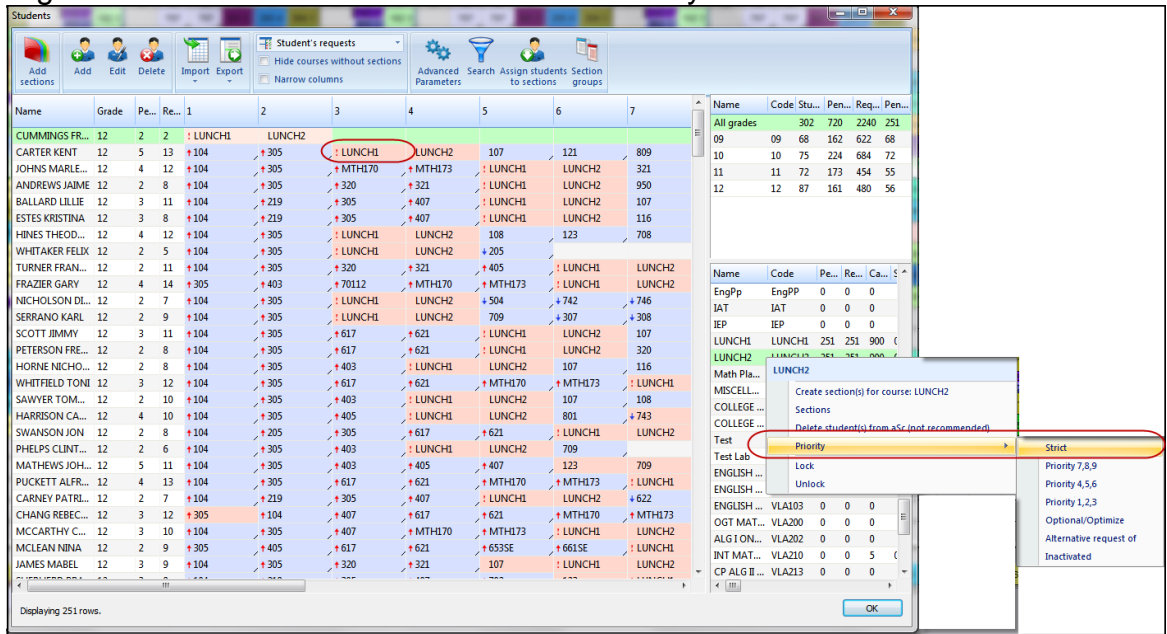
64. There will now be a red exclamation point next to each lunch request.
65. Click OK to return to the Main screen.
66. Click on Create New Schedule BUT this time choose Entire Schedule and Execute.
67. Congrats! Now you have lunch 4a, 4b, 4c scheduled.
68. Finish the original instructions starting with step #78 to load the results back into StudentInformation.
69. Before printing schedules go into Course Section Mtnce in StudentInformation and edit the meeting time of the lunch sections and add the teacher back.

Appendix B: How to schedule all teachers within a certain department into the same planning period

1. Before you pull into aSc, create a course named Planning Period in StudentInformation in 13/14. This new course can be any course type except Blank.
2. Complete steps 1-39, but before continuing to step #40 complete the following in aSc:
   a. Go to Courses & select the Planning Period course
   b. Click Sections
   c. Click New section button in bottom left corner
   d. Click More Teacher and select the teachers that you want to have the same planning period and click OK.
   e. In the Grade dropdown select the dash -.
   f. In the Sections/week dropdown select "E"
   g. Then choose Single and All Year
   h. Finally uncheck the Homeroom checkbox and click OK
   i. You will receive a warning, ignore it by clicking OK
3. Repeat these steps as many times as needed for other departments.

Appendix C: How to figure what % of students are fully scheduled in aSc

1. Run aSc schedule to schedule sections and students in sections.
2. Go to Student/Courses and in top right pane it will say the total # of students (222 in example screenshot below).
3. Now go to Students tab of aSc scheduling grid and scroll down thru entire grid and find the students who don't have any sections assigned. These students didn't have requests in StudentInformation. (40 students in 2nd screenshot below).
4. Subtract # of students without requests from total # of students in aSc. (222-40= 182 students). This will give you the # of students aSc scheduled.
5. Next go to Student with Pending Requests tab and count the # of students appearing on the tab. These are the kids that didn't get all their requests met or aren't fully scheduled in aSc. (In my example I have 32 students on the Pending Students tab.)
6. Finally take the # of students that aSc scheduled and subtract the # of partially scheduled students. This will be the # of students fully scheduled in aSc. (I took 182-32 and got 150.)
7. To get the percentage of students fully scheduled in aSc divide the # of fully scheduled students by the total of students scheduled in aSc. (150/182 = 82%).
8. To get the percentage of students partially scheduled in aSc divide the # of partially scheduled students by the total of students scheduled in aSc. (32/182= 17% partially scheduled).
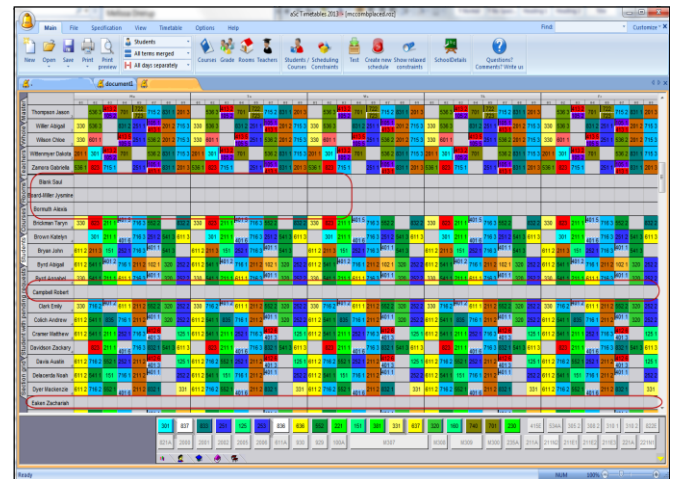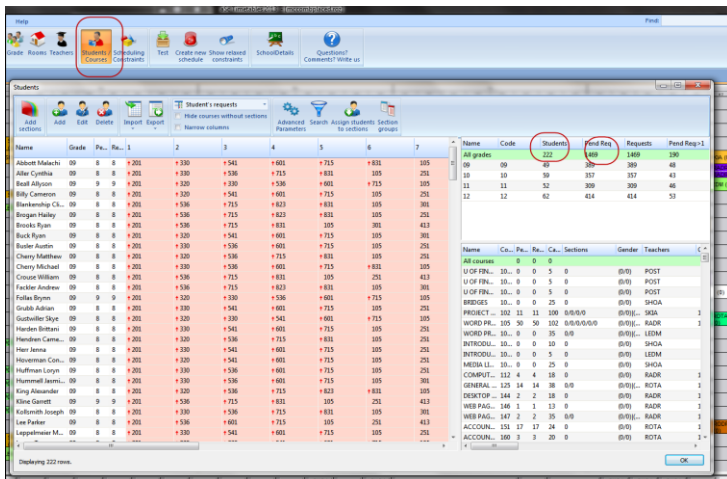
Appendix D: What information will come over into aSc from StudentInformation

F.Y.I.

aSc only pulls data from the Default Schedule.

Master Schedule Maintenance
From this screen, you can display, add, change and delete data pertaining to schedules.

Add Schedule

					Name ^	Description	Modified Date
✏	▣	Course Sections	Course Groups	Courses	Default Schedule		Jan 21, 2014

Courses (except for Course Type = Blank)
1. Course Sections of course that have requests (see table below)
   a. Assigned Teacher
   b. Assigned Course Term
   c. Assigned Room
   d. How many periods section meets, but not which periods it meets
2. Rooms that are marked as Is Schedulable in SI
3. Teachers
4. Any student with overall student status of "Active" (refer to Student Status table in SI)
   a. Student's Grade level
   b. Student's Course Requests
      i. Student's Request priority (Low, Medium, High)

StudentInformation Request Priority	Translates to what priority in aSc?
1,2,3	**Low**
4,5,6	**Medium**
7,8,9	**High**
n/a	**Strict*** (Use sparingly, must be done manually in aSc)

*Course Type in StudentInformation	Will sections come over into aSc if students have **requested** course in StudentInformation?	Notes:
Lunch	Yes	
Vocational	Yes	
ESC	Yes	
Spare	Yes	
Satellite	Yes	
PSEO	Yes	
Blank	No	*Course itself doesn't come over either
Case Mgmt	Yes	
Study Hall*****	****	Study Hall sections will come over regardless if there are requests for the study halls or not

Appendix E: How to figure section capacity versus # of requests out of aSc

a. Build "New Schedule" in aSc (unofficially)
b. Under Student/ Courses
c. Choose Export –Export to MS Excel – Courses
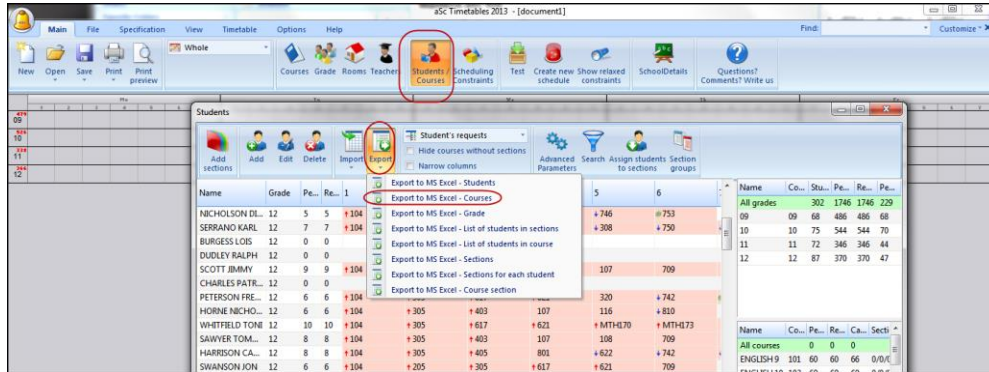
d. Add another column to the Excel spreadsheet. Subtract the Requests column from the Capacity column
e. Now sort by this new column. The new column will tell you which courses don't have enough capacity in the sections or no sections at all
f. The column titled Sections will tell you how many sections the course has and the capacity of each section
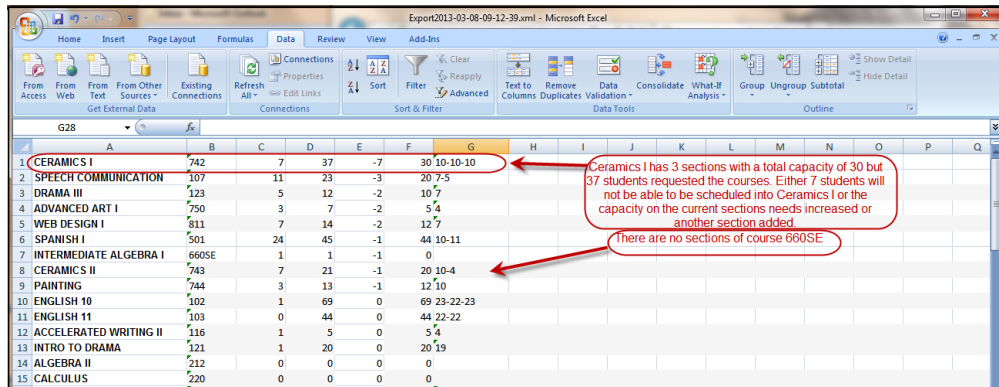
Appendix F: Scheduling Worksheet

Teachers who are there the entire day:
(Example: Band Teacher who is at the Middle School in the AM, High School in the PM)

Teacher Name	Which periods are they gone?

Courses / Teachers / Rooms that are double scheduled:
(Example: Art 2, Art 3, Art 4 all taught the same period by the Art teacher in the Art room)

Teacher Name	Courses	Classroom

Course Sequencing Rules / Teacher Link Groups:

Lunch Period(s) – Should lunch print on student schedules?

Lunch Period(s)	Print on schedule?

Courses that can be scheduled in either term:
(Example: Keyboarding can be Sem1 or Sem2)

Course	Term

List of students & their courses that the student's schedule should be built around:

Courses that need to meet certain periods:
(Example: Band is 7th period, Choir is 5th period)

Course	Period

Back to School Checklist – Items that need to be verified before the 1st day of school.
(Can be completed in any order.)

Tasks	Completed	Initials
Student:		
Enroll new students in 20/21. *(FY21 Admission and Withdrawal Scenarios)* *StudentInformation » SIS » Registration Wizard*	☐	
Enter contact information for newly registered students. *StudentInformation » SIS » Student » Contacts Summary*	☐	
Update profiles of existing students. *StudentInformation » SIS » Student » Edit Profile*	☐	
Update contact information for existing students. *StudentInformation » SIS » Student » Contacts Summary*	☐	
Use registration wizard or student transfer to enroll students in 20/21 that were missed by promotion. *(FY21 Admission and Withdrawal Scenarios)* *StudentInformation » SIS » Registration Wizard or StudentInformation » SIS » Student » Student Transfer*	☐	
Process students who have withdrawn over the summer. *(FY21 Admission and Withdrawal Scenarios)* *StudentInformation » SIS » Student » Withdraw Student*	☐	
Ensure all Resident Attending Elsewhere students are assigned to the non-attending calendar. (Hint: Use Advance Search to search for R status students and flip thru them to ensure they are assigned to the non-attending calendar.) *StudentInformation » SIS » Student » Edit Profile*	☐	
Assign lockers, if applicable. *(Assigning Lockers Procedural Checklist)* *StudentInformation » Management » Ad-Hoc Updates » Locker Bulk Assignment*	☐	
Assign homerooms, if applicable. *(Homeroom Assignment Procedural Checklist)* *StudentInformation » Management » Ad-Hoc Updates » Homeroom Bulk Assignment*	☐	
Assign counselors, if applicable. *(Assigning Counselors Procedural Checklist)* *StudentInformation » Management » Ad-Hoc Updates » Counselor Bulk Assignment*	☐	
Reassign Family Group Couriers *(Family Groups and Contacts Procedural Checklist)* *StudentInformation » Management » Distirict Administration » Family Groups Wizard*	☐	
Attendance: *(Attendance Procedural Checklist)*		
Configure StudentInformation Options – Attendance tab for either period or daily attendance. *StudentInformation » Management » School Administration » StudentInformation Options*	☐	
Verify attendance codes are set up properly in Attendance Maintenance. *StudentInformation » Management » School Administration » Attendance Administration*	☐	
Staff/Security:		
Make any needed changes to staff and staff job functions on View Staff Members page. *StudentInformation » Management » Security » View Staff Members*	☐	
Add impersonations to applicable staff on the View Accounts page. Impersonations allow non-teachers to view students in the Teacher Menu. *StudentInformation » Management » Security » View Accounts*	☐	

Scheduling:		
Update EMIS fields on courses. *(Course Course Section Course Group Setup Procedural Checklist or StudentInformation EMIS End User Documentation)* *StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Courses*	☐	
Continue processing schedule changes for existing students and add schedules for new students who were not enrolled at the time scheduling initially took place. *(Elementary Scheduling Procedural Checklist or Batch Scheduler Procedural Checklist)* *StudentInformation » SIS » Student » Student Schedule » Request Assignments or StudentInformation » SIS » Scheduling » Course Section Assignments*	☐	
Verify course section assignments have the correct start date. *StudentInformation » SIS » Student » Student Schedule » Request Assignments or StudentInformation » SIS » Scheduling » Course Section Assignments*	☐	
Finalize the 20/21 schedule in StudentInformation Options – Scheduling tab. *StudentInformation » Management » School Administration » StudentInformation Options*	☐	
Print Class Lists (R703). The R703 lists each student assigned to a specific class. *(Report Card Processing Procedural Checklist)* *StudentInformation » SIS » Marks » Marks Reports » Class List Formatter (R703)*	☐	
Print Schedules (R701) *(Batch Scheduler Procedural Checklist)* *StudentInformation » SIS » Scheduling » Scheduling Reports » Schedule Card Formatter (R701)*	☐	
Fees: optional *(Fee Procedural Checklist)*		
Verify proration tables are set up and linked to fees. *StudentInformation » Management » School Administration » Fees Administration » Prorated Fee Schedules*	☐	
Verify and update course fees, membership fees, general fees, and miscellaneous fees. *StudentInformation » Management » School Administration » Fees Administration*	☐	
Make sure Uses Fees and Has Fees Assigned are checked on StudentInformation Options – Fees tab. *StudentInformation » Management » School Administration » StudentInformation Options*	☐	
Bulk Assign fees. *StudentInformation » Management » Ad-Hoc Updates » Student Fee Assignment*	☐	
Marks:		
Define whether the building is using Alpha or Numeric marks on StudentInformation Options – Marks tab. *(School Year Initialization Procedural Checklist or Report Card Processing Procedural Checklist)* *StudentInformation » Management » School Administration » StudentInformation Options*	☐	
School Building:		
Verify course terms are correct and linked to the proper schedule terms. *(School Year Initialization Procedural Checklist or Report Card Processing Procedural Checklist)* *StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Course Terms*	☐	
Verify each reporting term has the correct start and stop date. *(School Year Initialization Procedural Checklist or Report Card Processing Procedural Checklist)* *StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance*	☐	
Verify the school's master calendar is correct. Pay close attention to the start and stop dates and planned and actual day counts. *(Calendar Non-EMIS or Master and Sub-Calendar Maintenance including EMIS Exceptions Procedural Checklist)* *StudentInformation » Management » School Administration » Scheduling Administration » Master Calendar*	☐	
Verify Sub-calendars are set up correctly. *(Calendar Non-EMIS or Master and Sub-Calendar Maintenance including EMIS Exceptions Procedural Checklist)* *StudentInformation » Management » School Administration » Scheduling Administration » Sub-Calendars*	☐	
Update building information such as Principal name on School Demographics page.	☐	

StudentInformation » *Management* » *School Administration* » *School Building Administration* » *School Demographics*		
Review and update Progress Book On flag on School Demographics page for all buildings and district. *StudentInformation* » *Management* » *School Administration* » *School Building Administration* » *School Demographics*	☐	
Set up registration defaults. *StudentInformation* » Management » School Administration » School Building Administration » Registration Defaults	☐	

ProgressBook StudentInformation

Editing the Master Calendar and Sub-calendars Procedural Checklist for NON EMIS Reporting Entities

Change Log

Date	Section Number/Name	Change Description
4/7/21	Reporting Terms – How to change the last day of a reporting term or schedule term	Update screenshots
4/21/20	Entire document	Review and update
1/7/20	Entire document	Review and update
02/08/18	Snow Day section	Moved step 4 to step 2 – pre-entered absences note

Table of Contents

What is the Master Calendar?

- The Master Calendar details each day a school is in session or not in session. It is the general calendar that districts adopt for the school year, however, it is not necessarily the calendar a student's attendance is tracked against. Any non-attending day on the Master Calendar also appears on each Sub-Calendar automatically. However, the building has the ability to change a day from a non-attending day to an attending day on a Sub-Calendar. If a non-attending day applies to only one Sub-Calendar, it should be changed on that Sub-Calendar only.
- The Master Calendar is created when Calendar Wizard is run at the building level. See *School Year Initialization Procedural Checklist* for additional information on Calendar Wizard.
- The attendance module uses the Sub-Calendars to validate that the day is a school day. This allows attendance to be taken for dates outside of the Master Calendar.
- All Sub-Calendars initially match the Master Calendar until a day is changed.
- Each building in a district will have its own unique Master Calendar as well as other calendars to cover unique situations. If a district has 5 buildings, there would a unique Master Calendar for each building. For example, the district may require the high school students to attend the day before Thanksgiving, but the elementary and middle school students have the day off because of Parent Teacher Conferences. Having a separate Master Calendar in each building allows for this and other scenarios.

If only students on a particular Sub-Calendar attend school on a certain day, that day on the Master Calendar must be an attending day.

What are non-attending days?
- Non-attending days are days school is not in session.
- Any day students are not physically in the building is considered a non-attending day.

What are Sub-Calendars and why are they needed?
- Sub-calendars are for students whose attendance differs from the Master Calendar. Sub-Calendars may start or stop earlier or later than the Master Calendar start and end dates. Attendance can be taken for students on Sub-Calendars where the start date is earlier than the Master Calendar start date and where the end date is later than the Master Calendar end date.
- Kindergarten students who attend only in the morning would need a Sub-Calendar created since the Master Calendar is typically setup for full days.
- Sub-Calendars ensure accurate attendance is figured for students who attend part-time or not at all.

- Each school will have at least two calendars, the Default calendar and a Non-Attending calendar.
- The Sub-Calendars from the prior year were copied up in SYI. Before school starts, each Sub-Calendar will need to be edited and the exceptions added for any days out, lengthened or shortened.
- If a new attendance situation arises that does not fit into the current Sub-Calendars, a new Sub-Calendar will need created.

What are exceptions?
- Exceptions are days that differ from what was setup originally when the Calendar Wizard was run during SYI.

Non-attending Calendar - Create a non-attending Sub-Calendar if one does not already exist

1. Navigate to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Sub-Calendars**.
2. Add a non-attending Sub-Calendar by clicking **Add Sub-Calendar.**
3. Type in a **Code** that makes sense to you and your school. DNAC is used as the code in the example.
4. Next, give the sub-calendar a **Name** that makes sense to you and your school.
5. Select the **Max Absence Level** from the dropdown.
6. Since we are creating the non-attending calendar, choose **Non-attending**.
7. Uncheck the **Report to EMIS** checkbox for non-attending calendars.
8. Click **Save**.

1/2 Day Calendar - How to create or edit the 1/2 day calendar, if needed

1. Navigate to: **StudentInformation » Management » School Administration » Scheduling Administration » Sub-Calendars**.
2. Each Sub-Calendar you had in the prior year should have copied to the future year during SYI.
3. The Code, Name, Max Absence Level get copied from the Master Calendar. The actual exceptions do not copy.
4. Be sure to update the Daily Start Time and Daily Stop Time if they are different than the values on the Master Calendar.
5. You will notice a Sub-Calendar has a lock. This is the default calendar or the copy of the Master Calendar. Different schools call it different names.
6. The other sub-calendars will not have locks.
7. When setting up the half day calendar, the Hours Per Day field should be the **total number of hours** in a regular school day. If all other students in the building attend 6 hours per day, then the Hours Per Day for a half day calendar should be 6, even if the students on this calendar attend only 50% of the time.
8. Click on the **edit pencil** icon of one of the calendars that is not locked. The Max Absence Level is no longer used in the attendance/absence calculations, so the value can be left at Full Absence.
9. Once you click on the **calendar** icon, you are brought to the **Sub-Calendar Day Maintenance** page.
   a. You will notice everyday has a lock on it. This means that each day is the same day type as the master calendar. The day types for each day on the calendar can also be viewed on the Calendar Exceptions Management page.
   b. The locks mean the Sub-Calendar was not disassociated from the Master Calendar. Since the Sub-Calendar was not disassociated, anytime you change a day on the Master Calendar, it automatically changes the day on the Sub-Calendar.
   c. An example would be if December 16 became a **Snow Day** instead of a **School Day**. If you change December 16 to a **Snow Day** on the Master Calendar. it will automatically change December 16 to a **Snow Day** on the Sub-Calendar.
   d. StudentInformation gives you the option of making everyday on the ½ day Sub-Calendar an actual ½ day. This step is not necessary, but can be done. Right now, the **Day Type** column matches the Master Calendar and says **School Day**.
   e. To change each **Day Type** to a **School Half-Day** instead of **School Day** to better reflect the actual day type, click **Create Exception(s)**.
   f. The **Day Type** dropdown is currently defaulting to **Use Master Calendar Actual Day Type.**
   g. Since we are editing the ½ day calendar, change the **Day Type** to

School Half-Day.
h. Click **Recurring Pattern**.
i. The screen will refresh.
j. In the **Begin** field, type in the first day of school and for **Until**, type in the last day of school since everyday during the school year will be a **School Half-Day**.
k. Check the appropriate **Days of the Week**.
l. Put a checkmark in **Replace Existing Exceptions**.
m. Click **Save**.

Sub-Calendar Day Maintenance - PS AM
From this screen, you can display, add, change and delete data pertaining to Sub-Calendar Day Exceptions.

General

ℹ️ The **Day Type** is used to override the Master Calendar Actual Day Type.
This means that if the Master Calendar Actual Day Type changes,
the **Day Type** specified here is still used.

Daily Start Time:	⊙
Daily Stop Time:	⊙
Periods of the Day:	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ L14 ☐ L23 ☐ LKG5
Day Type:	School Half-Day ▼

○ Single Day ⦿ Recurring Pattern

ℹ️ Using the Recurring Pattern option requires that Actual Rotation Day be set on the Master Calendar Day in order to be updated. If you plan on updating a day without a Rotation Day, such as a Master Calendar Day that is a holiday, you must first set an Actual Rotation Day on the Master Calendar Day.

Begin:*	08/21/2019 📅 -Until:* 5/28/2020 📅
Days of the Week:*	✔ M ✔ T ✔ W ✔ R ✔ F
Replace Existing Exceptions:	✔

ℹ️ After adding a Recurring Pattern of Exception(s) please update the EMIS Exception Type(s) of each day where it is required.

[Save] [Save and New] [Cancel]

10. You will receive the following message: **The pattern was applied. 178 calendar days were updated.** You will notice that the days that were changed to School Half-Day are unlocked.
11. Since the days have pencils instead of locks, you can tell this Sub-Calendar was disassociated from the Master Calendar.
12. Now, if you would change a school day to a Snow Day on the Master Calendar, the day would not automatically update to a Snow Day on the Sub-Calendar since the Sub-Calendar had been disassociated.

Snow Days - How to enter Snow Days that occur on a reporting term start date

Qtr 2 was originally slated to end Friday, January 10th. Qtr 3 starts on Monday, January 13th. Inclement weather forces the district to cancel school on Friday, January 10th, pushing back the start of Qtr 3 until Tuesday, January 14th instead.

If the steps below are not followed in the exact order outlined below, the course section assignment start dates will not be updated.

If you change days to snow days using the Master Calendar page in StudentInformation, then the course section assignment start dates will not get updated.

1. At the building level in the school year you would like to enter a snow day navigate to: **StudentInformation** » **Management** » **School Administration** » **School Building Administration** » **Calendar Dates Wizard**.
2. Skip to tab 3 named **Schedule Term Dates**.
3. Change Quarter 2's Stop Date to the day before you want 2nd semester to start. (01/13/20 in the example above)

4. Click **Next** to move to the **Non-Attending Days** tab.
5. In the **Stop Date** field, enter the date of the snow day. (01/10/20 in the example above)

6. In the **Day Type** dropdown, select **Snow Day**.
7. Click **Next**.
8. Leave the **Change in Non attending dates are Planned** checked.
9. Now, click **Save** to add the snow day**.** Click **Next** to move to the next tab.
10. On the **Master Calendar Review** tab, click Finish.
11. Now, go to a student's Course Section Assignments page and verify that the 2nd semester course section assignment start dates were updated.

NOTE: Student Course Section Assignment Start Dates **are not** updated by the Calendar Dates Wizard. Use the **Course Section Assignment Dates** page to update the student course section start dates.

Snow Days - How to enter Snow Days or other non-attending days after the master calendar has been created that do not change course term start and stop dates

1. If the day you want to change to a snow day or non-attending day is the last day of the reporting term, please stop and go to the following section titled **Reporting Terms – How to change the last day of the reporting term**.
NOTE: If you already had pre-entered absences (examples include field trips, vacations, and students on medical leave) for a school day that got changed to a snow day, you will need to delete the absences by navigating to: **StudentInformation » SIS » Attendance » Daily Absence List.**
   a. Enter the date that is now a snow day in the **From Date** and **To Date** field and click **Go**.
   b. Place a checkmark next to each student's absence you wish to delete or use the checkbox at the top to place a checkmark in every student.
   c. Click **Delete Selected**.
   d. You will receive a confirmation message asking if you would like to continue, click **OK**.
2. At the building level in the school year you would like to enter a snow day navigate to: **StudentInformation » Management » School Administration » Scheduling Administration » Master Calendar**.
   a. Click the **edit pencil** next to the date you want to change to a snow day.
   b. The **Planned School Day Type**, **Planned Rotation Day**, **Planned Student Attendance Day Count**, and **Planned Staff Attendance Day Count** are defaulted to the current values of the master calendar and do not need changed.
   c. The first field you will want to change is **Actual School Day Type**.
   d. In the dropdown, choose **Snow Day** or **Non Attending Day**. Either one will work, they both mean the same.
   NOTE: Only total number of days students are actually physically in the building get reported to EMIS when the ATTUPEMIS program is run. Actual days and day types are not reported to EMIS.
   e. You will notice once you selected **Snow Day** or **Non Attending Day,** the **Actual Rotation Day** dropdown did not change – which is correct. The **Actual Staff Attendance Day Count** dropdown may change depending on what the original value was, but it does not matter since the **Actual Staff Attendance Day Count** field is not functional in StudentInformation at this time.
   f. However, the **Actual Student Attendance Day Count** field did change from 1 to 0 – which is correct.
   g. Leave the **Is Fixed** box unchecked. It is not functional at this time.

h. Click **Save**.
   NOTE: If your school has snow days, the Planned and Actual Count will not match - which is correct.

Makeup Days - How to change a non-attending to a school day

1. At the building level in the school year you would like change the reporting term or schedule term, navigate to: **StudentInformation » Management » School Administration » Scheduling Administration » Master Calendar**.
2. Locate the day that will be a makeup day instead of a non-attending day.
   a. Click on the **edit pencil** icon.
   b. In the **Actual School Day Type** dropdown, select **School Day**.
   c. In the **Actual Rotation Day** dropdown, select the day of the week. **NOTE:** If the makeup day is a weekend day, you will need to select one of the normal days of the week to assign to the date. (This will look like you have two days of the week with the same day, but it will not matter).
   d. The **Actual Student Attendance Day Count** and **Actual Staff Attendance Day Count** automatically update to 1.0.
   e. Ignore the **Is Fixed** checkbox because it is not functional at this time.
   f. In the **Tumble Rotation Day Duration** section, only select None.
   g. In the **Add Additional Day To** section, leave both selections unchecked.
   h. Click **Save**.
3. Next, verify the **Actual Days** count is correct.
4. Click **Save**.
5. If this is a full makeup day with the same number of hours as every regular school day, then nothing further is required to be done. Changing it to a School Day with EMIS Exceptions already in place on the sub-calendars for these days, the EMIS Exceptions should be removed from any sub-calendar that will now be an attending day.
6. If this makeup day is shorter or longer than the regular school day, then the appropriate EMIS Exceptions should be entered for the day indicating the number of hours that the students will be in attendance.
   Longer Day – Choose Planned Lengthened Day with the total number of hours of attendance for that day; hours must be greater than the regular day hours.
   Shorter Day – Choose Planned Shortened Day with the total number of hours of attendance for that day; hours must be shorter than the regular day hours.
   Weekend Makeup Day – Choose Planned Weekend Make Up Day with the total number of hours of attendance for that day.

Mass updating calendars where this added day should NOT be an attending day.

1. Now that you have made this day a school day on the master calendar, it will be a school day on all sub-calendars unless you change the day to a non-attending day on calendars where this change does not apply. Use the Calendar Bulk Exceptions calendar page to update all sub-calendars at the same time.
2. Navigate to: **StudentInformation » Management » School Administration » Calendar Bulk Exception Management.**
3. In the **Sub Calendar Day** box, select **Non Attending Day** from the dropdown for **Sub Calendar Day Type**. Click on **Update**.
4. Click **No Action** in the State Reporting box as no EMIS Exception will be reported for this day.
5. In the **Day(s)** section, click on **Add Days**. From the calendar, click on the weekend day you changed on the master calendar to an attending day. Click **Use These Days** to save the selected date.
6. In the **Calendar(s)** box, check the box beside each calendar where the master calendar day changed does NOT apply.
7. Click **Save**.

Reporting Terms - How to change the last day of a reporting term or schedule term

1. At the building level in the current school year you would like to change the reporting term or schedule term navigate to:
   StudentInformation » **Management** » **School Administration** » **School Building Administration** » **Calendar Dates Wizard**.
2. You will be on the **Calendar Boundaries** tab. Do not make any changes on this tab and click **Next**.
3. Now you will be on the 3rd tab named **Schedule Term Dates**.
   a. Change the Stop Date of the corresponding Reporting Term/Schedule Term.
   b. In the example, I have chosen the Stop Date of Quarter 2 which will affect the Start Date of Quarter 3 or 2nd Semester only classes.
   c. Back on the **Calendar Dates Wizard** page on tab 3 **Schedule Term Dates,** I am changing Quarter 2 to end Tuesday, January 12th instead of Monday, January 11th.

   d. This will change the Quarter 3 start date to January 13th.
   e. Leave the checkbox in **Changes to Stop Dates are Planned**. At this time, the checkbox is not functional.
   f. Click **Next**.
4. Now you are on the 4th tab named **Non-Attending Days**, click **Next** to move to the last tab.
5. Your changes are now reflected on the final tab named **Master Calendar Review**. You will notice the start date of the 2nd semester only class was automatically updated with the new start date of January 13th.

6. Next, check to make sure the reporting term start and stop dates updated by navigating to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Initialization** » **Reporting Terms Maintenance**.

Reporting Terms Maintenance
From this screen, you can display and change data pertaining to reporting terms.

				Code	Name	Start Date	End Date	Planned Days	Actual Days	Sort Order	EMIS Term	Marks Start Date	Marks Cutoff Date	Archive Date	Active
🔒	✏		↓	Qtr1	Quarter 1	Aug 25, 2020	Oct 23, 2020	43.00	43.00	1	Q1				🟢
🗑	✏	↑	↓	INT1	1st 9 week interim			0.00	0.00	2					🟢
🔒	✏	↑	↓	Qtr2	Quarter 2	Oct 26, 2020	Jan 12, 2021	54.00	54.00	3	Q2				🟢
🗑	✏	↑	↓	INT2	2nd 9 week interim			0.00	0.00	4					🟢
🗑	✏	↑	↓	EX1	EX1			0.00	0.00	5	X1				🟢
🔒	✏	↑	↓	Qtr3	Quarter 3	Jan 13, 2021	Mar 19, 2021	48.00	48.00	6	Q3				🟢
🗑	✏	↑	↓	INT3	3rd 9 week interim			0.00	0.00	7					🟢
🔒	✏	↑	↓	Qtr4	Quarter 4	Mar 22, 2021	May 21, 2021	45.00	45.00	8	Q4				🟢
🗑	✏	↑	↓	INT4	4th 9 week interim			0.00	0.00	9					🟢
🗑	✏	↑	↓	EX2	EX2			0.00	0.00	10	X2				🟢
🗑	✏	↑		FIN	FIN			0.00	0.00	11	YE				🟢

☑ Show Active Only

7. Finally, make sure the schedule term dates updated also by navigating to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Initialization** » **Schedule Terms**.
8. If you encounter any issues updating the reporting term/schedule term start or stop dates, please contact your ITC or State Support.

Student Course Section Assignment Start Dates

Student course section assignment start dates are no longer updated through the Calendar Dates Wizard. Use the new Course Section Assignment Dates page to adjust any course section assignment start or end dates necessary.

Course Section Assignment Dates

Term Code	Term Name	Start Date	Stop Date	Original CSA Start Date	Original CSA Stop Date
1SEM	1st Sem Only	8/25/2020	1/12/2021	📅	📅
2SEM	2nd Sem Only	1/13/2021	5/21/2021	01/12/2021 📅	📅
ALYR	All Year	8/25/2020	5/21/2021	📅	📅

Save Changes

Earlier First Day of School - How to change the first day of school to start earlier than originally planned

In order to update the first day of school or a reporting term start date to a date that has already passed, you will need to be granted extra security permissions named – Update past on calendar dates wizard. Please contact your security administrator to verify you have the needed security permissions.

1. Navigate to: **StudentInformation » Management » School Administration » School Building Administration » Calendar Dates Wizard**.
2. In the example, the school was supposed to start on 8/20/19.
3. The school board votes to change the first day to 8/19/19.
4. On the first tab named **Calendar Boundaries**, enter in the new **Start Date** of 8/19/19. Click **Next**.
5. On the 2ⁿᵈ tab named **Configure and Confirm Boundary Changes**, fill in the dropdowns for each day added.
   a. Since school was originally supposed to start on Tuesday, 8/20/19 and the start date is changing to Monday, 8/19/19, **Rotation Day Type**, **School Day Type**, **Student Att. Day Count**, **Staff Att. Day Count** are required for each day added.
   b. Match the **Rotation Day Type** dropdown with the same value in the **Day** column.
   c. In the **School Day Type** dropdown, chose **School Day**.
   d. When the **School Day Type** dropdown is changed to **School Day,** the **Student Att. Day Count** field is automatically populated with 1.00 – which is correct. Click **Next**.
6. The 3ʳᵈ tab named **Schedule Term Dates** lists each schedule term and reporting term. If any stop date of any reporting term or schedule term has changed due to starting the school year early, make those adjustments here.
   a. Leave the check in the box next to **Changes to Stop Dates are Planned**.
   b. Click **Save**.
7. On the **Non-Attending Days** tab, add any non-attending day that was not added previously, if necessary. **Click Next**.
8. Once on the **Master Calendar Review** page, verify the changes. The new start date of school is reflected on this page.
9. Now, navigate to: **StudentInformation » Management » School Administration » Scheduling Administration » Master Calendar** to make sure the correct start date is listed in the **Start Date** field.
10. If any of the reporting term or schedule term stop dates were changed, navigate to the following pages to ensure the changes took:

StudentInformation » **Management** » **School Administration** » **Scheduling Administration** » **Initialization** » **Reporting Terms Maintenance** and **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Initialization** » **Schedule Terms**

11. Course section assignments that already exist are no longer updated with the new first day of the term. You must use the new **Course Section Assigment Dates** page to update the course section assignment start dates to reflect the new date.

12. Once on the page, for each course term starting on the first day of school, enter the original first day of school in the **Original CSA Start Date** column. If the course term stop date is also changing, enter the original course term stop date in the **Original CSA Stop Date** column. Any course section assignment for the course term that has the original date for the start/stop date will be updated to the new start and/or stop date. If only one date changed (start or stop), only fill in the date for the one changing. All assignments matching that start/stop date selected will be updated to reflect the new date.

13. Check all sub-calendars to verify the Calendar Start Date / Stop Date are correct; update if needed.

Course Section Assignment Dates

Term Code	Term Name	Start Date	Stop Date	Original CSA Start Date	Original CSA Stop Date
FULL	Full	8/19/2019	5/19/2020		
SEM1	Semester 1	8/19/2019	12/20/2019		
QTR1	Quarter 1	8/19/2019	10/17/2019		
QTR2	Quarter 2	10/18/2019	12/20/2019		
SEM2	Semester 2	1/6/2020	5/19/2020		
QTR3	Quarter 3	1/6/2020	3/10/2020		
JB	JB	1/6/2020	5/19/2020		
QTR4	Quarter 4	3/11/2020	5/19/2020		

Save Changes

Later First Day of School - How to change the first day of school to start later than originally planned

1. Navigate to: **StudentInformation** » **Management** » **School Administration** » **School Building Administration** » **Calendar Dates Wizard**.
2. On the first tab named **Calendar Boundaries:**
   a. Enter the new 1st day of school.
   b. Leave the check in **Change in start date is planned**.
   c. Click **Next**.
3. If any of the Schedule Term Stop dates need adjusted because of the change in the first day of school, make the adjustments on the **Schedule Term Dates** tab. Click **Next**.
4. Add any new non-attending days on the **Non-Attending Days** tab. Click **Next**.
5. On the **Master Calendar Review** tab, click **Finish**.
6. Next, go to **Reporting Terms Maintenance**, **Schedule Terms Maintenance**, and the **Master Calendar** pages to make sure the changes saved.
7. Check all sub-calendars to verify the Calendar Start Date is correct; update if needed.

Later Last Day of School - How to change the last day of school to end later than originally planned using the Master Calendar page

1. In the current school year at the building level, navigate to:
   StudentInformation **»** ***Management*** **»** ***School Administration***
    » ***Scheduling Administration*** **»** ***Master Calendar***.
2. Click on the **ellipse** next to the **Stop Date** field.
3. Enter the new last day of school in the **New Stop Date** field.
4. Click **Go**.
5. In the **Rotation Day Type** dropdown for each day, select the appropriate day of the week. If the days falls on a Saturday or Sunday, leave the field blank.
6. In the **School Day Type** dropdown for each day, select School Day. If the days falls on a Saturday or Sunday, select **Non Attending Day**.
7. Click **Save**.
8. You will receive the following message: **The master calendar's school year has been successfully changed.**
9. Verify the **Stop Date** has been updated.

Later Last Day of School - How to change the last day of school to end later than originally planned using the Calendar Dates Wizard page

1. In the current school year at the building level navigate to:
   StudentInformation » **Management** » **School Administration** » **School Building Administration** » **Calendar Dates Wizard**.
2. Enter the new last day of school in the **End Date** field and leave the **Change in end date is planned** checked.
3. Click **Next**.
4. In the **Rotation Day Type** dropdown for each day, select the appropriate day of the week. If the days falls on a Saturday or Sunday, leave the field blank.
5. In the **School Day Type** dropdown for each day, select **School Day**. If the days falls on a Saturday or Sunday, select **School Day**.
6. Click **Next**.
7. You will receive the following message: **The boundaries have been successfully saved.**
8. Click **Next** twice to advance to the final tab named **Master Calendar Review.**
9. Click **Finish**.
10. Navigate to the Master Calendar page and verify the last day of school was updated.
11. Check all sub-calendars to verify the Calendar End Date is correct; update if needed.

Only students on a particular sub-calendar attend – How to configure the calendar so day is non-attending for all students, but the students assigned to a particular sub-calendar

The Master Calendar no longer has to be marked as an attending day for the sub-calendar to be marked as an attending day. The Master Calendar can have a day marked as a non-attending day, which will trickle down to each sub-calendar. Then if you have one sub-calendar where the students will be attending on that specific day, the sub-calendar can be updated so that it is an attending day. Districts will be able to take attendance/absences for students on that sub-calendar.

1. At the building level, navigate to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Calendar Bulk Exception Management**.
   a. Navigate to the date that will be updated to be an attending day.
2. Next, modify the day on each sub-calendar where students will be attending on this day.
3. In the **Sub Calendar Day** box, in the **Sub Calendar Day Type** dropdown, select **School Day**. No need to specify times or periods of the day.
4. In the **State Reporting Exception(s)** box, click the **Remove Exception(s)** to remove any exceptions for Planned Full Day.
5. In the **Day(s)** box, click **Add Days** to add the date(s) the change will apply to.
6. In the **Calender(s)** box, select the calendars in each building the change will apply to. If the day will be applied to all calendars in a building, check the checkbox beside the school name.
7. Click **Save**. The day will become an attending day on all selected calendars with no EMIS Exceptions reported.

JVS Integration Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
3/25/21	Entire document	Review and update
4/29/20	Introduction	Add note about concentrators
4/20/20	Entire document	Update format
3/19/20	Entire document	Review and update
3/21/19	Entire document	General updates

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Introduction

Terminology used in this document

The following terminology will be used throughout this document to refer to the building at the JVS or the home school building:

JVS Clone – The JVS clone building is the building set up at the JVS to clone the Home School satellite building.

Home School Satellite – The Home School Satellite building refers to the actual location of the satellite course. Satellite courses are housed in regular districts.

The purpose of JVS Integration is to ease the burden on the JVS to report courses and students attending JVS courses which are housed in the student's own home district. These types of courses are called Satellite classes. The JVSD is the employer of the teacher, therefore, they have the responsibility of reporting all information related to these classes even though they are housed in another district. The JVS Integration process will:

- Update limited student demographic information for students in the JVS Satellite classes for reporting by the JVSD

- Maintain course sections assignments for these students in the JVS Clone buildings

The integration process will be set up at the ITC to run at scheduled intervals to look for changes in demographic information or class assignments only in satellite classes at the home school and will update the JVS clone building to mirror the Home School Satellite.

NOTE: The JVS Clone building is the entity that would report the Concentrator status. If the home school owns the course and its vocational (some districts have their own vocational programs), then the home school would report the Concentrator status.

Preliminary Steps for ITC

Task #1 – Submit ticket requesting JVS Clone buildings be created in the database for the future school year

A 1:1 relationship between the Home School Satellite and the JVS Clone is required. For example, if both the middle school and high school within a district offer JVS satellite courses, you need to create a separate JVS Clone building for each.

Once the JVS Clone buildings are created in the database, they can be seen in the School dropdown under the JVSD after you log out and back in.

Task #2 – Create a JAMS job to run the SoftwareAnswers.JVSIntegration console application

Please see the JVS Integration Installation Instructions found on the SA Portal. The document is located under Products – StudentInformation – ITC Documentation.

The job can be setup to run once nightly or at any other time interval you choose.

** You will want to turn off the ethnicity sync portion of the process. If the ethnicity sync is turned on, the ethnicity from the Home School Satellite will be synced to the JVS Clone. Currently, if the home school has a value of "* - Not recollected", but the JVS has the student with an actual ethnicity value, the actual ethnicity value would be overridden with '*', which would cause an error in reporting the data.

Turn off the ethnicity sync (Hispanic/Latino, Racial Group(s) and Summative Race values) by passing the following command argument:

   a. Open a command prompt.
   b. Enter the following: "C:\JVS\SoftwareAnswers.JVSIntegration.exe – SKIPETHNICITYUPDATE"

   NOTE: the "C:\JVS\" portion of the command should indicate whereever you have your application files stored on your server and may not be in a JVS folder.

Secondary Steps for JVS Clone Buildings

Task #1 – Perform the following setups in each new JVS Clone building for the future school year

The purpose of the Clone building is to make it look just like the Home School Satellite building. Each of the following items need to be completed in each JVS Clone building.

1. **Run Calendar Wizard & SYI Tasks** – Run Calendar Wizard at the new JVS Clone building with the same Master Calendar start and stop dates and Reporting Term start and stop dates as the Home School Satellite building.

   Note: If you pick STD Standard Day for the Rotation Days, and you want to take period attendance at the JVS Clone building, you will need to edit the Day code in SI and change it to a 2-character value (such as MO for Monday) because GradeBook only allows 2 characters in that field.

   Also, create Periods of the Day to tie to the course section meeting times. If a student is taking 3 Satellite classes, you will need 3 periods. If using period attendance, the periods in Periods of the Day Maintenance need to have start/end times.

   When running SYI tasks in the future year, select to copy from the current year. You do not need to map the course terms after the 2nd set of tasks.
2. **Create a Default Schedule Result Set.**
3. **Add Building Grade Levels** – Add applicable grade levels for the JVS Clone building on the Building Grade Levels Maintenance page.
4. **Add a Sub-Calendar** – Add a sub-calendar on Sub-Calendar Maintenance. This sub-calendar should mirror the calendar at the Home School Satellite building that Satellite students are assigned to.
5. **Create Course Terms** – Create course terms on Course Terms Maintenance for the corresponding satellite sections.
6. **Create Periods:** Verify at least one period of the day was created during Calendar Wizard – if not, create one period on Master Calendar Periods and link it to each day of the week on Periods of the Day Maintenance. If a student is taking 3 Satellite classes, you will need 3 periods. If using period attendance, the periods in Periods of the Day Maintenance need to have start/end times.
7. **Add Teachers** – Manually enter teachers teaching JVS satellite courses into the new JVS Clone building. Ensure they have a job function of Teacher.

8. **Add Rooms** – Create a room to be used on all of the satellite course section meeting times on Rooms/Locations Maintenance page.
9. **Add Local Ethnicity Codes** – Manually enter Local Ethnicity Codes that mirror the Home School Satellite building, or ask the SSST DBA to copy the Home School Satellite building Local Ethnicity Codes to the JVS Clone building. If the JVSD's Local Ethnicity Codes are configured at the district level, they will appear at the new JVS Clone building. The Local Ethnicity Code used at the Home School Satellite building must match the Local Ethnicity Code used at the new JVS Clone building.
10. **Add Student Status Codes**– Add at least one Student Status Code.
11. **Add Courses** – Manually enter courses with a Course Type = *Class* (they do not have to match the course code at the Home School Satellite), or ask the SSST DBA to copy the Course Catalog from the Home School Satellite building to the JVS Clone building. **Please note**: You do not need the entire Course Catalog from the corresponding Home School Satellite building, you only need the JVS Satellite courses.
    NOTE: Courses at Home School Satellite building must be Type = *Satellite*. JVS Clone building courses must be Type = *Class*.
12. **Add Course Sections** – Create course sections at the new JVS Clone building that correspond to the course sections in which the students are enrolled at the Home School Satellite building.
13. **Configure StudentInformation Options** (**Scheduling tab**)– Select a Default Calendar and Final Schedule Result.
14. **Configure Registration Defaults.**

Task #2 – Turn on JVS Integration at each JVS Clone building

1. Navigate to: ***StudentInformation » Management » School Administration » School Building Administration » School Demographics***.
2. Select the **JVS Integration On** checkbox.
3. Select the school from the **Select JVS Satellite School** dropdown list where students will be taking JVS Satellite classes.
4. Clear the SI Cache.

Progress Book On:	☐		
JVS Integration On:	☑	Select JVS Satellite School:*	- MT. HEALTHY HIGH SCHOOL

Task #3 – Turn on JVS Integration at each Home School Satellite building

1. Navigate to: ***StudentInformation » Management » School Administration » School Building Administration » School Demographics***.
2. Select the **JVS Integration On** checkbox.
3. Select the Clone building from the **Select JVS Satellite School** dropdown list where Home School Satellite students and classes will be cloned.
4. Clear the SI Cache.

| JVS Integration On: | ☑ | | Select JVS Satellite School:* | - Z-MT. HEALTHY SATELLITE | ∨ |

Task #4 – Use the Student Transfer process to register Satellite students into JVS Clone building

Each student attending satellite classes must be enrolled in the JVS Clone building before any information may be synced from the Home School Satellite building.

Task #5 – Map Home School Satellite courses to courses at the JVS Clone building

1. Navigate to: ***StudentInformation » Management » School Administration » JVS CourseSection Map***.
2. The courses on the right side are the JVS Clone building courses that are marked as Type = Class. Courses in the dropdowns on the left are the Home School Satellite courses with a Type = Satellite.
3. Choose a corresponding Teacher, Course, and Section on the left for each Satellite course.

After the JVS Integration job runs, the following items will be updated:

Course Section Assignments

1. After the JVS Integration job completes for the first time, any Satellite courses the student is taking at the Home School Satellite building will appear on the student's Course Section Assignment's page at the JVS Clone building.
2. On subsequent runs of the JVS Integration job, if the following scheduling transactions are performed at the Home School Satellite building, the student's schedule at the JVS Clone building will reflect that change after the JVS Integration job completes:
    a. Adds
    b. Drops
    c. Removes
    **For Transfers, at the Home School Satellite building, you must manually drop the old course and add the new one.

Rerun CTRMEMIS in update mode to pick up any roster changes.

Student Demographic Data

If a change is made to any of the following demographic fields at the Home School Satellite building, the same field will be updated on the Student's Profile at the JVS Clone building after JVS Integration job completes:

- First Name
- Middle Name
- Last Name
- Gender
- Birthdate
- Local Ethnic Category
- Hispanic/Latino* (currently unavailable)
- Racial Group(s) * (currently unavailable)
- Summative Race* (currently unavailable)
- Native Language
- Home Language
- Address of Residence
- Mailing Address

Reminders:

- Students must be enrolled in both the Home School Satellite building and the JVS Clone building.
- Student's SSID must be the same in both schools.
- The Student's Home School IRN at the JVS Clone building must match the Attending Building IRN field on the Profile – FS-Standing tab at the Home School Satellite building.

F.Y.I.

Periodically run the Student Verification to check for any new errors.

School Year Initialization Procedural Checklist

School Year Initialization (SYI)

 The SYI process is typically performed in January or February in order to configure the following school year. The SYI Tasks must be executed by the ITC, by the District, and by the Building in that order. Some ITC's wish to initialize all of their buildings. Others allow their districts to run the SYI tasks at the district and building level. Please consult your ITC to determine how initializations are handled. Unless otherwise noted, see **School Year Initialization End User Guide.**

NOTE: Installing the release that includes the New School Year in the dropdown will reset all FS/FD/FN Exclude Records from Fall Initialization checkboxes to blank. These should not be rechecked until the student has been promoted to the new school year.

NOTE: The SYI process does not add students to the new school year. Consult the **Student Promotion Procedural Checklist** step by step instructions. SYI must be completed at all three levels before students can be promoted and bulk enrolled into the new school year.

NOTE: Initialization is processed in a three-part procedure: Initialize the ITC level (once), Initialize the District level (once per district), and Initialize the Building level (once per building). In other words, if a district has 10 buildings SYI will need to be completed once at the district level and at each of the 10 buildings.

Change Log

Date	Section Number/Name	Change Description
8/6/21	Appendix C	Add Note about SI Options – Uses Fees
11/23/20	Entire doc	Updates for 2021/2022 school year
04/06/20	Task #4	Note added re: 72 schedule terms
11/13/19	Entire doc	Updates for 2020/2021 school year Added note for period start/stop times
11/05/18	Entire doc	Updates for 2021/2220 school year
11/22/17	Entire doc	Updates for 2018/2019 school year
11/22/17	Task #4	Added update for Start/End Time on Calendar & Start/Stop Times on Periods

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Task #1 – Verify the 21/22 school year appears in the dropdown.

Please contact your ITC if 21/22 does not appear in the dropdown.

Task #2 - Initialize the ITC level for the new school year

You will only need to run the ITC level tasks once for the entire ITC.

Only ITC Personnel have the security permissions to initialize the ITC level.

1. Change context to the ITC and 21/22.
2. Navigate to: ***StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks***.
3. On the first tab named **Module Task List** click the **Execute Now** button for the first 8 tasks. (**Student : Profile** thru **Marks : Marks Configuration**).
   a. Click the **Next** button.
4. Now you are on the second tab named **Required Information**.
   a. In the **Source School Year** dropdown, choose 20/21 since we are copying data from this school year to 21/22.
   b. Click **Next**.
5. Now you are on the third tab named **Confirmation**.
6. Click **Execute**.
   a. Your screen will flicker while StudentInformation processes through the selected tasks.
   b. As each task finishes, the **Status** of the task will change from **Pending** to **Complete** or **Failed**.
   c. If any of the tasks **Failed,** report them to State Support in a Help Desk ticket and discontinue SYI until you hear back from State Support.
   d. Also, if you setup any ITC level codes you will want to click **View Log** to view any information messages and to make sure the codes copied properly.
   e. If all the tasks completed and you do not have any codes setup at the ITC level, you can skip **View Log**.
   f. Otherwise, if you are ready to proceed and finish the remaining tasks, click **Execute More Tasks**.
7. Now you are back on the first tab.
   a. You should see a checkmark in the **Completed** column for the tasks that were successfully executed.
   b. You can now click the **Execute Now** button for the remaining two tasks: **Scheduling : Course Configuration** and **Course History**.
   c. Click Next.
8. In the **Source School Year** dropdown, choose 20/21 since we are copying data from this school year to next school year.
   a. Click **Next**.
9. Now you are on the **Confirmation** tab.
   a. Click **Execute**.
10. Now you are on the fourth tab. Your screen will flicker as StudentInformation processes the tasks.

a. The status of the tasks will change from **Pending** to **Completed**.
b. Congratulations! You have just completed initialization at the ITC level.
11. Now you can initialize the District level.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

Module Task List	Required Information	Confirmation	Results

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☑
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	●	○	○	☑
Student: Memberships	Copies membership groups and memberships	●	○	○	☑
Discipline	Copies code values for discipline	●	○	○	☑
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☑
Attendance: Absence Events	Copies configuration and code values used by attendance	●	○	○	☑
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☑
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☑
Scheduling: Course Configuration	Copies code configuration used by course master	●	○	○	☑
Course History	Copies configuration used to support course history	●	○	○	☑

1st Pass

2nd Pass

Next >

Task #3 - Initialize the District level for the new school year

You will need to run the District level tasks for each District in your ITC.

1. Change context to the District and 21/22.
2. Navigate to *: **StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks**.
3. On the first tab named **Module Task List,** click the **Execute Now** button for the first 11 tasks EXCEPT **Student: Admission**. (**School : Configuration** thru **Marks : Marks Configuration**).
   a. Click **Next** .
4. Now you are on the second tab named **Required Information**.
   a. In the **Source School Year** dropdown, choose 20/21.
   b. Leave the **Locker Combination Series** blank. You will have an opportunity to update the locker combination series at the building level.
   c. Click **Next**.
5. Now you are on the third tab named **Confirmation**.
   a. Click **Execute**.
   b. Your screen will flicker while StudentInformation processes through the selected tasks.
   c. As each task finishes the **Status** of the task will change from **Pending** to **Complete** or **Failed**.
   d. If any of the tasks **Failed,** submit a Help Desk Ticket. Discontinue with SYI until you have heard back from State Support.
6. Next, you will want to navigate to : **StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist.**
   a. If you have any codes setup at the district level, you will want to complete the follow-up checklist task. For example: If attendance codes are setup at the district level, you will want to make sure you complete the follow-up tasks for **Attendance : Absence Events**.
   b. You can click on the **Go To** link for the desired task and the link will take you to the necessary page to verify the data copied to 21/22.
   c. If you find an issue with data copying up, please submit a Help Desk ticket. Discontinue the SYI process until you have heard from State Support.
   d. One important thing to note is Staff members are copied to the new school year when you run initialization at the district level, but staff job functions are not copied to the new school year until initialization is run at the building level.
   e. Now we are ready to return to the **Execute Tasks** page to finish the initialization process.
7. Navigate back to : **StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks**.

8. You should be on the first tab.
    a. You should see a checkmark in the **Completed** column for the tasks that were successfully executed in the steps above.
    b. You can now click the **Execute Now** button for the remaining three tasks: **Student: Admission**, **Scheduling : Course Configuration** and **Course History**.
    c. Click **Next**.
9. Choose 20/21 for the **Source School Year**.
    a. Click **Next**.
10. Now you are on the **Confirmation** tab.
    a. Click **Execute**.
11. Now you are on the fourth tab. Your screen will flicker as StudentInformation processes the tasks.
    a. The **Status** of the tasks will change from **Pending** to **Completed** or **Failed.**
12. You will want to go back to the **Follow-up Checklist** page and complete the follow-up checklist for any items you have configured at the district level.
13. Congratulations! You've just completed initialization at the District level.
14. Now you are ready to proceed onto the Building level.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed
School: Configuration	Copies basic school configuration settings to the new school year	●	○	○	☐
School: Staff Members	Copies the roles and settings for staff members	●	○	○	☐
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☐
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	●	○	○	☐
Student: Memberships	Copies membership groups and memberships	●	○	○	☐
Discipline	Copies code values for discipline	●	○	○	☐
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☐
Fee Proration	Copies fee prorations and proration details	●	○	○	☐
Attendance: Absence Events	Copies configuration and code values used by attendance	●	○	○	☐
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☐
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☐
Scheduling: Course Configuration	Copies code configuration used by course master	●	○	○	☐
Course History	Copies configuration used to support course history	●	○	○	☐

1st Pass (School: Configuration, School: Staff Members, Student: Profile)
2nd Pass (Student: Admission)
1st Pass (Student: Memberships, Discipline, Fees, Fee Proration, Attendance: Absence Events, Attendance: Absence Letters, Marks: Mark Configuration)
2nd Pass (Scheduling: Course Configuration, Course History)

Task #4 - Run Calendar Wizard at the building level

This step creates the school building's master calendar, course terms, periods of the day, rotation days, and reporting terms.

Allow yourself plenty of uninterrupted time to complete this task. The next set of steps must be done in its entirety. If you become distracted and navigate from the page all information you have entered will be lost.

Schools have the ability to start scheduling before a district's school calendar has been approved for the upcoming school year. However, it is still preferred to have the district's calendar in hand when you do SYI. If fictitious dates are used to complete the Calendar Wizard there will be additional steps to correct the dates. Please see the Calendar Procedural Checklists.

Non-attending days should be entered during the Calendar Wizard task so they are included on the master calendar. Once SYI is complete, refer to the Calendar with EMIS Exceptions Procedural Checklist to add the EMIS exceptions for 21/22 to the applicable sub-calendars.

The batch scheduler will not complete for schools having 72 schedule terms so we highly advise against this. A maximum of 36 schedule terms should be used.

Helpful Hint – Print screenshot of the following pages in 20/21 to ensure code and names match.

1. ***StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Reporting Terms Maintenance***
2. ***StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Course Terms***
3. ***SStudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendars***
4. ***StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Periods of the Day***
5. ***StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Master Calendar Periods***
6. ***StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Rotation Days***

WARNING WHEN RE-RUNNING CALENDAR WIZARD! Use extreme caution when re-running Calendar Wizard. Rerunning Calendar Wizard wipes out course section assignments – this cannot be restored. One of the tasks undone by

rerunning Calendar Wizard is Student: Admission. All admission history will be deleted. Students will still be searchable in the current school year, but will have no Intrabuilding Progression or Building Admissions for the current school year. Student Promotion / Bulk Enrollment will need to be redone. Please consult the School Year Initialization Step by Step Checklist – Appendix section for more information on rerunning Calendar Wizard.

When the Calendar Wizard loads, if it has been run before, the following message will appear:

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

Are you sure you want to run the Calendar Wizard again?
All Absences, Marks, GPA/Honor Rolls, Marking Patterns, Course Section Assignments, Schedules, Homerooms, and Terms will be deleted and you will need to rerun Student Promotion and Student Bulk Enrollment.
To continue, click OK, otherwise click Cancel.

OK   Cancel

If you hit Cancel, the following message will appear:

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

You have chosen not to re-run the Calendar Wizard.

1. Change the context to the building level and 21/22.
2. Navigate to: ***StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard***.
3. Now you are on the first tab of the Calendar Wizard named ***General***.
   a. The ***Master Calendar Code*** and ***Master Calendar Name*** are defaulted to the word ***Master***. State Support recommends not changing the names at this time.
   b. Enter the ***Start Date*** for next year. The example screenshots following this task use the ***Start Date*** of 08/25/21 HINT: Make sure you use the correct year.
   c. Enter the ***End Date*** for next year. The The example screenshots following this task use the ***End Date*** of 05/26/22. HINT: Make sure you use the correct year.
   d. If the school isn't sure when school will start or end you can guess and enter fictitious dates. These dates can be changed at a later time.
   e. Enter ***Daily Start Time*** & ***Daily Stop Time***. This will be the standard Start & Stop time for the Master Calendar for the school year and will be used in calculating attendance.
   f. You will want to make sure you are not using Saturdays or Sundays as the 1st or last day of school, unless Saturdays and Sundays are legitimate school days.
   g. The ***Instructional Weeks on which to base Calendar*** field is defaulted to ***36***. State Support recommends not changing that.
   h. Next, you will need to mark ***Attending Days***. 99.99% of schools will choose Monday through Friday.
   i. Click ***Next***.
4. Now you are on the second tab named ***Reporting Terms***.
   a. On this tab you tell StudentInformation how often you print report cards, which length of courses you offer, and the Reporting Term stop dates.
   b. Please Note : Whatever you choose in the ***Report Card Frequency*** dropdown determines which Reporting Terms are locked on the Reporting Terms Maintenance screen.
   c. A good percentage of schools hand out report cards every quarter. 4 Quarters (9 weeks each) was chosen in the screenshot example below.
   d. The ***Select Course Lengths Used*** filter determines the breakdown of your schedule terms. If your school definitely offers 9 week courses and there is a possibility they may offer 12 week courses, you would want to make sure you pulled 9 weeks and 12 weeks over to the right of the filter box.
   e. 9, 12, 18 and 36 week course lengths were chosen in the example following this task. The lowest common denominator of 9 and 12 is 3. So, this school will have 3 week schedule terms. If I had chosen 9 week and 7 week courses the lowest common denominator would be 1 week and this school would have their schedule terms broken down into 1 week increments. ***Note – the batch scheduler will not complete for buildings that have 72 schedule terms.

f.   If there is any uncertainty about which course lengths the school will be offering next year, select all course lengths that have a possibility of being offered. StudentInformation does not require all the course lengths chosen to be used.

g.   Now it is time to fill in the Reporting Term *Stop Date* fields.

h.   The example screenshots following this task use 10/22/21 for the Quarter 1 *Stop Date*.

i.   The example screenshots following this task use 01/14/22 for the Quarter 2 *Stop Date*.

j.   The example screenshots following this task use 03/18/22 for the Quarter 3 *Stop Date*.

k.   Quarter 4 *Stop Date* is already filled in since it is the last day of school.

l.   Click *Next*.

5.   Now you are on the third tab named *Virtual Terms*.

a.   This tab allows you to copy your virtual reporting terms from last year, which include interims, exams, averages, and finals.

b.   The *Copy Virtual Terms From* dropdown should be set to 20/21 since we are going to copy the virtual reporting terms from this year to next year.

c.   Click *Go*.

d.   Now use the up and down errors to move the virtual terms into the correct position.

e.   REMEMBER : If you are using interims, the interim Reporting Terms follow the locked reporting term. Example: Quarter 1 followed by Interim 1.

f.   Notice the virtuals do not have start and stop dates – this is by design.

g.   If not choosing to copy virtual reporting terms from last year and wish to enter them by hand, you can click *Add Virtual Term*.

h.   Note: Not all schools use virtual terms. If the school does not use virtual terms such as interims or finals, please skip this tab.

i.   Click *Next* to move to the fourth tab.

j.   A large majority of schools will want to choose to copy virtual reporting terms from last year.

6.   The fourth tab is named *Non-Attending Days*.

a.   If the school has determined which days are non-attending days, they can be entered now. Otherwise, these dates can be entered at a later time by editing the Master Calendar.

b.   Add a non-attending day by entering a *Date* or *Date Range*, *Day Type*, and optional *Note*. If entering a Date Range, only include Dates that fall on a Rotation Day (ex. Monday – Friday). Do not include non-Rotation Days (ex. Saturday – Sunday).

c.   Click *Add*.

d.   Repeat this process to add more non-attending days.

e.   Keep in mind that any day the students are not physically in the building is a non-attending day.

f. Once the Non-Attending days have been entered, click **Next** to advance to the fifth tab.

7. The fifth tab, named **Periods**, allows periods to be entered from scratch or copied from a prior year, just like the **Virtual Terms** tab.

a. To copy periods from last year, select 20/21 in the **Copy Periods From** dropdown.

b. Click **Go**.

c. To generate the periods from scratch, enter the number of periods in the **Generate Periods** box and click **Go**.

d. Rename the period codes and names to suit your needs but keep in mind, if the codes are not the same as last year, the meeting times on the course sections will not copy up properly to 21/22.

e. Enter **Start Time** and **Stop Time** on periods if applicable (lunch periods should have times entered or that time won't be deducted from absences during attendance calculations). The Start/Stop Times entered will be copied to the applicable periods for each rotation day.

f. **Note:** If period start/stop times are not entered now, they can be entered or edited later but this will have to be completed **on each individual rotation day. There is not a way to enter times on master calendar periods.**

g. 99% of schools will use the **Copy Periods From** feature. State Support recommends using the **Copy Periods From** functionality because there is less chance of making a mistake.

h. If choosing to use the **Copy Periods From** feature and the school is no longer using a specific period - click the red **X** next to the period to delete it. NOTE: If course sections still have a meeting times assigned to this period, the meeting time will not copy over correctly to 21/22 and the meeting time in 21/22 will need to be manually corrected.

i. Once the periods have been configured, click **Next**.

8. The sixth tab is named **Calendar Type**.

a. Choose a **Calendar Type** from the dropdown.

b. 95% of schools should choose **Fixed Rotation Days**.

c. Choosing **Fixed Rotation Days** allows the ability to schedule classes that meet Monday and Wednesday or only Friday or everyday of the week. **Fixed Rotation Days** offers tremendous flexibility.

d. Once **Fixed Rotation Day** is selected another prompt appears named **# of Rotation Weeks**.

e. Again, 95% of schools will pick **1 Week**, which allows schools to schedule course section meeting times for Monday, Tuesday, Wednesday, Thursday, and Friday.

f. Picking *2 Week* allows the following setup: Monday1, Tuesday1, Wednesday1, Thursday1, Friday1, Monday2, Tuesday2, Wednesday2, Thursday2, and Friday2.

g. Very few schools will pick *2 Week*.

h. When in doubt, contact your ITC or send a Help Desk ticket to State Support for advice.

i. Adjust the *Code* and *Name* if needed, but keep in mind if the codes do not match what is in StudentInformation in 20/21, the meeting times on the course sections will not copy to 21/22 correctly.

j. Choosing *Fixed Day* allows only for courses that meet everyday of the week. There is no flexibility. Example: All courses meet Monday thru Friday, no exceptions. Use this option with caution.

k. When in doubt ,contact your ITC or send a Help Desk ticket to State Support for advice.

l. Very few schools will choose the *Alternating Rotation Days* from the dropdown.

m. Schools with Blue and Gold Days, for example, will choose *Alternating Rotation Day*.

n. If using Blue and Gold Days, choose *# of Alternating Days* equal to *2* and click *Go*.

o. Adjust the *Code* and *Name* to suit the school's needs. Again, if the code is changed and it does not match last year's code, the course section meeting times will not copy correctly to 21/22.

p. Click *Next* after the *Rotation Days* have been selected.

9. The final tab named *Projected Calendar* is a review of the reporting term start and stop dates and non-attending days.

a. Review the dates that have been entered and make any necessary changes before clicking *Finish*.

b. To make changes, click *Back* until the tab the changes are needed on is in context.

c. Once finished making changes, advance to the last tab and click *Finish* or if no changes were made, click *Finish*.

d. The following message will display : *The calendar was successfully saved*.

e. If you do not receive the above message or the Calendar Wizard times out or fails, contact your ITC or send a Help Desk ticket to State Support immediately.

Congratulations! Calendar Wizard is complete. Give yourself a pat on the back.

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

General	Reporting Terms	Virtual Terms	Non-Attending Days	Periods	Calendar Type	Projected Calendar

Master Calendar Code: * Master

Master Calendar Name: * Master

Start Date: * 08/25/2021

End Date: * 05/26/2022

Daily Start Time: * 08:00 am

Daily Stop Time: * 03:00 pm

Instructional Weeks on which to base Calendar: 36

Attending Days

S M T W R F S

[ ] ✓ ✓ ✓ ✓ ✓ [ ]

Next >   Cancel

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

General	Reporting Terms	Virtual Terms	Non-Attending Days	Periods	Calendar Type	Projected Calendar

Report Card Frequency:* [4 Quarters (9 weeks each) ▼] Only terms that can be expressed in whole or half weeks will be shown

Select Course Lengths Used*

3.0 Weeks	9.0 Weeks
4.5 Weeks	12.0 Weeks
6.0 Weeks	18.0 Weeks
7.5 Weeks	36.0 Weeks
10.5 Weeks	
13.5 Weeks	
15.0 Weeks	
16.5 Weeks	
19.5 Weeks	
21.0 Weeks	
22.5 Weeks	
24.0 Weeks	
25.5 Weeks	
27.0 Weeks	
28.5 Weeks	
30.0 Weeks	
31.5 Weeks	
33.0 Weeks	
34.5 Weeks	

Code:* [Qtr1]

Name:* [Quarter 1]

Stop Date:* [10/22/2021]

Code:* [Qtr2]

Name:* [Quarter 2]

Stop Date:* [01/14/2022]

Code:* [Qtr3]

Name:* [Quarter 3]

Stop Date:* [03/18/2022]

Code:* [Qtr4]

Name:* [Quarter 4]

Stop Date:* [5/26/2022]

[< Back] [Next >] [Cancel]

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | **Virtual Terms** | Non-Attending Days | Periods | Calendar Type | Projected Calendar |

ℹ If you would like the system to copy Virtual Reporting Terms from a previous year, select a school year and select the 'Go' button. If y

Add Virtual Term   Copy Virtual Terms From: `2020-2021 ▾`   **Go**

			Code	Name	Start Date	Stop Date	Sort Order
🗑		↓	Qtr1 *	Quarter 1 *	Aug 25, 2021	Oct 22, 2021	1
🗑	↑	↓	Int1 *	Interim 1 *			2
🗑	↑	↓	Qtr2 *	Quarter 2 *	Oct 23, 2021	Jan 14, 2022	3
🗑	↑	↓	Int2 *	Interim 2 *			4
🗑	↑	↓	Ex1 *	Exam 1 *			5
🗑	↑	↓	Sem1 *	Semester 1 *			6
🗑	↑	↓	Qtr3 *	Quarter 3 *	Jan 15, 2022	Mar 18, 2022	7
🗑	↑	↓	Int3 *	Interim 3 *			8
🗑	↑	↓	Qtr4 *	Quarter 4 *	Mar 19, 2022	May 26, 2022	9
🗑	↑	↓	Int4 *	Interim 4 *			10
🗑	↑	↓	Ex2 *	Exam 2 *			11
🗑	↑	↓	Sem2 *	Semester 2 *			12
🗑	↑		FIN *	Final *			13

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | **Non-Attending Days** | Periods | Calendar Type | Projected Calendar |

Date:* `___` 📅 Thru: `___` 📅 Day Type:* `▾` Note: `___`   **Add**

	Date	Thru	Non-Attending Type	Note
🗑	Sep 06, 2021	Sep 06, 2021	Holiday	Labor Day
🗑	Nov 22, 2021	Nov 23, 2021	Parent - Teacher Day	Parent-Teacher Conferences
🗑	Nov 24, 2021	Nov 26, 2021	Holiday	Thanksgiving Break

`< Back`   `Next >`   `Cancel`

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | Non-Attending Days | Periods | Calendar Type | Projected Calendar |

ℹ If you would like the system to **automatically** generate the correct number of periods in the grid, please enter the number of unique periods the school uses for the calendar and select the 'Go' button. Alternatively, you can copy the master calendar periods from a selected school year.

Generate Periods: [ ] ⬍ [Go]   Copy Periods From: [2020-2021 ▼] [Go]

[Add Period]

			Code	Name	Start Time	Stop Time
🗑		⬇	HR *	HR *	⊙	⊙
🗑	⬆	⬇	01 *	01 *	⊙	⊙
🗑	⬆	⬇	02 *	02 *	⊙	⊙
🗑	⬆	⬇	03 *	03 *	⊙	⊙
🗑	⬆	⬇	04 *	04 *	⊙	⊙
🗑	⬆	⬇	05 *	05 *	⊙	⊙
🗑	⬆	⬇	L1 *	Lunch 1 *	11:15 am ⊙	11:40 am ⊙
🗑	⬆	⬇	L2 *	Lunch 2 *	11:45 am ⊙	12:10 pm ⊙
🗑	⬆	⬇	06 *	06 *	⊙	⊙
🗑	⬆	⬇	07 *	07 *	⊙	⊙
🗑	⬆	⬇	08 *	08 *	⊙	⊙
🗑	⬆	⬇	09 *	09 *	⊙	⊙
🗑	⬆		10 *	10 *	⊙	⊙

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | Non-Attending Days | Periods | Calendar Type | Projected Calendar |

Calendar Type:* [Fixed Rotation Days ▼]

# of Rotation Weeks:* [1 Week ▼] [Go]

Rotation Days:

Code	Name
M *	Monday *
T *	Tuesday *
W *	Wednesday *
R *	Thursday *
F *	Friday *

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

General	Reporting Terms	Virtual Terms	Non-Attending Days	Periods	Calendar Type	Projected Calendar

Calendar		Non-Attending/Attending
8/25/2021	Start of School Year	6/191
8/25/2021	Start of Quarter 1	1/42
9/6/2021	Labor Day	
10/22/2021	Last Day of Quarter 1	
10/25/2021	Start of Quarter 2	5/55
11/22/2021	Parent-Teacher Conferences	
11/23/2021	Parent-Teacher Conferences	
11/24/2021	Thanksgiving Break	
11/25/2021	Thanksgiving Break	
11/26/2021	Thanksgiving Break	
1/14/2022	Last Day of Quarter 2	
1/17/2022	Start of Quarter 3	0/45
3/18/2022	Last Day of Quarter 3	
3/21/2022	Start of Quarter 4	0/49
5/26/2022	Last Day of Quarter 4	
5/26/2022	Last Day of School Year	

Task #5 - Complete the Follow-up Checklist before continuing

1. Navigate to **StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist.**
2. The **Follow-up Checklist** contains four follow-up tasks.
3. First review the **Periods of the Day**.
   a. Click on the link **Go to: Periods of the Day**.
   b. Double check the periods on each rotation day to ensure they copied correctly from 20/21 to 21/22 and Start/Stop Times entered during Calendar Wizard are on the applicable periods for each rotation. Manually update Start/Stop Times if needed.
   c. Once you have reviewed the **Periods of the Day,** navigate to **StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist**.
   d. Put a check in the box next to **Completed** and click **Save** down at the bottom of the page.
   e. You will notice the completed task does not appear on the Follow-up Checklist anymore. To view Completed and Incomplete tasks, uncheck **Incomplete Tasks Only** in the upper right-hand corner of the page.
4. Next, check the **Rotation Days**, click on **Go to: Rotation Days**.
   a. Once on the **Periods of the Day** page, ensure the correct rotation days copied to 21/22. If **Periods of the Day** only says STD and the school has courses that meet Monday and Wednesday or everyday but Friday, Calendar Wizard will need rerun to correct this issue. Simply adding Monday thru Friday will not resolve the issue. Calendar Wizard will need rerun.
   b. Once you have reviewed the **Rotation Days,** navigate to **StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist**,
   c. Put a check in the box next to **Completed** and click **Save** down at the bottom of the page.
5. Third, check the **Master Calendar Periods**. Click on Go to**: Master Calendar Periods**.
   a. Once you have reviewed the Master Calendar Periods, navigate back to **StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist**.
   b. Put a check in the box next to **Completed** and click **Save** down at the bottom of the page.
6. Finally, check the **Review Reporting Terms**.
   a. Click on Go to**: Reporting Terms Maintenance**.

b. Once on the ***Reporting Terms Maintenance*** page, ensure the dates are correct and the virtual terms copied if you chose to copy virtuals during Calendar Wizard.

c. The reporting terms with locks were created on the second tab of Calendar Wizard when prompted for Report Card Frequency.

d. If the ***Start or Stop Dates*** are incorrect, rerun Calendar Wizard .

e. If virtual terms were chosen to be copied during Calendar Wizard, make sure the virtuals (the reporting terms without locks) did indeed copy to 21/22.

f. If the virtuals didn't copy, rerun calendar wizard or add the virtuals by hand by clicking ***Add Virtual Term***.

g. Adjust the sort order of the reporting terms by clicking the arrows up and down until the desired sort order is achieved. Click ***Save Changes*** to apply the sort order changes.

h. Remember, if the school is using interims, the interim reporting terms must follow the quarters or trimester reporting terms. See example screenshots following this task.

i. When in doubt, report any unusual behavior on the reporting terms page to your ITC or send a Help Desk ticket to State Support.

j. Return to ***StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist*** and place a check in the box next to ***Completed*** and click ***Save*** down at the bottom of the page.

7. The next two items are not listed on the Follow-up Checklist, but are very important.

8. Next,navigate to ***StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Schedule Terms***.

a. Double check the ***Schedule Term Start*** and ***End Dates***.

b. Once again the ***Start*** and ***End Dates*** should not be non-attending days.

c. The ***Schedule Terms*** page could look quite different from the Reporting Terms page, don't be alarmed.

9. If ***Calendar Wizard*** was run with ***Report Card Frequency*** set to 4 quarters and Course Lengths set to 9 and 12, the Schedule Terms will look very different.

10. Finally, navigate to ***StudentInformation > Management > School Administration > Scheduling Administration > Master Calendar.***

a. Double check the ***Start*** and ***Stop Date*** to make sure they are correct.

b. Double check the ***Planned and Actual Days*** to make sure they do not say zero. If the Planned and Actual say zero, please contact your ITC.

c. If any of the above items are incorrect, rerun ***Calendar Wizard***.

d. Report any issues to your ITC or send a Help Desk ticket to State Support.

Schedule Terms

From this screen, you can view data pertaining to schedule terms.

Name	Start Date ▲	End Date	Planned Days	Actual Days
08/25/2021	Aug 25, 2021	Sep 14, 2021	14.00	14.00
09/15/2021	Sep 15, 2021	Oct 04, 2021	14.00	14.00
10/05/2021	Oct 05, 2021	Oct 22, 2021	14.00	14.00
10/25/2021	Oct 25, 2021	Nov 19, 2021	20.00	20.00
11/29/2021	Nov 29, 2021	Dec 17, 2021	15.00	15.00
12/20/2021	Dec 20, 2021	Jan 14, 2022	20.00	20.00
01/17/2022	Jan 17, 2022	Feb 04, 2022	15.00	15.00
02/07/2022	Feb 07, 2022	Feb 25, 2022	15.00	15.00
02/28/2022	Feb 28, 2022	Mar 18, 2022	15.00	15.00
03/21/2022	Mar 21, 2022	Apr 12, 2022	17.00	17.00
04/13/2022	Apr 13, 2022	May 04, 2022	16.00	16.00
05/05/2022	May 05, 2022	May 26, 2022	16.00	16.00

Master Calendar

From this screen, you can display and change data pertaining to a master calendar and calendar days.

Code:*	Master	Start Date:	8/25/2021	Planned Days:	191.00
Name:*	Master	Stop Date:	5/26/2022	Actual Days:	191.00
Daily Start Time:*	08:00 AM	Daily Stop Time:*	03:00 PM		

Task #6 - Run the first set of initialization tasks at the building level

1. At the building level and 21/22, navigate to*: **StudentInformation >**
   Management > School Administration > School Year Initialization >
   Execute Tasks.
2. On the first tab named **Module Task List,** click the **Execute Now** button
   for the first 12 tasks minus the **Student: Admission** and **Fee:**
   Prorations task, those two tasks are now run in the 2nd and 3rd passes,
   respectively. (**School : Configuration – Marks : Marks Configuration**)
   a. Click **Next**.
3. Now you are on the second tab named **Required Information**.
   a. In the **Source School Year** dropdown, choose 20/21.
   b. Fill in the **New Locker Combination Series** box with the new series
      number. NOTE: This will only update the series in the 21/22. It will
      not affect the locker series of the current year.
   c. If you do not wish to update the locker combination series, ignore
      this field.
   d. Click **Next**.
4. Now you are on the third tab named **Confirmation**.
   a. Click **Execute**.
   b. The screen will flicker while StudentInformation processes through
      the selected tasks.
   c. As each task finishes, the **Status** of the task will change from
      Pending to **Complete** or **Failed**.
   d. This process could take several minutes. Do not navigate away from
      the page until all tasks either say **Completed** or **Failed**.
   e. If any of the tasks **Failed,** submit a Help Desk Ticket. Discontinue
      with SYI until you have heard back from State Support.
   f. If the process appears to be frozen (taking longer than 20 minutes),
      contact your ITC or send a Help Desk ticket to State Support.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed	
School: Configuration	Copies basic school configuration settings to the new school year	●	○	○	☐	
School: Staff Members	Copies the roles and settings for staff members	●	○	○	☐	**1st Pass**
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☐	
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	●	○	○	☐	**2nd Pass**
Student: Homerooms	Copies homeroom configuration	●	○	○	☐	
Student: Memberships	Copies membership groups and memberships	●	○	○	☐	**1st Pass**
Discipline	Copies code values for discipline	●	○	○	☐	
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☐	
Fee Proration	Copies fee prorations and proration details	●	○	○	☐	**3rd Pass**
Attendance: Absence Events	Copies configuration and code values used by attendance	●	○	○	☐	**1st Pass**
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☐	
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☐	
Scheduling: Course Configuration	Copies code configuration used by course master	●	○	○	☐	
Scheduling: Courses	Copies course catalog and related fees	●	○	○	☐	**2nd Pass**
Scheduling: Schedule	Copies course sections and related fees	●	○	○	☐	
Marks: Marking Patterns	Builds marking patterns and automatic marks	●	○	○	☐	
Marks: GPAs	Configures GPA sets	●	○	○	☐	**3rd Pass**
Marks: Honor Rolls	Copies configuration used to support honor rolls	●	○	○	☐	
Course History	Copies configuration used to support course history	●	○	○	☐	

Task #7 - Complete the Follow-up Checklist for the first pass

1. Click **View Log**.
   a. After clicking **View Log,** you will be on the following page: **StudentInformation > Management > School Administration > School Year Initialization > Job History**.
   b. Under **Include Message Types,** check **Fatal Errors, Non-Fatal Errors, and Informational Messages**.
   c. Click **Refresh**.
   d. Pay particular attention to the **Fatal Error** messages and **Non-Fatal Error** messages.
   e. The Informational Messages detail how many of each item was copied to the new school year. The Informational Message below says 57 Discipline Policy Codes were copied to the new school year.

Message Type	Table Name	Message
Informational Message	Codes (DisciplinePolicy)	57 code(s) created

2. Now navigate to: **StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist**.
   a. Just like after running **Calendar Wizard** each of the eleven initialization tasks has a follow-up task.
   b. Click on each of the **Go to** links and verify the information was copied to 21/22.
   c. After completing each Follow-up task, return to the **Follow-up Checklist** page and place a check in the box next to **Completed** and click **Save**.
   d. All follow-up tasks are important, but the next several follow-up task detailed in the next steps are notable and worth spending extra time on.
   e. The 2nd task named School: Staff Members now copies Staff Impersonations to the new school year. Verify each staff member and add or delete any impersonations that are no longer needed.
   f. The 5th follow-up task is named **Homeroom Terms**. This task is **crucial** for any school using Homerooms. Follow the Go to link which takes you to the **Homeroom Term Maintenance**. Link the appropriate schedule terms to the Homeroom Term or Terms and Click **Save.** If you do not use Homerooms, this follow-up task can be skipped.

Homeroom Terms Maintenance

From this screen, you can display and change data pertaining to homeroom terms.

		Code	Name	Schedule Terms	Start Date	End Date	Planned Days	Actual Days	Sort Order	Active
	↓	FullYear	Full Year Term	08/25/2021, 09/15/2021, 10/05/2021, 10/25/2021, 11/29/2021, 12/20/2021, 01/17/2022, 02/07/2022, 02/28/2022, 03/21/2022, 04/13/2022, 05/05/2022	Aug 25, 2021	May 26, 2022	191.00	191.00	1	●
	↑ ↓	SEM1	Semester 1	08/25/2021, 09/15/2021, 10/05/2021, 10/25/2021, 11/29/2021, 12/20/2021	Aug 25, 2021	Jan 14, 2022	97.00	97.00	2	●
	↑	SEM2	Semester 2	01/17/2022, 02/07/2022, 02/28/2022, 03/21/2022, 04/13/2022, 05/05/2022	Jan 17, 2022	May 26, 2022	94.00	94.00	3	●

☑ Show Active Only

   g. The 6th follow-up task is named **Fee Accounting Options**. Fees cannot be assigned until the schedule is finalized in the future year, which usually does not happen until late summer. Consult the **Fees Procedural Checklist** when the school is ready to assign fees to help

determine which checkboxes should be checked. At this time, since fees cannot be assigned until the schedule is finalized, it does not matter which options are marked.

    h.   The 7th follow-up task is named **Update Attendance Configuration**. Follow the **Go to** link to the **StudentInformation Options** page. Click on the **Attendance** tab and verify the attendance setup. Be sure Default absence types are set or schools will not be able to take attendance at the start of school.

    i.   The 8th follow-up task is named **Review Marks Options**. Click on the **Go to** which takes you once again to the **StudentInformation Options** page. Click on the **Marks** tab and verify the configuration.

  3.   Now the 2nd pass of initialization can be completed.

Rooms and Locations are not school year specific. If you change the capacity, for example, of a room in 21/22 it will change the capacity of the room/location in 20/21. This is by design. The only item this will affect is if you would print a student's schedule in 20/21, the room numbers might not be correct.

Homerooms are school year specific which means if you change the capacity, for example, in the future school year it will not affect the capacity in the current school year.

Task #8 - Run the second set of initialization tasks at the building level

1. At the building level and 21/22, return to*: **StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks**.
2. On the first tab named **Module Task List,** click the **Execute Now** button for **Student : Admission**, **Scheduling : Course Configuration** and **Scheduling Courses**)
   a. Click **Next**.
3. Now the second tab named **Required Information** is displayed.
   a. In the **Source School Year** dropdown, choose 20/21.
   b. Click **Next**.
4. Now you are on the third tab named **Confirmation**.
   a. Click **Execute**.
   b. The screen will flicker while StudentInformation processes through the selected tasks.
   c. As each task finishes,the **Status** of the task will change from **Pending** to **Complete** or **Failed**.
   d. This process could take several minutes. Do not navigate away from the page until all tasks either say **Completed** or **Failed**.
   e. If any of the tasks **Failed,** submit a Help Desk Ticket. Discontinue with SYI until you have heard back from State Support.
   f. If the process appears to be frozen (taking longer than 20 minutes), contact your ITC or send a Help Desk ticket to State Support immediately.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed	
School: Configuration	Copies basic school configuration settings to the new school year	●	○	○	☐	
School: Staff Members	Copies the roles and settings for staff members	●	○	○	☐	1st Pass
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☐	
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	●	○	○	☐	2nd Pass
Student: Homerooms	Copies homeroom configuration	●	○	○	☐	
Student: Memberships	Copies membership groups and memberships	●	○	○	☐	1st Pass
Discipline	Copies code values for discipline	●	○	○	☐	
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☐	
Fee Proration	Copies fee prorations and proration details	●	○	○	☐	3rd Pass
Attendance: Absence Events	Copies configuration and code values used by attendance	●	○	○	☐	1st Pass
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☐	
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☐	
Scheduling: Course Configuration	Copies code configuration used by course master	●	○	○	☐	2nd Pass
Scheduling: Courses	Copies course catalog and related fees	●	○	○	☐	
Scheduling: Schedule	Copies course sections and related fees	●	○	○	☐	
Marks: Marking Patterns	Builds marking patterns and automatic marks	●	○	○	☐	3rd Pass
Marks: GPAs	Configures GPA sets	●	○	○	☐	
Marks: Honor Rolls	Copies configuration used to support honor rolls	●	○	○	☐	
Course History	Copies configuration used to support course history	●	○	○	☐	

Task #9 - Complete the Follow-up Checklist for the second pass

1. Click **View Log.**
2. After clicking **View Log,** you will be on the following page: **StudentInformation > Management > School Administration > School Year Initialization > Job History**.
   a. Under **Include Message Types,** check **Fatal Errors, Non-Fatal Errors, and Informational Messages**.
   b. Click **Refresh**.
   c. Pay particular attention to the **Fatal Error** messages and **Non-Fatal Error** messages.
   d. The Informational Messages detail how many of each item was copied to the new school year.
3. Now navigate to: **StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist**.
   a. The **Sub-Calendar Exception Days** requires you to enter the exceptions to the sub-calendars. SYI only copies the sub-calendar codes. SYI does not copy the exceptions from 20/21 since they differ from year to year. If all the non-attending days are not known at this time, this task can be completed at a later time.
   b. The **Review Scheduling Options** allows you to choose **Default Calendar** on **StudentInformation Options**. The only thing the **Default Calendar** is used for is registration. If a new student is registered, they will be placed on the calendar listed as the default on **StudentInformation Options**. The user always has the option of changing the calendar when registering the student.
   c. Click on the **Go to: Course Terms** link.
   d. Once on the **Course Terms Maintenance** page, edit each Course Term and link the appropriate schedule terms to the course term. This step is **crucial** in order for course sections to copy up correctly.
   e. Click **Save** to commit changes.
4. Now the 3rd and final pass of SYI can be executed.

Course Terms Maintenance
From this screen, you can display, add, change and delete data pertaining to course terms.

| Add Course Term | Save Changes | Cancel Changes |

Reporting Terms					Qtr1			Int1	Qtr2			Int2	Ex1	Sem1	Qtr3			Int3	Qtr4			Int4	Ex2	Sem2	FIN
Schedule Terms					08/25/2021	09/15/2021	10/05/2021		10/25/2021	11/29/2021	12/20/2021				01/17/2022	02/07/2022	02/28/2022		03/21/2022	04/13/2022	05/05/2022				
		Term Code	Term Name	Sort Order																					
🗑 ✏ ⬇ 🔍		FULL	Full	1	X	X	X		X	X	X				X	X	X		X	X	X				🟢
🗑 ✏ ⬆ ⬇ 🔍		SEM1	Semester 1	2	X	X	X		X	X	X														🟢
🗑 ✏ ⬆ ⬇ 🔍		SEM2	Semester 2	3											X	X	X		X	X	X				🟢
🗑 ✏ ⬆ ⬇ 🔍		Qtr1	Quarter 1	4	X	X	X																		🟢
🗑 ✏ ⬆ ⬇ 🔍		Qtr2	Quarter 2	5					X	X	X														🟢
🗑 ✏ ⬆ ⬇ 🔍		Qtr3	Quarter 3	6											X	X	X								🟢
🗑 ✏ ⬆ 🔍		Qtr4	Quarter 4	7															X	X	X				🟢

☑ Show Active Only

Task #10 - Run the third set of initialization tasks at the building level.

1. At the building level and 21/22, return to*: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks*.
2. On the first tab named *Module Task List,* click *Execute Now* for the last 5 tasks plus the Fee Proration task. (*Scheduling: Schedule - Course History*)
   a. Click *Next*.
3. Now the second tab named *Required Information* is displayed.
4. In the *Source School Year* dropdown, choose 20/21.
   a. The final pass of SYI requires you to verify and map information unlike any previous passes.
   b. The *Source Report Term* needs mapped to the *Target Report Term*. If virtual terms were copied up in Calendar Wizard, all of this information should already be mapped and you will just need to verify it.
   c. If any of the dropdowns say *Do Not Load,* verify the Reporting Term will not be used in 21/22. If you are sure it should not be loaded, keep the dropdown at *Do Not Load*, otherwise map it to the correct value.
   d. The next section named *Source Course Term* to *Target Course Term* maps the current year's course terms to 21/22's course terms. This step helps ensure all of last year's Semester 1 only classes are Semester 1 only classes in 21/22 as an example.
   e. The final section named *Source Period* to *Target Period* maps the current year's periods to 21/22's periods and ensures meeting times for course sections copy up properly.
   f. In the example screenshot below, Course Term Q1 & Periods 9 and 10 are marked as *Do Not Load* because the school is no longer using that course term or those two periods and do not want them copied to 21/22.
   g. Click *Next*.
5. Now you are on the third tab named *Confirmation*.
   a. Click *Execute*.
   b. The screen will flicker while StudentInformation processes through the selected tasks.
   c. As each task finishes the *Status* of the task will change from *Pending* to *Complete* or *Failed*.
   d. This process could take several minutes. Do not navigate away from the page until all tasks either say *Completed* or *Failed*.
   e. If any of the tasks *Failed,* submit a Help Desk Ticket. Discontinue with SYI until you have heard back from State Support.
   f. If the process appears to be frozen (taking longer than 20 minutes), contact your ITC or send a Help Desk ticket to State Support immediately.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed	
School: Configuration	Copies basic school configuration settings to the new school year	⦿	○	○	☐	1st Pass
School: Staff Members	Copies the roles and settings for staff members	⦿	○	○	☐	
Student: Profile	Copies code values to support student profiles but no student specific data	⦿	○	○	☐	
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	⦿	○	○	☐	2nd Pass
Student: Homerooms	Copies homeroom configuration	⦿	○	○	☐	1st Pass
Student: Memberships	Copies membership groups and memberships	⦿	○	○	☐	
Discipline	Copies code values for discipline	⦿	○	○	☐	
Fees	Copies basic fee configuration excluding course and course section fees	⦿	○	○	☐	
Fee Proration	Copies fee prorations and proration details	⦿	○	○	☐	3rd Pass
Attendance: Absence Events	Copies configuration and code values used by attendance	⦿	○	○	☐	1st Pass
Attendance: Absence Letters	Copies configuration used to generate absence letters	⦿	○	○	☐	
Marks: Mark Configuration	Copies configuration to support marks	⦿	○	○	☐	
Scheduling: Course Configuration	Copies code configuration used by course master	⦿	○	○	☐	2nd Pass
Scheduling: Courses	Copies course catalog and related fees	⦿	○	○	☐	
Scheduling: Schedule	Copies course sections and related fees	⦿	○	○	☐	
Marks: Marking Patterns	Builds marking patterns and automatic marks	⦿	○	○	☐	3rd Pass
Marks: GPAs	Configures GPA sets	⦿	○	○	☐	
Marks: Honor Rolls	Copies configuration used to support honor rolls	⦿	○	○	☐	
Course History	Copies configuration used to support course history	⦿	○	○	☐	

Source Course Term		Target Course Term
Q1 - Quarter 1	➔	-- DO NOT LOAD -- ⌄
S1 - Semester 1	➔	S1 - Semester 1 ⌄
S2 - Semester 2	➔	S2 - Semester 2 ⌄
All - All Year	➔	All - All Year ⌄

Source Period		Target Period
Day: M - Period: 01 ⌄	➔	**Day: M - Period: 01**
Day: M - Period: 02 ⌄	➔	**Day: M - Period: 02**
Day: M - Period: 03 ⌄	➔	**Day: M - Period: 03**
Day: M - Period: 04 ⌄	➔	**Day: M - Period: 04**
Day: M - Period: 05 ⌄	➔	**Day: M - Period: 05**
Day: M - Period: LUN1 ⌄	➔	**Day: M - Period: LUN1**
Day: M - Period: LUN2 ⌄	➔	**Day: M - Period: LUN2**
Day: M - Period: 06 ⌄	➔	**Day: M - Period: 06**
Day: M - Period: 07 ⌄	➔	**Day: M - Period: 07**
Day: M - Period: 08 ⌄	➔	**Day: M - Period: 08**
-- DO NOT LOAD -- ⌄	➔	**Day: M - Period: 09**
-- DO NOT LOAD -- ⌄	➔	**Day: M - Period: 10**

Task #11 - Complete the Follow-up Checklist for the third pass

Since course sections and marking patterns are copied from the prior year each marking pattern in the new school year will need edited and saved – this will link the course sections to the marking pattern.

1. Click **View Log**.
   a. After clicking **View Log,** you will be on the following page: ***StudentInformation > Management > School Administration > School Year Initialization > Job History***.
   b. Under **Include Message Types** check **Fatal Errors, Non-Fatal Errors, and Informational Messages**
   c. Click **Refresh**.
   d. Pay particular attention to the **Fatal Error** messages and **Non-Fatal Error** messages.
   e. The Informational Messages detail how many of each item was copied to the new school year.
2. Now navigate to: ***StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist***.
   a. Complete the follow-up tasks.
   b. Follow the **Go to: Course Sections** link and verify the course sections and meeting times copied correctly.
   c. The task named **Update Fee Definitions** copies up the course fees, general fees, miscellaneous, membership, program fees, and proration tables.
   d. Click on the **Go to: Fees Administration** link and verify the fees copied correctly.
   e. The task named **Custom Meeting Times** copies the course sections and meeting times to 21/22.
   f. The task named **Review Marking Patterns** copies marking patterns and marking pattern rules to 21/22.
   g. Follow the **Go to** link to the marking pattern page and verify the marking patterns copied.
   h. Also verify Automatic Marks copied correctly by going to ***StudentInformation > Management > School Administration > Marks Administration Menu > Automatic Mark Maintenance***.
   i. The task named **Review GPA Sets** copies GPA sets from the current year to 21/22. Follow the **Go to** link to the **GPA Set Maintenance** page and edit each GPA to verify the information on each tab copied forward.
   j. The last task named **Review Honor Rolls** copies Honor Rolls setup in the current year to 21/22. Follow the **Go to** link to the **Honor Roll Set Maintenance** page to verify the honor rolls and honor roll exclusions copied forward.

k. If you find any information that did not copy, report this to your ITC or to State Support in a Help Desk ticket.

Task #12 - Create Default Result Set

1. At the building level and 21/22, navigate to ***StudentInformation > Management > School Administration > Scheduling Administration > Scheduler > Schedule Result Sets*** to create a Schedule Result Set.
   a. On the **Schedule Result Sets** page in the **Filter By Schedule** dropdown, choose a Master Schedule. Typically there is only one schedule in the dropdown.
   b. Click **Add Schedule Result**.
   c. Enter a name in the **Name** field. State Support recommends naming it ***Default Schedule Result***.
   d. Click **Save**.

You've just completed SYI!
Give yourself a pat on the back.

Appendix A - Rerunning Calendar Wizard

> **WARNING WHEN RE-RUNNING CALENDAR WIZARD!** Use extreme caution when re-running Calendar Wizard. Rerunning Calendar Wizard wipes out course section assignments – this cannot be restored.

Rerunning Calendar Wizard :
1. Will undo certain School Year Initialization tasks which are highlighted below.
2. Will **delete** all students from the year in context.

Follow-up steps after rerunning Calendar Wizard:

1. Bulk Enrollment will need rerun. Once Bulk Enrollment is redone, the students will now have an admission record for the year and building in context. Their course requests will reappear but their course section assignments will be permanently deleted.
2. Reregister students that are newly admitted to the district.

Tasks Undone:
Student: Admission
Student: Homerooms
Attendance: Absence Events
Scheduling: Course Configuration
Scheduling: Courses
Scheduling: Schedule
Marks: Marking Patterns
Marks: GPAs
Marks: Honor Rolls

Execute School Year Initialization Tasks
This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed
School: Configuration	Copies basic school configuration settings to the new school year	●	○	○	☑
School: Staff Members	Copies the roles and settings for staff members	●	○	○	☑
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☑
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	○	○	●	☐
Student: Homerooms	Copies homeroom configuration	○	○	●	☐
Student: Memberships	Copies membership groups and memberships	●	○	○	☑
Discipline	Copies code values for discipline	●	○	○	☑
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☑
Fee Proration	Copies fee prorations and proration details	●	○	○	☑
Attendance: Absence Events	Copies configuration and code values used by attendance	○	○	●	☐
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☑
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☑
Scheduling: Course Configuration	Copies code configuration used by course master	○	○	●	☐
Scheduling: Courses	Copies course catalog and related fees	○	○	●	☐
Scheduling: Schedule	Copies course sections and related fees	○	○	●	☐
Marks: Marking Patterns	Builds marking patterns and automatic marks	○	○	●	☐
Marks: GPAs	Configures GPA sets	○	○	●	☐
Marks: Honor Rolls	Copies configuration used to support honor rolls	○	○	●	☐
Course History	Copies configuration used to support course history	●	○	○	☑

Next >

When the Calendar Wizard loads, if it has been run before, the following message will appear:

Calendar Wizard
From this screen, you can initialize a new calendar using a step-by-step wizard approach.

Are you sure you want to run the Calendar Wizard again?
All Absences, Marks, GPA/Honor Rolls, Marking Patterns, Course Section Assignments, Schedules, Homerooms, and Terms will be deleted and you will need to rerun Student Promotion and Student Bulk Enrollment.
To continue, click OK, otherwise click Cancel.

OK   Cancel

If you hit Cancel, the following message will appear:

Calendar Wizard
From this screen, you can initialize a new calendar using a step-by-step wizard approach.

You have chosen not to re-run the Calendar Wizard.

Appendix B – Rerunning Calendar Wizard or using Calendar Dates Wizard to correct issues

Problem	Rerun Calendar Wizard to fix	Use Calendar Dates Wizard to fix
School picked the wrong type of rotation day (Fixed vs. Alternating Rotation Day)	Yes – tasks will be undone and scheduling lost	No
Four quarters were chosen during Calendar Wizard and school is switching to 6 week classes	Yes– tasks will be undone and scheduling lost	No
Calendar Wizard was run with quarter, semester and all year course lengths chosen and school also offers 6 week classes	Yes– tasks will be undone and scheduling lost	No
First or last day of school is incorrect	Yes– tasks will be undone and scheduling lost	Yes – no data loss
Schedule term stop and start dates are incorrect	Yes – tasks will be undone and scheduling lost	Yes – no data loss
Reporting Term stop and start dates are incorrect	Yes– tasks will be undone and scheduling lost	Yes – no data loss

Note: If course term start dates are updated after course section assignments have been made, go to StudentInformation > Management > School Administration > Scheduling Administration > Course Section Assignment Dates and select the Original CSA Start/Stop date in applicable fields to update the existing dates on course section assignments.

Please see "WARNING WHEN RE-RUNNING CALENDAR WIZARD!" in **Appendix A.**

Appendix C – How to change locker combination series after school year initialization is complete

Occasionally a school will want to change the locker combination series assigned to each locker. Rerunning SYI Task #1 will change the locker combination series in the upcoming year.

> Rerunning this task will not affect scheduling in anyway, regardless if the schedule is finalized or not.
> Rerunning the task will not cause any other SYI tasks to be undone.
> The first task copies the following information to the upcoming school year:
> 1. Grade Level Progressions
> 2. Building Grade Levels
> 3. STUDENTINFORMATION Options
> 4. Lockers
> NOTE: Confirm the Uses Fees option on the StudentInformation Options – Fees tab is set correctly. You might want to verify this setting before re-running task #1 to compare it afterwards.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

Module Task List	Required Information	Confirmation	Results

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed
School: Configuration	Copies basic school configuration settings to the new school year	○	○	●	☑

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

Module Task List	Required Information	Confirmation	Results

Step 2: Required Information
In order to process the selected tasks, some additional information is required. Please complete the form below and click 'Next'.

Source School Year: 2018-2019 ▾

New Locker Combination Series: 2

[< Back] [Next >]

Student Promotion/Bulk Enrollment Procedural Checklist

Student Promotion/Bulk Enrollment process creates admission records for students in the 21/22 school year. Student Promotion/Bulk Enrollment is a two part process. First, use Promotion in 20/21 to set the New School field on each student's profile. Second, use Bulk Enrollment in 21/22 to admit the students into the upcoming school year.

Student Promotion/Bulk Enrollment cannot be done until the entire School Year Initialization (SYI) process is complete. Please see the School Year Initialization Procedural Checklist for detailed instructions on how to complete SYI.

It is best to do promotion for the entire district at one time. This means the person performing the promotion needs to have access to all buildings. Promotion/Bulk Enrollment can be performed for one building now and the other buildings in the district at a later date, but often you end up repeating steps.

The Assigned Building IRN field on the FS Standing tab will be reset to ******* during Bulk Enrollment in the future school year. If the student requires the Assigned Building IRN to be something other than *******, (most districts have less than 5% of all students), the field will need to be manually updated in the future year.

After students have been promoted to the next school year, schools can begin making changes to the students FS, FN, and FD tabs in the future school year. After FY21 processing is complete, the ITC can run a process to sync the students 21/22 tabs to match the 20/21 tabs. When making changes to a student's EMIS situation, % of time, Sent to IRN, etc that you do not want overridden, select the Exclude checkbox at the bottom of each FS, FD or FN tab when making those changes in the 20/21 school year. NOTE: These boxes are cleared when the new school year is added to StudentInformation.

☑ Exclude FS Records from Fall Initialization Updates

☑ Exclude FD Records from Fall Initialization Updates

☑ Exclude FN Records from Fall Initialization Updates

Change Log

Date	Section Number/Name	Change Description
11/23/20	Entire doc	Updated for the 2021-2022 school year
4/16/20	Entire doc	Updated screenshots
12/02/19	Entire doc	Updated for the 2020-2021 school year
2/25/19	Intro	Fix typo
11/14/18	Appendix E	Student Data Tasks info added
11/05/18	Entire doc	Updated for the 2019-2020 school year

Table of Contents

Task #1 - Verify District codes needed for Promotion/Bulk Enrollment are setup correctly in 20/21 and 21/22

Change your context to the District level and 20/21.

1. Navigate to ***StudentInformation*** *»* ***Management*** *» School Administration* *»* ***Grade Level Administration*** *»* ***Grade Level Codes***.
   a. The ***Grade Level Codes*** table lists all the grade levels offered by your district.
   b. Verify the grade levels listed on the page are correct and linked to the proper ***EMIS Code*** grade level.
   c. Make any needed changes and click ***Save*** when you are finished.
2. Next, navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Grade Level Administration*** *»* ***Grade Level Progressions***.
   a. The ***Grade Level Progressions*** table outlines which grade students will be promoted to in the next school year.
   b. Example: If a student's ***Current Grade*** is 02 they will be promoted to grade 03 next year. So, 03 is the ***Forecasted Grade*** for grade 02.
   c. In some cases the ***Current Grade*** and the ***Forecasted Grade*** will be the same. An example of this situation is ***Current Grade*** = 23 and ***Forecasted Grade*** = 23. In other words, students who are in grade 23 in 20/21 will be promoted to grade 23 in 21/22.
3. Now, change your context to 21/22 at the District level.
4. Check the following two pages in 21/22 to make sure the information copied up correctly in SYI.
5. ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Grade Level Administration*** *»* ***Grade Level Codes***.
6. ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Grade Level Administration*** *»* ***Grade Level Progressions***.
7. Report any item which did not copy up correctly to your ITC or State Support.
8. Make any needed changes to the tables and click ***Save*** when you are finished.

Task #2 - Review and Create Building Progression Track

F.Y.I. Each District should have at least one Progression Track. If your district has multiple elementary buildings, you will need at least one Progression Track for each elementary building.

F.Y.I. If your district only has one elementary, one middle school, one high school then you would only need one progression track since students can only take one path.

1. With the District and 20/21 in context, navigate to : ***StudentInformation*** ***» Management*** ***» School Administration*** ***» Student Promotion*** ***» Building Progression Tracks***.
   a. Click ***Add Building Progression Track*** to add a new progression track.
   b. Enter an eight character ***Code***. State Support recommends using a code that makes sense to the district personnel. Example: Wel-HS, which stands for West Elementary to High School.
   c. In the ***Name*** field enter a descriptive name, such as West Elementary to High School.
   d. By looking the name, I can assume this progression track will tell me where students who start out at West Elementary are promoted to each year.
   e. You can enter an optional ***Description*** and make sure the ***Is Active*** box is checked.
   f. Next, you'll need to fill in the dropdown for each grade level.
   g. Basically, when filling in the dropdown ask yourself this question: If a student is going to be _____ (insert grade level) which building will they be in?
   h. Example: If a student is going to be in the 1st grade next year which building will they be in? The answer is the Elementary Building.
   i. Another Example: If a student is going to be a grade GR next year what building will they be in? The answer is no building. GR students are not promoted into a building for 21/22 because the students have graduated. The dropdown for grade GR on the progression track should be left blank.
   j. Important – if the GR dropdown is not left blank, the graduated seniors will be promoted to 21/22 and will have to be removed from the building by the database administrator.
   k. The screenshots following this task detail the setup for a school with two elementaries, one middle school, and one high school.
   l. If your school already has a progression track setup, edit the progression to track verify the accuracy.
   m. Save any changes you make.

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

[Add Building Progress Track]

		Code	Name	Description	Active
🗑	✏	DCHS	Donald Creek High School		🟢
🗑	✏	JES	Jones Elementary School		🟢
🗑	✏	MES	Miller Elementary School		🟢
🗑	✏	WES	Weston Elementary School		🟢

☑ Show Active Only

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

Code:* JES

Name:* Jones Elementary School

Description:

Is Active: ☑

Grade Level Code	Building/School
01	HOWARD ELEMENTARY ▾
02	HOWARD ELEMENTARY ▾
03	JONES ELEMENTARY ▾
04	JONES ELEMENTARY ▾
05	JONES ELEMENTARY ▾
06	JONES ELEMENTARY ▾
07	Donald Creek Jr/Sr High School ▾

Task #3 - Verify Building codes needed for Promotion/Bulk Enrollment are setup correctly in 20/21 and 21/22

1. Change your context to the building level and 20/21.
2. Navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Grade Level Administration*** *»* ***Building Grade Levels***.
   a. At each building in the district, verify the grade levels listed on the table indeed are offered at that building.
   b. Example: If grade 02 is listed on the ***Building Grade Levels*** table at the high school and you know there are no 2nd graders in the high school building, click on the red X to delete the grade levels. This is your opportunity to clean up bad data and prevent it from copying up to 21/22.
   c. Save any changes.
3. Next navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***StudentInformation Options***.
   a. Click on the 5th tab named ***Prog Track***.
   b. You can choose a progression track from the dropdown or leave it blank.
   c. If you choose a progression track in the dropdown, each time you register a new student they will automatically be put on that progression track unless you change it during registration.
   d. If your school has several progression tracks and there is a 50-50 chance a newly registered student can be placed on either progression track, State Support recommends leaving the Progression Track dropdown blank. That way the person registering the student can decide which progression track they should be assigned to.

Task #4 - OPTIONAL: Create an Ad Hoc Membership Group to use to bulk assign progression tracks to students

The Bulk Assign Building Progression Track process only assigns the students to a progression track, it did not actually promote them.

If you choose to skip this step, students that are missing a progression track will display on the 2nd tab of Promotion screen. You can assign them to a progression track at that point in the promotion process.

If you want to change the progression track the student is assigned to, then you must use the bulk assign of progression tracks and choose to override existing tracks or edit the student's profile and change the progression track manually.

1. Navigate to: ***StudentInformation*** *» **My Account** » **Ad Hoc Memberships*** at the building level for 20/21.
   a. Click ***Add New Ad-hoc Membership***.
   b. Fill in the ***Membership Name***. The more descriptive you are the better. Suggested names are Entire School and Promo/Enroll.
   c. Ensure ***Active*** is checked.
   d. You can choose to check ***Make Private*** or leave it unchecked. If you uncheck ***Make Private,*** anyone with access to the school can use your ad-hoc membership which is a good idea for troubleshooting purposes.
   e. Leave the ***Search Mode*** radio button defaulted to ***Search Criteria***.
   f. Check the box next to ***Students Selected by Default***.
   g. Click ***Search***.
   h. Every student in the entire building is listed.
   i. At the bottom of the screen, the ***Add to Membership*** radio button should be marked.
   j. Click ***Add Selected Students***.
   k. You will receive a confirmation message at the top of your screen that looks similar to the following:

   > Added 23 Students to Membership

   l. Now click ***Save***.
   m. The students are not added to the ad-hoc membership until you click ***Save***.
2. Now we are ready to bulk assign a progression track to the students in the ad-hoc membership.
3. The Bulk Assign Building Progression Track process only puts a progression track on the Additional tab, it does not actually promote students.

4. Navigate to: ***StudentInformation*** *» **Management*** *» **School Administration*** *» **Student Promotion*** *» **Bulk Assign Building Progression Track***.
   a. In the ***Ad-Hoc Membership*** dropdown, choose the ad-hoc membership you created above.
   b. In the ***Building Progression Track*** dropdown choose the appropriate progression track.
   c. You can choose to click ***Override Existing Tracks***. State Support recommends putting a check in the box to ***Override Existing Tracks*** incase a student accidentally was assigned to the incorrect one in the past.
   d. Click ***Assign***.
   e. Remember the Bulk Assign Building Progression Track process only assigns the students to a progression track, it does not actually promote them. Do not be concerned that students who are graduating or who are already withdrawn are going to be promoted to 21/22, they will not be.
   f. Edit the ***Additional*** tab of several students at random to ensure the ***Building Progression Track*** field on the ***Additional*** tab of their profile is filled in.

Task #5 - Perform Promotion in 20/21 to set the New School field on each student's Additional tab

1. With the building in context and in the 20/21 school year, navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Student Promotion*** *»* ***Student Promotion***.
   a. The first tab is named **Students needing next grade level**.
   b. If any students are listed on this page, fill in their appropriate grade level and click Next to move to the 2nd tab.
   c. Students must have the Grade Next Year field filled in on their profile General tab in order to be promoted.
   d. Do not be alarmed if zero students show on the page, this means that every student has this field filled in already. (Whenever you edit a student's General tab and save the Next Grade Level field is auto populated based off the Progression tables.)
   e. The 2nd tab is named **Students needing building progression track set.**
   f. If the Bulk Assignment of Progression Tracks process outlined in the previous task was carried out correctly, there should be no students listed on this tab.
   g. If there are students listed, you can either fill in their progression track or go back to Task #4 and redo the Bulk Assignment of Progression Tracks.
   h. Click Next to move to the 3rd tab named **Students without primary building.**
   i. If a student's **Primary Building** is not set on the Additional tab, they will not get promoted. This page serves as a data quality check. Correct the students before continuing to the final tab.
   j. Click Next to move to the last tab named **Promote Students.**
   k. A grid is displayed with seven columns.

| Number | Student Name ▲ | | Grade | Next Grade | Prog. Track | | New School | Enrolled Next Year |

   l. The first time you do promotion the **New School** and **Enrolled Next Year** columns are blank. Rarely you may see students with the **New School** column filled out. The **New School** field on the Additional tab of the student's profile is not copied from year to year.
   m. If you are doing promotion for the first time in 20/21 and almost all students have the **New School** column filled out, then promotion was accidentally run in 20/21 last year when a user thought they were in 19/20. There is nothing to be alarmed about.
   n. Notice there are no students whose Grade Next is GR. The promotion process was set up to ignore students who are graduating or are withdrawn.
   o. Click **Promote**.

p. The following message will display

> The promotion was executed successfully

The **New School** field is now filled in.

q. When the **Promote** button is pressed StudentInformation goes out and looks at the student's grade level and compares that to the Progression Track they are assigned and determines which school the student will reside in the upcoming year.

r. The promotion process is updating each student's **New School** field on their Additional tab.

s. The **Enrolled Next Year** column is blank unless the Promotion/Bulk Enrollment process has already been executed.

t. If Promotion/Bulk Enroll have already been done the building the student was admitted to will display in the last column.

F.Y.I.

Promotion and Bulk Enrollment may be executed multiple times until the first day of school arrives. Once school begins the Bulk Enrollment screen is no longer available.

Task #6 - Perform Bulk Enrollment in the 21/22 school for the first time

F.Y.I. If you need to bulk enroll a certain grade level, such as Seniors or students who attended half days last year, but will be attending full days this year, please see Appendix D.

1. In 21/22 at the building level, navigate to: ***StudentInformation » Management » School Administration » Student Promotion » Student Bulk Enrollment***.
2. The first tab named **Currently enrolled here and set to go elsewhere** shows students who were already admitted to the building in context in prior runs of Promo/Bulk Enroll but have since had their **New School** field on the Additional tab updated to another building in the district.
3. If you are running Bulk Enroll for the first time, zero students will show on this tab since no one has been admitted yet.
4. Click **Next** to move to the **Currently enrolled elsewhere and set to go here** tab.
5. If you are running Bulk Enroll for the first time, zero students will show on this tab since no one has been admitted yet.
6. Click **Next** to move to the **Students to enroll** tab.
7. Any student in the district whose **New School** field in 20/21 is set to the building in context will display on the **Students to Enroll** tab.
8. You can use the **Show Only Students in Prior School** and **Show Only Students In Prior Grade level** filters to narrow down the number of students to enroll.
9. In the following example Grade 11 was chosen in the **Show Only Students In Prior Grade Level** dropdown. These are the students who will be 12th graders in 21/22.
10. Check the box next to the students you wish to enroll or click **Select All.**
11. Click **Next** to advance to the final tab named **Bulk Enroll**.
    a. On this tab you will tell StudentInformation which student information you would like to copy to 21/22.
    b. If you would like to copy the student's locker assignments from 20/21 to 21/22, then put a check in the box next to **Copy Locker Assignments.** If you do not want to copy locker assignments, leave the box unchecked.
    c. Next, if you would like to copy student's free lunch statuses that appear on the FD-Attributes tab, check the box next to **Copy Free Lunch Status Assignments**. If you do not want to copy Free Lunch Assignments, uncheck the box.
    d. If you would like to copy counselor assignments from 20/21 to 21/22, put a check in the box next to **Copy Counselor Assignments.**

e. If you would like to copy transportation assignments from 20/21 to 21/22, put a check in the box next to **Copy Transportation Assignments.**

f. If you would like to copy all data flags on the Additional tab of the profile then uncheck the box next to **Clear All Data Flags.**

g. If you would like to copy homeroom assignments from 20/21 to 21/22, then uncheck the box next to **Clear Homerooms..**

NOTE: These Enrollment Options only apply if the Primary Building and the New School values are the same in the current school year – promoted the students into a grade level in the same building.

12. The next section named **Map Sub-Calendars** allows you to map students who were on a certain calendar in 20/21 to the same calendar in 21/22.

a. A majority of the time you will map student to the same calendar they were on last year.

b. In the following screenshot, there are 99 students on the Non-Attending Calendar in 20/21. I have chosen to assign them to the Non-Attending Calendar for 21/22.

c. Occasionally students will be mapped to a different calendar in 21/22 then what they are assigned to in 20/21.

d. A good example of this scenario is Kindergarten students who are on a ½ day calendar in 20/21. These students will be 1st graders in 21/22 and will be on the Default Calendar.

13. After you have finished mapping the sub-calendars, move onto the next section named **Map Student Statuses.**

a. This section allows you to determine what status the students will be enrolled in for 21/22.

b. In almost all cases, you will map the student to the same status as they were last year.

c. Example: If a student was on the non-attending calendar in 20/21 there is a good chance they will be on the non-attending calendar in 21/22.

14. Once you have finished mapping the student statuses, click **Process Bulk Enrollment.**

15. You will receive the following message:

The Student Bulk Enrollment Job has been submitted successfully. Please check the Batch/Report Management link for job status.

16. A job was sent to your Batch/Report Management screen.

17. Go to the Batch/Report Management screen to see if the job has completed.

18. The *Job Name* is *DASL_STUDENT* and the *Job Description* is *DASL Students Batch Process*.

Appendix A: How to override a progression track and promote a student to a different building

Scenario: A district has approximately 55 students who are grade level UG. All 55 student's Grade Level Next Year is grade UG. Approximately 30 of the students will be promoted to the high school building next year and the remaining 25 will be promoted to the elementary. How should I set up the progression track to ensure the students get promoted to the correct building?

Solution:

The district has several options.

1st Option: Set up multiple progression tracks and assign the appropriate progression track to the students. One progression track would have UG set up to go to the high school and the other progression track would have grade level UG set up to go the elementary.

2nd Option: Since a majority of the 55 students will be promoted to the high school set up the progression track so UG goes to the high school. For the 25 other students who will be promoted to the elementary manually update their **New School** field on the Additional tab *after* promotion is run, but before Bulk Enrollment is performed.

Appendix B: Examples of a progression track set up for districts with multiple elementary, middle school, and high school buildings.

Example #1

A District has 7 elementary buildings, 1 middle schools, and 1 high school buildings. The district has chosen to set up a progression track for each elementary building then one for just middle school to high school and one for just high school. Example: Sally is a 1st grader at Hummel Elementary. She is assigned to the Hummel to Williams to Boston progression track. Hummel Elementary houses grades K-5. The district will not need to change Sally's progression track before they do promotion and bulk enrollment when she completes grade 5 since her progression track is setup from the elementary to the high school. If a student is enrolled in the district for grade 7, the student would be placed on the Williams MS to Boston HS progression track, no need to worry about the elementary progressions. District would only need to change progression tracks for elementary students moving to another area of the district.

		Code	Name	Description	Active
🗑	✏	BRHS	Boston High School	BRHS	🟢
🗑	✏	BRM	Williams MS to Boston HS	BRHS/BRMS	🟢
🗑	✏	BRMA	Arnold to Williams to Boston	BRHS/BRMS/BRAE	🟢
🗑	✏	BRMC	Chambers to Williams to Boston	BRHS/BRMS/BRCE	🟢
🗑	✏	BRMH	Hummel to Williams to Boston	BRHS/BRMS/BRHE	🟢
🗑	✏	BRMK	Kindling to Williams to Boston	BRHS/BRMS/BRKE	🟢
🗑	✏	BRMM	Marion to Williams to Boston	BRHS/BRMM/BRME	🟢
🗑	✏	BRMRE	Houston Landing to Williams to Boston	BRHS/BRMS/BRRE	🟢
🗑	✏	BRMT	Tall Tree to Williams to Boston	BRHS/BRMS/BRTE	🟢

☑ **Show Active Only**

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

Code:* BRMH

Name:* Hummel to Williams to Boston

Description: BRHS/BRMS/BRHE

Is Active: ✔

Grade Level Code	Building/School
PS	▼
KG	Hummel Elementary ▼
01	Hummel Elementary ▼
02	Hummel Elementary ▼
03	Hummel Elementary ▼
04	Hummel Elementary ▼
05	Hummel Elementary ▼
06	Williams Middle School ▼
07	Williams Middle School ▼
08	Williams Middle School ▼
09	Boston High School ▼
10	Boston High School ▼
11	Boston High School ▼
12	Boston High School ▼

Example #2
A district has 7 elementary buildings, 2 middle schools, and 1 high school building. The district has setup 1 progression track for each elementary covering grades KG-5 only. Then when students are moving into grade 6, the district assigns them to the respective middle school progression track and they remain on that progression track through high school.

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

Add Building Progress Track

		Code	Name	Description	Active
🗑	✏	ADHS	Adams MS to HS		🟢
🗑	✏	BLEL	Black Elementary		🟢
🗑	✏	CLHS	Climbers MS to HS		🟢
🗑	✏	EMEL	Emmett Elementary		🟢
🗑	✏	ENEL	Ellis North Elementary		🟢
🗑	✏	GAEL	Gammett Elementary		🟢
🗑	✏	HEEL	Helms Elementary		🟢
🗑	✏	RMEL	Ralph Miller Elementary		🟢
🗑	✏	SIEL	Silver Elementary		🟢

☑ **Show Active Only**

Code: * BLEL

Name: * Black Elementary

Description:

Is Active: ✔

Grade Level Code	Building/School
PS	▼
KG	Black Elementary ▼
01	Black Elementary ▼
02	Black Elementary ▼
03	Black Elementary ▼
04	Black Elementary ▼
05	Black Elementary ▼
06	▼

Code: * ADHS

Name: * Adams MS to HS

Description:

Is Active: ✔

Grade Level Code	Building/School
PS	▼
KG	▼
01	▼
02	▼
03	▼
04	▼
05	▼
06	Adams Middle School ▼
07	Adams Middle School ▼
08	Adams Middle School ▼
09	Malcom High School ▼
10	Malcom High School ▼
11	Malcom High School ▼
12	Malcom High School ▼

Appendix C: How to correct students who enrolled into the wrong building

Scenario: A district promoted all students who are going to be in 8th grade next year to the wrong building. They should be promoted to the middle school but they were promoted to the high school which houses grades 9-12. Most likely the progression track was setup incorrectly. How can the district correct this?

Solution: How to mass remove students accidentally promoted to the wrong building

1. In current year at District level, edit progression track and correct the building dropdown for the grade level
2. In current year at building level, redo Student Promotion. This will change the student's New School field on their Additional Tab
3. In future year at building the students need removed from, redo Bulk Enrollment. The students who are now marked to go to a new building will appear on tab 1. Select the students needing removed and click Remove Selected Student Enrollments.
4. Finally, in the future year of the correct building, redo the Bulk Enrollment. The same students will now appear on tab 3.

   If Graduating Seniors are accidentally promoted and bulk enrolled into the future year, the Progression Track will need edited. Choose another school in the GR dropdown, besides the building they accidentally were enrolled into. Now, follow steps 2 & 3 above. Finally, you will need to edit the Progression Track in the current year and change Building/School dropdown for the GR grade level back to blank and redo promotion in the current year. The end result will be all Graduating Seniors will be removed from the future year and their New School field set back to blank.

Appendix D: How to bulk enroll a certain grade level of students who need assigned to a different attendance calendar than last year (Ex: Seniors)

1. Follow promotion steps outlined in Task #5
2. Follow bulk enroll steps outlined in Task #6 up to step #6
3. On the **Students to Enroll** tab use the **Show Only Students in Prior Grade Level** filter and choose 11th grade.
4. Skip to step #10 and continue with the rest of the steps

Student Bulk Enrollment

| Currently enrolled here and set to go elsewhere | Currently enrolled elsewhere and set to go here | Students to Enroll | Bulk Enroll |

< Back   Next >

Students set to be enrolled this school and school year. You must select the students you would like to enroll.

Show Only Students In Prior School:
[Show All] ▼

Show Only Students In Prior Grade Level:
11 ▼

Select All: ☑

	Student Number	Student Name	Admitting From	Prior Grade Level	Current Grade Level	Student Status
☑	4917	Student82237, SCOTT	HIGH SCHOOL	11	12	ACTIVE RES
☑	4754	Student84682, WILLLIAM A.C.	HIGH SCHOOL	11	12	RES A/ELSE
☑	4215	Student84800, JULIE	HIGH SCHOOL	11	12	ACTIVE RES
☑	4208	Student84804, JIMMY	HIGH SCHOOL	11	12	RES A/ELSE

Appendix E: Student Data Tasks

After promoting students to the next school or school year, and subsequent to running bulk enrollments, you can change certain bulk enrollment options from the Student Data Tasks screen. You can copy enrollment options from the previous school and school year to the current school and school year. You can also delete enrollment options from a prior or current school or school year. You can run this process multiple times while preparing for the new school year, up until the day the new school year begins.

Note: For the copy function to work, the previous and current schools must be the same school.

1. With a school and school year in context, navigate to StudentInformation – Management – School Administration – Student Promotion – Student Data Tasks, select the check box for the task(s) you want to run or select the check box in the top row, next to Enrollment Options, to select all tasks to run:
   • **Copy Locker Assignments** – copies the students' locker assignments to the next school/school year (only if previous and next schools are identical)
   • **Copy Homeroom Assignments** – copies the students' homeroom assignments to the next school/school year
   • **Copy Data Flags** – copies all data values from the Additional tab of the Student Profile screen to the next school year student record
   • **Copy Counselor Assignments** – copies the students' counselor assignments to the next school/school year
   • **Copy Transportation Assignments** – copies the transportation record from the Student Profile screen Transportation tab to the next school/school year
   • **Copy Free Lunch Status Assignments** – copies the students' free lunch status assignments to the next school/school year
   • **Clear All Data Flags** – clears (does not carry forward) all data values from the Student Profile screen for the new school year student record
   • **Clear Homerooms** – clears (does not carry forward) student homeroom assignments for the next school/school year (If deselected, assigns homerooms if previous and next schools are identical)

2. Click **Run Tasks**.

   Note: When Clear and Copy tasks are both selected, the clear operation is performed first.

   Note: If the year in context is the current school year, the copy tasks copies data from the previous school year. If the year in context is the future school year, the copy tasks copies data from the current school year.

   Note: When clear tasks are selected, the year in context is always the year to which they are applied.

How to Create Absence Intervention Letters

Change Log

Date	Section Number/Name	Change Description
8/5/21	Beginning	Update Note at the beginning on the location of the templates
6/17/21	Creating Absence Intervention Letter Templates in Word	Add tip regarding the RepeatForEach bookmark
4/7/20	Appendix D	Clarify steps
3/26/20	Appendix A	Add Medical Bookmarks
02/2/19	Appendix A	Added RepeatForEach Bookmarks
4/10/18	Appendix A	Update the Bookmarks
2/6/18	New Document	New Document

NOTE: Templates are available to use as your Intervention Letter or as a starting point to customize your own Intervention Letter. They are located with the documentation under the Quick References – Templates section.

Change Settings in Word before Creating Letter Templates

1. Open a blank Word document.

2. Click on **File** in the upper left hand corner.
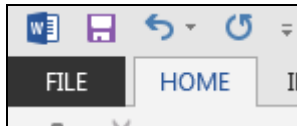
3. Click on **Options**.

4. Click on **Advanced**.
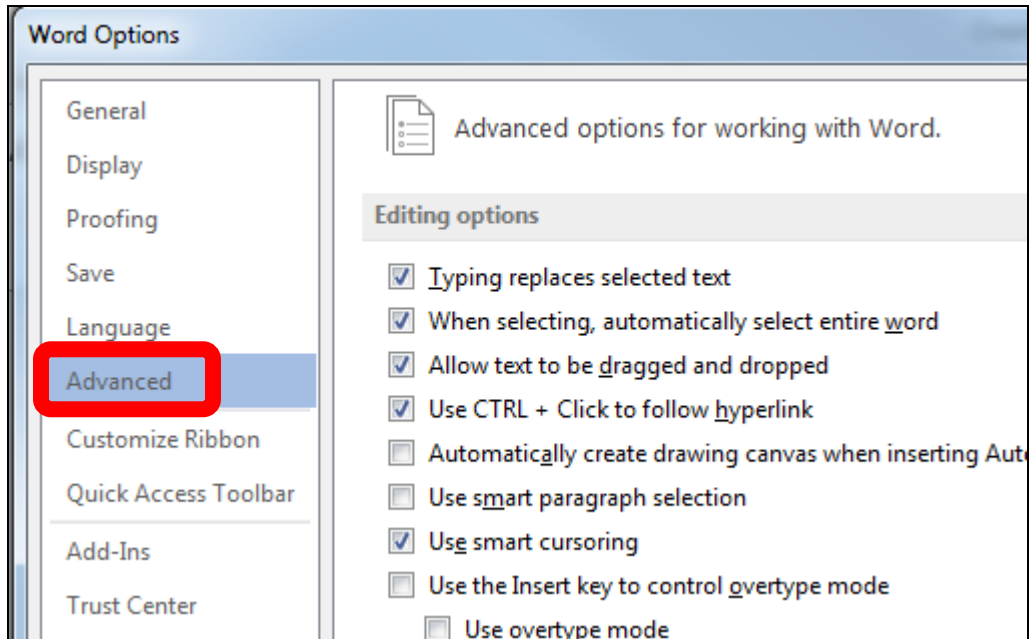
5. On the right side, under **Editing options**, UNCHECK **Use smart paragraph selection**.
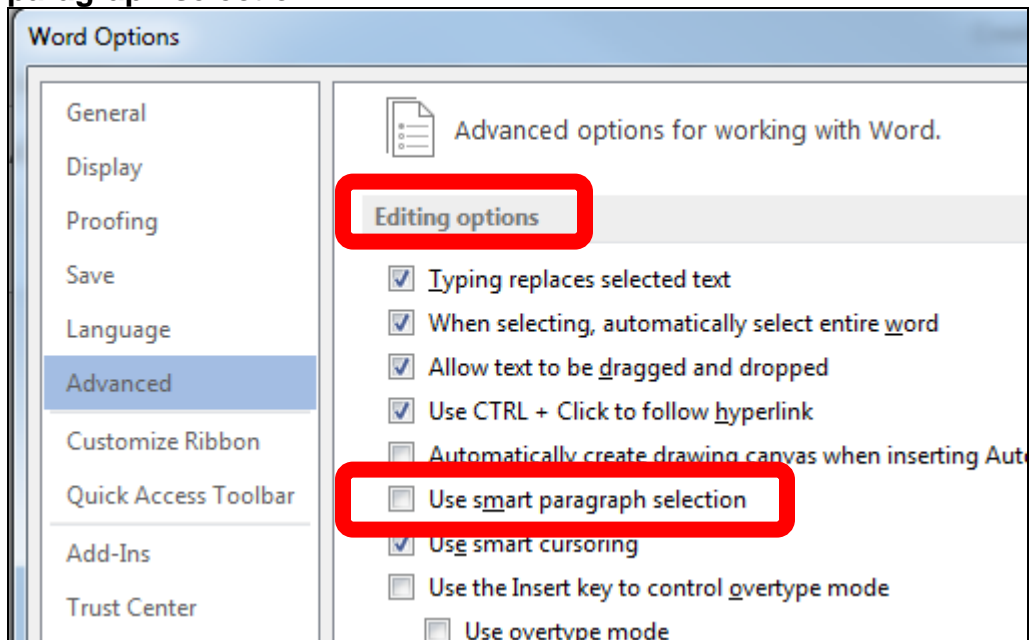
6. Scroll down to find **Show document content** options and CHECK **Show bookmarks**.
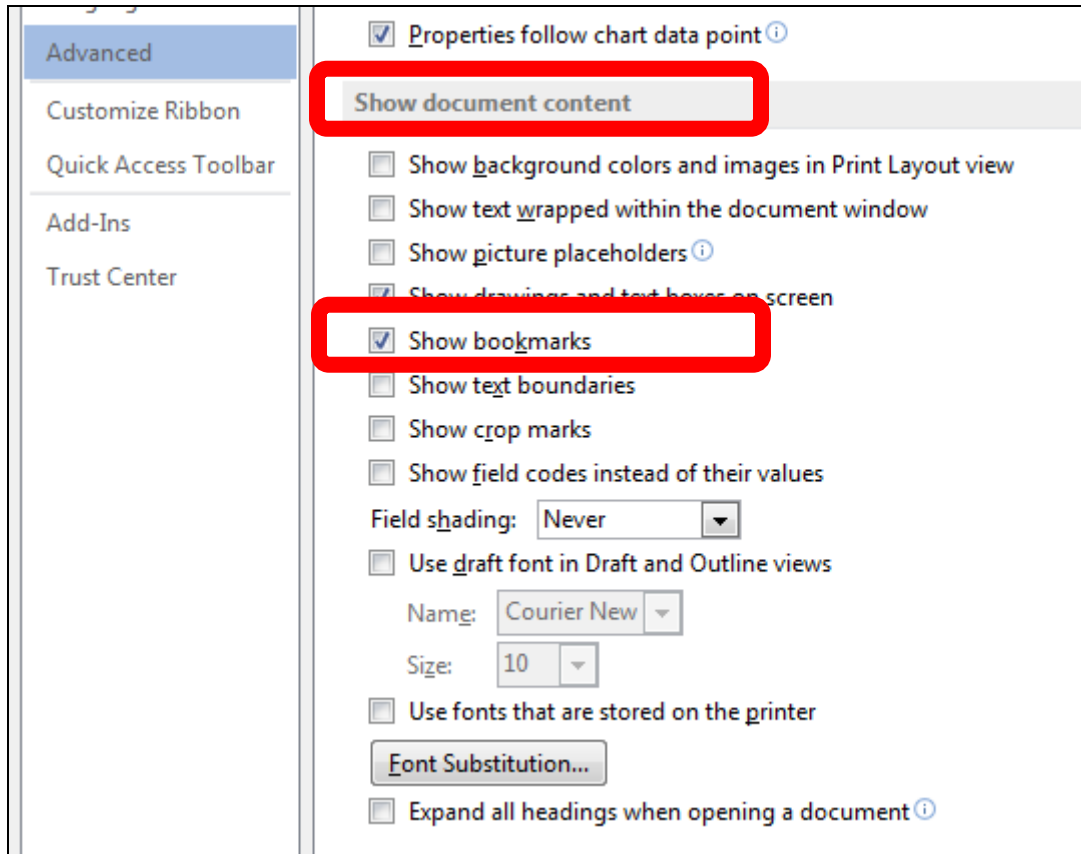
7. Click **OK** (lower right corner of screen).

Creating Absence Intervention Letter Templates in Word

1. Enter placeholder text into the MS Word document, for example "SchoolName" is where the building name is going to be inserted as a bookmark. The placeholder text can be anything, for example BLDG for SchoolName or School. It is merely a placeholder. Be sure there are no spaces in the placeholder text.

   Note: The MS Word document <u>cannot</u> be Word 97-2003 .doc version. It must be .docx version.

2. Next, you will need the actual Bookmark names. They must be typed exactly as listed in **Appendix A** of this document.

3. In your document, you will select the placeholder text by double clicking the word - it will display as highlighted grey text   (**SchoolName**), then click the Insert tab in the menu/ribbon and choose Bookmark. (Or you may use Ctrl+Shift+F5 which will also bring up the Bookmark dialog box.)
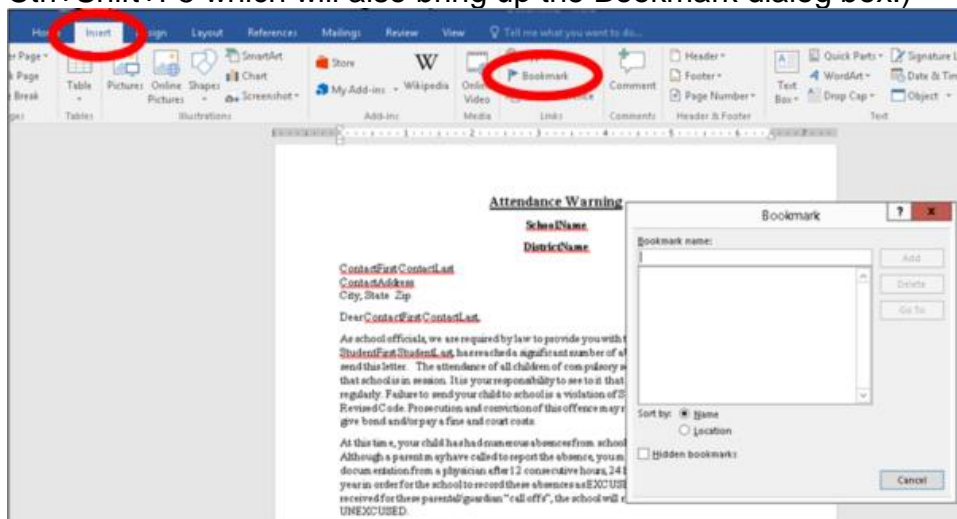
4. In the Bookmark Dialog box, enter the Bookmark name you are linking to the placeholder word you have typed in your document. For example, if you select SchoolName, which is the placeholder word for the name of the building, you will use the Bookmark listing in Appendix A of this document, find and use the bookmark called **SchoolName** and then click **Add**.
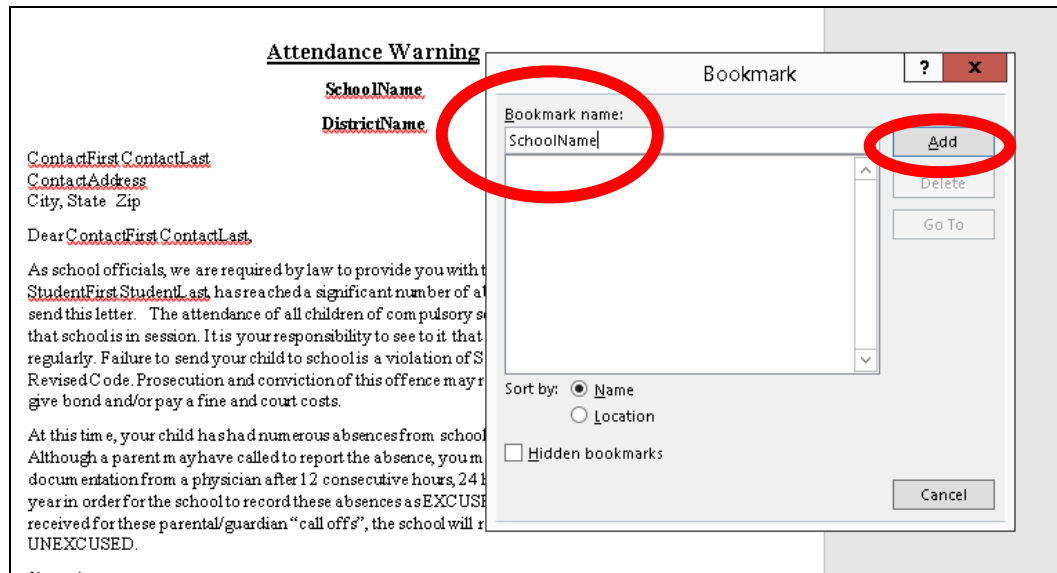
5. Repeat these steps for each placeholder word in your attendance letter.

   Note: You may use a bookmark multiple times in a letter. See Appendix C for detail.

6. Once you have completed linking the Bookmark to the placeholder word, Save your Word document.

   NOTE: You must have the District in context for the upload to work. Letter Templates may only be uploaded at the district level.

   NOTE: If you have different wording for your letters at each building, you may want to name the files with a building specific code since all files will be uploaded to one location at the district level. For example, when you are saving your letters in Word, save them using the 4 character SI building code for your building.

   Example naming convention of letters:
   XXEL Warning Letter.docx
   XXMS Intervention Letter.docx
   XXHS Warning Letter.docx

TIP: If you are getting multiple pages for the same student, make sure the RepeatForEach tag is before the items that would be grouped, like the list of absences at the end.

Manage Report Templates

You can use report templates to generate intervention letters for students. Refer to the appropriate section as follows:

- *"Upload Report Templates"*
- *"Download Report Templates"*
- *"Delete Report Templates"*

Upload Report Templates

Navigation: StudentInformation – Management – District Administration – Report Template Administration

1. On the **Report Template Administration** screen, click **New Template**.
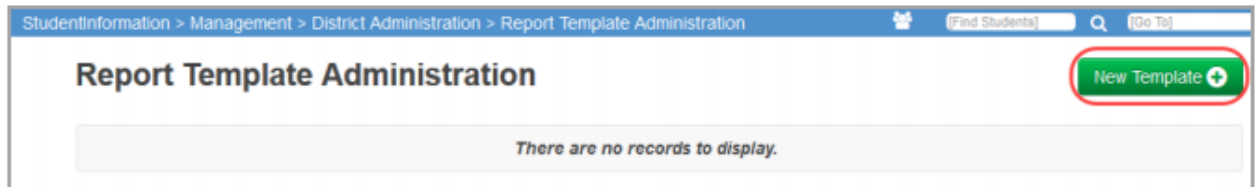
2. On the **Upload Template** window, in the **Select Report...** drop-down list, select **Absence Intervention Letter**.

   The **Available Bookmarks in Report** section displays the bookmarks in the current report that you can select to customize your template.

3. In the **Template Description** field, enter the description that you want to display in StudentInformation to identify this template.

4. Click **Browse**, and navigate to and select the file you want to use as a template.

5. Click **Upload**.

The uploaded template displays in the list.

Delete Report Templates

Navigation: StudentInformation – Management – District Administration – Report Template Administration

1. On the **Report Template Administration** screen, in the row of the template you want to delete, click **Actions** and select **Delete**.
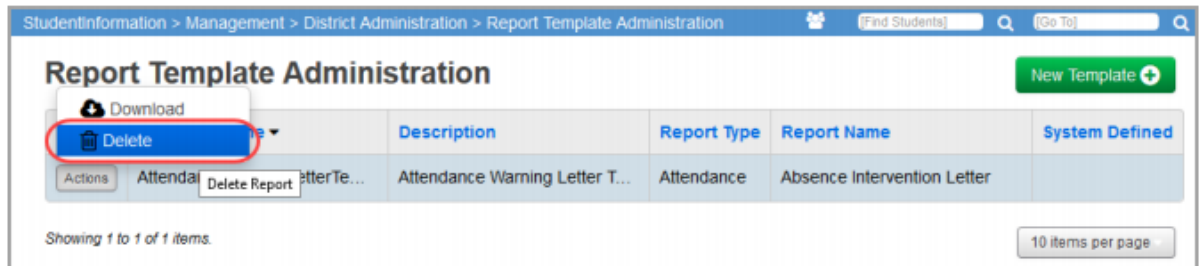
2. On the confirmation window, click **Yes**.
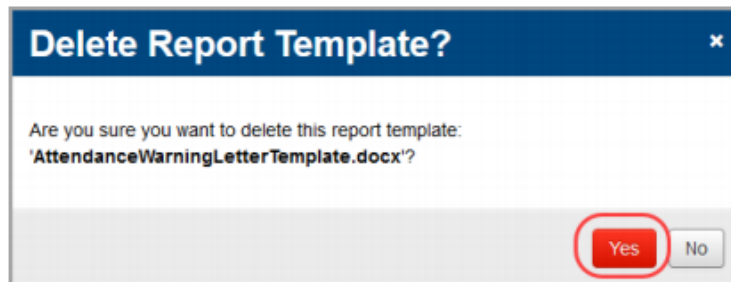
Download Report Templates

Navigation: StudentInformation – Management – District Administration – Report Template Administration

1. On the **Report Template Administration** screen, in the row of the template you want to download, click **Actions** and select **Download**.
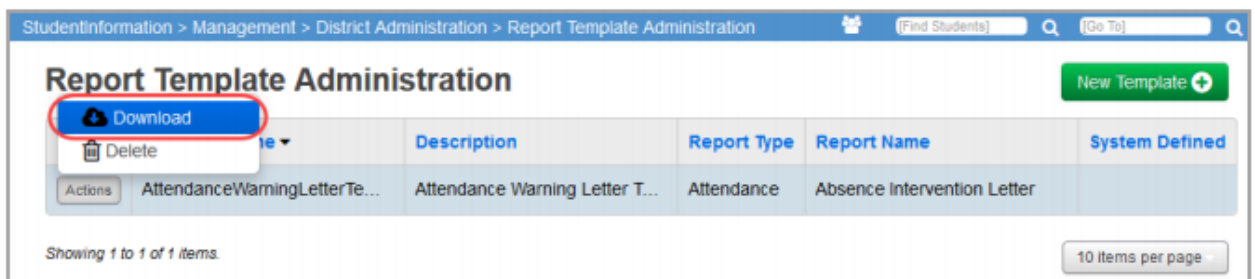
2. Open or save the file.

Appendix A

Bookmarks for Absence Intervention Letters

StudentId	[StudentId]
StudentNumber	[StudentNumber]
StudentName	[StudentName]
StudentLastName	[StudentLastName]
StudentFirstName	[StudentFirstName]
StudentMailingAddress	[StudentMailingAddress]
GradeLevel	[GradeLevel]
ProgramName	[ProgramName]
Counselor	[Counselor]
HomeroomTeacher	[HomeroomTeacher]
ContactFirstName	[ContactFirstName]
ContactLastName	[ContactLastName]
ContactFullName	[ContactFullName]
ContactFullAddressFormatted	[ContactFullAddressFormatted]
ContactAddress	[ContactAddress]
ContactAddress2	[ContactAddress2]
ContactCity	[ContactCity]
ContactState	[ContactState]
ContactZip	[ContactZip]
DistrictName	[DistrictName]
SchoolName	[SchoolName]
SchoolYear	[SchoolYear]
SchoolYearId	[SchoolYearId]
SchoolId	[SchoolId]
DistrictId	[DistrictId]
SchoolAddress	[SchoolAddress]
Principal	[Principal]
SchoolPhoneFormatted	[SchoolPhoneFormatted]
SchoolPhone	[SchoolPhone]
YearlyAbsenceHours	[YearlyAbsenceHours]
YearlyAbsenceDays	[YearlyAbsenceDays]
YearlyExcusedAbsenceHours	[YearlyExcusedAbsenceHours]
YearlyExcusedAbsenceDays	[YearlyExcusedAbsenceDays]
YearlyUnexcusedAbsenceHours	[YearlyUnexcusedAbsenceHours]
YearlyUnexcusedAbsenceDays	[YearlyUnexcusedAbsenceDays]
YearlyOutOfSchoolSuspAbsenceHours	[YearlyOutOfSchoolSuspAbsenceHours]
YearlyOutOfSchoolSuspAbsenceDays	[YearlyOutOfSchoolSuspAbsenceDays]
YearlyAbsenceMedicalHours	YearlyAbsenceMedicalHours
YearlyAbsenceMedicalDays	YearlyAbsenceMedicalDays

Daily Absences

AttendanceTrackingDailySummaryId	[AttendanceTrackingDailySummaryId]
CalendarDate	[CalendarDate]
AbsenceDays	[AbsenceDays]
AbsenceHours	[AbsenceHours]
ExcusedAbsenceDays	[ExcusedAbsenceDays]
ExcusedAbsenceHours	[ExcusedAbsenceHours]
UnexcusedAbsenceDays	[UnexcusedAbsenceDays]
UnexcusedAbsenceHours	[UnexcusedAbsenceHours]
OutOfSchoolSuspAbsenceHours	[OutOfSchoolSuspAbsenceHours]
OutOfSchoolSuspAbsenceDays	[OutOfSchoolSuspAbsenceDays]
RepeatForEach_DailyAbsence	RepeatForEach_DailyAbsence
MedicalExcusedAbsenceHours	MedicalExcusedAbsenceHours
MedicalExcusedAbsenceDays	MedicalExucsedAbsenceDays

Monthly Summary

AttendanceTrackingMonthlySummaryId	[AttendanceTrackingMonthlySummaryId]
MonthlySummaryMonthName	[MonthlySummaryMonthName]
MonthlySummaryMonthNumber	[MonthlySummaryMonthNumber]
MonthlySummaryYear	[MonthlySummaryYear]
MonthlySummaryAbsenceHours	[MonthlySummaryAbsenceHours]
MonthlySummaryAbsenceDays	[MonthlySummaryAbsenceDays]
MonthlySummaryExcusedAbsenceHours	[MonthlySummaryExcusedAbsenceHours]
MonthlySummaryExcusedAbsenceDays	[MonthlySummaryExcusedAbsenceDays]
MonthlySummaryUnexcusedAbsenceHours	[MonthlySummaryUnexcusedAbsenceHours]
MonthlySummaryUnexcusedAbsenceDays	[MonthlySummaryUnexcusedAbsenceDays]
MonthlySummaryOutOfSchoolSuspAbsenceHour	[MonthlySummaryOutOfSchoolSuspAbsenceHour]
MonthlySummaryOutOfSchoolSuspAbsenceDays	[MonthlySummaryOutOfSchoolSuspAbsenceDays]
RepeatForEach_MonthlySummary	RepeatForEach_MonthlySummary
MonthlyAbsenceMedicalHours	MonthlyAbsenceMedicalHours
MonthlyAbsenceMedicalDays	MonthlyAbsenceMedicalDays

Consecutive Summary

AttendanceTrackingConsecutiveSummaryId	[AttendanceTrackingConsecutiveSummaryId]
ConsecutiveStartDate	[ConsecutiveStartDate]
ConsecutiveEndDate	[ConsecutiveEndDate]
ConsecutiveAbsenceHours	[ConsecutiveAbsenceHours]
ConsecutiveAbsenceDays	[ConsecutiveAbsenceDays]
ConsecutiveSummaryTypeId	[ConsecutiveSummaryTypeId]
RepeatForEach_ConsecutiveSummary	RepeatForEach_ConsecutiveSummary

Threshold Summary

AttendanceTrackingThresholdTrigger DateId	[AttendanceTrackingThresholdTrigger DateId]
ThresholdTriggerDate	[ThresholdTriggerDate]
ThresholdTypeName	[ThresholdTypeName]
RepeatForEach_Threshold	RepeatForEach_Threshold

Appendix B
Sample

<u>Attendance Warning</u>
SchoolName
DistrictName

ContactFirst ContactLast
ContactAddress
City, State   Zip

Dear ContactFirst ContactLast,
As school officials, we are required by law to provide you with the notice that your child, StudentFirst StudentLast, has reached a significant number of absences that makes it necessary to send this letter.   The attendance of all children of compulsory school age is expected every day that school is in session. It is your responsibility to see to it that your child attends school regularly. Failure to send your child to school is a violation of Section 3321.38 of the Ohio Revised Code. Prosecution and conviction of this offence may result in the court ordering you to give bond and/or pay a fine and court costs.
At this time, your child has had numerous absences from school. (See attached list of dates.) Although a parent may have called to report the absence, you may be required to provide written documentation from a physician after 12 consecutive hours, 24 hours in a month or 48 hours in a year in order for the school to record these absences as EXCUSED. If this documentation is not received for these parental/guardian "call offs", the school will record the absence as UNEXCUSED.

Sincerely,
Principal

Appendix C
Using a bookmark multiple times

To use a bookmark multiple times, use _x2, _x3, etc. at the end of the bookmark.

Example:
ContactFirstName will print the first name of the contact.
ContactFirstName_x2 will print the contact's first name a 2nd time in the letter.
ContactFirstName_x3 will print the contact's first name a 3rd time in the letter.

Appendix D
Insert a Letter Date that will display the date a letter is run

To insert a date field into the template so that the current date will print when a letter is run:
1. Place your cursor on the line that you wish the date to display in your letter
2. On the **Insert tab**, **Text** section, click the **Insert Date & Time** icon.
3. Select an **Available Formats** and click the **Update automatically** box.
4. Click **OK.**

Bookmarks for Absence Intervention Letters

StudentId	[StudentId]
StudentNumber	[StudentNumber]
StudentName	[StudentName]
StudentLastName	[StudentLastName]
StudentFirstName	[StudentFirstName]
StudentMailingAddress	[StudentMailingAddress]
GradeLevel	[GradeLevel]
ProgramName	[ProgramName]
Counselor	[Counselor]
HomeroomTeacher	[HomeroomTeacher]
ContactFirstName	[ContactFirstName]
ContactLastName	[ContactLastName]
ContactFullName	[ContactFullName]
ContactFullAddressFormatted	[ContactFullAddressFormatted]
ContactAddress	[ContactAddress]
ContactAddress2	[ContactAddress2]
ContactCity	[ContactCity]
ContactState	[ContactState]
ContactZip	[ContactZip]
DistrictName	[DistrictName]
SchoolName	[SchoolName]
SchoolYear	[SchoolYear]
SchoolYearId	[SchoolYearId]
SchoolId	[SchoolId]
DistrictId	[DistrictId]
SchoolAddress	[SchoolAddress]
Principal	[Principal]
SchoolPhoneFormatted	[SchoolPhoneFormatted]
SchoolPhone	[SchoolPhone]
YearlyAbsenceHours	[YearlyAbsenceHours]

YearlyAbsenceDays	[YearlyAbsenceDays]
YearlyExcusedAbsenceHours	[YearlyExcusedAbsenceHours]
YearlyExcusedAbsenceDays	[YearlyExcusedAbsenceDays]
YearlyUnexcusedAbsenceHours	[YearlyUnexcusedAbsenceHours]
YearlyUnexcusedAbsenceDays	[YearlyUnexcusedAbsenceDays]
YearlyOutOfSchoolSuspAbsenceHours	[YearlyOutOfSchoolSuspAbsenceHours]
YearlyOutOfSchoolSuspAbsenceDays	[YearlyOutOfSchoolSuspAbsenceDays]
YearlyAbsenceMedicalHours	YearlyAbsenceMedicalHours
YearlyAbsenceMedicalDays	YearlyAbsenceMedicalDays

Daily Absences

AttendanceTrackingDailySummaryId	[AttendanceTrackingDailySummaryId]
CalendarDate	[CalendarDate]
AbsenceDays	[AbsenceDays]
AbsenceHours	[AbsenceHours]
ExcusedAbsenceDays	[ExcusedAbsenceDays]
ExcusedAbsenceHours	[ExcusedAbsenceHours]
UnexcusedAbsenceDays	[UnexcusedAbsenceDays]
UnexcusedAbsenceHours	[UnexcusedAbsenceHours]
OutOfSchoolSuspAbsenceHours	[OutOfSchoolSuspAbsenceHours]
OutOfSchoolSuspAbsenceDays	[OutOfSchoolSuspAbsenceDays]
RepeatForEach_DailyAbsence	RepeatForEach_DailyAbsence
MedicalExcusedAbsenceHours	MedicalExcusedAbsenceHours
MedicalExcusedAbsenceDays	MedicalExcusedAbsenceDays

Monthly Summary

AttendanceTrackingMonthlySummaryId	[AttendanceTrackingMonthlySummaryId]
MonthlySummaryMonthName	[MonthlySummaryMonthName]
MonthlySummaryMonthNumber	[MonthlySummaryMonthNumber]
MonthlySummaryYear	[MonthlySummaryYear]
MonthlySummaryAbsenceHours	[MonthlySummaryAbsenceHours]

MonthlySummaryAbsenceDays	[MonthlySummaryAbsenceDays]
MonthlySummaryExcusedAbsenceHours	[MonthlySummaryExcusedAbsenceHours]
MonthlySummaryExcusedAbsenceDays	[MonthlySummaryExcusedAbsenceDays]
MonthlySummaryUnexcusedAbsenceHours	[MonthlySummaryUnexcusedAbsenceHours]
MonthlySummaryUnexcusedAbsenceDays	[MonthlySummaryUnexcusedAbsenceDays]
MonthlySummaryOutOfSchoolSuspAbsenceHour	[MonthlySummaryOutOfSchoolSuspAbsenceHour]
MonthlySummaryOutOfSchoolSuspAbsenceDays	[MonthlySummaryOutOfSchoolSuspAbsenceDays]
RepeatForEach_MonthlySummary	RepeatForEach_MonthlySummary
MonthlyAbsenceMedicalHours	MonthlyAbsenceMedicalHours
MonthlyAbsenceMedicalDays	MonthlyAbsenceMedicalDays

Consecutive Summary

AttendanceTrackingConsecutiveSummaryId	[AttendanceTrackingConsecutiveSummaryId]
ConsecutiveStartDate	[ConsecutiveStartDate]
ConsecutiveEndDate	[ConsecutiveEndDate]
ConsecutiveAbsenceHours	[ConsecutiveAbsenceHours]
ConsecutiveAbsenceDays	[ConsecutiveAbsenceDays]
ConsecutiveSummaryTypeId	[ConsecutiveSummaryTypeId]
RepeatForEach_ConsecutiveSummary	RepeatForEach_ConsecutiveSummary

Threshold Summary

AttendanceTrackingThresholdTriggerDateId	[AttendanceTrackingThresholdTriggerDateId]
ThresholdTriggerDate	[ThresholdTriggerDate]
ThresholdTypeName	[ThresholdTypeName]
RepeatForEach_Threshold	RepeatForEach_Threshold

ProgressBook
StudentInformation

Assessment – Misc to AAT Conversion

Change Log

Date	Section Number/Name	Change Description
2/12/10	Beginning Information	Added non-supported functionality disclaimer

Table of Contents

IMPORTANT! NON-SUPPORTED FUNCTIONALITY: The MISC to AAT Conversion is no longer supported by DASL State Support and Development. The MISC to AAT Conversion is still available in DASL and can be used as is. However, no changes or corrections will be made should there be any issues.

Follow these steps to convert assessment data stored in the Miscellaneous Data Groups to the new Additional Assessment Test pages. This affects ACT, Plan, SAT Reasoning Test, and PSAT/NMSQT Test Scores that are currently stored in Miscellaneous Data. After the Misc to AAT Conversion, the scores will then be accessible through Assessment screens and reports, and available on other reports such as transcripts and report cards.

IMPORTANT: DO NOT CONVERT if you are still using non-custom transcript formats.

Non-custom transcript formats only use data from Miscellaneous Data Groups, and this conversion process removes data from the Miscellaneous Data Groups being converted. The new custom transcript formatter uses data from the individual Additional Assessment Test pages. If you are unsure which transcript formatter you use, please ask your ITC personnel.

Unless otherwise noted, see Assessment End User Documentation for details. However, since this process is only performed once, and new Additional Assessment Test information should be entered on the new screens rather than Miscellaneous Data Groups, the Misc to AAT conversion screen itself is not detailed in the End User Guide documentation.

☐ **Set Up Misc Groups/Definitions – Inactivate Unused Definitions** (optional) – While the Misc to AAT conversion procedure is simple when the Misc Group only includes a few Definitions, many schools' Misc Groups contain many Definitions which aren't being used. If you have Misc Definitions within a group which are not being used (no "Used By" listings), inactivate those to prevent confusion.

     o   Navigation: Home – Management – School Administration – Miscellaneous Data Groups – Miscellaneous Data Definitions

☐ **Set Up Misc Groups/Definitions – Rename Duplicate Definitions** (optional) – While the Misc to AAT conversion procedure is simple when each Misc Group only includes a single testing attempt, many schools' Misc Groups contain Definitions for multiple attempts within the same Group. If you have Misc Definitions for multiple test attempts within a single group, rename each field something unique, so you can select the correct information when converting.

      o   Navigation: Home – Management – School Administration – Miscellaneous Data Groups – Miscellaneous Data Definitions

Home » Management » School Administration » Miscellaneous Data Groups » Miscellaneous Data Definitions

Miscellaneous Data Definitions Maintenance - 30 - SAT Scores
From this screen, you can display, add, change and delete data pertaining to miscellaneous data field definitions.

Add Data Definition

		Field Title	Field Type	Data Type	Used By	Field Length	Sort Order ^	Searchable	On Profile	Active	Read Only
✕	✎	month tested - MM	Textbox	Whole Number	0	2	1	☐	☐	💡	💡
✕	✎	year tested - YY	Textbox	Alpha Numeric	0	2	2	☐	☐	💡	💡
✕	✎	grade	Textbox	Whole Number	0	2	3	☐	☐	💡	💡
✕	✎	SAT verbal	Textbox	Whole Number	0	3	4	☐	☐	💡	💡
✕	✎	SAT math	Textbox	Whole Number	0	3	5	☐	☐	💡	💡
✕	✎	month tested - MM	Textbox	Alpha Numeric	0	2	6	☐	☐	💡	💡
✕	✎	year tested - YY	Textbox	Alpha Numeric	0	2	7	☐	☐	💡	💡
✕	✎	grade	Textbox	Alpha Numeric	0	2	8	☐	☐	💡	💡
✕	✎	SAT verbal	Textbox	Alpha Numeric	0	3	9	☐	☐	💡	💡
✕	✎	SAT math	Textbox	Alpha Numeric	0	3	10	☐	☐	💡	💡
✕	✎	month tested - MM	Textbox	Alpha Numeric	0	2	11	☐	☐	💡	💡
✕	✎	year tested - YY	Textbox	Alpha Numeric	0	2	12	☐	☐	💡	💡
✕	✎	grade	Textbox	Alpha Numeric	0	2	13	☐	☐	💡	💡
✕	✎	SAT verbal	Textbox	Alpha Numeric	0	3	14	☐	☐	💡	💡
✕	✎	SAT math	Textbox	Alpha Numeric	0	3	15	☐	☐	💡	💡

☑ Show Active Only

Back to Groups

Duplicate Definition Names

Home » Management » School Administration » Miscellaneous Data Groups » Miscellaneous Data Definitions

Miscellaneous Data Definitions Maintenance - 30 - SAT Scores
From this screen, you can display, add, change and delete data pertaining to miscellaneous data field definitions.

Add Data Definition

		Field Title	Field Type	Data Type	Used By	Field Length	Sort Order ^	Searchable	On Profile	Active	Read Only
✕	✎	month tested - MM	Textbox	Whole Number	0	2	1	☐	☐	💡	💡
✕	✎	year tested - YY	Textbox	Alpha Numeric	0	2	2	☐	☐	💡	💡
✕	✎	grade	Textbox	Whole Number	0	2	3	☐	☐	💡	💡
✕	✎	SAT verbal	Textbox	Whole Number	0	3	4	☐	☐	💡	💡
✕	✎	SAT math	Textbox	Whole Number	0	3	5	☐	☐	💡	💡
✕	✎	2nd Attempt - month tested - MM	Textbox	Alpha Numeric	0	2	6	☐	☐	💡	💡
✕	✎	2nd Attempt - year tested - YY	Textbox	Alpha Numeric	0	2	7	☐	☐	💡	💡
✕	✎	2nd Attempt - grade	Textbox	Alpha Numeric	0	2	8	☐	☐	💡	💡
✕	✎	2nd Attempt - SAT verbal	Textbox	Alpha Numeric	0	3	9	☐	☐	💡	💡
✕	✎	2nd Attempt - SAT math	Textbox	Alpha Numeric	0	3	10	☐	☐	💡	💡
✕	✎	3rd Attempt - month tested - MM	Textbox	Alpha Numeric	0	2	11	☐	☐	💡	💡
✕	✎	3rd Attempt - year tested - YY	Textbox	Alpha Numeric	0	2	12	☐	☐	💡	💡
✕	✎	3rd Attempt - grade	Textbox	Alpha Numeric	0	2	13	☐	☐	💡	💡
✕	✎	3rd Attempt - SAT verbal	Textbox	Alpha Numeric	0	3	14	☐	☐	💡	💡
✕	✎	3rd Attempt - SAT math	Textbox	Alpha Numeric	0	3	15	☐	☐	💡	💡

☑ Show Active Only

Back to Groups

Unique Definition Names

☐ **Select a Test Type** – Navigate to the Misc to AAT conversion page and select the test for which you wish to convert results data. If you do not see this page in your SIS – Assessment menu or the sidebar, your ITC has not enabled this feature yet.

    o   Navigation: Home – SIS – Assessment – Misc to AAT

> **‖▶** Home » SIS » Assessment » Assessment Reports » Misc to AAT Conversion
>
> ## Misc to AAT Conversion
> From this screen, you can select parameters to generate a report.
>
> | Selection Criteria | Selection Summary | Load Settings |
>
> **Selecting an Ad-Hoc Membership Group will limit the conversion to the students associated with that membership group.**
>
> **Ad-Hoc Membership:**   -- Select an Ad-Hoc Membership -- ▾
>   Public And Private ☐
>
> **If not limiting to an Ad-Hoc Membership Group, all students will be converted.**
>
> **Assessment Type:**   - Select a Test Type - ▾ ⚡
>
> **Validate without converting?**   ○ Validate Only ○ Validate and Convert ⚡
>
> **Print original value detail when new values differ from existing values?**   ☐
>
> **Overwrite existing values? (Conversion only)**   ☐
>
> **Make source Misc Data read-only? (Conversion only)**   ☐
>
> **Delivery Method:**   Pickup ▾   [Set As Default]
> **Email Address:**   chris@noacsc.org
>
> **Description:**   [_____]
>
> [Submit]

Ad-Hoc Membership (optional) **–** Choose an ad-hoc membership if you wish to limit the Misc to AAT Conversion to specific students. You can choose from both Public and Private Ad-Hoc Memberships. If you are not choosing an Ad-Hoc Membership, all students will be converted.

Assessment Type (required) **-** Choose ACT, PLAN, PSAT, SAT. Once the Assessment Type is selected, the Testing Date Storage, Combined Date Format, and individual test data fields will become available.

Validate without converting? (required) **–** Choose to "Validate Only" or "Validate and Convert". It is highly recommended to "Validate Only" to review results before converting. Validation always occurs on every run. It is not possible to run a conversion without re-validating the data.

Note: One or more students failing validation does not automatically mean that no student data can be converted. If "Validate and Convert" has been selected, data that passes validation will be used to update the database even if some students fail validation. Passing and failing validation is done on a case by case rather than batch by batch basis.

Print original value detail when new values differ from existing values? (optional) – If checked, the Misc to AAT Report will include a Data Differences section listing the existing values for this student, this test, this date, and this field – indicating the existing value and the differing new value that would replace it. This information only appears if there is an existing value for this field: fields or dates that did not previously have values will not be listed. Existing

data that is not being overwritten will not be listed. Values that would not be altered by the update (i.e. the new and existing values are the same) will not be listed.   See the Misc to AAT Report section for more details.

Overwrite existing values? (optional) – Works only with "Validate and Convert" option. Check to actually overwrite existing values for a given student, test, date, and field with new data when converting. If this is not checked and "Validate and Convert" has been selected, existing values will not be overwritten. The Data Differences section of the Misc to AAT Report can be used to determine what data would be potentially be overwritten.

Replacement of data is done on a field-by-field basis: If an existing SAT record has an Essay Sub Score and a Critical Reading Score, but the incoming data does not include a Critical Reading Score, the existing Critical Reading Score will not be touched. Existing data does not include a Critical Reading Score, the existing Critical Reading Score will not be touched. Existing data for students who do not have data in the Misc Data facility or who are not included in the Ad-Hoc Membership will not be touched. Remember that existing data must be for exactly the same date (in the case of month/year data, the first of the month) in order to be replaced.

Make source Misc Data read-only? (optional) – Works only with "Validate and Convert" option. Check to make Misc data read-only after conversion.   Read-only status can be turned on and off in the Miscellaneous Data Definitions Maintenance page – available through the Miscellaneous Data Groups Maintenance page at Home – Management – School Administration – Miscellaneous Data Groups.

☐ **Select Misc Group(s)** – Once a test is selected, you will see the conversion screen. Select the Misc Group which contains data for the selected test (this will set all data fields to the same Misc Group). Note that you can, if necessary, change individual fields to different Misc Groups, but under most circumstances, all data for one test will be in a single Misc Group. **NOTE:** Only select **ONE** test attempt at a time. If your Misc Data Group contains multiple test attempts, only select one at a time, then re-run the conversion for each additional attempt.

   o   Navigation: Home – SIS – Assessment – Misc to AAT – Assessment Type selected – Misc Group selected in any Misc Group field

---

Home » **SIS** » **Assessment** » **Assessment Reports** » **Misc to AAT Conversion**

Misc to AAT Conversion
From this screen, you can select parameters to generate a report.

| Selection Criteria | Selection Summary | Load Settings |

Selecting an Ad-Hoc Membership Group will limit the conversion to the students associated with that membership group.

Ad-Hoc Membership: -- Select an Ad-Hoc Membership -- ▾
Public And Private ☐

If not limiting to an Ad-Hoc Membership Group, all students will be converted.

Assessment Type: SAT ▾
Testing Date Storage: ◉ Combined ○ Separate Month and Year
Combined Date Format: MM/DD/YYYY ▾   ☐ Dates have no separators

AAT Field Name	Misc Group	Misc Data Definition
Date	▾	▾
Grade at Time of Test:	▾	▾
Critical Reading Score	▾	▾
Math Score	▾	▾
Writing Score	▾	▾
Writing Multiple-Choice Sub Score	▾	▾
Essay Sub Score	▾	▾
Critical Reading Score	▾	▾
Math Score	▾	▾
Writing Score	▾	▾
Writing Multiple-Choice Sub Score	▾	▾
Essay Sub Score	▾	▾
Critical Reading Score	▾	▾
Math Score	▾	▾
Writing Score	▾	▾
Writing Multiple-Choice Sub Score	▾	▾
Essay Sub Score	▾	▾

Validate without converting?   ○ Validate Only ○ Validate and Convert
Print original value detail when new values differ from existing values?   ☐
Overwrite existing values? (Conversion only)   ☐
Make source Misc Data read-only? (Conversion only)   ☐

Delivery Method: Pickup ▾   [Set As Default]
Email Address: chris@noacsc.org

Description: [   ]

[Submit]

☐ **Select Misc Data Definitions and Convert** – Once a Misc Group is selected, select a Misc Data Definition for each data field in the list. Once all fields are set, click the Submit button to bring this data into the DASL Assessment module, where it will display on the appropriate Additional Assessment Test page. You will see a confirmation message

The Misc data was converted to AAT data successfully and can continue entering additional conversions for the same Assessment (or another, selected from the drop-down).

o Navigation: Home – SIS – Assessment – Misc to AAT – Assessment Type selected – Misc Group selected in any Misc Group field – Misc Data Definitions selected

Home » SIS » Assessment » Assessment Reports » Misc to AAT Conversion

Misc to AAT Conversion
From this screen, you can select parameters to generate a report.

| Selection Criteria | Selection Summary | Load Settings |

Selecting an Ad-Hoc Membership Group will limit the conversion to the students associated with that membership group.

Ad-Hoc Membership: -- Select an Ad-Hoc Membership --
Public And Private ☐

If not limiting to an Ad-Hoc Membership Group, all students will be converted.

Assessment Type: SAT
Testing Date Storage: ○ Combined ● Separate Month and Year

AAT Field Name	Misc Group	Misc Data Definition
Month	32 - 1st SAT Attempt	month tested - MM
Year		year tested - YY
Grade at Time of Test:	32 - 1st SAT Attempt	grade
Critical Reading Score	32 - 1st SAT Attempt	SAT CR
Math Score	32 - 1st SAT Attempt	SAT math
Writing Score	32 - 1st SAT Attempt	SAT W
Writing Multiple-Choice Sub Score	32 - 1st SAT Attempt	
Essay Sub Score	32 - 1st SAT Attempt	
Critical Reading Score	32 - 1st SAT Attempt	
Math Score	32 - 1st SAT Attempt	
Writing Score	32 - 1st SAT Attempt	
Writing Multiple-Choice Sub Score	32 - 1st SAT Attempt	
Essay Sub Score	32 - 1st SAT Attempt	
Critical Reading Score	32 - 1st SAT Attempt	
Math Score	32 - 1st SAT Attempt	
Writing Score	32 - 1st SAT Attempt	
Writing Multiple-Choice Sub Score	32 - 1st SAT Attempt	
Essay Sub Score	32 - 1st SAT Attempt	

Validate without converting? ○ Validate Only ○ Validate and Convert
Print original value detail when new values differ from existing values? ☐
Overwrite existing values? (Conversion only) ☐
Make source Misc Data read-only? (Conversion only) ☐

Delivery Method: Pickup [Set As Default]
Email Address: chris@noacsc.org

Description:

[Submit]

☐ **Misc to AAT Report**

The PDF report has 3 sections – Validation, Data Differences, and Summary

Validation section of MISC to AAT Report

The Validation section of the Misc to AAT report checks for the following:

- The Misc to AAT Conversion will attempt to convert data for students that have data for any of the Misc Data fields mapped to AAT fields. If a field is not populated for that student, this is reported as an error, and this student's data will not be converted. An error message "xxxxxx Data not found" will be printed.

- The Misc to AAT Conversion attempts to parse the date in the specified format. If it cannot, the student is not processed. An error message "Date cannot be parsed in the format xxxx" will be printed.

- If the user has mapped a field to the grade level, the Misc to AAT Conversion checks that the value provided is a valid grade level. If this check does not pass, an error message "Grade at time of test is not a valid value" will be printed.

- 20 characters is the maximum size allowed in the database for a test score value. If data is longer, an error message "Data is longer than the max 20 characters" will be printed.

- Different test fields have different data validation requirements. All values except ACT Essay Comments must be numeric. Different numeric ranges are defined as valid depending on the test and the specific field. The validations set up on the Assessment Maintenance pages for the various Assessments were used in the Misc to AAT Conversion. If the data validation does not pass, an error message "Data is not valid for this field" will be printed.

- If none of the fields to be used for score data have values for a student, this appears on the validation section of the report. This will usually only happen if Misc Data from more than one test attempt has been mixed together, as the only students who will be processed will be those who have data in at least one of the fields used for mapping. For those students with no score values, an error message will appear "The fields specified for score data are all blank for this student".

Report: MiscToAAT
Printed Thu, Apr 10, 2008, 5:54 PM

HIGH SCHOOL
2007-2008
Misc to AAT Conversion Report

Validation

Student Number	Student Name	Misc Group	Misc Defn	Field	Value	Error Message
93	, JENNIFER SARAH	Test Data for MiscToAAT	Pre-Defined List	GradeLevel	A	Grade at time of test is not a valid value
		Test Data for MiscToAAT	Checkbox	Math Score	1	Data is not valid for this field
		Test Data for MiscToAAT	Alpha data	Essay Sub Score	aaaaaaaaaaaaaaaaaa aaaaaaaaaaaaaaaaa aaaa	Data is longer than the max 20 characters
		Test Data for MiscToAAT	Alpha data	Essay Sub Score	aaaaaaaaaaaaaaaaaa aaaaaaaaaaaaaaaaa aaaa	Data is not valid for this field

Report: MiscToAAT
Printed Wed, Apr 09, 2008, 9:17 PM

HIGH SCHOOL
2007-2008
Misc to AAT Conversion Report

Validation

Student Number	Student Name	Misc Group	Misc Defn	Field	Value	Error Message
93	, JENNIFER SARAH			Score data		The fields specified for score data are all blank for this student

Note: One or more students failing validation does not automatically mean that no student data can be converted. If "Validate and Convert" has been selected, data that passes validation will be used to update the database even if some students fail validation. Passing and failing validation is done on a case by case rather than batch by batch basis.

Data Differences section of MISC to AAT Report

The Data Differences section of the Misc to AAT report will be printed if the "Print Original Value Detail When New Values Differ from Existing Values" option was checked. New data (that does not replace existing data) or data that contains the same values as the existing data will not appear.

Report: MiscToAAT
Printed Thu, Apr 10, 2008, 3:03 PM

Misc to AAT

Data Differences

Student Number	Student Name	Test Date	Target Field	Old Value	New Value
80	, PATRICK BURNS	10/01/2006	Math Score	560	540
80	, PATRICK BURNS	10/01/2006	Critical Reading Score	460	420
80	, PATRICK BURNS	10/01/2006	Writing Score	540	560
15	, MARK D	10/01/2005	Math Score	770	800
15	, MARK D	10/01/2005	Critical Reading Score	640	740
15	, MARK D	10/01/2005	Writing Score	680	750
46	, ALENA MARIE	04/01/2006	Math Score	550	670
46	, ALENA MARIE	04/01/2006	Critical Reading Score	620	660
46	, ALENA MARIE	04/01/2006	Writing Score	620	630

Summary section of MISC to AAT Report

The Summary section of the Misc to AAT report lists the number of Misc Data records found, the number of students found, and the number of students with errors. If the user has selected "Validate and Convert", a count of the new Assessments created will be shown, as well as a count of Assessments to be updated. A total is included of differences between the old and new values. If the user has selected "Validate Only", these values will be 0.

Report: MiscToAAT
Printed Thu, Apr 10, 2008, 5:54 PM

Summary

Misc Data Records Found	4
Number of Students With Data	1
Students with Errors	1
Specific Errors:	
Data is longer than the max 20 characters	1
Data is not valid for this field	2
Grade at time of test is not a valid value	1
Total Errors	4
New Assessments to Save	0
Assessments to be Updated	0
Differences between Old and New Values	0

☐ **Confirm Conversion** – Navigate to the appropriate Additional Assessment Test page, and review the data to confirm that the conversion worked for the appropriate students.

- o   Navigation: Home – SIS – Student – Assessment – (appropriate Additional Assessment Test page)

Assessment Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
7/23/21	Entire document	Review and update
6/15/21	Perform Assessment Imports Enter Other Assessments	Update table regarding DPR Growth (NWEA) and DPR Growth (STAR) and add notes about DPR Growth (STAR) and OST. DPR Growth - Able to enter 4-digit score
4/1/21	Perform Assessment Imports	Rename Redesigned ACT (New Format as of 09/2016) to ACT FY21+ Rename Redesigned SAT (New Format as of 10/2015) to SAT Import Remove SAT (Old Format) Add note regarding SAT Import accepting SEX or GENDER for column I
8/3/20	Perform Assessment Imports	Added ACT Roster View FY20 to table
7/8/20	Perform Assessment Imports	Added OCTCA FY20 Only to table and notes and updated ODDEX File in the table
4/9/20	Entire document	Review and update
3/24/20	Perform Assessment Imports	Add ODDEX File to table and ODDEX File notes
3/23/20	Enter Other Assessments	Updated screenshot of CTE Industry Credential (GW)

Table of Contents

Assessment*:* Follow these steps to review, add, and edit student assessment data. StudentInformation gives the district the ability to create electronic files for the testing company for producing pre-identification labels used during the student testing. StudentInformation also allows districts to import test results from testing companies and then copy that same data from StudentInformation to EMIS for your EMIS reporting requirements. District personnel also have the ability to view testing data by grade level, building, courses, teacher, etc. and use that data to analyze results and needs of the students and district. Test results can be integrated on the transcripts for school use, if desired.

StudentInformation provides optional reports that can be processed to validate the data. You can refer to the Analytics Hub / Report Designer.   In the documentation (WebHelp or SA Portal), under the Reporting application, a Report List provides a list of reports available by module and includes a description for each.

Unless otherwise noted, see Assessment Guide for details.

☐ **Run Pre-Ident For Riverside ITBS Export** – For pre-identification labels for the Riverside ITBS Pre-Identification Export, select Pre-Ident For Riverside ITBS Export. Select the appropriate building, grade level, building name and applicable layout.

Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export - Pre-Ident For Riverside ITBS Export dropdown

See Import/Export Guide for details.

Pre-Ident For Riverside ITBS Export   Please Select a Pre-Identification Export ▾

Galion *☐

☐ Galion Middle School   ☐ Galion Intermediate   ☐ Galion Primary
☐ Galion High School

Pre-Ident Export

Grade Level: *	[▾]
Building Name: *	[Building Name]
Layout:	⦿ Long ○ Short
Logramos (ITBS) Form:	[▾]
Logramos (ITBS) Level:	[▾]
CogAT Form:	[▾]
CogAT Level:	[▾]

File Options: * ○ Download ○ Email

[Export] [Reset]

☐ **Run Pre-Ident For Pearson Educational Measurement Export** – For pre-identification labels for the Pearson Educational Measurement Export, select Pre-Ident For Pearson Educational Measurement Export. Select the appropriate building, grades for students to include, as well as whether contract vocational students, JVS students, and CVI home schooled students should be included. If you wish to run a Pre-Ident export for only specific students, you can enter their Student IDs, separated by commas, in the text box to only return those students in the export.

Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export – Pre-Ident For Pearson Educational Measurement Export dropdown

See Import/Export Guide for details.

☐ **Run Pre-Ident For OELPA Export** – For pre-identification labels for the OELPA Export, select Pre-Ident For OELPA Export. Select the appropriate building, grades for students to include, as well as whether contract vocational students, JVS students, and CVI home schooled students should be included. Also, specify if the test will be taken by Paper or Online.

Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export – Pre-Ident for OELPA Export dropdown

See Import/Export Guide for details.

Note: The files now display **blanks** instead of **N** in all test eligibility columns.
Note: The files are now formatted as .csv files instead of .txt files.

☐ **Run Pre-Ident For OLSAT Export** – For pre-identification labels for the OLSAT Export, select Pre-Ident For OLSAT Export. Select the appropriate building and grades for students to include. If you wish to run a Pre-Ident export for only specific students, you can enter their Student IDs, separated by commas, in the text box to only return those students in the export.

Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export – Pre-Ident for OLSAT Export dropdown

See Import/Export Guide for details.

Pre-Ident For OLSAT Export	Please Select a Pre-Identification Export ▾

Galion *☐

☐ Galion Middle School	☐ Galion Intermediate	☐ Galion Primary
☐ Galion High School		

Include the following grades* ☐

☐ IN	☐ PS	☐ KG
☐ 01	☐ 02	☐ 03
☐ 04	☐ 05	☐ 06
☐ 07	☐ 08	☐ 09
☐ 10	☐ 11	☐ 12
☐ 13	☐ 23	☐ GR
☐ UG	☐ **	☐ DR

Only these students

Comma seperated Student Ids

File Options: * ○ Download ○ Email

[Export] [Reset]

☐ **Run Pre-Ident For KRA Export** – For pre-identification labels for the KRA Export, select Pre-Ident For KRA Export. Select the appropriate building and KRA Pre-ID Type to Export. There are 3 pre-identification exports for the KRA. They are (1) student; (2) teacher; and (3) enrollment.

Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export - Pre-Ident For KRA Export dropdown

See Pre-Ident for KRA Procedural Checklist or Import/Export Guide for details.

PreIdent For Kra Export

Please Select a Pre-Identification Export ▾

Galion * ☐

☐ Galion Middle School ☐ Galion Intermediate ☐ Galion Primary
☐ Galion High School

Choose KRA Pre-Id Type to Export

[▾] *

File Options: * ○ Download ○ Email

[Export] [Reset]

☐ **Run Pre-Ident For Next Generation Assessment Export** - Previously known as Pre-Ident For AASWD and OCBA 3-8 Export. For pre-identification labels for the Next Generation Assessment Export, select Pre-Ident For Next Generation Assessment Export. Select the appropriate building and the assessments for each grade. If you wish, you can select an ad-hoc membership for the AASCD which can be run at the same time as the NGA. The export can be a combined file or you can select separate files for the AASCD and NGA. If you wish to run the export for only specific students, you can enter their Student IDs, separated by commas, in the text box to only return those students in the export.

Note: The file will exclude students who do not have an SSID or a Non-Public SSID. If a non-public district is in context, and some students have not been assigned a Non-Public SSID, a message displays to click on the Student Name to go to the Edit Student Profile screen to add/edit the Non-Public SSID field on the Additional tab.

Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export – Pre-Ident For Next Generation Assessment Export dropdown

See Pre-Ident for Next Generation and End of Course Exports Procedural Checklist or Import/Export Guide for details.

Note: The files are now formatted as .csv files instead of .txt files.

StudentInformation includes students in the export based on their enrollment in course sections matching the following criteria:

Tested Subject Area	EMIS Subject Code	IS HS Credit
HS Physical Science	132220, 132900	Y
HS American History	150810, 152300	Y
HS American Government	150300, 015590, 150308	Y
HS Biology	132230	Y
HS ELA1 and ELA2	05XXXX, 06XXXX	Y
K-3 ELA	050152	N
3-4 ELA	050153, 050154	N
5-6 ELA	050154	N
7-8 ELA	050156	N
K-3 Math	110003	N
4-6 Math	110150	N
7-8 Math	110175	N
7 Advanced Math	110060	N
8 Advanced Math	110065	N
K-3 Social Studies	151209	N
4-6 Social Studies	151210	N
7-8 Social Studies	151201	N
K-3 Science	132110	N
4-6 Science	132120	N
7-8 Science	132130	N
Math1, Math2, Algebra, Geometry	11XXXX	Y

Pre-Ident For Next Generation Assessment Export

Please Select a Pre-Identification Export ▼

Galion * ☐

☐ Galion Middle School	☐ Galion Intermediate	☐ Galion Primary
☐ Galion High School		

Include the Following Assessments

☐ 3rd Grade
- ☐ English Language Arts
- ☐ Mathematics

☐ 4th Grade
- ☐ English Language Arts
- ☐ Mathematics

☐ 5th Grade
- ☐ English Language Arts
- ☐ Mathematics
- ☐ Science

☐ 6th Grade
- ☐ English Language Arts
- ☐ Mathematics

☐ 7th Grade
- ☐ English Language Arts
- ☐ Mathematics

☐ 8th Grade
- ☐ English Language Arts
- ☐ Mathematics
- ☐ Science

Select an Ad-Hoc Membership for AASCD
-- No AASCD Membership Selected - ▼
☐ Private and Public

Only these students:
Comma separated Student Numbers

AASCD Test Mode * ○ Online ○ Paper ○ Supplemental
(Test mode required for students taking an Alternate Assessment)

File Options: * ○ Download ○ Email   ☐ Create Separate File for AASCD

ⓘ 05/08/2020 📅 * **Export** **Reset**

☐ **Run Pre-Ident For End of Course Exam Export –** Previously known as Pre-Ident For AASWD and OCBA HS Export. For pre-identification labels for the End of Course Exam Export, select Pre-Ident For End of Course Exam Export. Select the appropriate building and the assessments. Select whether contract vocational students, JVS students, and CVI home schooled students should be included. If you wish, you can select an ad-hoc membership for the AASCD. The export can be a combined file or you can select separate files for the AASCD and EOC. If you wish to run the export for only specific students, you can enter their Student IDs, separated by commas, in the text box to only return those students in the export.

Note: The files are now formatted as .csv files instead of .txt files.

Note: The file will exclude students who do not have an SSID or a Non-Public SSID. If a non-public district is in context, and some students have not been assigned a Non-Public SSID, a message displays to click on the Student Name to go to the Edit Student Profile screen to add/edit the Non-Public SSID field on the Additional tab.

Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export – Pre-Ident For End of Course Exam Export dropdown

See Pre-Ident for Next Generation and End of Course Exports Procedural Checklist or Import/Export Guide for details.

StudentInformation includes students in the export based on their enrollment in course sections matching the following criteria:

Tested Subject Area	EMIS Subject Code	IS HS Credit
HS Physical Science	132220, 132900	Y
HS American History	150810, 152300	Y
HS American Government	150300, 015590, 150308	Y
HS Biology	132230	Y
HS ELA1 and ELA2	05XXXX, 06XXXX	Y
K-3 ELA	050152	N
3-4 ELA	050153, 050154	N
5-6 ELA	050154	N
7-8 ELA	050156	N
K-3 Math	110003	N
4-6 Math	110150	N
7-8 Math	110175	N
7 Advanced Math	110060	N
8 Advanced Math	110065	N
K-3 Social Studies	151209	N
4-6 Social Studies	151210	N
7-8 Social Studies	151201	N
K-3 Science	132110	N
4-6 Science	132120	N
7-8 Science	132130	N
Math1, Math2, Algebra, Geometry	11XXXX	Y

Pre-Ident For End of Course Exam Export

Please Select a Pre-Identification Export ▼

Select Schools and Course Sections to Include in the Export

☐ **Galion Middle School**

| English Language Arts 1 ⊗ | Mathematics 1 ⊗ | Algebra 1 ⊗ | American History ⊗ | Physical Science ⊗ |
| English Language Arts 2 ⊗ | Mathematics 2 ⊗ | Geometry 1 ⊗ | American Government ⊗ | Biology ⊗ |

☐ **Galion Intermediate**

| English Language Arts 1 ⊗ | Mathematics 1 ⊗ | Algebra 1 ⊗ | American History ⊗ | Physical Science ⊗ |
| English Language Arts 2 ⊗ | Mathematics 2 ⊗ | Geometry 1 ⊗ | American Government ⊗ | Biology ⊗ |

☐ **Galion Primary**

| English Language Arts 1 ⊗ | Mathematics 1 ⊗ | Algebra 1 ⊗ | American History ⊗ | Physical Science ⊗ |
| English Language Arts 2 ⊗ | Mathematics 2 ⊗ | Geometry 1 ⊗ | American Government ⊗ | Biology ⊗ |

☐ **Galion High School**

| English Language Arts 1 ⊗ | Mathematics 1 ⊗ | Algebra 1 ⊗ | American History ⊗ | Physical Science ⊗ |
| English Language Arts 2 ⊗ | Mathematics 2 ⊗ | Geometry 1 ⊗ | American Government ⊗ | Biology ⊗ |

Include the Following Types of Students

☐ Contract Vocational - In   ☐ Contract Vocational - Out   ☐ JVS
☐ Include CVI home school information   ☐ Include JVS home school information

Select an Ad-Hoc Membership for AASCD

[-- No AASCD Membership Selected ▼]
☐ *Private and Public*

Only these students:

[Comma separated Student Numbers]

AASCD Test Mode Selection ⓘ

ELA Test Mode: ◯ Online ◯ Paper ◯ Supplemental   **Social Studies Test Mode:** ◯ Online ◯ Paper ◯ Supplemental
Math Test Mode: ◯ Online ◯ Paper ◯ Supplemental   **Science Test Mode:** ◯ Online ◯ Paper ◯ Supplemental

File Options: * ◯ Download ◯ Email   ☐ Create Separate File for AASCD   **Overall Test Taken:** ◯ Paper ◉ Online ⓘ

ⓘ [04/24/2020 📅] * [Export] [Reset]

☐ **Run Terra Nova Export** – For a Terra Nova export file, create Terra Nova export configurations for each school before exporting for the district.

Navigation: StudentInformation – Management – Import/Export – Terra Nova Export

See Import/Export Guide for details.

NOTE: To include the district IRN in the export file, enter the district IRN in the Special Code field under the formatting options on the submission page.

☐ **Enter WebXam Assessment Coordinator Records** – For a WebXam Export file, enter WebXam Assessment Coordinator Records for each CTE Program of Concentration to be assigned to a default Assessment Coordinator in each district.

Navigation: StudentInformation – SIS – Assessment – WebXam Assessment Coordinator Records

☐ **View Assessment Standards** – View the Assessment Standards table to view scores and passing criteria. This table is view-only and maintained per ODE standards.

Navigation: StudentInformation – SIS – Assessment – Standards

Assessment Standards

From this screen, you can view the assessment standards.

Choose Assessment OGT ▾

Fiscal Year ▼	Test Type	Test Part	Scaled Score Standard	Alternate	Min Score	Max Score	Passing	Transcript Desc	Report Card Desc
2021	OGT	Math	Limited	☐	0.00	383.00	☐		Failed
2021	OGT	Math	Basic	☐	384.00	399.00	☐		Failed
2021	OGT	Math	Proficient	☐	400.00	424.00	☑	Passed	Passed
2021	OGT	Math	Accelerated	☐	425.00	443.00	☑	Passed	Passed
2021	OGT	Math	Advanced	☐	444.00	999.00	☑	Passed	Passed
2021	OGT	Reading	Limited	☐	0.00	382.00	☐		Failed
2021	OGT	Reading	Basic	☐	383.00	399.00	☐		Failed
2021	OGT	Reading	Proficient	☐	400.00	428.00	☑	Passed	Passed
2021	OGT	Reading	Accelerated	☐	429.00	447.00	☑	Passed	Passed
2021	OGT	Reading	Advanced	☐	448.00	999.00	☑	Passed	Passed
2021	OGT	Science	Limited	☐	0.00	370.00	☐		Failed
2021	OGT	Science	Basic	☐	371.00	399.00	☐		Failed
2021	OGT	Science	Proficient	☐	400.00	424.00	☑	Passed	Passed
2021	OGT	Science	Accelerated	☐	425.00	444.00	☑	Passed	Passed
2021	OGT	Science	Advanced	☐	445.00	999.00	☑	Passed	Passed

☐ **Perform Assessment Imports**– (District-only) This program moves results into StudentInformation from vendor files.

Navigation: StudentInformation – SIS – Assessment – Assessment Imports

Import Name	Assessment Type	Status	File Layout Required
ACT FY21+ (AC)	ACT	Current	.csv
ACT Roster View FY20	ACT WorkKeys	Current	.csv
ACT WorkKeys Vendor File	ACT WorkKeys	Current	.csv
ACT WorkKeys Import from Template	ACT WorkKeys	Current	.csv
AP Exam (AP)	AP Exams	Current	.csv
Assessment Extract	Assessment Import File (various assessments)	Current	.csv
DPR Growth (NWEA) (GD) DPR Growth (STAR)	Aka DPR Growth, DORP or NWEA Assessment (MAP)	Current	.csv Combo File Format
KRA (GO)	KRA	Current	.csv
OAA (GA)		Not Used	
OAA (GA) & OGT (GX) Alternate		Not Used	
OCTCA (GY)	WebXam; CTE Student Assessment; OCTCA	Current as of 18.2.0 Release	.csv
OCTCA FY20 Only (GY)	WebXam; CTE Student Assessment; OCTCA	For FY20 only	.csv
ODDEX File	ACT, AP Exam, PS ELA, CTE Technical, OELPA, DPR Growth, End-of-course, Industry Credential, International Baccalaureate, KRA, Next Generation, OGT (Alternate Assessment), PS COS, SAT, WorkKeys, Student Achievement	Current	.txt

	(grades 3-8 alternate assessment)		
OELPA (GF)	OELPA	Current	.txt
OELPS	OELPS fka ELPA21 Screener (This assessment is not reported to EMIS but can be loaded to StudentInformation)	Current	.csv
OGT (GX)	OGT	Not used, assessment must be manually entered	
OST	Next Generation Assessment, End of Course Assessment, Alternate Assessments (AASCD)	Current	.txt
OTELA		Not Used	
PARCC		Not Used	
PLAN	PLAN (pre-ACT) Scores; This import was for the PLAN which is now the Pre-ACT, and has not been updated for the pre-ACT values	Not Used	.txt
PSAT/NMSQT	Preliminary SAT/National Merit Scholarship Qualifying Test	Current	.xlsx
PS COS (GM)	Preschool COS	Current	.csv
PS ELA (GB)	Preschool ELA	Current	.csv
SAT Import (SA)	SAT	Current	.csv

Regarding Accommodations, for the Next Generation Assessments and End of Course Imports:

ACCOM Value to Load	Test Type (STR or ALT)	(153) LEP Value	(156) 504 Plan Value	(157) IEP	(161) Accom ELA **or**	((162) Accom MAT **or**	(163) Accom SS **or**	(164) Accom Sci
Y1	STR	N	Y	N	Y	Y	Y	Y
Y2	STR	N	N	Y	Y	Y	Y	Y
Y3	STR	Y	N	N	Y	Y	Y	Y
NO*	STR	Y	N	Y	Y	Y	Y	Y
NO*	STR	Y	Y	Y	Y	Y	Y	Y
NO*	STR	N	Y	Y	Y	Y	Y	Y
NO*	STR	Y	Y	N	Y	Y	Y	Y
NO	STR	N	N	N	N	N	N	N
NO	STR	Y	N	N	N	N	N	N
NO	STR	N	Y	N	N	N	N	N
NO	STR	N	N	Y	N	N	N	N
NO	ALT							

*If the student has more than one accommodations value flagged in the LEP, 504 or IEP columns, then we cannot determine which Accommodations value to use. A warning message should be displayed on the Assessment Errors load page indicating that more than one accommodations value was flagged so accommodations could not be determined.

Assessment Import matches based on the following:
- o Match on SSID and Birthdate and district
- o Match on SSID and LastName and district
- o Match on EMISId and Birthdate and district
- o Match on EMISId and LastName and district
- o Match on StudentNumber and Birthdate and district
- o Match on StudentNumber and LastName and district
- o Match on first name and last name and birthdate and district

ACT records are matched to students in StudentInformation if ALL of the following data matches:

- Legal Last and First Name (Student Last and First Name used if no match is found)
- Gender
- Birthdate

ACT assessment records are updated according to the following rules:

- If the student has no previous ACT record for the test date, a test record is created and all scores are imported.
- If the student has a previous ACT record for the test test, existing scores are updated with the scores from the import file, new scores are added, or existing scores not found in the import file are not updated.

ACT assessment records are day date specific so multiple tests can be reported in the same month.

OCTCA records are matched to students in StudentInformation if ALL of the following data matches:

- EMIS ID AND District IRN
OR
- District IRN AND Legal Last, First, and Middle Name (Student Last, First, and Middle Name used if no match is found)

OCTCA assessment records are updated with scores from the import file.

OCTCA FY20 Only - Due to the COVID-19 school closures during FY20, updates have been made for reporting this assessment. Refer to the ODE EMIS Manual, Special Section: COVID-19 Related EMIS Reporting Guidance for updated instructions for the WebXam/OCTCA.

ODDEX File Imports

When utilizing files that have been obtained from ODDEX to import using the ODDEX file option, remember the following:

1. ODDEX will permit you to obtain records using either the SSID or the EMIS ID. Be aware that the import into StudentInformation will NOT import files with the EMIS ID. It MUST be the SSID.
2. The import file contains and matches on the student's SSID (from tblStudentEMISFS).
3. If the record in the import file does not have an SSID that matches in the district, the record will not import.
4. The Test Date on the record in the import file will be the Test Date imported.
5. Records from multiple years will import to the appropriate school year.
6. ACT record has a 'day date'; day dates of 00 will default day value to 01.
7. Records already in the Assessment Maintenance page will be overwritten if the import contains a record with the same date.

Note: The Assessment Import does not handle records from the testing company that have an incorrect District IRN.

If no match is found using any of these, then the assessment record will be displayed on the Assessment Import Management – "Records imported-but not yet assigned to a student in StudentInformation" tab which is detailed later in this document.

Once the import file has been uploaded, the View Import Management and View Import History buttons display.

The View Import Management button lets you view the results of the file import.

The View Import History button lets you view the details of each import of the specified file.

SAT Import now accepts a column header of SEX or GENDER for column I to accommodate both new and old vendor files from FY20.
Effective in release 20.4.

AP Exam Import now accepts a column header of Grade Level or Education Level for column Q.
Effective in release 20.5.

DPR Growth (STAR) import is now available and matches students based on the following:
- SSID, Birthdate
- SSID, Last Name
Effective in release 20.5.

DPR Growth (STAR) now uses the Activity Completed Date in column AD as the student's test date (mm/dd/yyyy). It also uses the Activity Type value to determine whether the results are for English (R) or Math (M).

OST import now accept import files that contains the AASCD results for the following FY21 assessments:
- Grades 3 – 8 Mathematics
- Grades 3 – 8 English Language Arts

☐ **Review Assessment Import Management -** When the Assessment Import is unable to match a student record from the vendor file to a student in StudentInformation, the records will appear on the Assessment Import Management – **Unmatched Records** tab as shown below. Clicking the search icon allows you to search for the student in StudentInformation, and link the unassigned assessment record to the appropriate existing student record (*e.g.*, if the student's EMIS ID in StudentInformation changed since pre-identification, or the student changed buildings and/or grades).

Clicking the **trash can** icon allows you to delete records from the **Unmatched Records** tab.

Navigation: StudentInformation – SIS – Assessment – Assessment Import Management

☐ **Review Assessment Import History** – The Assessment Import History page includes a list of all files imported by the Assessment Import, plus the number of records processed, the user, and the date of the import for troubleshooting. Clicking on the **magnifying glass** icon will show the detailed import file information and record counts by building, test type, and test part.

Navigation: StudentInformation – SIS – Assessment – Assessment Import History

Assessment Import History

From this screen, you can view history on assessment import records that have a building accessible through the school and school year in context.

User: [▾] [Filter]

	Assessment Type	File Name	Total Test Records	Unmatched Test Records	Matched Test Records	Errors	User	Date
Q	PS ELA	Fall - FY 20 Reports_160322_1578583265_LearningProgression-GalionCity.csv	828	0	828	0		01/09/2020 11:37 AM
Q	OST	Galion Fall ELA 2019 Scores.txt	279	0	279	0		12/18/2019 02:56 PM
Q	KRA	Reports_156512_1574452485_SSR-GalionCity.csv	1116	0	1116	0		11/22/2019 02:57 PM
Q	OST	Galion Summer 2019 OCBA Assmt.txt	24	0	24	0		11/06/2019 08:16 AM

Assessment Import History

From this screen, you can view history on assessment import records that have a building accessible through the school and school year in context.

File Name: Fall - FY 20 Reports_160322_1578583265_LearningProgression-GalionCity.csv
User:
Date: Thursday, January 9, 2020

Building IRN	School	Test	Part	Records	Imported	Not yet assigned to student	Errors
008201	Primary Elementary School	All	All	1	1	0	0
		ELA	AEE	1	1	0	0
		ELA	COMM	1	1	0	0
		ELA	COOP	1	1	0	0
		ELA	CSM	1	1	0	0
		ELA	NBSN	1	1	0	0
		ELA	PCT	1	1	0	0
		ELA	PHA	1	1	0	0
		ELA	RWA	1	1	0	0
		ELA	SFIP	1	1	0	0
		ELA	VOC	1	1	0	0

☐ **Assessment Extract –** The Assessment Extract lets the district extract test results from multiple assessments for one or more students into a single file to be transferred to another district. The files can be imported into the district through the **Assessment Imports** screen.

You can filter **Students** by Student Numbers, separated by commas, or by Ad Hoc Memberships. You can also filter **Non-Specific Students** by Status, Grade Levels, or Schools.

Note: If you filter by Students, the Non-Specific Students section is disabled. As well, if you filter by Non-Specified Students, the Students section is disabled.

The **Assessment** filter allows you to select one or more items from the drop-down list or enter text to search for specific items.

Student Assessment Extract

Filter Students ⓘ

Student Numbers - *Enter specific student numbers, separated by a comma, to include them in the extract.*

Ad Hoc Memberships - *Select one item from the drop-down list or enter text to search for a specific item to filter your results.*

Public and Private
☐

Filter Non-Specific Students ⓘ

Select one or more items from the drop-down lists below or enter text to search for specific items to filter your results.

Student Statuses

Grade Levels

Schools

Assessment Filter

Select one or more items from the drop-down list or enter text to search for specific items to filter your results.

Assessments

Extract

☐ **Review Test Data and Manually Enter if Necessary –** View and change a selected student's test records. If a student needs a test record manually added directly into StudentInformation, use the **Add** button on the appropriate screen to add the record.

KRA (GO)

Navigation: StudentInformation – SIS – Student – Assessment – KRA

OGT (GX)

Navigation: StudentInformation – SIS – Student – Assessment – OGT

PLAN

Navigation: StudentInformation – SIS – Student – Assessment - PLAN

ACT (AC)

Navigation: StudentInformation – SIS – Student – Assessment - ACT

PSAT/NMSQT

Navigation: StudentInformation – SIS – Student – Assessment – PSAT/NMSQT

SAT (SA)

Navigation: StudentInformation – SIS – Student – Assessment – SAT Reasoning Test

Navigation: StudentInformation – SIS – Student – Assessment – SAT Subject Tests

AP Exams (AP)

Navigation: StudentInformation – SIS – Student – Assessment – AP Exams

☐ **Enter Other Assessments** – There are additional tests that require manual entry, as the Assessment Import is not yet capable of importing data for these tests: Preschool COS (GM - Childhood Outcome Summary), Preschool ELA (GB - Early Learning Assessment), Student Acceleration (FB), International Baccalaureate (IB), WorkKeys (WK), CTE Industry Credential (GW), Next Generation Assessment Grades 3-8 (GN), End of Course Exam (GE), and DPR Growth (GD).

Preschool COS (GM)

Navigation: StudentInformation – SIS – Student – Assessment – Preschool COS

Preschool ELA (GB)

Navigation: StudentInformation – SIS – Student – Assessment – Preschool ELA

Student Acceleration (FB)

Navigation: StudentInformation – SIS – Student – Assessment – Student Acceleration (FB)

International Baccalaureate (IB)

Navigation: StudentInformation – SIS – Student – Assessment – International Baccalaureate (IB)

WorkKeys (WK)

Navigation: StudentInformation – SIS – Student – Assessment – WorkKeys

CTE Industry Credential (GW)

Navigation: StudentInformation – SIS – Student – Assessment – CTE Industry Credential

Next Generation Assessment Grades 3-8 (GN)

Navigation: StudentInformation – SIS – Student – Assessment – Next Generation Assessment Grades 3-8

End of Course Exam (GE)

Navigation: StudentInformation – SIS – Student – Assessment – End of Course Exam

DPR Growth (MAP) (GD)

Navigation: StudentInformation – SIS – Student – Assessment – DPR Growth
A 4-digit numeric score (0-9999) can now be entered.

☐ **Enter Accelerated Records** – A record should be added via the Accelerated Student screen for accelerated students taking a higher level Next Generation assessment. This must be done for the pre-identification export to pull the student for the correct assessment.

Navigation: StudentInformation – SIS – Student – Assessment – Accelerated Student

☐ **Student Assessment List** – The Student Assessment List will allow the user to display, edit, and add all student assessment records.

Navigation: StudentInformation – SIS – Student – Assessment – Student Assessment List

☐ **COS Report** – The COS (Preschool Childhood Outcome Summary) report lists the Preschool COS Assessment records for a student or group of selected students.

Navigation: StudentInformation – SIS – Assessment – Assessment Reports – COS

☐ **Ohio Graduation Test (OGT) Report** – The OGT Report lists OGT records for a student or group of selected students.

Navigation: StudentInformation – SIS – Assessment – Assessment Reports – Ohio Graduation Test (OGT)

☐ **Standardized Test Detail Report** – The Standardized Test Detail report lists AP, ACT, PLAN, PSAT, SAT, and SAT2 records for a student or group of selected students.

Navigation: StudentInformation – SIS – Assessment – Assessment Reports – Standardized Test Detail

NOTE: There are also other Assessment reports available in the Analytics Hub / Report Designer section.

Assigning Non-Public Student SSIDs

Change Log

Date	Section Number/Name	Change Description
1/26/16	New document	

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Non-Public SSID Assignment

Beginning in FY16, non-public schools are testing students using the OCBA. Since non-public school districts do not participate in the public SSID student assignments, ODE has provided a way for non-public students to have a unique identifier similar to the SSID. Each non-public district has been given a unique four character prefix to use when assigning students an SSID. The remaining 5 values must be numeric.

    Ex: XXOO99999

StudentInformation provides the ability to assign all students in the district a unique ID using the district's state assigned prefix. The following pages provide instructions on how to assign the IDs to be used for the pre-Identification file for assessments.

Because non-public schools do not report to EMIS, their SSID will NOT be stored in the FS record SSID field. A new field has been added to the Additional Tab of the Edit Student Profile page. This field is only visible if the entity is a non-public school district.

Once IDs have been assigned, use the OCBA pre-Identification options under ***StudentInformation > Management > Import/Export > Pre-Identification*** **Export** to create your Pre-Identification files. Only students with an SSID assignment will be included in the pre-ID file.

Non-Public SSID Management

The non-Public SSID Management page is used to assign IDs to all students in one transaction. With the district level in context, navigate to:

StudentInformation > Management > Ad-Hoc Updates > Non-Public SSID Management

At the top of the page, enter the Non-Public SSID Prefix assigned to you by ODE. This prefix must be all letters. Once entered in the box, click the Update Non-Public SSID Prefix button. If a student has already been assigned a non-public SSID manually, this will not override the student's assignment. This step needs to be completed regardless of whether you're using the Non-Public SSID Management page to assign IDs or assigning them manually on the Edit Student Profile page.

Non-Public SSID Management

Enter the Non-Public SSID Prefix | Update Non-Public SSID Prefix

The next step is to begin ID assignments for all students. Below the prefix assignment will be a list of all students in the non-public district. Choose the students you wish to assign IDs to by checking the box beside their name. If you wish to assign IDs to all students, check the box in the header line and all students will be selected.

Once students have been selected, click

Assign Non-Public SSID to Selected Students

Numbering begins with zero. All students selected will receive an SSID assignment. Once the update is complete, you should receive a success message at the top of the page.

Non-Public SSID Management

Non-Public SSID Prefix has been successfully updated!

Once ID assignments have been made, the students who were not assigned an ID will remain in the listing on the page. If you wish to also include students *with* SSID assignments in the display, check the box at the top right side of the listing to show students that have been assigned a Non-Public SSID.

☐ **Show students that have been assigned a Non-Public SSID**

Then your display will include students that have an ID assigned.

Reassigning IDs if the wrong prefix was used

If the prefix was entered incorrectly and all students were assigned the incorrect prefix, use this page to correct the IDs.

1. Enter the correct prefix at the top of the page and click the "Update Non-Public SSID Prefix" button.
2. Next, check the "Show students that have been assigned a Non-Public SSID" checkbox to display all students.
3. Check the box in the header row to select all students.
4. Click the "Assign NonPublic SSID to Selected Students" button. This will reassign IDs to all students using the new prefix.

Viewing Non-Public SSIDs on the Student Profile

Non-public SSIDs are stored on the Edit Student Profile – Additional Tab.

IDs may also be assigned by editing the student profile and manually entering an ID number in the Non-public SSID box. Before IDs may be entered manually, you must go to the Non-Public SSID Management page and enter your State Assigned Prefix in the box. This prefix will show on the Edit student Profile page as **District's Non-Public SSID Prefix: XXOO**

Assigning Counselors to Students Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
4/22/20	Entire document	Review and update

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Task #1: Verify Staff Members

See the Security Guide for more detailed instructions on Staff Members. Make sure any Counselors you wish to use have a Staff record. Go to View Staff Members, **Search**, click the **edit pencil** for the appropriate staff member then click on the **Staff Member Schools** tab.
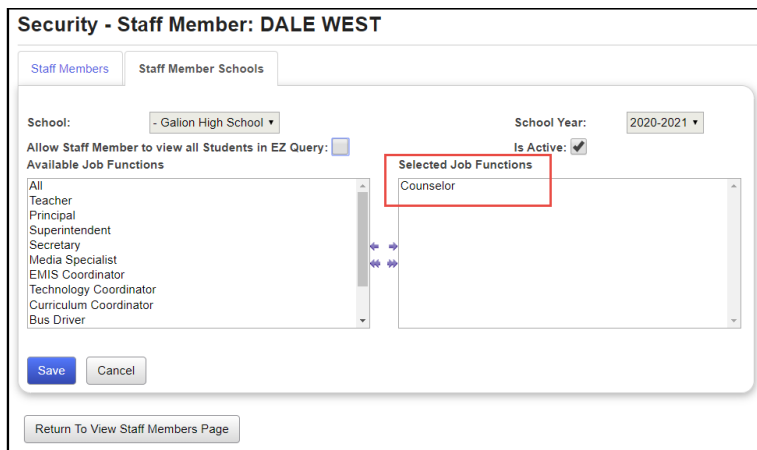
Task #2: Add Counselors Job Function to Staff Member

When viewing a staff member's details, click the **Staff Member Schools** tab. For a staff member to be considered a Counselor, their current school year's Staff Member School entry must include Counselor as a job function.

Task #3: Assign Grade Levels to Counselors

Navigation: StudentInformation – Management – School Administration – School Building Administration – Counselors

Once the staff member is a Counselor, on the Counselor Maintenance screen, edit that Counselor's record, and check the boxes next to each grade level the counselor will be working with.
NOTE: You can assign non-grade-appropriate Counselors, but the default behavior is to use grade-appropriate Counselors only.

Counselor Maintenance

From this screen, you can display and change data pertaining to school guidance counselors.

	First Name	Last Name ▲	Grade	Active
✏	SHARON	BALL	09, 10	🟢
✏	RALPH	COOPER	09, 10	🟢
✏	MARILYN	HAMPTON	11, 12	🟢
✏	BRENT	SIMS	11, 12	🟢
✏	DALE	WEST	11, 12	🟢

✔ Show Active Only

Counselor Maintenance

From this screen, you can display and change data pertaining to school guidance counselors.

Counselor Name: DALE WEST

Is Active: ✔

Grade:
☐ PS ☐ KG ☐ 01 ☐ 02 ☐ 03 ☐ 04
☐ 05 ☐ 06 ☐ 07 ☐ 08 ☐ 09 ☐ 10
✔ 11 ✔ 12 ☐ 13 ☐ 23 ☐ GR

Save   Cancel

Task #4: Assigning a Counselor during Registration

Navigation: StudentInformation – SIS – Registration Wizard

If you want a single Counselor to be automatically assigned to all students being enrolled in a specific grade level, select that Counselor from the drop-down menu in the **Building Grade Levels Maintenance** screen – **Grade Specific Registration Default Data** section.

Task #5: Counselor Bulk Assignment by Homeroom

Navigation: StudentInformation – Management – Ad-Hoc Updates – Counselor Bulk Assignment – Assignment Method tab

To bulk assign Counselors to students by Homeroom, choose the **Homeroom Assignment Method** and select a **Homeroom Term**.

Click **Next** to go to the **Options** tab and choose a Counselor for specific homerooms.

Click **Next** to go to the **Confirmation** tab.

Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method	Students	Options	Confirmation	Results

Counselor	Previously Assigned	Assignments to be Removed	Assignments to be Made	Total Students to be Assigned
COOPER, RALPH	0	0	0	0
WEST, DALE	0	0	26	26
SIMS, BRENT	0	0	0	0
BALL, SHARON	0	0	0	0
HAMPTON, MARILYN	0	0	0	0

Cancel   < Back   Finish

Click **Finish** to process the Counselor Bulk Assignment by Homeroom. The **Results** tab will show you the students that were assigned a Counselor.

Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method	Students	Options	Confirmation	Results

Student	Student Number	Grade	Status	Counselor
ABBOTT, AMY	02262429	12	A	
ALFORD, SAMUEL	02278195	09	A	
ALLEN, TROY	02279882	10	A	
ANDREWS, MAE	02280346	09	N	
ATKINSON, DENNIS	02262038	12	J	WEST, DALE

Task #6: Randomly Bulk Assigning Counselors

Navigation: StudentInformation – Management – Ad-Hoc Updates – Counselor Bulk Assignment – Assignment Method tab

To bulk assign counselors to students randomly, chose the **Random Assignment Method**.

Click **Next** to go to the **Students** tab and select students by **Search Criteria, Student IDs, or Ad-Hoc Membership.**

Click **Next** to go to the **Options** tab and choose a Counselor for the selected students.

Click **Next** to go to the **Confirmation** tab.

Click **Finish** to process the Counselor Bulk Assignment assigning randomly. The **Results** tab will show you the students that were assigned a Counselor.

Task #7: Manually Bulk Assigning Counselors

Navigation: StudentInformation – Management – Ad-Hoc Updates – Counselor Bulk Assignment – Assignment Method tab

To bulk assign counselors to students manually, chose the **Manual Assignment Method**.

Click **Next** to go to the **Students** tab and select students **by Search Criteria, Student IDs, or Ad-Hoc Membership.**

Click **Next** to go to the **Options** tab and choose a Counselor for the selected students.

Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

| Assignment Method | Students | Options | Confirmation | Results |

Counselor: WEST, DALE ▼

Cancel | < Back | Next >

Click **Next** to go to the **Confirmation** tab. Select the students that you wish to assign the Counselor to.

Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

| Assignment Method | Students | Options | Confirmation | Results |

☑ Students selected by default

		Student Name	Student Number	Grade	Status	Counselor
1	☑	ABBOTT, AMY	02262429	12	A	WEST, DALE

Cancel | < Back | Finish

Click **Finis**h to process the Counselor Bulk Assignment assigning manually. The **Results** tab will show you the students that were assigned a Counselor.

Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

| Assignment Method | Students | Options | Confirmation | Results |

Student	Student Number	Grade	Status	Counselor
ABBOTT, AMY	02262429	12	A	WEST, DALE

Start Over

Task #8: Assign Counselors Manually

Navigation: StudentInformation – SIS – Student – Edit Profile – Additional tab

If you do not want to use Counselor Bulk Assignment, or if you need to adjust only a few students individually, you can select a Counselor for a single student on the Additional tab of that student's profile. If you need to select a Counselor that has no grade levels set, or has a different grade level set, uncheck the **Show grade appropriate counselors only** checkbox to refresh the list.

Task #9: View Counselor Assignments

Navigation: StudentInformation – SIS – School – Counselors

To view Counselor Assignments, on the **Student Counselor Assignments** screen, select a **Counselor** from the drop-down menu. The screen will display all students assigned to this Counselor. Click on a student's name to view the student's profile.

Student Counselor Assignment

From this screen, you can view students assigned to a specific counselor.

Filter By Counselor: WEST, DALE ▾

Student ID	Student Name ▲	Student Status	Grade	Gender	Homeroom	Phone Number	Program	Age
02262038	ATKINSON, DENNIS	JVS FULL T	12	M		4195552144	504 PLAN	18
02271330	BRUCE, JOANN	ACTIVE RES	11	F		4195557126		17
02271675	BUCK, PHYLLIS	ACTIVE RES	11	F		4195559649		16
02261877	BUCKNER, SONIA	ACTIVE RES	12	F		4195552055		18

Assigning Lockers to Students Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
05/03/21	Entire document	Review and Update
4/23/20	Entire document	Review and update

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Task #1: Create Rooms/Locations

Create Room/Locations to be referenced when creating new lockers. An example of using this information for assigning lockers could be to assign the special needs students near the classroom where they are most frequently located.

Room/Location Maintenance

From this screen, you can display, add, change and delete data pertaining to locations.

Add Location

		Code	Name ▲	Description	Location Type	Capacity	Schedulable	Homeroom	Active
🗑	✏	C110	Art	Art, Painting, Ceramics	Art Room	20	☑	☑	🟢
🗑	✏	C128	AVID I & II	AVID	Regular Classroom	25	☑	☑	🟢
🗑	✏	BUS	Bus	Bus-Transportation	Bus	50	☐	☐	🟢
🗑	✏	C122	Business	Business Law, Marketing, Accounting, Media Communications	Regular Classroom	25	☑	☑	🟢
🗑	✏	CAFE	Cafeteria		Cafeteria	200	☑	☑	🟢
🗑	✏	Clin	Clinic	Clinic	Clinic	50	☐	☐	🟢
🗑	✏	C109	English	English, Spanish IV, AP Spanish	Regular Classroom	25	☑	☑	🟢

Task #2: Create Locker Size Codes

Create/Edit Locker Size codes to be used when creating new lockers.

Locker Size Maintenance

From this screen, you can display, add, change and delete Locker Size codes.

Add Locker Size Code

		Code	Name ▲	Active
🗑	✏	LG	Large Locker	🟢
🗑	✏	MD	Medium Locker	🟢
🗑	✏	SM	Small Locker	🟢

☑ Show Active Only

Task #3: Create Lockers

Create/Edit lockers and their characteristics. Lockers are school-year specific, and may have different combination series, locations, sizes, capacities, and grades assigned in each school year without affecting other school years.

Locker Maintenance

From this screen, you can display, add, change and delete data pertaining to lockers.
Clicking a locker number shows the students assigned to the locker.

Add Locker Filter: Active ▾ ✔ Academic Only

		Locker Number ▲	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
🗑	✏	001	Active	500E5697, E-2	1	0		2		09
🗑	✏	002	Active	500E5698, B-9	1	0		1		09
🗑	✏	003	Active	500E5699, E-5	1	1		2		09
🗑	✏	004	Active	500E5700, A-1	1	0		5		09
🗑	✏	005	Active	500E5701, C-9	1	1		5		09

Click the **edit pencil** icon to change an existing locker.

Locker Maintenance

From this screen, you can display, add, change and delete data pertaining to lockers.
Clicking a locker number shows the students assigned to the locker.

Locker Number:* [001]
Academic Locker: ✔
Locker Status:* [Active ▾]
Description: [500E5697, E-2]
Capacity:* [1 ▾]
Size: [▾]
Current Series: [2 - 23-09-45 ▾]
Reference Location: [▾]
Grade: [09 ▾]
Is Active: ✔

Series: Combination:
[6 ▾] [   ] Add Combination

	Series	Combination
🗑	1	31-17-03
🗑	2	23-09-45
🗑	3	16-02-38
🗑	4	11-47-33
🗑	5	05-41-27

Save   Save and Next   Cancel

Click the **Add Locker** button to add a new locker.

To assign a Locker Combination to a locker, you must select an existing Locker Combination Series from the Current Series drop-down. If there are none in the drop-down, or you want to add another Locker Combination, then you will need to select a Combination Series, enter the Combination and then click **Add Combination**. Once you have done this, you can select that Combination Series from the Current Series drop-down.

NOTE: The Locker Number field is an alpha-numeric field. The Locker Number column on the Locker Maintenance page is sorted numerically, however, Locker Location Assignment is done according to alpha characters.
Recommendation: Use leading zeros on locker numbers.

Task #4: Assign Locker Locations

Assign a range of lockers to a specific location within a school. This sets the lockers' Reference Location.

Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

ℹ In order to view the current lockers by location or assign lockers to a location, you must first select a location from the dropdown. In addition, you must specify whether you are working with academic lockers.

Filter By Location: -- Select a Location -- ▼ ✔ Academic Lockers

Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

Filter By Location: 203 - Special Education ▼ ✔ Academic Lockers

	Starting Locker ▲	Ending Locker	Available Lockers	Capacity
🗑	100	120	21	21

Physical Capacity	Total Capacity
21	21

Starting Locker:* [   ]

Ending Locker: [   ] Add Range

Task #5: Assign Locker Grade Levels

Assign a range of lockers to a specific grade level within a school.

Locker Grade Level Assignment

From this screen, you can assign grade levels to lockers within the school

ⓘ In order to view the current lockers by grade level or assign lockers to a grade level, you must first select a grade level from the dropdown. In addition, you must specify whether you are working with academic lockers.

Filter By Grade Level: -- Select a Grade Level -- ▼   ✔ Academic Lockers

Locker Grade Level Assignment

From this screen, you can assign grade levels to lockers within the school

Filter By Grade Level: 10 ▼   ✔ Academic Lockers

	Starting Locker ▲	Ending Locker	Available Lockers	Capacity
🗑	140	200	61	61

Physical Capacity	Total Capacity
61	61

Starting Locker:* [   ]

Ending Locker: [   ]   **Add Range**

During Locker Location Assignment and Locker Grade Level Assignment, if you do not specify an Ending Locker, the location you specify will be assigned all lockers from the specified Starting Locker to the last locker listed.

Locker Location Assignment is done according to alpha characters.
Recommendation: Use leading zeros on locker numbers.

Task #6: Bulk Locker Assignment

Student lockers can be assigned to a group of students selected by one of three different methods: Select Students By **Search Criteria**, **Student IDs**, or **Ad-Hoc Membership**. Unless otherwise noted, see the Student Lockers Guide for details.

NOTE: All students must have a locker designated as their Primary Locker in order for the locker number to print on reports or schedules.

Students Tab - Search Criteria
When searching for students by Search Criteria, select Student Status and Grade Level for all students being assigned lockers. Other options on the Search Criteria screen include searching by Last Name or First Name (with wildcards if you select the checkbox next to those fields), Homeroom Assignment, Gender, Program, or Team. You can also combine those search criteria as needed to select specific a group of students.
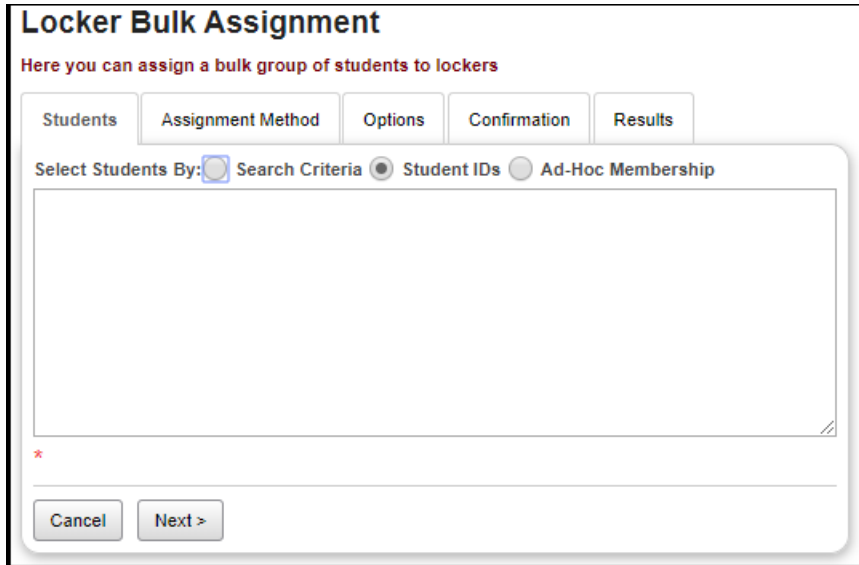
Students Tab - Student IDs
When searching for students by Student ID, enter all Student IDs to be included in the bulk assignment. You must use commas between ID numbers when listing more than one Student ID number.
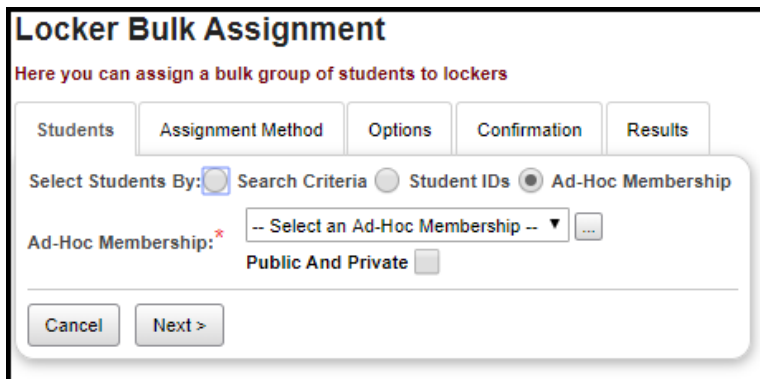
Students Tab - Search by Ad-Hoc Membership
When searching for students by Ad-Hoc Membership, you must select a single Ad-Hoc Membership group from the dropdown box. You can select an Ad-Hoc Membership from the pull-down menu and select **Next**, or you can select the **ellipse** button next to the Ad-Hoc Membership name to be taken to the Ad-Hoc Membership screen, where you can see and edit the individual students in that Ad-Hoc Membership. (This screen is located at StudentInformation – My Account – Ad-Hoc Memberships, and more details can be found in the Getting Started Guide.)
If you went to the Ad-Hoc Memberships screen, once you locate and confirm the Ad-Hoc Membership to use, click on the **green arrow** icon to select that membership and return to the Locker Bulk Assignment screen.
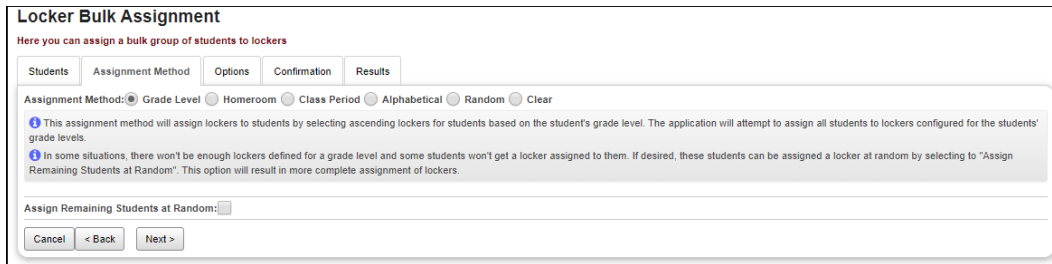
Once you have selected your students through one of these methods, select **Next** to proceed to the **Assignment Method** tab.

Assignment Method Tab
Once you have your selected group of students, you can assign lockers to them by one of five different methods: **Grade Level**, **Homeroom**, **Class Period**, **Alphabetical** order, and **Random** assignment. You can also **Clear** some or all locker assignments (clearing selections will be covered below).

Grade Level Assignment option:
To assign lockers by grade level, just select **Grade Level** and select **Next** to proceed to the **Options** tab.

Homeroom Assignment option:
To assign lockers by individual homerooms, select **Homeroom** and then select the **Homeroom Term** for which lockers are being assigned. Students will be assigned lockers from those lockers assigned to their homeroom location. Select **Next** to proceed to the **Options** tab.

Class Period Assignment option:
To assign lockers by a particular class period, select **Class Period**, use the calendar to choose a **Calendar Date**, and from the **Period of the Day** dropdown, select a class period on that date. Students will be assigned lockers from those lockers assigned to their classroom location at that period. Select **Next** to proceed to the **Options** tab.

Alphabetical Assignment option:
To assign lockers alphabetically, select **Alphabetical**. This option assigns students to lockers in alphabetical order by student last name, in ascending order of lockers, without regard for grade or location. Select **Next** to proceed to the **Options** tab.

Random Assignment option:
To assign lockers randomly, select **Random**. This option randomly assigns students to lockers without regard for grade or location. Select **Next** to proceed to the **Options** tab.

Options Tab
There are four options. If you retain locker assignments, or if you some students are keeping previous locker assignments, select **Students without a primary locker assignment** or **Students without any locker assignments** from the **Students to Include** section. You can also select types of **Lockers to Include**, to **Create Assignments** as primary or secondary, and how you wish **Existing Locker Assignments** to be treated. When all options are set as desired, select **Next** to proceed to the Confirmation tab.

Locker Bulk Assignment
Here you can assign a bulk group of students to lockers

Students	Assignment Method	Options	Confirmation	Results

Students to Include:
- ◉ Students without a primary locker assignment
- ○ Students without any locker assignments
- ○ Students with number of assignments fewer than: 2
- ○ All Students (no limit on number of locker assignments)

Lockers to Include:
- ◉ Academic lockers only
- ○ Non-Academic lockers only
- ○ Both academic and non-academic lockers

Create Assignments as:
- ◉ Primary locker assignments
- ○ Secondary locker assignments

Existing Locker Assignments:
- ◉ Remove primary assignments only
- ○ Remove all assignments
- ○ Keep assignments (update as secondary assignments if new assignments are primary)

Cancel	< Back	Next >

Confirmation Tab
The screen will list the students by the method you selected on the Assignment Method tab. The accuracy of the locker assignment must be checked before the actual process is finished. If the number of students listed by grade level or location is equal to the number of intended locker assignments, click **Finish** to proceed to the **Results** tab. If the numbers are not reasonable, click **Back** to return to the **Options** tab or the **Assignment Method** tab and edit your selections. If your selections are correct and an error still exists, then the parameters and locker location assignments must be verified to see where the error lies. Selecting **Cancel** on the **Confirmation** screen completely exits Locker Bulk Assignment.

If you selected **Grade Level Assignment**, you can click on a **blue Grade Level link** to go to the **Locker Grade Level Assignment** screen for that grade level, completely exiting Locker Bulk Assignment.

Locker Bulk Assignment
Here you can assign a bulk group of students to lockers

Students	Assignment Method	Options	Confirmation	Results

Lockers Defined by Grade Level	Physical Lockers	Total Capacity	Existing Assignments	Remaining Capacity	Matching Students	Insufficiency
09 - 09	568	568	386	182	0	
10 - 10	61	61	53	8	0	
12 - 12	1	1	0	1	1	
No Grade Level	2	2	1	1		
All Students/Lockers	632	632	440	192	1	

Cancel	< Back	Finish

If you selected **Homeroom** or **Class Period Assignment,** you can click on a **blue link** to go to the **Locker Location Assignment** screen for that assignment method. The **Include statistics for locations with insufficient capacity only** checkbox will hide all homerooms or classrooms that had enough lockers for the students with that location assigned.

Locker Bulk Assignment
Here you can assign a bulk group of students to lockers

Students	Assignment Method	Options	Confirmation	Results

☑ Include statistics for locations with insufficient capacity only

Lockers Defined by Location	Physical Lockers	Total Capacity	Existing Assignments	Remaining Capacity	Matching Students	Insufficiency
C206 - C206	0	0	0	0	1	1
All Students/Lockers	632	632	440	192	1	

Cancel	< Back	Finish

If you selected **Random** or **Alphabetical Assignment**, the **Confirmation** tab will display simple text statistics for lockers assigned and insufficient.

Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

Physical Lockers: 632
Total Capacity: 632
Existing Assignments: 440
Remaining Capacity: 192
Students to be Assigned: 1
Insufficiency:

[Cancel] [< Back] [Finish]

Results Tab

The **Results** tab displays the students in your selected group of students, the lockers assigned to them, and lists the Action Taken with regards to that student and that locker. When clearing locker assignments, this will display a message informing you that those assignments have been removed.

The **Results** tab also contains a **Start Over** button. You can use this to assign lockers to a different group of students, or to clear some or all lockers and then reassign lockers.

NOTE: The Start Over button does not itself clear any locker assignments. To do this, you must select one of the **Remove** options under the **Existing Locker Assignments** area of the **Options** tab or proceed to the **Clearing Locker Assignments** section below.

Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

Student	Locker	Action Taken
ABBOTT, AMY	334	Added assignment as primary locker

[Start Over]

Task #7: Clearing Locker Assignments

Navigation: StudentInformation – Management – Ad-Hoc Updates – Locker Bulk Assignment

You can clear assigned lockers by selecting a group of students, then selecting **Clear** on the **Assignment Method** tab.

Students Tab:
Select a group of students and click **Next**.

Assignment Method Tab:
Select **Clear** - This option clears current locker assignments.

Options Tab:
Select types of **Lockers to Include** in the assignment removal, and how you wish to treat **Existing Locker Assignments**. Click **Next**.

Confirmation Tab:
The screen will display simple text statistics for lockers cleared. If correct, click **Finish**. If incorrect, click **Back** to return to the **Options** tab or the **Assignment Method** tab and edit your selections.

Results Tab:
The screen displays the students in your selected group of students, the lockers assigned to them, and lists the Action Taken with regards to that student and that locker. When clearing locker assignments, this will display a message informing you that those assignments have been removed.

Task #8: Single Locker Assignment during Registration

Navigation: StudentInformation – SIS – Registration Wizard

When a new student enrolls midyear, an individual locker must be assigned to that student. The student registration screen has a button entitled Assign Primary Locker, which activates the Locker Selection Wizard. The wizard shows a list of available lockers. By clicking on a locker number, that locker is assigned to the student being registered. You can also re-filter the lockers shown by Grade Level and by Location assigned.

NOTE: All students must have a locker designated as their Primary Locker in order for the locker number to print on reports or schedules.

Task #9: Single Locker Assignment on Edit Profile

Navigation: StudentInformation – SIS – Student – Edit Profile – Additional Tab

You can also run the Locker Selection Wizard from the Assign Primary Locker button on the **Edit Student Profile** – **Additional tab**.

NOTE: Clicking on the **Locker Assignments** title on the Edit Student Profile – Additional tab will take you to the Student Locker Assignment page (next task).

Edit Student Profile

From this screen, you can display and change information regarding a students profile.

| General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | FN-Graduate | Transportation |

Save   **Cancel**

Last Modified: 04/20/2020 2:32 PM by User: amy

Primary Building:*   Galion High School ▼

Special Ed: [   ]   Country of Origin: [▼]

Citizenship: [▼]

Building Progression Track: Galion - Galion ▼   Graduation Year   2021

New School: Galion High School ▼

Pri. Graduation Rule: [▼]   Alt. Graduation Rule: [▼]

Counselor: -- Select Counselor -- ▼   Scheduling Priority: 1 ▼

☑ Show grade appropriate counselors only   Locker Assignments: Assign Primary Locker

Team: [▼]   Homeroom: View / Assign Homeroom

| | 1 | 2 | 3 | 4 | 5 |

Include in Honor Roll: ☑   Flags: [ ][ ][ ][ ][ ]

Include in Ranking: ☑
Include in GPA: ☑
Requires Paper Copy of Report Card: ☐

Task #10: Single Locker Assignment on Locker Assignment screen

Navigation: StudentInformation – SIS – Student – Locker Assignment

Use the **Student Locker Assignment** screen to add, edit or delete locker assignments for a specific student. You can also select **View Free Lockers** to go to the **Free Lockers** screen. The gold star icon shows the primary locker. A student must have a primary locker for the locker to be shown on the student's Schedule Card. A student should only have one primary locker, since a student with multiple primary lockers may have transcripts and report cards duplicated.

Task #11: View Free Lockers

Navigation: StudentInformation – SIS – School – Free Lockers

Use the **View Free Lockers** screen to list lockers not assigned to students and to assign a specific locker to the selected student. A student must be selected to view Free Lockers.

Task #12: View Locker Resident

Student locker assignment can be accessed by going to the **Locker Maintenance** screen and clicking on individual locker numbers. A screen showing the locker resident will be visible. Clicking on the student's name will take you to that student's View Profile screen and make that student your actively selected student.
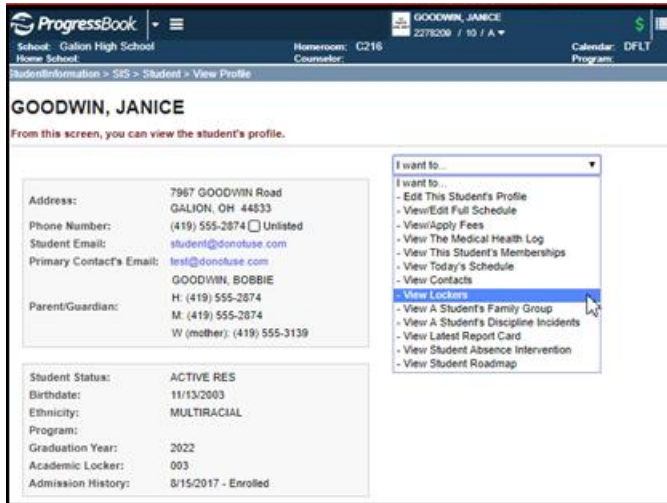
Locker Maintenance

From this screen, you can display, add, change and delete data pertaining to lockers.
Clicking a locker number shows the students assigned to the locker.

		Locker Number ▲	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
🗑	✏	001	Active	500E5697, E-2	1	0		2		09
🗑	✏	002	Active	500E5698, B-9	1	0		1		09
🗑	✏	003	Active	500E5699, E-5	1	1		2		09
🗑	✏	004	Active	500E5700, A-1	1	0		5		09

Add Locker   Filter: Active   ☑ Academic Only

Locker Resident

This screen displays students assigned to a specific locker.

Viewing students assigned to locker 633

Student
DAY, KEVIN

Back to Locker

Task #13: View Locker Assignment from View Profile

Navigation: StudentInformation – SIS – Student – View Profile – I want to…

From the student View Profile screen, you can also select **View Lockers** from the **I want to…** dropdown to see summary information about all lockers assigned to that student. The gold star notes which locker is assigned as that student's primary locker.

Task #14: Run Student Locker Allocation Report (LOCK)

Navigation: StudentInformation – SIS – School – Student Reports – Student Locker Allocation (LOCK)

Run the **Student Locker Allocation (LOCK)** report to view locker information and student allocations. The list will print both assigned and unassigned lockers.

Assigning Student Medical Info Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
4/27/20	Entire document	Review and update
1/22/20	Entire document	Review and update
2/11/19	Entire document	Update screenshots

Table of Contents

Before Assigning Medical Info to Students: Verify that all necessary codes and parameters are defined properly before entering student medical information. If you are confident that these steps have been properly completed previously, then you may continue to the section "Assigning Medical Info to Students." *Unless otherwise noted, see StudentInformation Student Medical Guide for details.*

☐ **Define Common Medications –** Verify that all necessary Common Medications have been defined.

Navigation: StudentInformation – Management – School Administration – Medical Office Administration – Common Medications

Common Medications Maintenance

From this screen, you can display, add, change and delete common medications.

Add Common Medications

		Code	Name ▲	Active
🗑	✏	INSU	Insulin	🟢
🗑	✏	RIT	Ritalin	🟢
🗑	✏	TYLE	Tylenol	🟢
✔ Show Active Only				

☐ **Define Common Immunizations –** Verify that all necessary Common

Immunizations have been defined.

Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

Add Immunization Code

		Code	Name ▲	Active
🔒	🔒	CPOX	CPOX	🟢
🔒	🔒	DPT	DPT	🟢
🔒	🔒	HEP	HEP	🟢
🔒	🔒	HIB	HIB	🟢
🔒	🔒	MEAS	MEAS	🟢
🔒	🔒	MMR	MMR	🟢
🔒	🔒	MUMP	MUMP	🟢
🔒	🔒	OPV	OPV	🟢
🔒	🔒	RUB	RUB	🟢
🔒	🔒	TB	TB	🟢

☑ Show Active Only

☐ **Define Care Type Codes –** Verify that all necessary Care Type Codes have been defined. These will appear as options on the Student Medical Health Log.

Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

Add Care Type Code

		Code	Name ▲	Description	Active
🗑	✏	Antb	Antibiotic Ointment	Antibiotic Ointment	🟢
🗑	✏	Basc	Basic Care	Basic Care	🟢
🗑	✏	Eye	Eye Observation	Eye Observation	🟢
🗑	✏	Fem	FeminineCare	FeminineCare	🟢
🗑	✏	Hlth	Health Ed Counsel	Health Ed Counsel	🟢
🗑	✏	Lice	Lice Care	Lice Care	🟢
🗑	✏	Med	Medication Required	Medication Required	🟢
🗑	✏	Mth	Mouth Care	Mouth Care	🟢
🗑	✏	Nbld	Nose Bleed Care	Nose Bleed Care	🟢
🗑	✏	Rchk	Recheck	Recheck	🟢
🗑	✏	Rest	Rest Or Observation	Rest Or Observation	🟢
🗑	✏	RICE	RICE Care	RICE Care	🟢
🗑	✏	Slng	Sling Splint	Sling Splint	🟢
🗑	✏	Stng	Sting Wipe	Sting Wipe	🟢

☑ Show Active Only

☐ **Define Disposition Codes –** Verify that all necessary Disposition Codes have been defined. These will appear as options on the Student Medical Health Log.

Navigation: StudentInformation – Management – School Administration – Medical Office Administration – Disposition Codes

Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

[Add Disposition Code]

		Code	Name ▲	Description	Active
🗑	✏	CLAS	Student returns to class	Student returns to class	🟢
🗑	✏	HOME	Student sent home	Student sent home.	🟢
🗑	✏	ER	Student taken to the ER	Student taken to the Emergency Room	🟢

☑ Show Active Only

☐ **Define Health Log Reason Codes –** Verify that all necessary Health Log Reason Codes have been defined. These will appear as options on the Student Medical Health Log.

Navigation: StudentInformation – Management – School Administration – Medical Office Administration – Health Log Reason Codes

Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

[Add Reason Code]

		Code	Name ▲	Description	Active
🗑	✏	FEVR	Fever	Fever	🟢
🗑	✏	HEAD	Headache	Headache	🟢
🗑	✏	INJ	Injury	Injury	🟢
🗑	✏	STOM	Stomach Ache	Stomach Ache	🟢

☑ Show Active Only

☐ **Define Student Medical Defaults –** Verify that all necessary Medical Defaults have been defined. These will appear on the following health screenings: Growth Screening, Health Log, Hearing Screening, Scoliosis Screening, and Vision Screening.

Navigation: StudentInformation – SIS – Medical – Student Medical Defaults

Student Medical Defaults

Growth Screening Defaults

Set Default Blood Pressure [   ]

Health Log Defaults

Set Default Location [▼]

Set Default Care By [▼]

Hearing Screening Defaults

Set Left Ear Default [Pass   ▼]

Set Right Ear Default [Pass   ▼]

Scoliosis Screening Defaults

Set Default Result Code [Pass   ▼]

Vision Screening Defaults

Set Default Right Eyesight [20/20]

Set Default Left Eyesight [20/20]

Set Default Muscle Balance Near [Not Applicable ▼]

Set Default Muscle Balance Far [Not Applicable ▼]

[Save] [Cancel]

Assigning Medical Info to Students: Follow these steps to add medical information to a student's record as necessary in StudentInformation.

NOTE: The Student Medical module is an optional part of StudentInformation. Therefore, users need only complete steps relevant to features they wish to utilize. *Unless otherwise noted, see StudentInformation Student Medical Guide for details.*

☐ **Add Medical Alert –** If a student has a medical condition that requires special attention, you may wish to add a Medical Alert to make staff aware of the student's condition. The student must be selected to add specific information. The **Medical Alert** icon (blue square with red cross) will be displayed in the student's context area. The **Life Threatening Medical Alert** icon (blue square with red cross in a white background) will also display in the student's context area identifying the student has a life threatening condition.

Note: Private Notes can be added for a Medical Alert condition. Private Notes are not sent to GradeBook.

Note: Only Active Medical Alerts with current Starting Date and Ending Date are sent to GradeBook.

Navigation: StudentInformation – SIS – Student – Medical – Medical Alerts

Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Add Medical Alert

		Date	Alert Description	Private Notes	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
🗑	✏	Feb 11, 2019	Peanut Allergy		1	Jan 01, 2019		amy		🟢
🗑	✏	Feb 11, 2019	Bee Sting Allergy	Student needs immediate medical attention	1	Jan 01, 2019		amy	⚠	🟢

☑ Show Active Only

☐ **Add Medical Contacts –** Add or edit a Student Contact record and mark the Medical Contact checkbox.

(To Add or Edit a contact) Navigation: StudentInformation – SIS – Student – Contacts Summary

(View-only medical contacts; Edit contacts through the Student Contacts Summary screen above)   Navigation: StudentInformation – SIS – Student – Medical – Medical Contacts

☐ **Add Health Log Entries –** To track care given to a student, make entries into the student's Health Log.

Navigation: StudentInformation – SIS – Student – Medical – Health Log

☐ **Add Student Medication –** Add information about medications a student may require. Options come from the Common Medications page, or you can enter a medication name.

Navigation: StudentInformation – SIS – Student – Medical – Student Medication

Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

Add Medication

		Date Received ▼	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
🗑	✏	Feb 11, 2019		Antibotic	1 tablet at noon with lunch	Dr. Smith		Feb 20, 2019	🟢

☐ Show Active Only

☐ **Add Vision Screening –** Add results from a student's vision screening.

Navigation: StudentInformation – SIS – Student – Medical – Vision Screening

Vision Screening

From this screen, you can display, add, change and delete data pertaining to the vision screening of students.

Add Screening

		Exam Date ▼	Glasses / Contacts	Eyesight	Plus Lenses	Nearsighted / Farsighted	Muscle Balance	Color Blindness	Stereopsis	Referral Date	Comments
🗑	✏	Feb 01, 2019	N	R - 20/20 L - 20/20	N	Near - P Far - P	Near - N Far - N	N	N		

☐ **Add Scoliosis Screening –** Add results from a student's scoliosis screening.

Navigation: StudentInformation – SIS – Student – Medical – Scoliosis Screening

Scoliosis Screening

From this screen, you can display, add, change and delete data pertaining to the scoliosis screening of students.

[Add Screening]

		Exam Date ▼	Result Code	Comments
🗑	✏	Feb 01, 2019	P	

☐ **Add Dental Screening –** Add results from a student's dental screening.

Navigation: StudentInformation – SIS – Student – Medical – Dental Screening

Dental Screening

From this screen, you can display, add, change and delete data pertaining to student dental exam records.

[Add Screening]

		Exam Date ▼	Private Exam	Mouthwash	Referral Date	Special Services Rendered	Findings
🗑	✏	Feb 01, 2019	☐	☐		x-ray	no cavities

☐ **Add Growth Screening –** Add results from a student's growth screening.

Growth Screening

From this screen, you can display, add, change and delete data pertaining to the growth of students.

[Add Screening]

		Height	Weight	BMI	Blood Pressure	Exam Date ▼	Comments
🗑	✎	62.0	110	20.1	120/80	Feb 01, 2019	

Note: The BMI value is an auto-calculated field based on the values entered in the Height and Weight fields.

☐ **Add Hearing Screening –** Add results from a student's hearing screening.

Hearing Screening

From this screen, you can display, add, change and delete data pertaining to the hearing of students.

[Add Screening]

		Exam Date ▼	Left Ear	Right Ear	Comments
🗑	✎	Feb 01, 2019	P	P	

☐ **Add Physical Screening –** Add results from a student's physical screening.

Physical Screening

From this screen, you can display, add, change and delete data pertaining to student physical exam records.

Add Screening

		Exam Date ▼	Referral Date	Comments	Findings	Pass Exam
🗑	✏	Feb 01, 2019				☑

☐ **Add Immunization –** Add student's immunization information.

Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

Add Immunization

		Date	Name	Series	Comments	Waiver
🗑	✏	Feb 02, 2015	CPOX			☐
🗑	✏	Sep 01, 2013	DPT	1		☐
🗑	✏	Nov 01, 2013	DPT	2		☐
🗑	✏	Sep 01, 2013	MMR	1		☐
🗑	✏	Feb 02, 2015	MMR	2		☐

Download Student Medical History– Export Student Medical History data in .xls, .csv, or .txt format for external processing. *See StudentInformation EZ Query Guide for details.*

Navigation: StudentInformation – EZ Query – Reports – Download Student Medical History

Download Student Medical History

Select District   Select School   **Filter Criteria**

ℹ Select from the filter criteria and choose download options. Click Finish to begin the download.

Student Status

| D - DELETED |
| I - INACTIVE |
| J - JVS FULL T |
| N - NON-RES |

A - ACTIVE RES

☁ **File Download Options**

CSV ▾   Download ▾

< Back   Finish

◢	A	B	C	D	E	F	G	H	I	J
1	SchoolCod	SSN	StudentNu	Status	StudentNa	Commentl	MedicalCc	AlertName	AlertComn	Grade
2	LUES		990123	A	Smith, John			Medical	Asthma	3
3	LUES		990333	A	Jones, Sarah			Medical	Dairy Aller	2
4	LUES		990222	A	White, Mary			Medical	Milk Allerg	1

View Student Medical Information – View student medical information in the following areas Medical Alerts, Student Medication, Vision Screening, Scoliosis Screening, Dental Screening, Growth Screening, Hearing Screening, Immunizations, and Physical Screening. *See StudentInformation EZ Query Guide for details.*

Navigation: StudentInformation – EZ Query – EZ Students – Medical

Medical

Medical Alerts

Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening
Feb 11, 2019	Peanut Allergy	1	Jan 01, 2019		amy	
Feb 11, 2019	Bee Sting Allergy	1	Jan 01, 2019		amy	⚠

Student Medication

Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date
Feb 11, 2019		Antibotic	1 tablet at noon with lunch	Dr. Smith		Feb 20, 2019

Vision Screening

Exam Date	Glasses / Contacts	Eyesight	Plus Lenses	Nearsighted / Farsighted	Muscle Balance	Color Blindness	Stereopsis	Referral Date	Comments
Feb 01, 2019	N	R - 20/20 L - 20/20	N	Near - P Far - P	Near - N Far - N	N	N		

Scoliosis Screening

Exam Date	Result Code	Comments
Feb 01, 2019	P	

Dental Screening

Exam Date	Private Exam	Mouthwash	Referral Date	Special Services Rendered	Findings
Feb 01, 2019	☐	☐		x-ray	no cavities

Growth Screening

Height	Weight	BMI	Blood Pressure	Exam Date	Comments
62.0	110	20.1	120/80	Feb 01, 2019	

Hearing Screening

Exam Date	Left Ear	Right Ear	Comments
Feb 01, 2019	P	P	

Immunizations

Date	Name	Comments	Waiver
Feb 02, 2015	CPOX		☐
Feb 02, 2015	MMR		☐
Nov 01, 2013	DPT		☐
Sep 01, 2013	DPT		☐
Sep 01, 2013	MMR		☐

Physical Screening

Exam Date	Referral Date	Special Services Rendered	Findings	Pass Exam
Feb 01, 2019				☑

☐ **Run Health Screening Report (SCRN) –** Run the Health Screening Report (SCRN) in order to produce a list of screening results for a specified time period.

Navigation: StudentInformation – SIS – Medical – Medical Reports – Health Screening Report (SCRN)

☐ **Run Daily Health Log Report (HLOG) –** Run the Daily Health Log Report (HLOG) to view health log entries for a specified time period.

Navigation: StudentInformation – SIS – Medical – Medical Reports – Daily Health Log Report (HLOG)

☐ **Run Student Immunization Report –** Run the Student Immunization Report in order to produce a list of immunizations for a specified time period.

Navigation: StudentInformation – SIS – Medical – Medical Reports – Student Immunization Report

☐ **Run Student Alerts Report –** The student alert report displays all student alerts for students meeting the specified criteria and having the selected alerts – custody, disability, fees, medical, miscellaneous, pending enrollment, and/or pending withdraw alerts. *See StudentInformation Student and Registration Guide for details.*

Navigation: StudentInformation – SIS – School – Student Reports – Student Alerts (STD_ALRT)

Attendance Letters Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
7/15/20	Entire document	Review and update

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Using Attendance Letters

Follow these steps to create and use student Attendance Letters. Please note that Attendance Letters are optional in StudentInformation and do not have to be configured and used. *See Attendance and Calendar End User Documentation for details.*

☐ **Review Absence Types –** Review Absence Types and add/edit as needed. Make sure that each absence type has the **Is Excused** checkbox marked or unmarked as appropriate.

Navigation: StudentInformation – Management – School Administration – Attendance Administration – Absence Types

Absence Type Maintenance

From this screen, you can display, add, change and delete data pertaining to absence types.

[Add Absence Type]

		Code	Name ▲	Description	Qualifier	Is Excused	Absence Group	Use for Daily Attendance	Use for Period Attendance	Report to EMIS	Active
🗑	✎	A	ABS/EX	ABS/EX	Absent	☑	None	☑	☐	☑	🟢
🗑	✎	Z	Excused Medical Full Day	Excused Medical Full Day	Absent	☑	Medical	☑	☐	☑	🟢
🗑	✎	ZZ	Excused Medical Partial	Excused Medical Partial	Partial	☑	Medical	☑	☐	☑	🟢
🗑	✎	ISD	In School Detention	In School Detention	Non-absence	☐	None	☑	☐	☐	🟢
🗑	✎	NA	NON-ABSENCE		Non-absence	☑	None	☑	☐	☐	🟢
🗑	✎	OSS	Out of School Suspension	Out of School Suspension	Absent	☐	Out of School Suspension	☑	☐	☑	🟢
🗑	✎	P	PARTIAL	PARTIAL ABSENCE	Partial	☑	None	☑	☑	☑	🟢
🗑	✎	T	TARDY	TARDY	Partial	☐	None	☑	☑	☑	🟢
🗑	✎	U	UNEXCUSED	UNEXCUSED	Absent	☐	None	☑	☑	☑	🟢

☑ Show Active Only

☐ **Create Absence Letter Rules –** Create Absence Letter Rules as necessary for the different types of Absence Letters needed. If you create multiple Rules that could all apply to one student, that student will get multiple letters when the separate rules are run. We recommend using one Rule with multiple criteria for each type of date range you want to run letters for (most schools will only need one Rule). For instance, if you want to reset absence counts for letters each semester, create a Semester Rule. If you want to reset absence counts for letters each quarter, create a Quarter Rule. (If you create multiple Rules, such as a Quarter Rule and a Year Rule, and run both, a student who meets criteria in both Rules will get a letter for each Rule.)

Navigation: StudentInformation – Management – School Administration – Attendance Administration – Absence Letter Rules

Absence Letter Rule Maintenance

From this screen, you can display, add, change and delete data pertaining to absence letter rules.

Add Absence Letter Rule

			Code	Name ▲	Description	Type	Is Active
🗑	✏	🔍	15	5, 10.15 day letter	5, 10, 15 day letter	Daily Cumulative	🟢

☑ Show Active Only

☐ **Create Absence Letter Rule Criteria** – Click the **magnifying glass** icon (View Details) for your Absence Letter Rule to add Rule Criteria. You will need one Rule Criterion for each type of letter you wish to run (5-day letter, 10-day letter, and so on).

> **Navigation: StudentInformation – Management – School Administration – Attendance Administration – Absence Letter Rules – Click on Magnifying Glass**

Absence Letter Rule Criterion: 5, 10, 15 day letter

From this screen, you can display, add, change and delete data pertaining to absence letter rule criteria.

Add Criteria

		Absence Types	Threshold	Interval	Period Type	Supp. Multi Letters	Precedence ▲	Is Active
🗑	✏	U - A	15			☑	1	🟢
🗑	✏	U - A	10			☑	2	🟢
🗑	✏	U - A	5			☑	3	🟢
🗑	✏	T	10			☑	4	🟢

☐ Show Active Only

Return to Letter Rules

When adding an Absence Letter Rule Criterion, make sure to enter the correct Precedence. Precedence is used to determine which criteria the student meets. For instance, if you had thresholds of 5, 10 and 15, you would set up the 5-day letter with a higher (less severe) Precedence number (3, for instance), and the 15-day letter with a lower (more severe) Precedence number (1, for instance), so that, if a student matched the criteria for both letters, the more severe letter (15-day, in this example) would print for that student. If you wish to use Precedence, make sure to check **Suppress Multiple Letters**.

Absence Letter Rule Criterion: 5, 10, 15 day letter

From this screen, you can display, add, change and delete data pertaining to absence letter rule criteria.

Absence Types:[*]

Available	Selected
ISD - In School Detention	U - UNEXCUSED
NA - NON-ABSENCE	A - ABS/EX
OSS - Out of School Suspens	
P - PARTIAL	
T - TARDY	

Absence types in available list: ☑ **Excused** ☑ **Unexcused**

Threshold:[*] `5`

Interval:[*]

Period Type:

Suppress Multiple Letters: ☑

Precedence:[*] `3`

Is Active: ☑

[Save] [Cancel]

☐ **Run Half/Full Day Absence Letter (R320) –** Run Half/Full Day Absence Letter (R320) if using Daily Attendance.

Navigation: StudentInformation – SIS – Attendance – Attendance Reports – Half/Full Day Absence Letter (R320)

Important Notes:

(1) Make sure that you do not use any non-standard characters in the Attendance Policy field (such as quote marks from Word or another word processor).

(2) Your Date Range must have a start date equal to the first day of the date range type (for instance, if you are running Semester Rules, your start date should be the first day of the semester).

(3) If a student's Violation Date (the date on which they broke the Rule Criterion Threshold triggering their letter) is within the Date Range for this report, and the student has already received a letter for that Criterion, the student will not receive further letters until another Criterion's Threshold is reached. For example, you have a rule with 5, 10 and 15 day thresholds. A student has already received a 5-day letter. If you run this Rule again, the student will not receive further 5-day letters. If the student then reaches 10 days, the next time you run this Rule, the student will receive a 10-day letter.

(4) A student will receive multiple letters if you run different rules; if you have **Precedence** and **Suppress Multiple Letters** set correctly for a single Rule, the student will not receive multiple letters.

☐ **Run Half/Full Day Absence Office Report (R320 Office) –** Run Half/Full

Day Absence Office Report (R320 Office) if using Daily Attendance.

Note: The Date Range specified will display any students that violated the attendance rules for that timeframe, not just since the last letter run.

Navigation: StudentInformation – SIS – Attendance – Attendance Reports – Half/Full Day Absence Office (R320Off)

☐ **Run Period Absence Letter (R317) –** Run Period Absence Letter (R317) if

using Period Attendance. See previous step (R320) for notes on running

Absence Letters.

Navigation: StudentInformation – SIS – Attendance – Attendance Reports – Period Absence Letters (R317)

☐ **Run Period Absence Office Report (R317Office) –** Run Period Absence

Office Report (R317 Office) if using Period Attendance.

Note: The Date Range specified will display any students that violated the attendance rules for that timeframe, not just since the last letter run.

Navigation: StudentInformation – SIS – Attendance – Attendance Reports – Period Absence Office (R317Off)

☐ **View School Attendance Letter History** – View Attendance Letter History for the school building for a specific date range. You can also select a single Rule Type and/or Letter Rule, and/or Grade Level with which to filter the list. If you want to disable some absence letters (so the next time you run absence letters, it will create new absence letters for those students), check the boxes next to those student letters to hide, and click **the Hide/Unhide Selected Records** button. Un-check **Show Active Only** and repeat this process if you wish to re-activate those letters.

Navigation: StudentInformation – SIS – Attendance – Letter History

Attendance Letter History

From this screen, you can view the history of attendance letter generation for a set of search criteria.

Start Date:*	07/14/2020	🗓	End Date:*	07/14/2020	🗓
Rule Type:		⌄	Letter Rule:		⌄
Grade Level:	⌄			**Search**	

	Student ▲	Student Number	Grade	Date Generated	Rule Code	Threshold Broken	Violation Date	Active
☐	ABBOTT, AMY	02262429	12	Jul 14, 2020	15	10	Dec 13, 2019	🟢
☐	ALFORD, DEAN	02278287	10	Jul 14, 2020	15	5	Sep 20, 2019	🟢

☑ **Show Active Only**

Hide/Unhide Selected Records

☐ **View Student Attendance Letter History –** View Student's Attendance Letter History for information about attendance letters sent for a selected student and for a specific date range. You can hide multiple attendance letter records on this screen as well. See the previous step for instructions.

Navigation: StudentInformation – SIS – Student – Attendance – Attendance Letter History

Student's Attendance Letter History

From this screen, you can view attendance letter history records for the current student.

Start Date:* 07/14/2020 📅   End Date:* 07/14/2020 📅   Search

	Date Generated	Rule Code	Rule Name	Rule Type	Threshold	Interval	Violation Date ▾	Active
☐	Jul 14, 2020	15	5, 10, 15 day letter	Daily Cumulative	5		Sep 20, 2019	🟢

☑ Show Active Only

Hide/Unhide Selected Records

Attendance Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
05/03/21	Entire document	Review & update
04/14/20	Entire document	Review & update

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Before Using Attendance

To begin taking attendance in StudentInformation the school/district must first have several code tables set up *See the Attendance and Calendar End User Documentation for details.*

Important: Verify that all necessary codes and parameters are defined properly before using the Attendance module. If you are confident that these steps have been properly completed previously, then you may continue to the second checklist, "Taking Attendance Each Day."

Task #1: Define Absence Types

Define how the absence is characterized – i.e. excused, tardy, unexcused, etc. Absence Types are school and school year specific. The Qualifier field indicates whether the Absence Type is considered Late/Tardy, Partial, Absent, or a Non-Absence. The Is Excused checkbox indicates that the Absence Type is considered an excused absence. The Absence Group will show None, Medical or Out of School Suspension, these are used for HB410 reporting purposes. Use for Daily Attendance and Use for Period Attendance indicate if the Absence Type is valid for those types of attendance reporting. The Report to EMIS checkbox is no longer used on absence types.

Absence Type Maintenance

From this screen, you can display, add, change and delete data pertaining to absence types.

Add Absence Type

		Code	Name ▲	Description	Qualifier	Is Excused	Absence Group	Use for Daily Attendance	Use for Period Attendance	Report to EMIS	Active
🗑	✏	A	EX ABSENT	EXCUSED ABSENCE	Absent	☑	None	☑	☐	☑	🟢
🗑	✏	Z	Excused Medical Full Day	Excused Medical Full Day	Absent	☑	Medical	☑	☐	☑	🟢
🗑	✏	ZZ	Excused Medical Partial	Excused Medical Partial	Partial	☑	Medical	☑	☐	☑	🟢
🗑	✏	OSS	OSS	OUT OF SCHOOL SUSPENSION	Absent	☐	Out of School Suspension	☑	☐	☑	🟢
🗑	✏	PE	PARTIAL EXCUSED	PARTIAL EXCUSED	Partial	☑	None	☑	☐	☑	🟢
🗑	✏	PU	PARTIAL UNEXC	PARTIAL UNEX	Partial	☐	None	☑	☐	☑	🟢
🗑	✏	U	UN ABSENT	UNEXCUSED ABSENCE	Absent	☐	None	☑	☐	☑	🟢

☑ Show Active Only

Task #2: Define Default Attendance Settings

Define the default settings for absences on the Attendance tab of the StudentInformation Options page.

StudentInformation Options

From this screen, you can display and change data pertaining to school year configuration functions.

| Scheduling | Marks | Fees | **Attendance** | Prog Track | INFOhio Export |

You can control how attendance collection appears to teachers here.

Absence Cut-Off Time: 11:00 AM   **Disable Late Option:** ☐

Method:* Daily Attendance ▾   **Frequency:*** Once per day ▾

Allow Teacher to Override: ☐

Select the Periods during which Attendance is collected.

Rotation Day	First Collection
M	Administrative Homeroom ▾ *
T	Administrative Homeroom ▾ *
W	Administrative Homeroom ▾ *
R	Administrative Homeroom ▾ *
F	Administrative Homeroom ▾ *

Default Settings:	Partial	Absence
Default Absence Type:*	TARDY EXCUSED ▾	EX ABSENT ▾

Save

Task #3: Define Absence Reasons

Define the reason for a specific absence – i.e. sick, doctor appointment, funeral, etc. Absence reasons are school and school year specific. Make sure to check "Use for daily attendance" or "Use for period attendance" for each Absence Reason, or that Reason will not be available for that form of Attendance.

Absence Reason Maintenance

From this screen, you can display, add, change and delete Absence Reason codes.

Add Absence Reason Code

		Code	Name ▲	Description	Use for daily attendance	Use for period attendance	Active
🗑	✏	4	DEATH REL	DEATH REL	☑	☐	🟢
🗑	✏	7	EMERGENCY	Emergency Circumstances approved by Superintendent	☑	☐	🟢
🗑	✏	8	HOME INSTRUCTION	Work and instruction is arranged for outside the school day	☑	☐	🟢
🗑	✏	2	ILL FAM	ILL FAM	☑	☐	🟢
🗑	✏	5	MED APPT	Medical or Dental Appointment	☑	☐	🟢
🗑	✏	1	PER ILL	PER ILL	☑	☐	🟢
🗑	✏	3	QUARANTINE	Quarantine in the home	☑	☐	🟢
🗑	✏	6	REL HOL	REL HOL	☑	☐	🟢
🗑	✏	9	SUSPENSION	Out of school suspension	☑	☐	🟢

☑ **Show Active Only**

Task #4: Define Absence Notes

 Define notes that can be added to each absence occurrence to provide further detail. Make sure to check "Use for daily attendance" or "Use for period attendance" for each Absence Note, or that Note will not be available for that form of Attendance.

Absence Note Maintenance

From this screen, you can display, add, change and delete Absence Note codes.

Add Absence Note Code

		Code	Name ▲	Description	Use for daily attendance	Use for period attendance	Active
🗑	✏	U	College	College Visit	☑	☐	🟢
🗑	✏	C	Court	Court	☑	☐	🟢
🗑	✏	H	Ex Half	Excused Half Day	☑	☐	🟢
🗑	✏	N	No Ca/Note	No Call or Note	☑	☐	🟢

Task #5: Define Lunch Type (optional)

Define Lunch Type codes to be used on Teacher Daily Attendance.
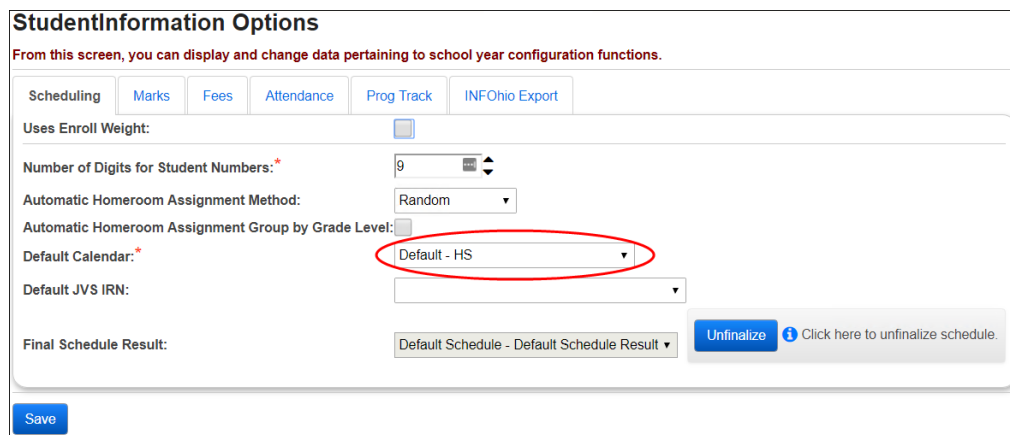
Lunch Type Maintenance

From this screen, you can display, add, change and delete Lunch Type codes.

Add Lunch Type Code

		Code	Name	Field Length	Sort Order ▲	Active
🗑	✏	Reg	Regular Lunch	2	1	🟢
🗑	✏	SB	Salad Bar	2	2	🟢
🗑	✏	ALA	Ala Carte	2	3	🟢

☑ **Show Active Only**

Task #6: Define Sub-Calendars

Define sub-calendars to use with Attendance. Refer to the *Calendar NON EMIS or Calendar with EMIS Exceptions Procedural Checklist* for details.

Task #7: Confirm Default Calendar

Make sure that default status has been assigned to the calendar that applies to the majority of students' attendance situation.

Task #8: Confirm Sub-Calendar Details

Sub-Calendars apply to students who have alternate attendance patterns. Confirm that these are correct with the Calendar Procedural Checklist.

Task #9: Edit Calendar Percentages

If a student attends more than one building within a district, you can view and modify their attendance percentage for each building on the Edit Calendar Percentages screen (see the ProgressBook StudentInformation Student and Registration Guide).

Task #10: Review Staff Member Associations

Staff members can be granted association rights to one or all staff members in a building in order to access the Attendance module through the Teacher Menu. This feature could be used by an aide or office staff during a teacher's absence. If needed, confirm that these are correct with the Security Procedural Checklist.

Taking Attendance Each Day

Follow these steps to create student attendance records. Unless otherwise noted, see the Attendance and Calendar End User Documentation for details.

Task #11: Enter Absences via Attendance Fast Entry

Used to quickly add a daily or period absence for a student or a group of students using default absence types, reason, and notes. If you are entering multiple absence events, you can use the "Retain Values" checkbox to keep your selections.

Select a set of students to work with either by search criteria (Grade level, Teacher, Membership Group, Membership, Course/Section, Homeroom, District of Residence IRN, Attending Building IRN, Home School IRN, or any combination) or by a specific list of student IDs (separated by commas), then clicking *Preview Students*.

When searching for students in this module check "*Include students with absences*" to include those students in your search.

If you want all absences entered to be the same absence type as specified in the Event Details on the top half of the screen, leave the "Vary Absence Types by Student" checkbox empty.

If you intend to enter different kinds of absences for each student, check the "Vary Absence Types by Student" box. The absence type entered in the Event Details will be the default selection for each student, and a pull-down menu will allow you to change absence type for each student.

After checking the students you wish to record an absence event for, and selecting the specific absence types, if you are varying absence types by student, click *Save* to record the absence event for those students.

Task #12: Delete Absences via Attendance Fast Delete

The Attendance Fast Delete screen can be used to quickly remove absences for a student or a group of students.

Select a set of students to work with either by search criteria (Grade level, Teacher, Membership Group, Membership, Course/Section, Homeroom, District of Residence IRN, Attending/Home IRN, or any combination) or be a specific list of student IDs (separated by commas), then clicking *Preview Students*.

Delete Event Check Boxes – If checked, will hard delete this Absence Event from the student records. Checking the box at the top of the column checks all boxes in the column for all Absence Events listed.

Once you have pressed the *Delete button*, you will be asked to confirm your decision. If you press OK you will see a confirmation screen indicating the successful deletion of absence events. ***NOTE:* You cannot undo this process once confirmed!**

Task #13: Enter Absences via Student's School Absences

Will display a summary of the student's absence events over the year, and show a range of dates with the ability to add, edit, or delete individual absence events. You can delete multiple events by checking the box and clicking "*Delete Selected Absences*". Clicking the blue link for Student Absence Intervention will take user to the student absence intervention screen if the user has the applicable role access.

Student's School Absences

From this screen, you can display, add, change and delete data pertaining to student absences.

Start Date:* 8/15/2018   **End Date:*** 5/23/2019   Go   Student Absence Intervention

Daily Attendance	Period Attendance

[Show Full Year Attendance Statistics]

Add Absence

		Date ▼	Calendar	Absence Level	Absence Type	Reason	Note	Time In	Time Out	Comment
☐	✏	Aug 24, 2018	9A - Grade 9, 10, 11, 23	Full Absence	E - Excused	P - PER ILL	H - HOSP			
☐	✏	Aug 23, 2018	9A - Grade 9, 10, 11, 23	Full Absence	E - Excused	P - PER ILL	H - HOSP			
☐	✏	Aug 22, 2018	9A - Grade 9, 10, 11, 23	Full Absence	E - Excused	P - PER ILL	H - HOSP			
☐	✏	Aug 20, 2018	9A - Grade 9, 10, 11, 23	Full Absence	U - UNEXC ABS					
☐	**Include Absences Outside of Admission Dates**									

Delete Selected Absences

Clicking the *Add Absence* button allows you to enter the details of an absence event. You can add a single absence or enter a date range to add multiple absences with the same Absence Type, Absence Level, Reason and Note.

OR

Task #14: Enter Absences via Student's External Absences

Add student absences for a previous school or JVS. In order to enter or edit external absences for a prior year, that prior year must be in context.

Student's External Absences

From this screen, you can display, add, change and delete data pertaining to student external absences.

Field	Value
School IRN:*	02_____ 🔍
Other School Name:*	_____ High School
Days Attended:*	162
Days Absent Excused:*	4
Days Absent Unexcused:*	5
Days Tardy:*	2
Hours Attended:*	972
Hours Absent Excused:*	24
Hours Absent Unexcused:*	30
Hours Out Of School Suspension:*	0
Comments:	

Save   Save and New   Cancel

Student's External Absences

From this screen, you can display, add, change and delete data pertaining to student external absences.

Add External Absence

	School Year	School ▲	Days Attended	Days Absent Excused	Days Absent Unexcused	Days Tardy	Hours Attended	Hours Absent Excused	Hours Absent Unexcused	Hours Out Of School Suspension
🗑 ✎	2018-2019	___ High School	162.00	4.00	5.00	2.00	972.00	24.00	30.00	0.00

Task #15: Enter Absences via Daily Attendance by Classroom (optional)

Allows the teacher to record daily absences and lunch counts for their classroom or homeroom. Teachers enter attendance once or twice per day and the information is recorded for teachers to view and added to the student's record. See *Teacher Menu End User Documentation* for details. Staff members who have an association for a teacher set may perform this step as necessary. See *Security End User Documentation* for details on Staff Member Association.

Task #16: Enter Absences via Period Attendance by Course Section (optional)

Allows the teacher to record period absences for their specific course section. Period attendance must be taken each period and the district must determine what constitutes a half-day, a full day and a partial day. See *Teacher Menu End User Documentation* for details. Staff members who have an association for a teacher set may perform this step as necessary. See *Security End User Documentation* for details on Staff Member Association.

Task #17: View Daily Absences

View a list of absences for a specific date or range of dates, as well as statistics for absences over the same date or date range. You can also search for a student and add an absence using the Search for Student field.

Task #18: Run Daily Attendance Completion List (optional)

Will display whether homeroom teachers have submitted their daily attendance in StudentInformation. (NOTE: The page will not display if attendance has been taken in GradeBook)

Task #19: Run Period Attendance Completion List (optional)

Will display whether homeroom teachers have submitted their period attendance in StudentInformation. (NOTE: The page will not display if attendance has been taken in GradeBook)

Period Attendance Completion List

From this screen, you can view period attendance collection completion.

Date:* 8/10/2018   Period:* 04 - 04

Teacher	Location	Course Section	Submitted
EDWARDS, RYAN	221 - CLASSROOM 221	8000 #1	No
FLETCHER, KENT	111 - CLASSROOM 111	3029 #1	No
JACKSON, PAUL	207 - CLASSROOM 207	6046 #2	No
MACK, JULIE	107 - CLASSROOM 107	4008 #2	No
NEWMAN, WADE	106 - CLASSROOM 106	4002 #1	No
RHODES, TERRENCE	223 - CLASSROOM 223	8689 #2	No
RODRIQUEZ, SERGIO	409 - CLASSROOM 409	7020 #1	No
AGUILAR, CHERYL	123 - CLASSROOM 123	1005 #1	Yes

Task #20: Run Daily Lunch Counts (optional)

Will display lunch counts for each homeroom teacher that has submitted their daily attendance.

Daily Lunch Counts

Date:* 8/22/2018   Go

Staff Name	Course	Regular Lunch	Salad Bar	Ala Carte	Pack Lunch
McCoy	206				
Vineyard,	HR CCP				
Harrison,	109	13	2	1	6
Smith,	123	11	5	4	2
Thomas,	204	16	1	0	4
TOTAL		40	8	5	12

Attendance Reports

Unless otherwise noted, see *Attendance and Calendars End User Documentation* for details.

Task #21: Run Student Absence Search Detail (R309-A)

This report will generate a list of selected students and show the details of their absences for the date range selected. Can be generated with or without absence comments.

Task #22: Run Student Absence Search Summary (R309-B)

This report will generate a list of selected students and show the summary of their absences for the date range selected.

Task #23: Run Homeroom Attendance Register Summary (R310-B)

This report shows student attendance summary grouped by homeroom and month

Task #24: Run Homeroom Attendance Register Detail (R310-A)

This report shows student attendance detail grouped by homeroom and month.

Task #25: Run Student Absence Statistics Report (R311)

This report will show student absence statistics by Type/Reason and by Type for a given date range

Task #26: Run ADM & ADA Report for ABSE Detail (R322-A)

This report is used to analyze student absence data (totals by grade) by pulling data stored in ABSE – Student Absence.

Task #27: Run Student ADM & ADA Report for Absence Summary (R322-B)

This report is used to analyze student absence data (totals by grade) by pulling data from the Student School Absences page.

Task #28: Run Homeroom Attendance Report (R331)

This report is used to generate a bi-weekly attendance report by homeroom based on students' absence records. The report now groups by Homeroom, Week, and lastly by Student Last Name.

Task #29: Run District-wide Membership Report (R500)
This report shows attendance information by membership (programs) and/or grade level

Task #30: Run Daily Office Report of Student Absences (R307)
This report is used to generate a list of students absent on a specified date grouped by Absence Type and Grade.

Task #31: Run Half/Full Day Absence Office Report (R320 Office)
This report will print half and full day absence letters for office use.

Note: The Date Range specified will display any students that violated the attendance rules for that timeframe, not just since the last letter run. *See Attendance Letters Procedural Checklist for more information*

Task #32: Run Period Absence Office Report (R317 Office)
This report is used to generate an office search report to identify students who have an attendance problem.

Note: The Date Range specified will display any students that violated the attendance rules for that timeframe, not just since the last letter run. *See Attendance Letters Procedural Checklist for more information*

Task #33: Run Cumulative Report of Student Period Absences (R316)
This report is used to generate a report listing the cumulative number of periods a student has been absent and/or late within a specified date range.

Task #34: Run Daily Report of Student Period Absences (R315)
This report is used to generate a list of all students absent on a specified date for at least one period.

Task #35: Run Perfect Attendance Report (PERF)
This report displays students with perfect attendance for a specified date range.

Task #36: View Student Attendance Information in EZQ

Display a specific student's attendance via charts and graphs. Also can View Absence History and View Absences for all Buildings for a specific. student.
See EZ Query End User Documentation for details.

Task #37: View Daily Absence List in EZQ

Display today's absences for any building in the district.

Task #38: View Absence Graph in EZQ

Display attendance rate graphed for the building across the entire school year. See *EZ Query End User Documentation* for details.

Task #39: View Weekday Attendance Percentage in EZQ

Displays year to date building attendance percentages graphed by each day of the week. See *EZ Query End User Documentation* for details.

Automatic Marks Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
05/03/21	Entire document	Review & Update
04/06/21	Entire document	Review & Update

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Automatic Marks will not calculate until the last day of the Reporting Term unless you have set the automatic marks up to calculate early. Setting up an early automatic mark calculation date is covered in Task #4 of this checklist. Example: If you are trying to calculate the Final for All Year courses using Automatic Marks, the Final will not calculate until the last day of school.

Automatic Marks do not automatically calculate when the last day of the term arrives. The Automatic Mark job needs to be kicked off and then the marks will calculate.

Note: If a mark flows into StudentInformation from GradeBook after automatic marks have been kicked off, the user will need to kick off the job again to update automatic marks.

To kick off the Automatic Marks job, edit and save an Automatic Mark Rule, this will kick off the job to calculate the marks.

If you change a student's marks used in the automatic mark calculation, the marks for only that one student will be recalculated. If you want to recalculate the marks for all students kick off the automatic mark job by editing an Automatic Mark Rule.

Task #1 - Configure Marks Maintenance Table

1. Change context to the applicable building and school year.
2. Navigate to : ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Marks Administration Menu*** *»* ***Marks***.
3. Any school using automatic marks should have the ***Average Point Threshold*** column filled out for each mark except those marked as Alternate Marks. The ***Average Point Threshold*** is the lowest value the student can receive to get the mark. For example: on the ***Marks Maintenance*** screenshot following this task, the ***Average Point Threshold*** for a mark of ***C*** is ***1.85***. This means when StudentInformation averages the grades together, the average must be at least 1.85 for the student to get a mark of C.
4. Also, each mark must have a different ***Point Value***. For example: if the school awards A, A-, and A+ each mark must have a different ***Point Value***. The marks can not each have a ***Point Value*** of 4.0. If a student received an A+ for 1st Qtr and an A- for 2nd Qtr, the student could get an A+ for the mark calculated by automatic marks, which logically does not make sense. An A+ and an A- do not average out to be an A+. This is why it is important that each mark have a ***unique Point Value***. F marks have a point value of zero. Marks of I, U, S for example typically have a point value of zero. In order for automatic marks to work properly, the I, U, and S marks should be marked as ***Alternate Marks***.
5. Marking them as ***Alternate Marks*** allows the school to keep the I, U, and S marks with a point value of zero and the marks will not interfere with automatic marks. StudentInformation can not calculate an automatic mark for alternate marks. For example: a student gets an I and an U. Both marks are Alternate Marks. StudentInformation will not be able to calculate the two marks together. The mark you are trying to calculate will need to be manually entered versus being calculated by automatic marks.
6. StudentInformation also cannot calculate an automatic mark for a regular mark and an alternate mark together. For example: a student received a B for 1st Qtr and an I for 2nd Qtr. Since the I is marked as an alternate mark, StudentInformation can not calculate an automatic mark for the two marks together. The mark will need to be hand entered.
7. If the school is a numeric school, the ***Min and Max Numeric Mark*** columns must be filled in. It is very important that there are no gaps in the ***Min and Max Numeric*** columns. If a numeric school has the Marks Maintenance page setup as follows, this is wrong. Notice the gaps in the ***Min and Max Numeric Mark*** values.

		Mark ▲	Mark Name	Description	EMIS Grade	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dq Mark	Active
🗑	✎	A	A	EXCELLENT	A	4.000000	3.990000	95.00	97.00	1.000000	☐	☑	☑	☐	🟢
🗑	✎	A-	A-	EXCELLENT	A	4.000000	3.500000	92.00	94.00	1.000000	☐	☑	☑	☐	🟢
🗑	✎	A+	A+	EXCELLENT	A	4.000000	4.000000	98.00	100.00	1.000000	☐	☑	☑	☐	🟢

8. If a student received a numeric grade of 94.00 for 1st qtr and 95.00 for 2nd qtr, their average would be 94.50. Since there are gaps on the marks scale and the Min value for an A is 95.00 and the Max value for an A- is

94.00, the student would not receive an average grade since 94.50 is missing from the scale.

9. Now, we are ready to setup the Automatic Mark rules.

Marks Maintenance

From this screen, you can display, add, change and delete data pertaining to marks for the current school year.

Add Mark

		Mark ▲	Mark Name	Description	EMIS Grade	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dq Mark	Active
🗑	✏	A	A	EXCELLENT	A	3.850000	3.850000	94.50	97.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	A-	A-	EXCELLENT	A	3.500000	3.500000	92.50	94.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	A+	A+	EXCELLENT	A	4.000000	4.000000	97.50	100.00	1.000000	☐	☑	☑	☐	🟢
🗑	✏	AU	AU	AUDIT		0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✏	B	B	GOOD	B	2.850000	2.850000	86.50	89.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	B-	B-	GOOD	B	2.500000	2.500000	84.50	86.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	B+	B+	GOOD	B	3.000000	3.000000	89.50	92.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	BLK	BLK	BLANK GRADE		0.000000				0.000000	☑	☐	☐	☐	🟢
🗑	✏	C	C	AVERAGE	C	1.850000	1.850000	78.50	81.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	C-	C-	AVERAGE	C	1.500000	1.500000	76.50	78.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	C+	C+	AVERAGE	C	2.000000	2.000000	81.50	84.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	D	D	POOR	D	0.850000	0.850000	70.50	73.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	D-	D-	POOR	D	0.500000	0.500000	68.50	70.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	D+	D+	POOR	D	1.000000	1.000000	73.50	76.49	1.000000	☐	☑	☑	☐	🟢
🗑	✏	EX	EX	Waived		0.000000				0.000000	☑	☐	☐	☐	🟢
🗑	✏	F	F	FAILING	F	0.000000	0.000000	0.00	68.49	1.000000	☐	☐	☑	☐	🟢
🗑	✏	I	I	INCOMPLETE	I	0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✏	N	N	NO GRADE		0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✏	P	P	PASS	P	0.000000				1.000000	☑	☑	☐	☐	🟢
🗑	✏	S	S	SATISFACTORY		0.000000				1.000000	☑	☑	☐	☐	🟢
🗑	✏	U	U	UNSATISFACTORY	U	0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✏	WD	WD	WITHDRAWN	W	0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✏	WF	WF	WITHDRAWN FAIL		0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✏	WP	WP	WITHDRAWN PASS		0.000000				1.000000	☑	☐	☐	☐	🟢

☑ Show Active Only

Task #2 - Setting up the Automatic Mark Rules

An Automatic Mark Rule should be setup for each mark the school wants to calculate. If a school has 1st semester and All Year courses, two separate Automatic Mark Rules will need to be setup. One for 1st Semester Average for 1st Semester only classes and one for 1st Semester Average for All Year courses.

Automatic Mark Rules can be setup for a variety of marks. If the school has quarter only classes, an automatic mark rule can be setup to move the quarter grade to the final slot. A separate Automatic Mark Rule would need setup for each quarter. For example: one rule to calculate 1st Qtr only classes, one rule for 2nd Qtr only classes, one rule 3rd Qtr only classes and one rule for 4th Qtr only classes.
.

1. Navigate to : ***StudentInformation*** *» **Management*** *» **School Administration*** *» **Marks Administration Menu*** *» **Automatic Mark Maintenance***.
2. Click **Add Automatic Mark**.
3. Enter a **Code** up to 4 digits.
4. In the example screenshot below, the code is ***S1F***.
5. Next, in the **Name** field, enter a descriptive name. State Support suggests using names such as: 1st Sem Only 1st Sem Avg or 1st 9 weeks Only Final.
6. If desired, you can give a more detailed name or enter notes in the **Description** field.
7. In the **Marking Pattern Rule** dropdown, choose the mark you are trying to calculate. In the example screenshot below, I have chosen 1SEM: FIN because I want StudentInformation to calculate the 1st Semester Final for the 1st Semester only classes.
8. Next, choose how you want to handle students missing grades used in the automatic mark calculation in the **Missing Marks Handling** dropdown. If you choose **Ignore Mark,** StudentInformation will not count the missing mark against the student and will base their grade on average of the other grades used in the calculation. If you choose **Ignore Student,** automatic marks will not calculate for any of the student's course section assignments that are missing a mark used in the calculation. If you choose **Use 0,** it is just like giving the student an F for any mark used in the automatic mark calculation and is missing.
9. Click **Save and Enter Details**.

Automatic Mark Maintenance

From this screen, you can display, add, change and delete data pertaining to automatic marks.

Code:* `S1F`

Name:* `1st Semester Only Final`

Description: `1st Semester Only Final`

Marking Pattern Rule:* `1SEM: FIN ▾`

Missing Marks Handling:* `Ignore Mark ▾`

[Save] [Save and Enter Details] [Save and New] [Cancel]

10. The page will refresh and now a new button named **Add Member** will appear.
11. Click **Add Member**.
12. In the **Marking Pattern Rule** dropdown, choose the mark that will be used in the calculation. In the example screenshot below, it was chosen to calculate 1st Sem Final for 1st Sem Only classes. The school in the example calculates the 1st Sem Final by averaging GP1 at 40%, GP2 at 40%, 1st Exam at 20%. Choose 1SEM: GP1. Be very careful **not** to choose ALYR: GP1, since the final for 1st semester only classes is being calculated, only 1SEM should be chosen for this entry.
13. Next, in the **Weight** field, enter **40** because the school wants GP1 to account for 40% of the student's grade.
14. Click **Save and New**.
15. Now, add another member for 2nd GP.
16. Choose 1SEM: GP2 in the **Marking Pattern Rule** dropdown.
17. In the **Weight** field, enter **40** because the school wants GP2 to account for 40% of the student's grade.
18. Click **Save and New**.
19. Next, choose **Marking Pattern Rule** equal to 1SEM: EX1.
20. In the **Weight** field, I entered **20** and clicked **Save**.
21. You will receive the following message: **The automatic mark member was saved successfully.**
22. The three members added are now displayed on the page. Do not be alarmed if the members are not appearing in the order you added them. If a wrong marking pattern rule was chosen, delete the member and add the correct one.
23. Click **Save** to kick off the automatic mark job and save your changes.
24. Note: Saving an automatic mark rule kicks off the **Automatic Mark Cache Rebuild (School Year)** job on your Management screen.

25. Wait for the job to finish and go the Student Marks page for a student to see if the marks calculated.
26. If the marks did not calculate, see the troubleshooting guide at the end of this checklist.

Automatic Mark Maintenance

From this screen, you can display, add, change and delete data pertaining to automatic marks.

Marking Pattern Rule:* 1SEM: GP1

1SEM: INT1
1SEM: GP1
1SEM: INT2
1SEM: GP2
1SEM: EX1
1SEM: FIN
2SEM: INT3
2SEM: GP3
2SEM: INT4
2SEM: GP4
2SEM: EX2
2SEM: FIN
ALYR: INT1
ALYR: GP1
ALYR: INT2
ALYR: GP2
ALYR: EX1
ALYR: INT3
ALYR: GP3

Weight:*

Save   Save And N

Task #3 - Spot checking students to make sure Automatic Marks are calculating correctly.

1. Navigate to **_StudentInformation_** **_»_** **_SIS_** **_»_** **_Student_** **_»_** **_Marks_** **_»_** **_Student Marks_**.
2. The 1st student is taking a 1st Semester only class – Intermediate Composition.
3. In Intermediate Composition, the student received the following marks:

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1	A+		
	GP2	A+		
	EX1	B+		

4. To figure out her final and make sure the automatic mark is calculating the final mark properly, you need to look at the school's **_Marks Maintenance_** table.
5. According to the table, the marks have the following point value:

		Mark ▲	Mark Name	Description	EMIS Grade	Point Value	Average Point Threshold
🗑	✏	A	A	EXCELLENT	A	3.850000	3.850000
🗑	✏	A-	A-	EXCELLENT	A	3.500000	3.500000
🗑	✏	A+	A+	EXCELLENT	A	4.000000	4.000000
🗑	✏	AU	AU	AUDIT		0.000000	
🗑	✏	B	B	GOOD	B	2.850000	2.850000
🗑	✏	B-	B-	GOOD	B	2.500000	2.500000
🗑	✏	B+	B+	GOOD	B	3.000000	3.000000

6. To compute the student's final mark, use the following formula:

   Sum of each (Mark Point Value x Weight) / Sum of Weights

   [(4.0 x 40) / 100] + [(4.0 x 40)/100] + [(3.0 x 20)/100] = Final
   160/100   +   160/100   +   60/100   = Final
   1.60   +   1.60   +   .60   = 3.8

7. The student's final for this course is a 3.8.

8. Next, we need to look at the Marks Maintenance table at the **Average Point Threshold** column. The **Average Point Threshold** is the minimum point value the student must receive to get the grade. The **Average Point Threshold** for an A+ is a 4.0 so the student does not meet the threshold. The **Average Point Threshold** for an A is 3.85 so the student does not meet that threshold either. The Average Point Threshold for an A- is 3.50 and the student does meet the threshold for an A-.

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1	A+		
	GP2	A+		
	EX1	B+		
	FIN (Auto)	A- (Auto)		

9. Now for the next student, she received the following grades:

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1			
	GP2	A+		
	EX1	C+		

10. Since the automatic mark rule was setup to Ignore Missing Marks, StudentInformation will average the 2nd 9 weeks mark and the Exam marks.

$$[(0 \times 40) / 60] + [(4.0 \times 40)/60] + [(2.0 \times 20)/60] = Final$$
```
    0/60      +    160/60  +    40/60     = Final
    0         +    2.666   +    .666      = 3.332
```

11. The student's final for this course is a 3.332.
12. Next, we need to look at the Marks Maintenance table again at the **Average Point Threshold** column. The **Average Point Threshold** is the minimum point value the student must receive to get the grade. The **Average Point Threshold** for an A+ is a 4.0 so the student does not meet the threshold. The **Average Point Threshold** for an A is 3.85 so the student does not meet the threshold for an A. The **Average Point Threshold** for an A- is a 3.50 so the student does not meet the threshold for an A-. The **Average Point Threshold** for a B+ is a 3.0 so the student does meet the threshold since her average is a 3.332.

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1			
	GP2	A+		
	EX1	C+		
	FIN (Auto)	B+ (Auto)		

13. If the Missing Marks Handling was set to *Use 0*, the student would have gotten a C+ for her 1st Semester Final.

$$[(0 \times 40) / 100] + [(4 \times 40)/100] + [(2.0 \times 20)/100] = \text{Final}$$
$$0/100 \quad + \quad 160/100 \quad + \quad 40/100 \quad = \text{Final}$$
$$0 \quad + \quad 1.60 \quad + \quad .40 \quad = 2.00$$

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1			
	GP2	A+		
	EX1	C+		
	FIN (Auto)	C+ (Auto)		

Task #4 - Setting up Automatic Marks to calculate before the last day of the Reporting Term.

1. Navigate to : ***StudentInformation*** *» **Management** » **School Administration** » **Marks Administration Menu** » **Automatic Mark Calculation Dates***.
2. Each physical or locked reporting term will show on the page.

Automatic Mark Calculation Dates

You can view, add, change, and delete automatic mark calculation dates.

[Hide Reporting Terms]

Code	Name	Start	Stop	Mark Cutoff
Qtr1	Quarter 1	08/25/2020	10/23/2020	
Qtr2	Quarter 2	10/26/2020	01/11/2021	
Qtr3	Quarter 3	01/12/2021	03/19/2021	
Qtr4	Quarter 4	03/22/2021	05/21/2021	

ℹ To add a calculation date: Select a reporting term, a grade level, and a calculation date, then click Add.
To delete a calculation date: Click 🗑 next to the date you would like to remove.
To edit a calculation date: Select the reporting term and grade level to edit below. Choose a new date and click Add.

Reporting Term:* `-- Select Reporting Term -- ▾` Grade Level:* `-- Select Grade Level -- ▾` Calculation Date:* `_____ 📅` `Add`

3. For Qtr2, the Stop date is 01/11/2021. This means if you want to calculate a mark and you use the Qtr2 mark in the calculation, the marks will not calculate until 01/11/2021. Remember: The marks will not automatically calculate on 01/11/2021. You will have to kick off the job by editing an Automatic Mark Rule.
4. Some schools would like automatic marks to calculate early so teachers can verify grades. The ***Automatic Mark Calculation Dates*** page allows this functionality.
5. In the following example, the school wants the automatic marks to calculate on 01/04/2021 so the teachers have time to verify grades before report cards are printed.
6. In the ***Reporting Term*** dropdown, Qtr2 – Quarter 2 was selected so StudentInformation calculates 1st Semester Final early.
7. In the ***Grade Level*** dropdown, grade 12 - 12 was selected.
8. In the ***Calculation Date*** field 01/04/2021 was selected.
9. Next, I clicked ***Add***.

	Reporting Term	Grade Level	Calculation Date
🗑	Qtr2 - Quarter 2	12 - 12	01/04/2021

10. Since the school wants the 1st Semester Final to calculate early for the entire school, I will need to perform the above steps for each grade level.
11. Another example of when a school might want to calculate grades early is at the end of the school year.
12. Many Elementary schools hand out report cards to the students on the last day. This means the report cards must be printed and ready to go on the last day of school. Since automatic marks do not calculate until the last

day, the school can setup the ***Automatic Mark Calculation Dates*** to make the marks calculate early.

13. An example of when a school would only want a certain grade level to calculate early would be graduating Seniors. Often Seniors end the school year early. The High School could setup an ***Automatic Mark Calculation Date*** for only Seniors. That way the Seniors' grades calculate early, but the other grade levels do not.

Task #5 - Automatic Marks are not calculating. What should I check?

1. First, check to see if it is the last day of the reporting term.
2. If you are trying to get 1st Semester Finals to calculate and the 2nd Qtr is one of the marks used to calculate the 1st Semester Final and 2nd Qtr ends tomorrow, the marks will not calculate until tomorrow.
3. Remember: You kick off the automatic mark job by editing the automatic mark rule and saving. The automatic marks are not going to automatically calculate.
4. If you want the marks to calculate early, setup an Automatic Mark Calculation Date as detailed in Task #4 above.
5. If the marks still are not calculating, verify the physical and virtual reporting terms are in the correct order in Reporting Terms Maintenance. (Qtr 1 is first then 1st Interim then Qtr 2, etc.)
6. If the marks still are not calculating, edit the automatic mark rule and make sure the correct marking pattern rule was chosen. For example: If you are trying to calculate 1st Semester Only classes Final, make sure you chose the marking pattern rule for 1st Semester Only.
7. The ***Automatic Mark Cache Rebuild*** job will be sent to your Management screen. Wait for the job to finish and go to the Student Marks page for a student to see if the marks are now calculating.
8. If the marks still are not calculating, go to the Marks Maintenance page and verify your setups. Please refer to Task #1 in this checklist for detailed automatic mark setup guidelines.
9. If the marks still are not calculating after doing all the above steps, contact your ITC or submit a Help Desk ticket to State Support.

Task #6 - Automatic Marks are calculating, but the marks are incorrect. What should I check?

1. If a student is receiving a B for her final and you know she should have a C, check the **Average Point Threshold** column. Most likely a threshold needs adjusted. Edit the Mark Maintenance table and change the **Average Point Threshold**. Now, edit an automatic mark rule and save to kick off the job. Once the job has finished, go to a Student Marks page to see if the grades are now correct.
2. If the school is a numeric school, also check the Min and Max Numeric Mark Column on the Marks Maintenance page to ensure there are no overlaps. If an A is a 93-100 then you also cannot have a mark S with a min and max value of 93-100. There should be no overlaps on the Min and Max Numeric values.
3. If the marks still are not calculating correctly after doing the above steps, contact your ITC or submit a Help Desk ticket to State Support.

Batch Scheduler Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
02/01/21	Task #13	Note re: running study hall wizard
12/09/20	Entire document	2021/2022 updates
12/12/19	Entire document	2020/2021 updates
12/11/18	Entire document	2020/2120 updates, screenshots updated, icons replaced with text

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Before running the Batch Scheduler the following steps need to be performed in this order:

1. School Year Initialization: Refer to the *School Year Initialization Procedural Checklist* for details.

2. Creating Sub-Calendars: Refer to the *Calendar NON EMIS or Calendar with EMIS Exceptions Procedural Checklist* for details.

3. Promoting Students to 21/22 school year: Refer to the *Student Promotion/Bulk Enrollment Procedural Checklist*.

4. Enter Course Requests in 21/22: Refer to the *Course Request Procedural Checklist* and the *Public Course Request Procedural Checklist.*

Course groups do not have a gender directive. If you give a student a request for a course group, the Batch Scheduler will not honor the gender directives set up on the course sections that comprise the course group.

Note: Course sections in StudenInformation that do not have any students assigned to them still go over to Grade Book. Teachers linked to these course sections (with no students) then need to hide these classes in GradeBook. It is recommended to either inactivate these course sections before turning on the PB Integration or change the teacher on these course sections to someone who does not teach other classes. However, if you choose to inactivate these course sections, the School Year Initialization process will not roll these course sections over to the next year.

Task #1 - Run scheduling reports to verify scheduling data before running the Batch Scheduler

1. Change your context to the building level in the 21/22 school year.
2. After requests have been entered, you can run scheduling reports.
3. The scheduling reports will help you verify requests, determine if you have enough course sections to accommodate the requests, and the course section meeting times are not creating conflicts for key courses. Scheduling reports can be found by navigating to ***StudentInformation*** >> ***SIS*** >> ***Scheduling*** >> ***Scheduling Reports***. All the following reports are optional, however it is highly recommended that you run and verify these reports before proceeding. Scheduling reports do not have to be run in order to use the Batch Scheduler, but the reports will help verify students have the proper requests and you have the proper course sections setup to accommodate the requests before you run the Batch Scheduler.
4. Run the ***Course Curriculum (CRSE)*** report. This report allows you to select up to ten customized fields which will help you verify the course weight, course abbreviations, course names, etc.
   TIP #1: Run CRSE report to see if study halls are marked as Course Type = Study Hall so when the Study Hall Wizard is run, the study halls will be assigned properly.
   TIP #2: Run CRSE report to see if courses have the correct course priority, demand count, etc.

COURSE CODE	COURSE NAME	GR	Incld Crdt	Incld GPA	Hon Roll	High Sch Crd	Schd Pri
122	ART 1	09;10;11;12	Y	Y	Y	Y	2
133	ART 2	09;10;11;12	Y	Y	Y	Y	2
144	ART 3	09;10;11;12	Y	Y	Y	Y	2
155	ART 4	09;10;11;12	Y	Y	Y	Y	2
201	KEYBOARDING	09;10;11;12	Y	Y	Y	Y	2
203	BUSINESS APPLICATIONS	09;10;11;12	Y	Y	Y	Y	2
223	FINANCIAL ACCOUNTING	09;10;11;12	Y	Y	Y	Y	2
224	ACCOUNTING 2	11;12	Y	Y	Y	Y	2
299	ENGLISH 9	09;10;11;12	Y	Y	Y	Y	8
299H	HONORS ENGLISH 9	09	Y	Y	Y	Y	8

REPORT: SI - REPO CRSE   HIGH SCHOOL   COURSE CURRICULUM   PAGE 1 OF 5
SCHOOLYEAR: 2018-2019   RUN AT 2:51 PM 12/6/2018

5. Run the ***Analytics Hub Course Detail*** report to view all fields on a course record with the option to export to excel. Note: The Course Detail report does not return Demand Count.
6. Next, run the ***Students with No Requests (NORQ)*** report. This report produces a list of students who do not have any requests and therefore will not be scheduled by the Batch Scheduler.
   TIP: Run the NORQ report for Active and Non-Resident students to see which students have not put in their requests yet.

REPORT: SI - REPO NORQ   HIGH SCHOOL   RUN AT 9:08 AM 12/10/2018
SCHOOLYEAR: 2018-2019   STUDENTS WITH NO REQUESTS OR ASSIGNMENTS REPORT   PAGE 1 OF 4

ID	STUDENT NAME	GN	GR	COUNSELOR	HMRM	HMRM TEACHER
170089	ADKINS, JERRY	M	09			
152045	AGUILAR, GARY	M	11			
150528	ANDREWS, TOMMY	M	09			
152718	BAKER, MATTIE	F	12			

7. The **Student Course Requests (REQU)** report allows you to print a list of each student's course requests. This report will not tell you if their requests have a Pending status.

Report: REQU Printed Mon, Dec 10, 2018, 9:05 AM							HIGH SCHOOL 2018-2019 **Students Course Requests**		
Student Number	Student Name	Gd	Gr	Counselor	Hmrm Code	Homeroom Teacher	Course Code	Course Name	Sec	Teacher Name
147570	ABBOTT, FRANCISCO	M	09							
							299	ENGLISH 9	8	JOE STEWART
							451	LIFE EXP	4	LAURA CHANDLER
							299	ENGLISH 9		
							660	PHYS ED		
							422	SPANISH 2	1	GERTRUDE COCHRAN
							122	ART 1	4	JOAN MANNING
							552H	HONORS GEOMETRY	1	JULIE MACK
							749	SOC STUDIES 1	5	WILLIAM BULLOCK
							710	PHYS SCI	4	TERESA THORNTON

8. If you would like a list of students who used the Public Module and their requests have a Pending Status, you can navigate to **StudentInformation** >> **Management** >> **School Administration** >> **Public Administration** >> **Uncommited Requests.** Choose either **Unapproved by Parent/Guardian** or **Uncommitted by Student**. The **Uncommitted Requests** page will give you a list of students whose requests do not have an **Approved** status. If you need to print this page, click **File – Print**.

9. The **Course Request Labels (R206)** can be run to generat student labels to affix to course request sheets.

36522	Hm Rm Bldg:	MAHS	36777	Hm Rm Bldg:	MAHS	37326	Hm Rm Bldg:	MAHS
MONROE, DERRICK			MAYER, PAUL			DYER, JESUS		
Home Room in 2018-2019 :			Home Room in 2018-2019 :			Home Room in 2018-2019 :		
Grade Level in 2018-2019 :	12		Grade Level in 2018-2019 :	12		Grade Level in 2018-2019 :	12	
37377	Hm Rm Bldg:	MAHS	37383	Hm Rm Bldg:	MAHS	37438	Hm Rm Bldg:	MAHS
DUFFY, LOUIS			NORMAN, CHAD			EVANS, JASON		
Home Room in 2018-2019 :			Home Room in 2018-2019 :			Home Room in 2018-2019 :		
Grade Level in 2018-2019 :	11		Grade Level in 2018-2019 :	11		Grade Level in 2018-2019 :	12	

10. Next, to ensure students have met all pre- and co-requisites for a request, do not have any invalid course requests, or they do not meet the gender or grade requirements of the course, run the **Student Course Request Verification (R401)**. The report will list each student's requests. The report also has the option to only print students with error messages.

```
REPORT: SI - R401                          HIGH SCHOOL                    RUN AT 9:12 AM 12/10/201

SCHOOLYEAR: 2018-2019        STUDENT COURSE REQUESTS VERIFICATION/EDIT REPORT      PAGE    1    OF   88

        STUDENT            -------- COURSE REQUESTS --------    -------- COURSE REQUESTS --------
                       ID   COURSE TITLE      PRIORITY  EDIT    ID   COURSE TITLE      PRIORITY  EDIT
                                                        CODE                                     CODE

        36522                        No Requests
     MONROE, DERRICK
     HOME DIST: 049452
     TEL: (419) 555-7984
     GRADE: 12  SEX: M   HMRM:
     COUNSELOR:
     DISB COND: **


        36777                   304P  ENGLISH 12         8       554  PRE-CALCULUS        8
     MAYER, PAUL             885  COMM/IND CONST ELEC  8       886  CONSTRUCTION ELEC   8
     HOME DIST: 049452                SYSTEMS                          SYSTEMS
     TEL: (419) 555-7500
     GRADE: 12  SEX: M   HMRM:
     COUNSELOR:
     DISB COND: **
```

The **R401** Error Code Key is as follows:
   a. ALT – Alternate Course ID
   b. INV – Invalid Course ID
   c. SEX – Sex restriction not met
   d. GRD – Grade restriction not met
   e. OTH – Other restrictions to be checked manually
   f. DUP – Duplicate Course Requests
   g. PRQ – Pre-requisites not met
   h. COQ – Co-requisites not met

11. Next, the **Tally of Student Course Requests (R402)** will list each course and the number of students requesting each course.
   TIP: You can use this report to ensure the course sections have enough capacity to accommodate all the requests.

COURSE CODE	COURSE NAME	TOTAL	TOTAL F	TOTAL M	GRADE 09 F	GRADE 09 M	GRADE 10 F	GRADE 10 M	GRADE 11 F	GRADE 11 M	GRADE 12 F	GRADE 12 M
122	ART 1	146	76	70	54	52	15	9	4	8	3	1
133	ART 2	50	25	25	0	1	14	11	6	3	5	10
144	ART 3	18	9	9					3	7	6	2
155	ART 4	7	3	4							3	4
201	KEYBOARDING	34	12	22	4	12	5	3	0	3	3	4
203	BUS APPLICATION	59	25	34	14	22	5	5	5	6	1	1
223	FIN ACCOUNTING	22	11	11					7	8	4	3
299	ENGLISH 9	162	73	89	72	87			0	1	1	1
299H	HONORS ENG 9	57	42	15	42	15						

12. The **Potential Course Conflicts Matrix (R403)** report can be used to generate a matrix listing of each course ID against all other course IDs in order to determine the number of conflicts that would result if two courses were offered only one time (singleton) within the same block/period of the day. The forecasted number of conflicts will be printed at the intersection point of the matrix corresponding to each pair of courses.
   TIP: You can use the report to analyze requests to determine how many sections of a course are needed, and if the requests create any time conflicts.

CODE	NAME	DEPT. CODE	122	133	144	155	201	203	223	299	299H	302	302H	303	303H	304	304P	305	306	392	394	395	399	400	421	422	423	424	425	451	452	454
122	ART 1	ART	146	0	0	3	13	0	68	26	16	5	9	1	2	1	1	0	12	0	0	0	0	26	40	5	3	0	40	34	9
133	ART 2	ART	0	50	0	0	2	2	2	1	0	22	3	8	1	8	6	0	1	2	0	0	1	0	4	7	3	1	0	1	2	8
144	ART 3	ART	0	0	18	0	1	0	2	0	0	0	6	1	3	2	0	0	1	0	0	1	0	0	2	0	2	0	0	0	0	0
155	ART 4	ART	0	0	0	7	0	0	0	0	0	0	0	0	1	6	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
201	KEYBOARDING	BUS	3	2	1	0	34	8	1	12	2	8	0	3	0	3	1	0	0	1	0	0	0	0	6	3	4	0	0	3	3	3
203	BUS APPLICATION	BUS	13	2	0	0	8	59	2	25	7	9	0	9	2	1	0	0	0	3	0	0	3	0	10	9	2	0	0	7	6	6
223	FIN ACCOUNTING	BUS	0	2	2	0	1	2	21	0	0	0	11	1	2	2	0	1	2	0	0	1	0	0	1	0	2	0	0	0	0	0
299	ENGLISH 9	ENG	68	1	0	0	12	25	0	161	0	0	0	1	0	1	1	0	0	14	0	0	0	0	49	41	0	1	0	58	50	0

13. The **Student Who Requested A Specific Course (R404)** report allows the user to receive a list of students that have requested a specific course. The report also has the ability to list the courses that have less than a specified number of requests.

ALTERNATE	ID	STUDENT NAME	COUNSELOR	TEAM	GN	ST	GR	HMRM	HOME DISTRICT	DIS	TELEPHONE
540	119979	CORTEZ, PAUL			M	A	10		MA	**	(419) 555-4156
	151827	WITT, ALAN			M	A	10		MA	**	(419) 555-5334
	38194	ABBOTT, MICHAEL			M	A	11		MA	**	(419) 555-4747

14. The ***Students Requesting A Specific Course Pair (R405)*** report a produces a list of students that have requested a specific pair of courses. Once you have determined which courses are singletons by running either the R403 or R406 report, you can run the R405 report to see which students will actually have a conflict if the meeting times on the two courses are left the same (singleton).

REPORT: SI - R405			HIGH SCHOOL				RUN AT 9:22 AM 12/10/2018

SCHOOLYEAR: 2018-2019   STUDENTS REQUESTING A SPECIFIC COURSE PAIR   PAGE   1   OF   1

COURSE 1:   733H - HONORS CHEMISTRY   COURSE 2:   554D - PRE-CALCULUS

ALTERNATE		ID	STUDENT NAME	GR	GN	HMRM	HOME DISTRICT	DISB COND	TELEPHONE
1	2								
		38194	ABBOTT, MICHAEL	11	M		049452	**	(419) 555-4747
		148072	ALBERT, GEORGE	11	M		049452	**	(419) 555-3641
		149488	DAVID, YVONNE	11	F		049452	**	(419) 555-7549
		39526	DUNN, SANDRA	11	F		049452	**	(419) 555-7883

15. The ***Potential Course Conflicts (R406)*** report is used to generate a table listing each course ID against all other course IDs that have been jointly requested by one or more students, in order to determine that number of conflicts that would result if the two courses were offered only one time (singleton) within the same block/period. Optionally, this report can be based on only those courses where the number of students requesting the course is less than or equal to the number specified on the report submission screen.

Report: R406   HIGH SCHOOL
Printed Mon, Dec 10, 2018, 9:26 AM   2018-2019
Potential Course Conflicts

Course:	554 - PRE-CALCULUS	Requests:	68	Dept:	MTH	Grd Lvls:	09,10,11,12

No	Id	Course Name	No	Id	Course Name	No	Id	Course Name	No	Id	Course Name
2	122	ART 1	6	133	ART 2	2	144	ART 3	3	155	ART 4
1	201	KEYBOARDING	2	203	BUS APPLICATION	5	223	FIN ACCOUNTING	20	303	ENGLISH 11
4	303H	HONORS ENG 11	2	303I	ENGLISH 11	8	304	ENGLISH 12	26	304P	ENGLISH 12

16. Next, the ***Course Request Verification Slip (R416)*** report can be run to create verification slips to pass out to students so they can verify their course requests for accuracy. The report has the option to print one student per page and also has the option to print the student's current schedule in 20/21 and their requests for 21/22.

REPORT: SI - R416	**HIGH SCHOOL**	**RUN AT 9:26 AM 12/10/2018**
SCHOOLYEAR: 2018-2019	**COURSE REQUEST VERIFICATION SLIP**	**PAGE 1 OF 522**

STUDENT: MONROE, JAIME   NUMBER: 149543
GRADE: 10   TELEPHONE (419) 555-6299
SEX: M   DISB: **
HMRM: HOME DIST: 049452
COUNSELOR:

REQUESTED COURSE	COURSE NAME	SEC	CURRENT YR - TRM	COURSE CODE - NAME	SEC	RP	MRK	MRK TYPE
302	ENGLISH 10	3						
421	SPANISH 1	2						
500	MANUFACTURING OPERATIONS 1	4						
540	COMPUTER SCIENCE ESSENTIALS	3						
552	GEOMETRY	1						
650	HEALTH	2						
713H	HONORS BIOLOGY	1						
751	SOCIAL STUDIES 2	5						

17. The *Location Schedule (R409)* report generates a schedule for one or all locations/rooms, indicating the courses that are scheduled within a specified time period in that location. Additionally, it is used to confirm that the class master schedule doesn't contain any location/room conflicts.

Report: R409 Printed Mon, Dec 10, 2018, 9:27 AM										HIGH SCHOOL 2018-2019 Location Schedule

								Schedule Terms			
Period	Rotation Days	Course Code	Course Short Name	Sec Num	Staff Code	Staff Name	Conflict	08/16/2018	10/22/2018	01/07/2019	03/18/2019
Location Code 100			Name: CLASSROOM								
1	MTWRF	302	ENGLISH 10	10	MC000 001	CHERYL AGUILAR		X			
1	MTWRF								Open	Open	Open
2	MTWRF	614	MUSIC THEORY	1	147	FELICIA OLSEN		X	X	X	X
3	MTWRF	612	CHOIR 9	1	147	FELICIA OLSEN		X	X	X	X
4	MTWRF	615	WOMEN'S CHORUS	1	147	FELICIA OLSEN		X	X	X	X
5	MTWRF	613	CONCERT CHOIR	1	147	FELICIA OLSEN		X	X	X	X
5A	MTWRF							Open	Open	Open	Open
5B	MTWRF							Open	Open	Open	Open
5C	MTWRF							Open	Open	Open	Open
6	MTWRF	612	CHOIR 9	2	147	FELICIA OLSEN		X	X	X	X
7	MTWRF							Open	Open	Open	Open
8	MTWRF							Open	Open	Open	Open
NS	MTWRF							Open	Open	Open	Open
NC	MTWRF							Open	Open	Open	Open
CCP	MTWRF	CCP1101	AGRISCIENCE	97	250	PETER STEPHENSON	Conflict	C	C		
CCP	MTWRF	CCP1103	MICROBIO	97	250	PETER STEPHENSON	Conflict	C	C		

18. The *Teacher Schedule (R411)* report is used to generate a schedule for one or all teachers. The report indicates the courses they are scheduled to teach within a specified time period. Additionally, the report is used to confirm that the class master schedule does not contain any teacher conflicts.

Report: R411 Printed Mon, Dec 10, 2018, 9:34 AM										HIGH SCHOOL 2018-2019 Teacher Schedule

									Schedule Terms			
Period	Rotation Days	Course Code	Course Short Name	Sec Num	Location	Filling Male	Filling Female	Filling Total	08/16/2018	10/22/2018	01/07/2019	03/18/2019
Teacher Code: MC00000 1			Name: CHERYL AGUILAR									
1	MTWRF	302	ENGLISH 10	10	CLASSROOM				X			
1	MTWRF									Open	Open	Open
2	MTWRF								Open	Open	Open	Open
3	MTWRF								Open	Open	Open	Open
4	MTWRF								Open	Open	Open	Open

19. The *Singleton List Report (R813-A)* report prints out courses that only exist in one period during the day. This allows the user to see which courses will be in conflict with each other if they are only offered once.

REPORT: SI - R813-A					HIGH SCHOOL							RUN AT	
					SINGLETON COURSE LIST						PAGE	1 OF	3
SCHOOLYEAR: 2018-2019						COURSE TERM:	FULL						

PERIOD												
1	2	3	4	5	5A	5B	5C	6	7	8	NS	NC
9973	9993	878	9822	9961				844	766	874		
9842	9994	9951	9981	856				623	621	810		
9844	970	9952	841TR	613				898	9862	858		
859	884	9832	9982	930				951	9861	886		

20. Finally, to verify you have the needed courses, course sections, meeting times and capacities setup, run the *Class Master Schedule (R407)* report. The demand count on the R407 is the number of students who have a request for a course that has not been fulfilled yet.

Group: (none)	(none)		Gr Cap:	Demand:	Gr Section:		Sec Cap:		

Course: 122	ART 1		Credits: 1.000	Dpt: ART		Demand:			13

Sec	Term	Day/Period/Location/Staff		Cap	M	F	Tot	Open
1	FULL	MTWRF / 1 / 151	JOAN MANNING	22	8	11	19	3
2	FULL	MTWRF / 2 / 151	JOAN MANNING	22	8	12	20	2
3	FULL	MTWRF / 6 / 151	JOAN MANNING	22	4	11	15	7
4	FULL	MTWRF / 4 / 151	JOAN MANNING	22	9	13	22	0
5	FULL	MTWRF / 5 / 151	JOAN MANNING	22	8	13	21	1
6	FULL	MTWRF / 8 / 151	JOAN MANNING	22	13	7	20	2
7	FULL	MTWRF / 3 / 132	JAMES DURAN	25	15	6	21	4
96	FULL	MTWRF / ALT / 107	LEO BERRY	0	3	0	3	-3
98	FULL	MTWRF / HBT / NS	LEO BERRY	0	0	0	0	0
			Totals:	157	68	73	141	16

21. Edit the Master Schedule by navigating to ***StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Master Schedule.*** Click on the blue links to edit course sections, course groups, or courses. The Master Schedule contains all class meeting information that corresponds to each course and course group that is offered for a selected school year. A building may have multiple Master Schedules defined. One example of why a school would want multiple Master Schedules is if they have a levy on the ballot and they are not sure if it will pass or not. One Master Schedule would include all course section assignments if they levy passed and other Master Schedule would not include the course sections they would have to discontinue using if they had to lay off teachers because the levy failed. State Support recommends keeping it simple the first couple of years and using only one Master Schedule. Once the school is familiar with how StudentInformation scheduling works and feels more comfortable with the process, they can use multiple Master Schedules. If the school decides to use multiple Master Schedules, please keep in mind that only one Master Schedule Result Set can be chosen as the finalized schedule.

22. Review and update course sections and course section meeting times by navigating directly to the course sections page ***StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Course Sections.***

23. Review and update course groups by navigating directly to the course groups page ***StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Course Groups.***

24. Review and update the courses by navigating directly to the courses page ***StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Courses.***

25. Once you have run all the necessary reports and made changes to the Master Schedule, the Batch Scheduler can be run.

Task #2 - Schedule important or special course sections by hand before the Batch Scheduler is run to ensure the student's placement in the courses

1. Occasionally, a student needs to have a certain course a certain period as a top priority.
2. State Support recommends scheduling those course sections by hand before the Batch Scheduler is run so the rest of the student's schedule can be built around those important courses.
3. Example: A student has to take PSO Comp in 21/22. The course is only offered 9th period but other key courses she has requested such as Geometry and Biology are also offered 9th period. The school would want to manually schedule her into 9th period PSO Comp by using the **Course Section Assignments** page or **Request Assignments** page and then let the Batch Scheduler fulfill her requests for Geometry and Biology for another period besides 9th period.
4. To add a manual assignment using the **Course Section Assignments** page navigate to **StudentInformation** » **SIS** » **Scheduling** » **Course Section Assignments**.
5. Put a student in context.
6. Select a master schedule from the **Schedule** dropdown.
7. Next, select a schedule result set from the **Schedule Result** dropdown.
8. The Schedule Result should have been created as a part of the **School Year Initialization Procedural Checklist**.
9. If you already have a Result Set in the dropdown skip to #10.
   a. If the dropdown is empty navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Schedule Result Sets** to create a Schedule Result Set.
   b. On the **Schedule Result Sets** page in the **Filter By Schedule** dropdown choose a Master Schedule. Typically there is only one schedule in the dropdown.
   c. Click **Add Schedule Result**.
   d. Enter a name in the **Name** field. SI State Support recommends naming it **Default Schedule Result**.
   e. Click **Save**.
10. Once you have selected a schedule and schedule result set we are ready to add assignments.
    a. Click **Add Course Assignment.**
    b. The page refreshes.
    c. In the **Course/Section** fields enter the course and section number.
    d. If you don't know the course and or section number use the **Ellipse** icon.
    e. If you clicked on the **Ellipse** icon a new window pops up that shows each section of the course and the capacity and filling count.

f. Click on the blue link for the section number 10 and the section number will be automatically filled in for you.

g. The **Assignment Start Date** field defaults to the first day of school.
h. If the course section is associated with a course term that starts after the current date the **Start Date** will default to the first day of that course term.

Leave the **Assignment Stop Date** field empty.

i. Click **Save**.
j. The page refreshes and the following message is displayed, **The Course Section Assignments was marked to be saved. Click the save changes button to commit to the database.**
k. Click **Save Changes** again to commit the changes to the database.
l. If click **Save Changes** isn't clicked the course section will not be assigned.
m. The page refreshes.
n. Another item to note is the **Type** says **Manual**. This means the course section assignment was added by hand by the office staff versus being scheduled by the Batch Scheduler. (Assignments made by the Batch Scheduler have a **Type** of **Batch**.)

11. The manual assignment will not show on the *Requests* page (see screen shot below) because the assignment didn't originate from a request. The *Requests* page only shows requests.

12. Manual assignments may also be added on the *Request Assignments* page.
13. Navigate to **StudentInformation** » **SIS** » **Student** » **Student Schedule** » **Request Assignments**.
    a. Select a *Working Schedule* and *Result* from the dropdowns.
    b. Click *Reload Screen*.
    c. Click *Add Assignment*.
    d. The right side of the screen refreshes.

    e. In the *Choose Course or Course Section* fields enter the course section number or use the **Ellipse** icon to select the course section.
    f. Click *Next* or hit the *Tab* key on the keyboard.
    g. All sections of the course will appear.

h. Click the **Assign** button of the section you would like to assign to the student.

i. The right side of the screen refreshes again.
j. The **Course/Section** fields are grayed out – which is correct since we selected which section we wanted by clicking Assign in the previous step.
k. If you selected the wrong course section click **Cancel**.
l. The **Assignment Start Date** field always defaults to the first day of the course term.
m. Click **Save Assignment**.

Student Requests & Assignments - DAILY, DANIEL

From this screen you can manage a student's requests and course section assignments

Working Schedule: Default Schedule   Result:

Assignment Added

Request					Assignment			
	Primary	Alt.			Course	Sec	Start	Drop
✏️	1560		🗑️	✏️	1560	12	1/15/2018	
✏️	1360		🗑️	✏️	1360	20	8/21/2017	
✏️	5210		🗑️	✏️	5210	21	8/21/2017	
✏️	8710		🗑️	✏️	8710	21	8/21/2017	
			🗑️	✏️	2520	22	1/15/2018	
✏️	3360		🗑️	✏️	3360	30	8/21/2017	
			🗑️	✏️	1140	40	8/21/2017	
✏️	2420		🗑️	✏️	2420	50	8/21/2017	

👥 Course Group 👤 Group Section   ☐ Show Active Only

ℹ️ Click assigned course for details

[Run Scheduler] [Schedule Study Halls]   [Add Request] [Add Assignment]

n.   Notice there is no corresponding request on the same line for this course section assignment. This means the course was entered manually and didn't originate from a request.

If you add a manual assignment to a student using the Course Section Assignments, Request Assignments, or Bulk Assign please make sure you inactivate any request they have for the course (if it doesn't appear on the same line on the Request Assignments page. If the request isn't inactivated before the Batch Scheduler runs the Batch Scheduler will attempt to fulfill the outstanding request and the student could end up with two assignments for the same course.

Task #3 - Configure Single Student Scheduler (SSS) to schedule individual students on the Requests page

1. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Scheduler*** *»* ***Job Parameter Sets***.
2. If your school was live on SI last year all the job parameter sets from 20/21 copied up to 21/22. SI State Support recommends deleting all unwanted job parameter sets that copied up from 20/21 so there will no confusion as to which job parameter you are using this year.
3. Click **Add Job Parameter Set**.
4. You will be brought to the first tab of the **Schedule Job Wizard** page named **Run Level Parameters**.
   a. In the **Grade Levels to Schedule** filter pull over all grade levels to the right.
   b. In the **Course Terms to Schedule** filter pull over all course terms to the right.
   c. In the **Sort Criteria for Student who are being Scheduled** filter it doesn't matter what is selected since the SSS only schedules one student at a time.
   d. In the following screenshot I have chosen **Student Random**.
   e. The **Section Overfilled Percent** field will be filled out according to your school's policy on overfilling. Some schools allow no overfilling and others allow five or ten percent or even more.
      Note: If your school does not allow section overfilling, enter 0. If left blank, the scheduler will not complete.
   f. Example: If a course had a capacity of 20 and the **Section Overfilled Percent** was set to five percent that means the SSS would overfill the course section by one student. (5% of 20 = 1)
   g. Next, in the **Course Group Locking** dropdown choose either **Lock No Course Groups** which means that if a student has a request for a course that is part of a group but doesn't have a separate request for the group, the SSS will attempt to schedule the student into the course even if the course group is marked as **Is Locked** on the Course Group Maintenance page.
   h. If **Honor Course Group Locks** is chosen, then the SSS will look at the course setup. If the group is locked and a student has a request for a course that is part of the group the SSS will not schedule the student in the course because the group is locked.
   i. If **Lock All Course Groups** is chosen, the SSS will not attempt to schedule any individual requests for a course that is part of a group even if the group isn't locked.
   j. In the **Balance By Ethnicity** choose **No Balancing** or an ethnicity filter.

k. If an ethnicity filter is chosen from the dropdown the Batch Scheduler will attempt to schedule 50% of the ethnicity chosen and then the remaining 50% will be comprised of all other ethnicities not chosen.

l. Example: If **H-Hispanic** is chosen the **Balance By Ethnicity** dropdown the Batch Scheduler will attempt to schedule each course section with 50% Hispanic students and the other 50% of students a mix of the remaining ethnicities that weren't chosen.

m. The **Time Limit Per Student** filter determines the maximum number of seconds that the scheduler will try to schedule each student.

n. In the following screenshot I have chosen **60** seconds per student.

5. Click **Next** to move to the 2nd tab named **Pass Level Parameters**.

a. In the **Maximum Number of Passes** dropdown choose **1**.

b. The SSS only needs to make one pass.

c. The **Maximum Number of Periods Per Day** filter typically defaults to the number of periods found on the **Periods of the Day Maintenance** page.

d. If you want to make sure there is room for study halls you may want to use a number that is lower than the actual number of periods for the school.

e. Example: Your school has 10 periods in each day. You can type in 8 in the **Maximum Number of Periods Per Day** field so that you still have 2 open periods.

f. The other four items on the tab will be explained in greater detail in Task #4 when you setup the job parameter for the Batch Scheduler.

g. In general the other options aren't used by the SSS scheduler so leave them blank.

h. The following screenshot is an example of the *Pass Level Parameters* tab for SSS.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

ℹ The number of passes executed by the scheduler. Note: the Single Student scheduler will only use the first pass even if multiple passes are selected

Maximum Number of Passes: * 1 ▾

ℹ The maximum number of periods that a student may be assigned to courses on a rotation day

Maximum Number of Periods Per Day: 7 × ⇕

ℹ The maximum difference, between any two schedule terms, in the number of courses to which a student is assigned

Maximum Variation of Courses Between Schedule Terms: ⇕

ℹ The maximum difference, between any two schedule terms, in the total weight of courses to which a student is assigned

Maximum Variation of Course Weights Between Schedule Terms: ⇕

ℹ The maximum number of days on which the courses to which a student is assigned may violate the Daily Pattern Rules

Maximum Number of Days Allowed with Restricted Patterns: ⇕

ℹ The maximum number of days on which the courses to which a student is assigned may violate the Max Periods Per Day restriction

Maximum Number of Days Allowed with Excessive Periods: ⇕

< Back Next >

6. Click *Next* to move the 3rd tab named *Pass Control*.
   a. On the *Pass Control* tab place a check in the box next to *#9 Allow Partial Schedules*.
   b. If the *Section Overfill Percent* was filled out on tab 1 make sure to a check in the box in *#7 Allow Section Overfilling*.
   c. If *#7 Allow Section Overfilling* wasn't checked the SSS wouldn't overfill even though 5% overfilling entered on tab #1.
   d. The other options typically aren't used when running the SSS and will be explained in detail in Task #4 when we setup the job parameter for the Batch Scheduler.
   e. If your school wishes to use some of the other options you can go back and edit the SSS job parameter at anytime and select them.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

#	Description	1
1.	Enforce Course Sequencing Rules	☐
2.	Enforce Daily Pattern Rules	☐
3.	Enforce Teacher Link Groups	☐
4.	Enforce Maximum Number of Periods Per Day	☐
5.	Enforce Number of Courses Between Schedule Terms	☐
6.	Enforce Course Weights Between Schedule Terms	☐
7.	Allow Section Overfilling	☑
8.	Try Alternates	☐
9.	Allow Partial Schedules	☑
10.	Order Requests By Priority	☐
11.	Enforce Requests with Assigned Teacher or Period	☐

< Back Next >

7. Click *Next* to move the 4th tab named *Course Sequencing Rules*.
   a. Typically, the SSS isn't set up with course sequencing rules.
   b. The *Course Sequencing* tab will be explained in detail in Task #4 when we setup the job parameter for the Batch Scheduler.
   c. If your school wishes to use *Course Sequencing Rules* tab you can edit the SSS job parameter at anytime and set them up.
8. Click *Next* to move to the 5th tab named *Teacher Link Groups*.
   a. Typically the SSS isn't set up with *Teacher Link Groups*.
   b. The *Teacher Link Groups* tab will be explained in detail in Task #4 when we set up the job parameter for the Batch Scheduler.
   c. If your school wishes to use *Teacher Link Groups* tab you can edit the SSS job parameter at anytime and set them up.
9. Click *Next* to move to the 6th and final tab named *Submit*.
   a. In the *Job Parameter Set Name* field enter *Single Student Scheduler*.
   b. The *Job Parameter Set Description* field is optional.
   c. Put a check in the box next to *Set this Parameter Set as the Single Student Parameter Set*.
   d. Once you put in the checkbox the page refreshes and now there is another option named *Allow Partial Schedules for the Single Student Parameter Set*.
   e. Place a checkbox in this option also.
   f. Caution – do not check the other box next to *Set this Parameter Set as the Default Batch Parameter Set*. A separate parameter set must be setup for the Batch Scheduler. We will do that in Task #4 when we set up the parameter for the Batch Scheduler.
   g. The next option named *Clear Schedule Result Created by the Scheduler*, if checked, the option will undo all course section assignments previously scheduled by the Batch Scheduler or all course section assignments scheduled in prior runs of the SSS and attempt to reschedule the student into the course sections.
   h. If the other option, *Clear Schedule Results Created Manually*, is checked, the SSS will undo any course sections assignments that originated from a request and were assigned manually and attempt to reschedule them.

i. Typically neither option is checked when running the SSS.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

Is Active: ☑

Job Parameter Set Name:* Single Student Scheduler

Job Parameter Set Description:

☐ Set this Parameter Set as the Default Batch Parameter Set

☑ Set this Parameter Set as the Single Student Parameter Set

☑ Allow Partial Schedules for the Single Student Parameter Set

ℹ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

☐ Clear Schedule Results Created By Scheduler

ℹ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

☐ Clear Schedule Results Created Manually

[Save Schedule Parameters] [< Back]

j. Click *Save Schedule Parameters*.
10. Once the page refreshes, you are brought back to the *Job Parameter Set Maintenance* page.
11. The Single Student Scheduler can be run on the Student Requests page (*StudentInformation » SIS » Scheduling » Requests*) and on the Request Assignments page (*StudentInformation > SIS > Student > Student Schedule > Request Assignments*)
    a. The Single Student Scheduler is typically run when new students arrive in the district after the Batch Scheduler has already been run.
12. Now, we are ready to setup the Batch Scheduler job parameter set.

Task #4 - Configure Batch Scheduler job parameter to schedule the entire school

1. The Batch Scheduler can be run for one grade level at a time or the entire school.
2. In this task we will setup the Batch Scheduler to run for the entire school.
3. If you would like to run the Batch Scheduler one grade level at a time select one grade level in the filter and run the Batch Scheduler. Run reports to resolve conflicts and then run the scheduler again with the same grade level selected until the desired results are achieved. Now edit the parameter set and pull a new grade level over to the right and remove the other grade level from the filter. Run the Batch Scheduler and resolve conflicts. Repeat this process for the remaining grade levels.
4. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Scheduler*** *»* ***Job Parameter Sets***.
5. Click **Add Job Parameter Set**.
6. You will be brought to the first tab of the **Schedule Job Wizard** page named **Run Level Parameters**.
   a. In the **Grade Levels to Schedule** filter pull over all grade levels to the right.
   b. In the **Course Terms to Schedule** filter pull over all course terms to the right.
   c. The next section is named the **Sort Criteria for Students who are being Scheduled**.
   d. Multiple sort criteria can be pulled over to the right but the sort criteria is applied in order from top to bottom.
   e. If **Grade Level ASC** is chosen SI will attempt to schedule the lowest grade level first.
   f. If **Grade Level DESC** is chosen SI will attempt to schedule the highest grade level first.
   g. In other words if you want the scheduler to schedule 12ᵗʰ graders before scheduling the other grade levels choose **Grade Level DESC**.
   h. If it doesn't matter which grade level gets scheduled first choose **Student Random**.
   i. Do not select both **Grade Level ASC** and **Grade Level DESC**.
   j. If **Student Name ASC** is chosen students with last names starting with A are scheduled before students with last names that begin with B.
   k. If **Student Name DESC** is chosen students with last names starting with W are scheduled before students with last names that begin with T for example.
   l. If it doesn't matter which students are scheduled first choose **Student Random**.

m. If *Student Number ASC* is chosen students with the lowest student numbers will be scheduled first.

n. Example: student #10029 will be scheduled before student #10041.

o. If *Student Number DESC* is chosen students with the highest student numbers will be scheduled first.

p. If it doesn't matter which students are scheduled first choose *Student Random*.

q. If *Student Schedule Priority* is chosen the Batch Scheduler will look the *Scheduling Priority* field on the Additional tab of each student's profile.

r. The *Scheduling Priority* field defaults to 5 upon registration and isn't a field that is commonly used in SI. Scheduling Priority is only used when running the Batch Scheduler or Study Hall Wizard.

s. *Scheduling Priority* is not the same as *Course Priority*. Course Priority will be discussed later in this task.

t. Most schools will not choose to schedule by *Scheduling Priority*.

u. If your school does choose to schedule by *Scheduling Priority* you can use *SIS Student Search* to create a list of each student's scheduling priority.

v. Navigate to *StudentInformation » EZ Query » Reports » SIS Student Search* to create the list.

w. If *Student Requesting Group* is chosen the Batch Scheduler will attempt to schedule students who have requests for course groups before students without requests for course groups.

x. For example, I have chosen to sort by *Student Requesting Groups* and *Student Last Name ASC*. Since *Student Requesting Group* is listed first this means the Batch Scheduler will attempt to schedule students who requested groups first and whose last names begins with the letter A and then all other students without requests for groups whose last name starts with A first.

y. The *Section Overfilled Percent* field will be filled out according to your school's policy on overfilling. Some schools allow no overfilling and others allow five or ten percent or even more.
Note: If your school does not allow section overfilling, enter 0. If left blank, the scheduler will not complete.

z. Example: If a course had a capacity of 20 and the *Section Overfilled Percent* was set to five percent that means the Batch Scheduler would overfill the course section by one student. (5% of 20 = 1)

aa. In the screenshot below I have chosen *5%*.

bb. Next, in the *Course Group Locking* dropdown choose either *Lock No Course Groups* which means that if a student has a request for a course that is part of a group but doesn't have a separate request for the group, the SSS will attempt to schedule the student into the course even if the course group is marked as *Is Locked* on the *Course Group Maintenance* page.

cc. If **Honor Course Group Locks** is chosen then the Batch Scheduler will look at the course setup and if the group is locked and a student has a request for a course that is part of the group but doesn't have a separate request for the group itself the Batch Scheduler will not schedule the student in the course.

dd. If **Lock All Course Groups** is chosen the Batch Scheduler will not attempt to schedule any request for a course that is part of a group even if the group isn't locked.

ee. In the **Balance By Ethnicity** choose **No Balancing** or an ethnicity filter.

ff. If an ethnicity is chosen from the dropdown the Batch Scheduler will attempt to schedule 50% of the ethnicity chosen and then the remaining 50% will be comprised of all other ethnicities not chosen.

gg. Example: If **H-Hispanic** is chosen in the **Balance By Ethnicity** dropdown the Batch Scheduler will attempt to schedule each course section with 50% Hispanic students and the other 50% of students a mix of the remaining ethnicities that weren't chosen.

hh. The **Time Limit Per Student** filter determines the maximum number of seconds that the scheduler will try to schedule each student.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

Grade Levels to Schedule:*

05 - 05	09 - 09
06 - 06	10 - 10
07 - 07	11 - 11
08 - 08	12 - 12

Course Terms to Schedule:*

	1st Semester Course
	2nd Semester Course
	All Year Course

ⓘ Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled:*

Student Number ASC	Student Requesting Group
Student Number DESC	Student Random
Student Schedule Priority	
Grade Level DESC	

Section Overfilled Percent: `5`

Course Group Locking: `Lock No Course Groups`   Balance By Ethnicity: `No Balancing`

ⓘ Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student:* `60`

[Next >]

7. Click **Next** to move to the 2nd tab named **Pass Level Parameters**.
   a. In the **Maximum Number of Passes** dropdown choose 3.
   b. You can choose more or less if desired.
   c. 99% of schools will choose 3 passes.
   d. The **Maximum Number of Periods Per Day** filter typically defaults to the number of periods found on the **Periods of the Day Maintenance** page.
   e. If you want to make sure there is room for study halls you may want to use a number that is lower than the actual number of periods for the school.

f. Example: Your school has 10 periods in each day. You can type in 8 in the ***Maximum Number of Periods Per Day*** field so that you still have 2 open periods.

g. 99% of schools will choose to leave the default value.

h. Next, the ***Maximum Variation of Courses Between Schedule Terms*** can be set so the maximum of courses the student is scheduled into doesn't vary more than the specified value between course terms.

i. Example: ***Maximum Variation of Courses Between Schedule Terms*** is set to 2. This means the student could have seven 1st Semester classes and nine 2nd Semester classes but couldn't have seven 1st Semester classes and ten 2nd Semester classes, because then the variation would be 3.

j. Next, the ***Maximum Variation of Course Weights Between Schedule Terms*** option looks at the ***Weight*** value filled out on each course and balances the student's course section assignments so both terms are equally weighted.

k. Example: A school chooses 10 in the ***Maximum Variation of Courses Weights Between Schedule Terms*** on the ***Pass Level Parameters*** tab. A student has 12 requests. Four requests are for All Year courses and each course has a weight of 10. Four requests are for 1st Semester Only courses and each course has a weight of five, and four requests are for 2nd Semester only courses and each course has a weight of ten. The sum of weights for All Year courses is 40, 1st Sem only courses is 20, and 2nd Sem only courses is 40. Since the school chose that the maximum variation couldn't be greater than ten the Batch Scheduler will attempt to schedule three All Year courses which would be a total weight of 30, all four 1st Sem only courses, which would be a total weight of 20, and three 2nd Sem only courses, which would be a total weight of 30. The maximum variation between course terms is ten.

l. Approximately only 5% of schools will use this option.

m. Next, the ***Maximum Number of Days Allowed with Restricted Patterns*** looks at the ***Daily Pattern Rules*** setup in SI and determines the number of days a student's schedule can break the ***Daily Pattern Rules***.

n. To setup ***Daily Pattern Rules*** navigate to ***StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Daily Pattern Rules***.

Daily Pattern Rules

From this screen, you are able to specify default daily pattern rules for the master calendar.

Max Consecutive Courses: [ ]

Max Consecutive Artificial Courses: [ ]

[Save] [Cancel]

o. In the *Max Consecutive Course* field fill in the number of courses a student can have in a row without a study or lunch (artificial courses). In the *Max Consecutive Artificial Courses* fill in the number of artificial courses a student can have in a row. You can also control the placement of study halls on the *Study Hall Wizard* which will be explained in detail later in this document.

p. Finally, the *Maximum Number of Days Allowed with Excessive Periods* is the maximum number of days a student's schedule may violate the *Max Periods Per Day Restriction* setup above.

8. Click *Next* to move to the third tab named *Pass Control*.
   a. Since three passes were selected on the *Pass Level Parameters* tab three columns are showing on the *Pass Control* tab.
   b. The Batch Scheduler will attempt to schedule the students in three passes.
   c. The first pass should be the most restrictive pass, the second pass less restrictive, and the third pass the least restrictive.
   d. The first option is *Enforce Course Sequencing Rules*.
   e. If the school is using Course Sequencing Rules put a checkbox in the appropriate passes. Typically schools will choose to *Enforce Course Sequencing Rules* on all passes or zero passes.
   f. Course Sequencing Rules will be explained when we move to the 4th tab which is named *Course Sequencing Rules*.
   g. Approximately 50% of schools will use this option.

h. The second option is named **Enforce Daily Pattern Rules**. If the school has setup **Daily Pattern Rules** and chose to use the **Maximum Number of Days Allowed with Restricted Patterns** on tab 2 they would want to put a check in the appropriate passes.

i. Only approximately 5% of schools use this option.

j. The third option is **Enforce Teacher Link Groups**. If the school is using Teacher Link Groups put a checkbox in the appropriate passes. Typically schools will choose to **Enforce Teacher Link Groups** on all passes or zero passes.

k. Teacher Link Groups will be explained in greater detail when tab 5 is reached.

l. Approximately 35% of schools will use this option. Typically the school will setup course groups instead of using **Teacher Link Groups**.

m. The fourth option is named **Enforce Maximum Number of Periods Per Day**.

n. If the school would like the Batch Scheduler to enforce the **Max Number of Periods Per Day** parameter setup on tab 1 check the appropriate passes.

o. Typically a school would only enforce **Max Number of Periods Per Day** if the **Max Number of Periods** was setup to a number lower than the total number of periods the school offered in a day.

p. Example: A school has 10 periods a day but on the **Max Number of Periods Per Day** on tab 2 they filled in 8. If the school would like to honor that parameter when the Batch Scheduler runs they would need to put a check in the appropriate passes.

q. Approximately only 5% of schools use this option.

r. The fifth option is named **Enforce Number of Courses Between Schedule Terms**.

s. If the school would like to enforce the **Maximum Variation of Courses Between Schedule Terms** parameter that was filled out on the 2nd tab check the boxes on the appropriate passes.

t. Approximately only 5% of schools use this option.

u. The sixth option is named **Enforce Course Weights Between Schedule Terms**.

v. If the school would like to enforce maximum **Variation of Course Weights Between Schedule Term**s that was filled out on the 2nd tab check the boxes on the appropriate passes.

w. Approximately only 5% of schools use this option.

x. The seventh option is named **Allow Section Overfilling**.

y. Typically overfilling is chosen for the final pass which is the least restrictive pass. If 5% overfilling was chosen on tab 1 but checkbox to allow overfilling isn't marked none of the course sections will be overfilled.

z. Approximately 95% of schools will use this option.

aa. The eighth option is named **Try Alternates**.

bb. When requests are entered the user has the option to specify an alternate request.

cc. If your school would like the Batch Scheduler to attempt to schedule alternate requests if the primary request isn't available check the corresponding boxes. Typically schools allow alternates on the last pass which is the least restrictive pass.

dd. Approximately 50% of schools will use this option.

ee. The ninth option is named **Allow Partial Schedules**.

ff. **Allow Partial Schedules** should always be checked for the final and least restrictive pass. **Allow Partial Schedules** isn't checked for the other passes because you want the Batch Scheduler to attempt to fully schedule the student and then if it can't honor all the student's requests by the time the Batch Scheduler gets to the final pass, the Batch Scheduler will attempt to honor the requests it can – thus giving the student a partial schedule.

gg. All schools will use this option.

hh. The tenth option is named **Order Requests By Priority**.

ii. Each request has a priority. Please see the **Course and Course Group Step by Step** for information on how to set up course priority.

jj. If **Order Requests By Priority** is marked on a pass the Batch Scheduler higher priority courses and course groups will be scheduled over lower priority courses and course groups.

kk. If two course or course group requests have the same priority the Batch Scheduler, will look to see how often the course is offered. If one course is offered only once (singleton) and the other course is offered twice (doubleton) the Batch Scheduler will schedule the singleton before it schedules the doubleton.

ll. Example: A student has a priority of 9 request for course A that has one course section (singleton), a priority 9 request for course B that has two course sections (a doubleton), and a priority 9 request for course C that has three course sections (a tripleton). The student also has a priority 7 request for course D, and a priority 4 request for course E. The Batch Scheduler will assign scheduling positions of 1 for request A, 2 for request B, 3 for request C, 4 for request D, and 5 for request E. When the Batch Scheduler schedules the student, it will never leave request A unscheduled in order to schedule requests B, C,D,or E. It will never leave request B unscheduled in order to schedule requests C,D, or E. It will never leave request C unscheduled in order to schedule requests D or E. And it will never leave request D unscheduled in order to schedule request E.

mm. Typically schools honor course priority on all passes of the Batch Scheduler or no passes.

nn. The eleventh option is **Enforce Requests with Assigned Teacher or Period**.

oo. When requests are entered users have the ability to specify a specific teacher or period. If specific teachers or periods have been requested SI State Support recommends enforcing this on all passes.

pp. Approximately 50% of schools will use this option.

9. Click **Next** to move to the fourth tab named **Course Sequencing Rules**.
   a. If the school wishes to use **Course Sequencing Rule**s the rules will need to be setup on the fifth tab.
   b. The Batch Scheduler assumes that if a student has a request for a course they have already been approved to take the course.
   c. The Batch Scheduler will not check to make sure pre and co-reqresuites are met or if the student is in the appropriate grade level to the take the course. All of this checking is done when the course request is entered.
   d. Again the Batch Scheduler assumes all criteria for the course have been met.
   e. The **Course Sequencing Rules** tab allows the school the option to tell SI that certain courses need to be taken in the same schedule term, an earlier schedule term, a later schedule terms, or not in the same schedule term.
   f. In the **Primary Course** field enter the course code. Use the picker to find the course code if needed.
   g. In the **Rule** dropdown choose **In Earlier Schedule Term**, **Not in Earlier Schedule Term**, **In Same Schedule Term**, or **Not in Same Schedule Term**.
   h. In the **Secondary Course** field enter the course code. Use the course picker if needed.
   i. The **Is Rigid** box can be checked if you want the Batch Scheduler to honor the course sequencing rules on all passes even though option #1, **Enforce Course Sequencing Rules**, isn't checked on the **Pass Control** tab.

j. If the *Is Rigid* box isn't checked the Batch Scheduler will not honor the course sequencing rules unless option #1 on the *Pass Control* tab is checked.

k. Click *Add*.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	**Course Sequencing Rules**	Teacher Link Groups	Submit

		Primary Course	Rule	Secondary Course	Is Rigid
🗑	✏	910111 - Art Foundations I	In Earlier Schedule Term	910112 - Art Foundations II	☑
🗑	✏	910111 - Art Foundations I	In Same Schedule Term	910121 - Drawing	☑
🗑	✏	910122 - Painting	In Earlier Schedule Term	910124 - Advanced Painting	☑
🗑	✏	910125 - Photography	In Earlier Schedule Term	910126 - Advanced Photography	☑
🗑	✏	910131 - Ceramics	In Earlier Schedule Term	910134 - Advanced Ceramics	☑
🗑	✏	910132 - Sculpture	In Earlier Schedule Term	910135 - Advanced Sculpture	☑
🗑	✏	950112 - PE II	Not In Same Schedule Term	950312 - Nutrition & Weight Management	☑

Primary Course:* `950112` ⊠ `...`

Rule:* `Not In Same Schedule Term ▾`

Secondary Course:* `950312` `...`

Is Rigid: ☑

[Save] [Cancel]

[< Back] [Next >] [Cancel]

l. In the example screenshot the course sequencing rules says 910111-Art Foundations I must be taken in an earlier schedule term than 910112-Art Foundations II and the course sequencing rule *Is Rigid*. This means even if *#1 Enforce Course Sequencing Rules* isn't marked on the *Pass Control* tab the Batch Scheduler will still enforce the course sequencing rules.

10. Click *Next* to move to the fifth tab named *Teacher Link Groups*.

a. *Teacher Link Groups* are used when a school wants students to have the same teacher for multiple courses but doesn't necessarily mind which course sections they are scheduled into-only that the teacher is the same.

b. Example: Mrs. Brown and Mr. Black each teach two sections Chemistry II and two sections of Chemistry Lab. If a student requested Chemistry II and Chemistry Lab the school wants the student to have the same teacher for both class and the lab but doesn't mind which section – as long as the teacher is the same.

c. In the *Teacher Link Group Name* field enter a name.

d. In the *Teacher Link Group Description* enter an optional description.

e. In the *Courses* dual select box pull the courses which require the students to take with the same teacher to the right.

f. Click *Add*.

g. In the screenshot below, a teacher link group has been setup for courses Chem and Chem Lab.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	Course Sequencing Rules	Teacher Link Groups	Submit

		Name	Description
🗑	✏	Chem & Chem Lab	855112 & 855112L

Teacher Link Group Name: *

Teacher Link Group Description:

Courses: *

110740 - Restaurant Oper
800101 - College & Career Prep I
800102 - College & Career Prep II
810100 - Art Appreciation
810101 - Music Appreciation
810211 - PS Financial Accounting

Add

< Back   Next >

11. Click ***Next*** to move to the final tab named ***Submit***.
   a. In the ***Job Parameter Set Name*** field enter a name.
   b. Enter an optional description in the ***Job Parameter Set Description*** field.
   c. Next put a check in the box next to ***Set this Parameter Set as the Default Batch Parameter Set***.
   d. The next option named ***Clear Schedule Result Created by the Scheduler*** if checked the Batch Scheduler will undo all course section assignments previously scheduled by the Batch Scheduler and attempt to reschedule the student into the courses.
   e. If the other option named ***Clear Schedule Results Created Manually*** is checked the Batch Scheduler will undo any course sections assignments that were manually assigned and that originated from a request and attempt to reschedule them.
   f. Typically a school will choose to ***Clear Schedule Results Created by the Scheduler*** so any assignments that were made in previous runs of the Batch Scheduler are undone and rescheduled so the student gets the best possible schedule.
   g. Typically a school will not choose to ***Clear Schedule Results Created Manually*** because if the office staff went directly into a student's schedule and turned a request into an assignment chances are there was a specific reason for assigning the student into that

section and most likely the school doesn't want that undone when the Batch Scheduler runs.

h. The Batch Scheduler only looks at requests. If the office staff went directly into the *Course Section Assignments* page or the **Request Assignments** page and manually added an assignment the Batch Scheduler will never undo that assignment. Remember the Batch Scheduler only works off requests.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	Course Sequencing Rules	Teacher Link Groups	Submit

Is Active: ☑

Job Parameter Set Name: * `BS All Grades`

Job Parameter Set Description: `Batch Scheduler All Grades`

☑ **Set this Parameter Set as the Default Batch Parameter Set**

☐ **Set this Parameter Set as the Single Student Parameter Set**

ℹ️ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

☑ **Clear Schedule Results Created By Scheduler**

ℹ️ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

☐ **Clear Schedule Results Created Manually**

[Save Schedule Parameters] [< Back]

i. Click **Save Schedule Parameters**.

12. The page refreshes and you are brought back to the **Job Parameter Set Maintenance** page.

Job Parameter Set Maintenance

From this screen, you can display, add, change and delete data pertaining to Job Parameter Sets, or Execute a Batch Scheduler Job .

[Add Job Parameter Set]

				Name	Description	Revision	Default Batch	Single Student	Is Active
🔒	✏️	🔁	▶️	BS All Grades	Batch Scheduler All Grades	1	☑	☐	🟢
🔒	✏️	🔁	▶️	Single Student Scheduler		2	☐	☑	🟢

☑ Show Active Only

a. The parameter is listed on the page with a lock because it was marked as the **Default Batch Parameter Set**.

b. Now we are ready to run the Batch Scheduler.

Don't forget to enter requests for lunches before running the Batch Scheduler. It is much easier to correct the issue now versus attempting to fix the issue after the Batch Scheduler has been executed multiple times.

Task #5 - Run the Batch Scheduler

Make sure you are in the correct school year before continuing. If you are scheduling for the 21/22 school year, you need to have your school year context set to 21/22. A confirmation message does display when you click the 3rd icon, Execute Job and Update Existing Schedule Result or 4th icon, Execute Job and Create New Schedule Result for a Job Parameter Set to confirm that you wish to run the Batch Scheduler for the school year in context.

If the Schedule is finalized for the school year in context on the StudentInformation Options page, these Execute icons are greyed out and you are not able to re-run the Batch Scheduler.

If the Batch Scheduler would happen to error out the error is only available off JAMS.

The Batch Scheduler will only schedule students who have an Overall Student Status of Active and have at least one course request.

Students with requests but whose Overall Student Status is a value other than Active will not be scheduled by the Batch Scheduler. If a school would like to schedule these students using the Batch Scheduler, State Support recommends temporarily changing the Overall Student Status value to Active and the changing it back after the Batch Scheduler has run.

1. At the building level in 21/22, navigate to **_StudentInformation_** **_» Management_** **_» School Administration_** **_» Scheduling Administration_** **_» Scheduler_** **_» Job Parameter Sets_**.
2. Click on the third icon named **_Execute Job and Update Existing Schedule Result_** of the Default Batch Scheduler Parameter created in the previous task.
   Note: When updating an existing Schedule Result, all previous Schedule Result records will be deleted, even those with a non-assigned status.
3. The page refreshes and now you are on the **_Submit_** tab of the job parameter.
4. In the **_Master Schedule_** dropdown select the Master Schedule. Typically schools will only have one Master Schedule in the dropdown.

5. In the *Schedule Result* dropdown select the schedule result you wish to work with.
6. In the *Schedule Job Name* field enter a descriptive name. State Support recommends naming the job *21/22 all grades*.
7. In the *Job Queue* dropdown select any queue listed, it doesn't matter which one you select.
8. Since we had already placed a check in the box next to *Clear Schedule Results Created By Scheduler* when we setup the Batch Scheduler job parameter in the last task it is still checked.
9. If you need to review what this option does please refer back to Task #4 where it is explained in detail.
10. Once again make sure you are in 21/22.
11. Click *Execute Schedule Job.*

Schedule Job Wizard

From this screen, you can run the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	Course Sequencing Rules	Teacher Link Groups	Submit

Master Schedule:* [Default Schedule ▼]   Schedule Result:* [Default Schedule Result ▼]

Schedule Job Name:* [All Grades]   Job Queue:* [STUD - STUDENT ▼]

ⓘ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

☑ **Clear Schedule Results Created By Scheduler**

ⓘ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

☐ **Clear Schedule Results Created Manually**

[Execute Schedule Job] [< Back] [Cancel]

12. The page refreshes and you are brought to the *Schedule Job History* page.
13. The job will be listed as *Pending* and then change to *Active*.
14. Click **Refresh Display** until the job says *Complete*.

Task #6 - Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules

1. On the *Schedule Job History* page, click on the Stats link for the job that just completed.
2. The page refreshes and you are brought to tab 1 named *Students Scheduled Summary* of the *Schedule Results Statistics* page.
   a. The tab details how many students were scheduled on each pass.
   b. The *Scheduled Status* column has five categories.
   c. The *Fully Scheduled* category is the number of students who had all of their requests scheduled. If a student had two requests and the Batch Scheduler was able to fill both requests the student is considered fully scheduled.
   d. The second category is named *Fully Scheduled With Request Error*.
   e. The number of students listed in this category have received a full schedule for the requests that were schedulable, but one or more of his/her requests had a problem that prevented the Batch Scheduler from trying to schedule it, e.g. no course sections were setup for the requested course.
   f. The third category is named *Partially Scheduled* is the number of students who didn't have all their requests scheduled.
   g. The fourth category named *Not Scheduled* is the number of students who didn't have any of their requests scheduled. Remember – only students with requests are included in the statistics. If a student doesn't have any requests the student isn't included in this statistic. This applies to the Total Scheduled For All Passes and Percent Scheduled For All Passes.
   h. The final category is named *Not Scheduled Due to Time Limit* is the number of students who couldn't be scheduled because the Batch Scheduler exceeded the number of seconds filled out in the *Time Limit Per Student* field on tab 1 of the job parameter. This applies to the Total Scheduled For All Passes and Percent Scheduled For All Passes.
   i. State Support recommends scheduling these students by hand.

j. The page also combines all passes and lists the statistics for **Total Scheduled For All Passes** and **Percent Scheduled For All Passes**.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

| Students Scheduled Summary | Students Scheduled Detail | Course Status Messages | Request Status Messages | Requests |

Stat Type	Scheduled Status	Grade 12	Grade 11	Grade 10	Grade 09	Pass Total
Total Scheduled For Pass 1	Fully Scheduled	87	156	211	232	686
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	0	0	0	0	0
Total Scheduled For Pass 2	Fully Scheduled	0	0	0	0	0
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	0	0	0	0	0
Total Scheduled For Pass 3	Fully Scheduled	0	0	0	0	0
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	107	44	23	2	176
Total Scheduled For All Passes	Fully Scheduled	87	156	211	232	686
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	107	44	23	2	176
	Not Scheduled	29	32	66	38	165
	Not Scheduled Due To Time Limit	0	0	0	1	1
Percent Scheduled For All Passes	% Fully Scheduled	39.01	67.24	70.33	84.98	66.73
	% Fully Scheduled With Request Error	0	0	0	0	0
	% Partially Scheduled	47.98	18.97	7.67	0.73	17.12
	% Not Scheduled	13	13.79	22	13.92	16.05
	% Not Scheduled Due To Time Limit	0	0	0	0.37	0.1

3. The second tab is named **Students Scheduled Detail** lists the student's name and student's number for each of the five categories. If the category said zero students then the category will not listed on the **Students Scheduled Detail**.
4. The third tab is named **Course Status Messages** lists each course, course sections, group, and group section that meets the following criteria, even if there were no requests for the course:
    -Course has no Course Sections on the master schedule
    -Group has no Group Sections on the master schedule
    -Course is not Active
    -Course Has No Course Sections with Meeting Times on the
        Master Schedule
    -Course has no section in selected course terms

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages	Requests Exceedin

Course	Course Section	Group	Group Section	Message	Requested
900110				Course Has No Course Sections with Meeting Times on the Master Schedule	No
920101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
960108				Course Has No Course Sections with Meeting Times on the Master Schedule	No
900101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
940313				Course has no Course Sections on the master schedule	No
B20133				Course has no Course Sections on the master schedule	No

5. The fourth tab is named ***Request Status Messages*** details the students who have request errors.
   a. The following screenshots shows some example errors.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages

Student	Course	Message
194312	965251	Student has multiple requests for the same course
192918	965252	Student has multiple requests for the same course
192918	A60211	Student has multiple requests for the same course

   b. If a student has multiple requests for the same course the Batch Scheduler will not double schedule the student. If the student does need to be scheduled into the same course more than once the office staff will need to manually put the student in the course on either the ***Course Section Assignments*** page or the ***Request Assignments*** page.

6. The fifth tab named ***Requests Exceeding Course Capacity*** details the courses in which the number of requests for the course exceeded the capacity for the course.
   a. In the following screenshot course 910134 has 39 requests but a capacity of 30. This statistic lets the school know they would need to increase capacity or add another section of course 910134 if they want to meet the full demand.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages	Requests Exceeding Course Capacity

Course	Requests Count	Capacity
910134	39	30
910123	35	30
A25311	65	64
B25311	65	64

7. The final tab named ***Constraint Test Failures*** details the number of students that couldn't be scheduled due to ***Course Sequencing Rules*** that were setup, ***Daily Pattern Rules***, ***Max Course Deviation, Max Course Weight Deviation***, and ***Max Periods Per Day***.

a. If none of these options were used when the Batch Scheduler was run each category will say zero.
b. In the following screenshot the Batch Scheduler was setup to run with Course Sequencing Rules. Two students couldn't have all their requests fulfilled because of the course sequencing rules.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages	Requests Exceeding Course Capacity	Constraint Test Failures

Course Sequencing Rule:	10
Daily Pattern Rule:	0
Max Course Deviation:	0
Max Course Weight Deviation:	0
Max Periods Per Day:	0

8. The **R413 Students Scheduled with Alternate Courses** report lists students who have been scheduled into their alternate course request instead of their primary course request.

REPORT: DASL - R413				ELMWOOD HIGH SCHOOL			
				STUDENTS SCHEDULED WITH ALTERNATE COURSES		PAGE 1 OF 1	
ID	STUDENT NAME	GR GN HMRM	HOME DIST	ORIGINAL REQUEST	ALTERNATE SCHEDULED CLASS		TERM
12274	Student100061, MICHAEL	12 M		French-French 1	610-LATIN I		All Year

9. **The R415 Student Scheduled With Free Time** report lists any open periods the student has.

Report: R415 **ELMWOOD HIGH SCHOOL**

Student Scheduled With Free Time

								Schedule Terms			
Student Number	Student Name	St Gr Gd HmRm	Disability Condition	Dist of Res	Period	Rotation Days	08/29/2011	10/24/2011	01/09/2012	03/26/2012
10781	Student101112, KAYLA	A 12 F								
					51	MTWRF	X	X	X	X
					52	MTWRF			X	X
					53	MTWRF	X	X		
					06	MTWRF	X	X	X	X
					07	MTWRF	X	X	X	X
					08	MTWRF	X	X	X	X

a. If a student has an assignment for a period the period won't be listed on the report. (In the example screenshot above period 00-04 isn't listed because the student isn't free those periods, she has assignments.)

10. The **R424 Student Scheduled in one Course Section and Not Another** generates a list of students who are scheduled into only one course for a specified pair of courses.

REPORT: DASL - R424				ELMWOOD HIGH SCHOOL				
				STUDENTS SCHEDULED INTO ONE COURSE/SECTION AND NOT ANOTHER				
		COURSE 1: 1047		SECT NO: 1	AND NOT	COURSE 2: 930		SECT NO: 1
			GR GN HMRM	PR	COUNSELLOR			
12390	Student99950, AIRICA	12 F		ALLEN Teacher2060				
12230	Student100096, MYRIAH	12 F		ALLEN Teacher2060				
12012	Student100288, KELSEY	12 F		DEB Teacher2117				
12241	Student100080, MONICA	12 F		ALLEN Teacher2060				
12099	Student100183, ALEXIS	12 F		ALLEN Teacher2060				

11. The *R425 Students Scheduled Into Two Assigned Course Sections* generates a list of students who are assigned to a specific pair of courses.

STUDENTS SCHEDULED INTO TWO ASSIGNED COURSES\SECTIONS　　　　　　PAGE　　1　OF　　1

SCHOOLYEAR:　　　　　COURSE　　1047　　　PRE-CALCULUS

ID	STUDENT NAME	GR	GN	HMRM	PR	COUNSELOR	COURSES 930
12009	Student100293, JOY		F		**	DEB Teacher2117	3　JACM
12059	Student100228, JOSIE		F		**		4　RVAR
12102	Student100177, KAITLYN		F		G		3　JACM
12104	Student100175, BRIDGET		F			ALLEN Teacher2060	2　JACM
12156	Student100123, SARAH		F		**		3　JACM
12237	Student100084, CASSIDY		F		**		1　JACM
12243	Student100075, JANICE		F		**	DEB Teacher2117	2　JACM
12320	Student100023, NYEMA		F				4　RVAR
12382	Student99955, CHESARE'		F				3　JACM

12. The *R426 Student Scheduling Analysis* lists each student's requests and if they were assigned into the course or their request could not be met.

Student99454, REBECCA　　　　　NON-ASSIGNED : 2　　NUMBER : 13199　　GRADE : 10　GENDER : F　HMRM:

TERM	COURSE	SEC	DESCRIPTION	DAYS	PERIOD	STATUS
	1222		CHEMISTRY I			All Full Sections
	1047		PRE-CALCULUS			All Full Sections
2nd	710	8	HEALTH	MTWRF	04	Assigned
YEAR	1320	6	U.S. SOCIAL STUDIES 10	MTWRF	51,53	Assigned
1st	Lun1	2	Lunch 1	MTWRF	52	Assigned
2nd	Lun2	2	Lunch 2	MTWRF	52	Assigned

13. The *R807 Section Summary by Report Period* lists each course section and if it is open or closed.

COURSE ID	COURSE DESCRIPTION	TERM	SECTION ID	TEACHER NAME	PERIODS	ROOM ID	SECTION CAPACITY	STUDENTS ENROLLED	CLASS STATUS
CU200	CU ART	1st	2	LANA Teacher2163	03	123	25		All
SA53	SA53	1st	3	HEATHER Teacher2143	53	203	5		All
SH1	SH1	1st	1	Jim Teacher1916	01	205	150		All
SA51	SA51	1st	2	CAROLYN Teacher1977	51	201	15		All
SA4	SA4	1st	21	MATT Teacher1945	04	118	5		All
CU711	CU Phys Ed	1st	1	CHARLES Teacher2108	52	123	5		All

14.   The **R407 Class Master Schedule** lists each course section and group course section. The demand count on the **R407** is the number of students who have a request for the course that hasn't been fullfilled yet.

Group: (none)	(none)		Gr Cap:		Demand:			Gr Section:		Sec Cap:				
Course: 140	AGRI-BUSINESS				Credits:	1.000	Dpt:	AG		Demand:			1	
	Sec Term	Day/Period/Location/Staff							Cap	M	F	Tot	Open	
	1 YEAR	MTWRF / 03 / 122			DENNIS Teacher1934				7	0	0	0	7	
Course: 220	DRAWING & PAINTING II				Credits:	0.500	Dpt:	ART		Demand:			1	
	Sec Term	Day/Period/Location/Staff							Cap	M	F	Tot	Open	
	1 1st	MTWRF / 51, 52 / 204			MARTHA Teacher2035				10	0	0	0	10	
	2 1st	MTWRF / 08 / 204			MARTHA Teacher2035				25	0	0	0	25	
								Totals:	35	0	0	0	35	

Task #7 - Make applicable changes and rerun the Batch Scheduler – updating the existing schedule result set

Updating the existing schedule result set is the simplest method.

StudentInformation recommends using this option if you are new to SI scheduling. Updating the existing schedule results option keeps things simple. Users only have one result set to choose from when making schedule changes so there is no chance that schedule changes are made on the wrong schedule result set. Once you become familiar with how Batch Scheduler works you can use the other method which is to create a new result set each time next year.

A student has a request for Spanish. The Batch Scheduler is run and a student is scheduled into Spanish-1. The student then decides they don't want to take Spanish anymore. Simply deleting the request for Spanish will not unschedule the assignment for Spanish the next time the Batch Scheduler is run, even if the option to Clear Results Created by the Scheduler is marked. The Batch Scheduler only looks at requests and if the request for Spanish is deleted but the assignment remains the Batch Scheduler will not touch the assignment for Spanish since there is no corresponding request. Both the assignment and request for Spanish should be removed/deleted.

Make sure you are in the correct school year before continuing. If you are scheduling for the 21/22 school year, you need to have your context set to 21/22. A confirmation message does display when you click the 3rd icon Execute Job and Update Existing Schedule Result or 4th icon Execute Job and Create New Schedule Result for a Job Parameter Set to confirm that you wish to run the Batch Scheduler for the school year in context.

 If the Schedule is finalized for the school year in context on the StudentInformation Options page, these Execute icons are greyed out and you are not able to re-run the Batch Scheduler.

1. After fixing any conflicts, errors, adding course sections, and editing meeting times rerun the Batch Scheduler.
2. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Scheduler*** *»* ***Schedule Job History***.
   a. The Batch Scheduler's last run will appear at the top of the list.
   b. Click the Rerun Job link.

Schedule Job History

From this screen, you can view all previously run schedule jobs for the current school and school year.

Result Set: -- All --   Job Type: Regular Batch   Job Status: -- All --   **Refresh Display**

Add Schedule Job

			Job Name	Schedule Result Set	Run Time ▼	Duration (min)	Job Type	Status	Username
Stats	Job Params	Rerun Job	SSST All Grades	SSST All Grades	12/29/2016 01:49 PM	10	Batch	Complete	devin.launder

   c. The page refreshes and you are brought to the ***Submit*** tab of the Parameter Set used in the last run.
   d. The ***Schedule Job Name*** field is defaulting to what you filled in on your first run which was ***21/22 all grades***. You can change the name to something like ***21/22 all grades 2nd try*** or leave it as it. Either one will work.
   e. Select any queue from the ***Job Queue*** dropdown.
   f. The ***Clear Results Created By Scheduler*** and ***Clear Schedule Results Created Manually*** will default to what was selected in the last run.
   g. SI State Support recommends checking ***Clear Schedule Results Created By the Scheduler*** so students can get the best possible schedule.
   h. Click ***Execute Schedule Job***.

Schedule Job Wizard

From this screen, you can run the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

Master Schedule:*   Default Schedule ▼   Schedule Result:*   SSST All Grades ▼

Schedule Job Name:*   SSST All Grades 2nd try   Job Queue:*   STUD - STUDENT ▼

ⓘ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

☑ Clear Schedule Results Created By Scheduler

ⓘ If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

☐ Clear Schedule Results Created Manually

Execute Schedule Job   **< Back**   **Cancel**

   i. The page refreshes and you are brought back to **the *Schedule Job History*** page.
   j. Click ***Refresh Display*** until the job completes.

Task #8 - Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules

1. On the *Schedule Job History* page, click on the Stats link for the job that just completed.
2. The page refreshes and you are brought to tab 1 named *Students Scheduled Summary* of the *Schedule Results Statistics* page.
   a. The tab details how many students were scheduled on each pass.
   b. The *Scheduled Status* column has five categories.
   c. The *Fully Scheduled* category is the number of students who had all of their requests scheduled. If a student had two requests and the Batch Scheduler was able to fill both requests the student is considered fully scheduled.
   d. The second category is named *Fully Scheduled With Request Error*. The number of students listed in this category have received a full schedule for the requests that were schedulable, but one or more of his/her requests had a problem that prevented the Batch Scheduler from trying to schedule it, e.g. no course sections were setup for the requested course.
   e. The third category is named *Partially Scheduled* is the number of students who didn't have all their requests scheduled.
   f. The fourth category is named *Not Scheduled* is the number of students who didn't have any of their requests scheduled. Remember – only students with requests are included in the statistics. If a student doesn't have any requests the student isn't included in this statistic.
   g. The final category is named *Not Scheduled Due to Time Limit* is the number of students who couldn't be scheduled because the Batch Scheduler exceeded the number of seconds filled out in the *Time Limit Per Student* field on tab 1 of the job parameter.
   h. The page lists these statistics for each pass. The page also combines all passes and lists the statistics for *Total Scheduled For All Passes* and *Percent Scheduled For All Passes*.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages	Requests

Stat Type	Scheduled Status	Grade 12	Grade 11	Grade 10	Grade 09	Pass Total
Total Scheduled For Pass 1	Fully Scheduled	87	156	211	232	686
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	0	0	0	0	0
Total Scheduled For Pass 2	Fully Scheduled	0	0	0	0	0
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	0	0	0	0	0
Total Scheduled For Pass 3	Fully Scheduled	0	0	0	0	0
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	107	44	23	2	176
Total Scheduled For All Passes	Fully Scheduled	87	156	211	232	686
	Fully Scheduled With Request Error	0	0	0	0	0
	Partially Scheduled	107	44	23	2	176
	Not Scheduled	29	32	66	38	165
	Not Scheduled Due To Time Limit	0	0	0	1	1
Percent Scheduled For All Passes	% Fully Scheduled	39.01	67.24	70.33	84.98	66.73
	% Fully Scheduled With Request Error	0	0	0	0	0
	% Partially Scheduled	47.98	18.97	7.67	0.73	17.12
	% Not Scheduled	13	13.79	22	13.92	16.05
	% Not Scheduled Due To Time Limit	0	0	0	0.37	0.1

3. The second tab named ***Students Scheduled Detail*** lists the student's name and student's number for each of the five categories. If the category said zero students then the category will not listed on the ***Students Scheduled Detail***.
4. The third tab is named ***Course Status Messages*** lists each course, course sections, group, and group section that meets the following criteria, even if there were no requests for the course:
    - -Course has no Course Sections on the master schedule
    - -Group has no Group Sections on the master schedule
    - -Course is not Active
    - -Course Has No Course Sections with Meeting Times on the Master Schedule
    - -Course has no section in selected course terms

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	**Course Status Messages**	Request Status Messages	Requests Exceedin

Course	Course Section	Group	Group Section	Message	Requested
900110				Course Has No Course Sections with Meeting Times on the Master Schedule	No
920101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
960108				Course Has No Course Sections with Meeting Times on the Master Schedule	No
900101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
940313				Course has no Course Sections on the master schedule	No

5. The fourth tab is named ***Request Status Messages*** details the students who have request errors.
    a. The following screenshots shows example errors.

    Schedule Result Statistics

    This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	**Course Status Messages**	Request Status Messages	Requests Exceedin

Course	Course Section	Group	Group Section	Message	Requested
900110				Course Has No Course Sections with Meeting Times on the Master Schedule	No
920101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
960108				Course Has No Course Sections with Meeting Times on the Master Schedule	No
900101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
940313				Course has no Course Sections on the master schedule	No
B20133				Course has no Course Sections on the master schedule	No

    b. If a student has multiple requests for the same course the Batch Scheduler will not double schedule the student. If the student does need to be scheduled into the same course more than once the office staff will need to manually put the student in the course on either the ***Course Section Assignments*** page or the ***Request Assignments*** page.
6. The fifth tab is named ***Requests Exceeding Course Capacity*** details the courses in which the number of requests for the course exceeded the capacity for the course.

a. In the following screenshot course H/PEII has 80 requests but a capacity of 50. This statistic lets the school know it may want to consider adding another section of course H/PEII to meet the demand.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages	Requests Exceeding Course Capacity

Course	Requests Count	Capacity
910134	39	30
910123	35	30
A25311	65	64
B25311	65	64

7. The final tab is named ***Constraint Test Failures*** details the number of students that couldn't be scheduled due to ***Course Sequencing Rules*** that were setup, ***Daily Pattern Rules***, ***Max Course Deviation, Max Course Weight Deviation***, and ***Max Periods Per Day***.
   a. If none of these options were used when the Batch Scheduler was run each category will say zero.
   b. In the following screenshot the Batch Scheduler was setup to run with Course Sequencing Rules. Two students couldn't have all their requests fulfilled because of the course sequencing rules.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages	Requests Exceeding Course Capacity	Constraint Test Failures

Course Sequencing Rule: 10
Daily Pattern Rule: 0
Max Course Deviation: 0
Max Course Weight Deviation: 0
Max Periods Per Day: 0

8. The ***R413 Students Scheduled with Alternate Courses*** report lists students who have been scheduled into an alternate course request instead of their primary course request.

```
REPORT: DASL - R413                              ELMWOOD HIGH SCHOOL

                              STUDENTS SCHEDULED WITH ALTERNATE COURSES                    PAGE    1  OF      1

  ID        STUDENT NAME          GR  GN    HMRM      HOME         ORIGINAL REQUEST    ALTERNATE SCHEDULED      TERM
                                                      DIST                             CLASS

  12274     Student100061, MICHAEL  12  M                          French-French 1     610-LATIN I           All Year
```

9. The ***R415A Student Scheduled With Free Time*** report lists any open periods the student has. The **R415B Student Scheduled With Free Time by Period** report lists ant open periods students have by period.

a. If a student has an assignment for a period the period won't be listed on the report. (In the example R415A screenshot above period 01 isn't listed because the student isn't free that period, she has an assignment.)

10. The ***R424 Student Scheduled in one Course Section and Not Another*** generates a list of students who are scheduled into only one course for a specified pair of courses.

11. The ***R425 Students Scheduled Into Two Assigned Course Sections*** generates a list of students who are assigned to a specific pair of courses.

12. The **R426 Student Scheduling Analysis** lists each student's requests and if they were assigned into the course or their request could not be met.

REPORT: DASL - R426			**ELMWOOD HIGH SCHOOL** STUDENT SCHEDULING ANALYSIS REPORT				PAGE 3 OF 27

Student99454, REBECCA			NON-ASSIGNED : 2	NUMBER : 13199		GRADE : 10 GENDER : F HMRM:	
TERM	**COURSE**	**SEC**	**DESCRIPTION**	**DAYS**	**PERIOD**	**STATUS**	
	1222		CHEMISTRY I			All Full Sections	
	1047		PRE-CALCULUS			All Full Sections	
2nd	710	8	HEALTH	MTWRF	04	Assigned	
YEAR	1320	6	U.S. SOCIAL STUDIES 10	MTWRF	51,53	Assigned	
1st	Lun1	2	Lunch 1	MTWRF	52	Assigned	
2nd	Lun2	2	Lunch 2	MTWRF	52	Assigned	

13. The **R807 Section Summary by Report Period** lists each course section and if it is open or closed.

REPORT: DASL - R807		**ELMWOOD HIGH SCHOOL** SECTION SUMMARY BY REPORT PERIOD					PAGE 1 OF 13	
COURSE ID	**COURSE DESCRIPTION**	**TERM**	**SECTION ID**	**TEACHER NAME**	**PERIODS**	**ROOM ID**	**SECTION CAPACITY**	**STUDENTS ENROLLED**	**CLASS STATUS**
CU200	CU ART	1st	2	LANA Teacher2163	03	123	25		All
SA53	SA53	1st	3	HEATHER Teacher2143	53	203	5		All
SH1	SH1	1st	1	Jim Teacher1916	01	205	150		All
SA51	SA51	1st	2	CAROLYN Teacher1977	51	201	15		All
SA4	SA4	1st	21	MATT Teacher1945	04	118	5		All
CU711	CU Phys Ed	1st	1	CHARLES Teacher2108	52	123	5		All

14. The **R407 Class Master Schedule** lists each course section and group course section. The demand count on the **R407** is the number of students who have a request for the course but who didn't get scheduled into the course when the Batch Scheduler was run.

Report: R407						**ELMWOOD HIGH SCHOOL**					

Class Master Schedule

Group: (none)	(none)		Gr Cap:	Demand:		Gr Section:		Sec Cap:			
Course: 140	AGRI-BUSINESS			Credits: 1.000	Dpt:	AG		Demand:			1
	Sec Term	**Day/Period/Location/Staff**						Cap	M	F	Tot Open
1 YEAR		MTWRF / 03 / 122		DENNIS Teacher1934				7	0	0	0 7
Course: 220	DRAWING & PAINTING II			Credits: 0.500	Dpt:	ART		Demand:			1
	Sec Term	**Day/Period/Location/Staff**						Cap	M	F	Tot Open
1 1st		MTWRF / 51, 52 / 204		MARTHA Teacher2035				10	0	0	0 10
2 1st		MTWRF / 08 / 204		MARTHA Teacher2035				25	0	0	0 25
							Totals:	35	0	0	0 35

Task #9 – Remove unwanted requests and assignments

F.Y.I.

The remove function will be the only option enabled when dropping a course if school hasn't started. Once the first day of school arrives the drop, remove, and transfer functions will all be enabled for course sections that are in progress. If the course term hasn't started yet, the transfer function will be disabled on the course section.

[Find Students] 🔍 [Go To] 🔍

WARNING: You are working with a Future School Year

Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Student: DAILY, DANIEL

Course Info	Term Info
Course: 2520 Sec: 22	Term: 2nd Semester Course
Course Name: WORLD AFFAIRS	Start Date: 1/15/2018
Start Date: 1/15/2018	Stop Date: 5/25/2018

☐ Remove / Delete

Save   Cancel

F.Y.I.

Performing a remove permanently deletes the assignment from all scheduling pages.

If an assignment is removed also ensure the request is also deleted.

Remove unwanted requests and assignments using the Request Assignments page

1. With a student in context navigate to ***StudentInformation   » SIS » Student » Student Schedule » Request Assignments***.
2. Select a schedule from the **Working Schedule** dropdown and a schedule result set from the **Result**.
3. Click on the trash can next to the assignment needing removed.
4. The right side of the screen refreshes.
   a. The **Remove/Delete** option is the only option available since the first day of school hasn't arrived.
   b. When a remove is done, SI automatically assumes the student should have never been scheduled into the course and permanently deletes it.
   c. Place a check in the box next to **Delete Request**.
   d. Removing the assignment and deleting the request will ensure that the student will not get scheduled into the course again the next time the Batch Scheduler runs.
   e. Click **Save**.
   f. The following message will display, **Assignment Saved.**

Remove unwanted requests and assignments using the Course Section Assignments page

1. With a student in context navigate to ***StudentInformation*** **»** ***SIS*** **»** ***Scheduling*** **»** ***Course Section Assignments*** or ***StudentInformation*** **»** ***SIS*** **»** ***Scheduling*** **»** ***Requests***.
2. Select a schedule from the **Schedule** dropdown and a schedule result set from the **Schedule Result** dropdown.
3. Click on the trash can next to the assignment needing removed.
4. The right side of the screen refreshes.
   a. The **Remove/Delete** option is the only option enabled since the first day of school hasn't arrived.
   b. Click **Save**.
   c. The following message will display, **The selected Course Seciton Assignment was marked for deletion. Click save changes button to commit to the database.**
      Click **Save Changes**.
   d. The following displays, **The Course Section Assignments have been successfully saved.**
5. Now the request also needs deleted.
6. Navigate back to the Requests page.
   a. Click on the trash can next to the request.
   b. Click **OK** to complete the deletion of the request.

Task #10 - Rerun Batch Scheduler as many times as needed

Redo Tasks #5 and #6 until the desired results are achieved.

Task #11 - Clean up students that are not fully scheduled using the Request page

1. With a student in context, navigate to ***StudentInformation*** *» **SIS** » **Scheduling** » **Requests***.
   a. On the ***Requests*** page there are two dropdowns. One dropdown is for the Master Schedule and one dropdown is for the Schedule Result Set.
   b. Since in the previous tasks we have chosen to Update the Existing Result Set there is only one Result Set to choose from in the dropdown.
   c. This makes things very easy and there is no way you could accidentally make changes to a student's schedule on the wrong result set.

2. In the screenshot above the student's request for ***SS6 – World Geography*** went unfulfilled.
   a. The ***Status*** column says ***All Full Section***.
   b. Click on the plus icon to the right of the request to turn the request for ***SS6*** into an assignment.
   c. The page refreshes and you are brought to the ***Course Section Assignments*** page.
   d. Enter a section # or click the Ellipse icon to choose a section number.
   e. If you clicked on the Ellipse icon a new window pops up that shows you each section of the course and its capacity and filling count

Course Code - Name	Department	Course Sections				
SS6 - World Geography	Social Studies	Section	Term	Teacher(s)	Meeting Time	Capacity Filling
		1	S2	Mr. M Jones	02 (107)	30 12.00
		2	S2	Mr. M Jones	07 (107)	30 23.00

f. Click on the blue link for the section number and the section number will be automatically filled in for you.

g. The **Assignment Start Date** field should default to the first day of school.

h. Click **Save**.

Task #12 - Clean up students that are not fully scheduled using the Request Assignments page

F.Y.I. Many users prefer to use the Request Assignments page versus the Requests page because on the Request Assignments page they can see requests, assignments that originated from requests, and assignments that didn't originate from requests all on the same page.

1. With a student in context navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Student*** *»* ***Student Schedule*** *»* ***Request Assignments***.
    a. On the ***Student Requests*** **& Assignments** page, there are two dropdowns. One dropdown for the Master Schedule and one dropdown for the Schedule Result Set.
    b. Since in the previous tasks we have chosen to Update the Existing Result Set, there is only one Result Set to choose from in the dropdown.
    c. This makes things very easy and there is no way you could accidentally make changes to a student's schedule on the wrong result set.
2. The student for example has a request for course 1140.
    a. The request couldn't be turned into an assignment. Unlike the Requests page, the Request Assignments page does not tell you why the request couldn't be fulfilled. (The Requests page notated if all course sections were full or if there was a conflict.)
    b. Click on the Edit Pencil under the Assignment column on the corresponding line for 1140.
    c. The right side of the screen does a partial refresh.
3. There are three available sections of course 1140.
    a. The flag symbol represents a scheduling conflict.
    b. The person with an X symbol represents the section is filled to capacity and scheduling the student into the section would overfill the section.
    c. Click on the **Assign** icon to the left of section 30 to assign the student into section 30.
    d. The right side of the screen refreshes again and the following is displayed.
    e. In the ***Assignment Start Date*** field defaults to the first day of the course term.
    f. Click ***Save Assignment***.
    g. The following warning message will appear since the section would cause a scheduling conflict and /or would be overfilled

h. If you have security permissions to override and allow course section conflicts, the **Save Assignment** button will be enabled. If you don't have permission to override you will need to select **Cancel** and choose another course section.

i. The assignment for 1140-30 appears on the same line as the request for 1140. This is how you can tell an assignment originated from a request, because they appear on the same line.

4. Now, a different student has a request for course 1011 and an assignment for course section 1011-1.

   a. The assignment doesn't appear on the same line as the request. Since they don't appear on the same line I can tell this course didn't originate from a request. The course section assignment was directly added to the student's schedule.

   b. If the school would run the Batch Scheduler again the Batch Scheduler would try to schedule the student's request for course 1011 since the request is still unfulfilled.

   c. The school should delete the request for course 1011 so the student doesn't get double scheduled into course 1011. If they don't delete the request the student could be assigned once manually by a user and another time by the Batch Scheduler.

   d. To delete a request click on the Edit Pencil to the left of the request for 1011.

   e. The right side of your screen refreshes.

   f. Click **Delete Request**.

   g. The page refreshes.

   h. Uncheck **Show Active Only**.

   i. The inactivated request for course 1011 will now show since Show Active only was unchecked.

   j. The Batch Scheduler will not attempt to schedule the student into course 1011 since the request is now inactive.

5. The Batch Scheduler only schedules active requests.
   The **Request Assignments** page has several other helpful features.

   a. One of those features is the Schedule Graph.

   b. Click **View Schedule Graph** in the upper right corner of the **Request Assignments** page.
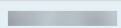
c. The bottom of the page refreshes and a graph is displayed.
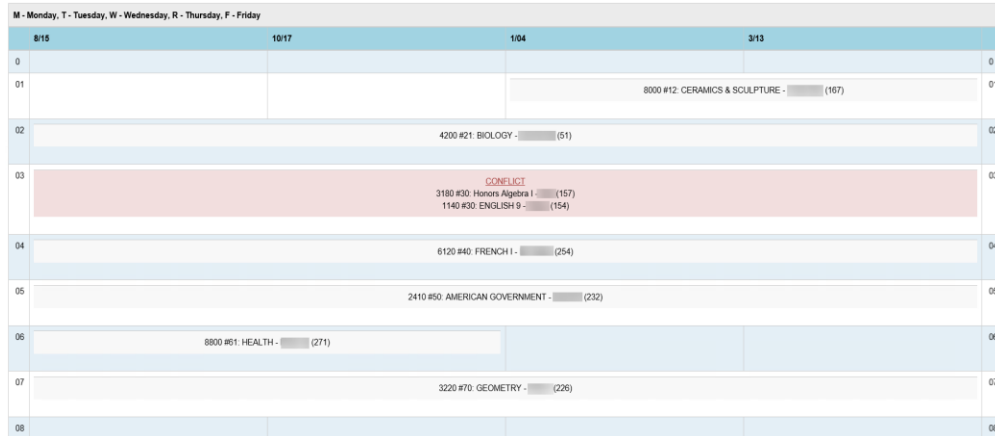
d. The Schedule Graph is a great tool for telling which periods are open with quick glance.
e. In the screenshot above the student has an opening All Year Period 0, 1st Semester Period 1, 2nd Semester Period 6 & All Year Period 08.
f. The Schedule Graph is also useful for determining if the student's schedule has any conflicts.
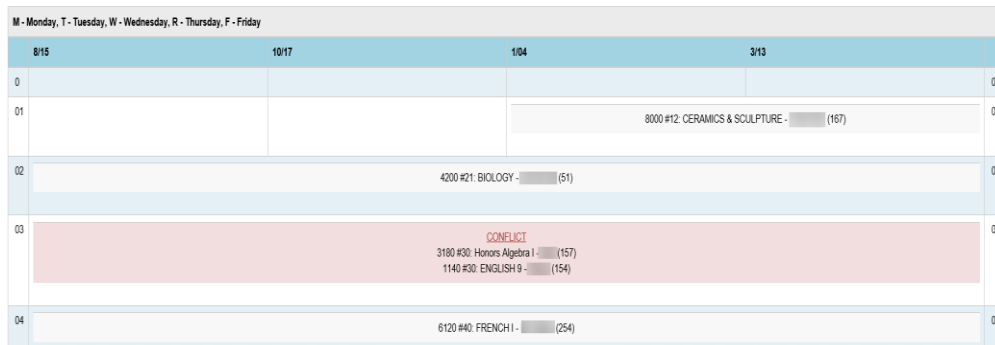
g. The student in the above example has a conflict 3rd Period. She was scheduled into two courses this period.
h. She has an assignment for course section 3180-30 and course section 1140-30.
i. The Batch Scheduler will not give a student an assignment for a course section in a period where the student already has an assignment. One of these assignments was manually assigned by a user and the user chose to override the conflict.
j. One way to double check if an assignment was manually assigned or assigned by the Batch Scheduler is to look at the *Course Section Assignments* page.
k. On the Course Section Assignments page course 3180-30 has a *Status* of *Batch* and course 1140-30 has a *Status* of *Manual*.

		Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
🗑	✎	8000	CERAMICS & SCULPTURE	12	01 (167)		2nd Semester Course	Batch	Assigned	Jan 03, 2017
🗑	✎	4200	BIOLOGY	21	02 (51)		All Year Course	Batch	Assigned	Aug 15, 2016
🗑	✎	3180	Honors Algebra I	30	03 (157)		All Year Course	Batch	Assigned	Aug 15, 2016
🗑	✎	1140	ENGLISH 9	30	03 (154)		All Year Course	Manual	Assigned	Aug 15, 2016
🗑	✎	6120	FRENCH I	40	04 (254)		All Year Course	Batch	Assigned	Aug 15, 2016

l. Conclusion: The Batch Scheduler scheduled the student into 3180-30 but the office staff scheduled the student into 1140-30 and created the conflict.

Task #13 - Run Study Hall Wizard to fill in the student's open periods with study halls

Don't run the Study Hall Wizard until all of the following conditions are met:

✓ You are sure the Batch Scheduler no longer needs run.
✓ You are satisfied with the results of the Batch Scheduler.
✓ You've resolved the majority of student's conflicts.
✓ You are ready to fill in the rest of the student's open periods with study halls.

The Study Hall Wizard will only schedule students into study halls if they have an Overall Student Status of Active and they must have at least one course request.

Student must have at least one course request or course section assignment to be scheduled into study halls by the Study Hall Wizard.

The Study Hall Wizard can be run multiple times. Unfortunately there is no easy way to clear all assignments for study halls if the Study Hall Wizard was run prematurely.

The Study Hall Wizard can be run on multiple result sets. If the school isn't sure which result set they will finalize they can run the Study Hall Wizard on both result sets. In other words, the Schedule doesn't have to be finalized in SI Options in order for the Study Hall Wizard to be run.

Make sure you are in the correct school year before proceeding. If you are scheduling for the 21/22 school year you need to have your context set to 21/22.

Also, DO NOT rerun the study hall wizard after the schedule is finalized. This could result in a loss of data.

The Study Hall Wizard can be accidentally run in 20/21. Be very careful and make sure you are in the correct school year before proceeding.

1. Before running the Study Hall Wizard, navigate to *StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Courses*.
   a. Check each study hall to make sure it has a *Course Type* of *Study Hall*.
   b. The *Course Type* field can be found on the *Miscellaneous* tab of each study hall.
   c. The Study Hall Wizard only looks at *Course Type* equal to *Study Hall*.

   d. The Study Hall Wizard can be run to look at the Grade Levels Selected on the Miscellaneous tab of the study hall. If the school would like to enforce grade levels ensure the Grade Levels Selected is properly setup for each study hall. If the school doesn't want to enforce grade levels on the study halls then there is no need to verify these fields at this time.
   Note: The selected Grade Levels on the Course load into GradeBook and are used for setting up Standard Based Report Cards.
2. Now navigate to *StudentInformation » Management » School Administration » Scheduling Administration » Scheduler » Study Hall Wizard*.
3. In the *Max Consecutive Study Halls* field enter the number of study halls students are allowed to have back to back.
   a. If your school only allows students to have 2 study halls in a row enter 2 in the field.
4. In the *Section Overfill Percent* enter the amount you would like the study halls to be overfilled.

a. If you don't want the study halls overfilled leave the field blank.
5. Next, in the **Sort Params Sort Order** section filter on which students you would like the Study Hall Wizard to schedule first.
    a. Multiple sort criteria can be pulled over to the right but the sort criteria is applied in order from top to bottom.
    b. If **Grade Level ASC** is chosen SI will attempt to schedule the lowest grade level first.
    c. If **Grade Level DESC** is chosen SI will attempt to schedule the highest grade level first.
    d. In other words if you want the Study Hall Wizard to schedule study halls for 12th graders before scheduling the other grade levels choose **Grade Level DESC**.
    e. If it doesn't matter which grade level gets scheduled first choose **Student Random**.
    f. Do not select both **Grade Level ASC** and **Grade Level DESC**.
    g. If **Student Name ASC** is chosen students with last names starting with A are scheduled before students with last names that begin with B.
    h. If **Student Name DESC** is chosen students with last names starting with W are scheduled before students with last names that begin with T for example.
    i. If it doesn't matter which students are scheduled first choose **Student Random**.
    j. If **Student Number ASC** is chosen students with the lowest student numbers will be scheduled first.
    k. Example: student #10029 will be scheduled before student #10041.
    l. If **Student Number DESC** is chosen students with the highest student numbers will be scheduled first.
    m. If it doesn't matter which students are scheduled first choose **Student Random**.
    n. If **Student Schedule Priority** is chosen the Batch Scheduler will look the **Scheduling Priority** field on the Additional tab of each student's profile.
    o. The **Scheduling Priority** field defaults to 5 upon registration and isn't a field that is commonly used in SI. This field is only used when running the Batch Scheduler or Study Hall Wizard.
    p. Most schools will not choose to schedule study halls by **Scheduling Priority**.
    q. If your school does choose to schedule study halls by **Scheduling Priority** you can use **SIS Student Search** to create a list of each student's scheduling priority.
    r. Navigate to **StudentInformation** **» EZ Query** **» Reports** **» SIS Student Search** to create the list.
    s. If **Student Requesting Group** is chosen the Study Hall Wizard will attempt to schedule students who have requests for course groups before students without requests for course groups.

6. If the school would like to enforce grade levels that were selected on the *Miscellaneous* tab of each study hall put a check in the box next to *Enforce Study Hall Grade Levels*.
7. In the *Grade Levels to Schedule* pull over the appropriate grade levels to the right.
   a. If the school would like to run the Study Hall Wizard for a grade level at a time just pull over one grade level and run the Study Hall Wizard and then repeat the process for the next grade level.
8. If the school would like to allow study halls first period put a check in the box next to *Permit First Period Study Halls*.
9. If the school would like to allow study halls before lunch place a check in the box next to *Permit Study Hall Before Lunch*.
10. If the school would like to allow study halls to be scheduled last period place a check in the box next to *Permit Last Period Study Hall*.
11. If the school would like to allow study halls after lunch, place a check in the box next to *Permit Study Hall After Lunch*.

Study Hall Wizard

From this screen, you can define the rules used by the study hall scheduler when assigning students to study halls.

Study Hall Parameters	Execute Job

Max Consecutive Study Halls:* [2]
Section Overfill Percent: [5]

Sort Params Sort Order:*
Student Number ASC
Student Number DESC
Student Schedule Priority
Grade Level ASC

Student Random

ℹ Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled

Enforce Study Hall Grade Levels: [ ]

Grade Levels to Schedule:
05 - 05
06 - 06
13 - 13
GR - GR

09 - 09
10 - 10
11 - 11
12 - 12

✔ Permit First Period Study Hall ✔ Permit Study Hall Before Lunch
✔ Permit Last Period Study Hall ✔ Permit Study Hall After Lunch

[Save] [Cancel] [Next >]

12. Click *Next* to move to the *Execute Job* tab.
    a. Select a *Schedule* from the dropdown.
    b. Next select a *Schedule Result* from the dropdown.
    c. The *Schedule Job Name* field defaults to *Study Hall*. You can change the name of leave it as is.
    d. Select any queue from the *Job Queue* dropdown. (It doesn't matter which one you select.)
    e. Make sure you are in 21/22.
    f. Click *Submit*.
    g. The following message will be displayed on the screen.

Study Hall Wizard

From this screen, you can define the rules used by the study hall scheduler when assigning students to study halls.

> The job was scheduled to run ✕

| Study Hall Parameters | Execute Job |

Schedule:* [Default Schedule ▼]

Schedule Result:* [Default Schedule Result ▼]

Schedule Job Name:* [Study Hall   ✕]

Job Queue:* [EMST - EMIS Transfer   ▼]

[Submit] [< Back]

13. Now navigate *to StudentInformation » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job History* to check the status of the Study Hall Wizard job.
   a. In the *Job Type* dropdown choose *Study Hall Batch*.
   b. Click *Refresh Display*.

Schedule Job History

From this screen, you can view all previously run schedule jobs for the current school and school year.

Result Set: [-- All -- ▼] Job Type: [Study Hall Batch ▼] Job Status: [-- All -- ▼] [Refresh Display]

[Add Schedule Job]

			Job Name	Schedule Result Set	Run Time ▼	Duration (min)	Job Type	Status	Username
Stats	Job Params	Rerun Job	Study Hall	Default Schedule Result Set	08/15/2016 01:25 PM	1	Study Hall Batch	Complete	▓▓▓▓

   c. The job will be listed as *Pending* and then change to *Active*.
   d. Click **Refresh Display** until the job says *Complete*.
   e. Click on the Stats link.
14. The page refreshes and the *Student Study Halls Scheduled – Summary* tab is displayed.
   a. The statistics summarize how many students in each grade level were assigned study halls.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

| Student Study Halls Scheduled - Summary | Student Study Halls Scheduled - Detail | Study Hall Constraint Test Failures |

Stat Type	Scheduled Status	Grade 12	Grade 11	Grade 10	Grade 09	Total
Total Study Halls Scheduled	Students Scheduled In One or More Study Halls	132	142	129	113	516
	Students Not Scheduled In Any Study Halls	2	13	33	43	91
Percent Study Halls Scheduled	% Students Scheduled In One or More Study Halls	98.51	91.61	79.63	72.44	85.01
	% Students Not Scheduled In Any Study Halls	1.49	8.39	20.37	27.56	14.99

   b. Next click on the 2nd tab named *Student Study Halls Scheduled – Detail*.
   The 2nd tab lists each student and how many study halls they received.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Student Study Halls Scheduled - Summary	Student Study Halls Scheduled - Detail	Study Hall Constraint Test Failures

Scheduled Status	Study Halls Scheduled	Student Number	Last Name	First Name	Grade Level Code
Students Scheduled In One or More Study Halls	7	27275		Katherine	12
	3	13		Gregory	12
	4	99671		Garrett	12
	1	99977		Andrew	12
	3	0045		Grant	12

15. The third tab is named ***Study Hall Constraint Failures*** summarizes how many students were scheduled into consecutive study halls, received a study hall 1st period, received a study hall before lunch, received a study hall after lunch, or received a study hall last period.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Student Study Halls Scheduled - Summary	Student Study Halls Scheduled - Detail	Study Hall Constraint Test Failures

Max Consecutive Study Halls: 107
Permit First Period Study Hall: 0
Permit Last Period Study Hall: 0
Permit Before Lunch Study Hall: 0
Permit After Lunch Study Hall: 0

16. The next screen shot is of a student's ***Course Section Assignments*** page.

		Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
🗑	✏	0109	WORLD GEOGRAPHY & CULTURES	11	01 (A111)		Semester 1	Manual	Assigned	Aug 24, 2016
🗑	✏	0116	POLITICAL TRENDS	12	01 (A200)		Semester 2	Manual	Assigned	Jan 04, 2017
🗑	✏	0035	CP HUMAN ANATOMY	21	02 (A159)		Semester 1	Batch	Assigned	Aug 17, 2016
🗑	✏	0189	FITNESS AWARENESS	22	02 (A174)		Semester 2	Batch	Assigned	Jan 04, 2017
🗑	✏	0205	INTRO TO GUITAR	31	03 (A189)		Semester 1	Batch	Assigned	Aug 17, 2016
🗑	✏	0182	FITNESS	32	03 (GYM)		Semester 2	Batch	Assigned	Jan 04, 2017
🗑	✏	SH41	STUDY HALL	41	04 (CAFE)		Semester 1	Batch	Assigned	Aug 17, 2016
🗑	✏	SH42	STUDY HALL	42	04 (CAFE)		Semester 2	Batch	Assigned	Jan 04, 2017
🗑	✏	0025	ENGLISH COMPOSITION I	51	05 (A102)		Semester 1	Batch	Assigned	Aug 17, 2016

   a. The student was scheduled into two study halls.

   b. The student still has a couple of open periods. The ***Schedule Graph*** on the Request Assignments page is an excellent tool in determining which periods the student has open at a glance.

c. The student has Periods 8 and 9 open all year.

M - Monday, T - Tuesday, W - Wednesday, R - Thursday, F - Friday

	8/17	10/18	1/04	3/13	
01	0111 #11: PSYCHOLOGY I - (A200) 0109 #11: WORLD GEOGRAPHY & CULTURES - (A111)	0109 #11: WORLD GEOGRAPHY & CULTURES - (A111)		0116 #12: POLITICAL TRENDS - (A200)	01
02	0035 #21: CP HUMAN ANATOMY - (A159)			0189 #22: FITNESS AWARENESS - (A174)	02
03	0205 #31: INTRO TO GUITAR - (A189)			0182 #32: FITNESS - (GYM)	03
04	SH41 #41: STUDY HALL - (CAFE)			SH42 #42: STUDY HALL - (CAFE)	04
05	0025 #51: ENGLISH COMPOSITION I - (A102)			0028 #52: ENGLISH COMPOSITION II - (A102)	05
06	0116 #61: POLITICAL TRENDS - (A108) SH61 #61: STUDY HALL - (CAFE)	0116 #61: POLITICAL TRENDS - (A108)		0054 #62: FORENSICS - (A164)	06
07	0082 #73: ALGEBRA III - (A220)				07
08					08
09					09
10	ADVIS #41: ADVISORY Wed. 12:07-12:43 - Polston (A164)				10

d. The school could also run the *R415 Student Scheduled With Free Time* report that will list any open periods the student has.

Task #14 - Print Schedule Cards (R701)

Custom R701 formats aren't currently available.

1. To print Schedule Cards navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Scheduling Reports*** *»* ***Schedule Card Formatter (R701)***.
2. In the Report Layout dropdown, select a format. The following table will guide you in your format selection.
   Note: The Print Two Students Per Page option is on formats 2, 3, 12, 13, 22, and 23.

Format	Orientation	Print Request Status?	Print Locker or Combo?	Print Fees?	Notes
1	Landscape	Yes	Yes –no combo	No	- Only format to print request status - When printing, choose Page Scaling = Fit to Printable Area
2	Portrait	No	Yes –no combo	No	
3	Portrait	No	Yes (both)	No	- Very similar to format 2; smaller print - Prints student number
4	Landscape	No	Yes –no combo	No	- 2 schedule cards for the same student per page - Prints student SSN
5	Landscape	No	Yes –no combo	No	- 2 schedule cards for the same student per page - Very similar to format 4 except for placement of several small items
6	Landscape	No	Yes (both)	Yes	- Can project fees if fees haven't been assigned - Prints program

*Note on Format 6: Font size is 8.5 and will accommodate 17 assignments on a single page with default margins of 0.4. For students with 17 assignments (or more), the common text will print on the 2nd page. A single page can accommodate more assignments by reducing the top and bottom margins or using the Adobe Page Scaling setting of "Fit to Printable Area" or "Shrink to Printable Area".

Format	Orientation	Print Request Status?	Print Locker or Combo?	Print Fees?	Notes
11					Same as format 1
12	Portrait	No	Yes (both)	No	- Similar to format 2 - Prints program - Does not print gender or homeroom
13					Same as format 3
14					Same as format 4
15					Same as format 5
16	Landscape	No	Yes (both)	Yes	- Can project fees if fees haven't been assigned

					- Very similar to format 6 - Prints student SSN
21					Same as format 1
22					Same as format 2
23					Same as format 3
24					Same as format 4
25					Same as format 5
26					Same as format 6
27					Similar to format 13 - Footer contains school's return address and parent's mailing address for use with self sealing paper (mailer)

3. Next, select a **Schedule** and **Schedule Result** from the dropdowns.
4. Select the desired filters for grade level, course terms, etc.
5. To print Schedule Cards to hand out to students choose the following parameters.

Suppress Requests That Have No Matching Assignment: ⦿ Yes   ◯ No

Position For Requests That Have No Matching Assignment: Before ⌄

Suppress Results That Have No Assignment: ⦿ Yes   ◯ No

Position Of Results That Have No Assignment: Before ⌄

Print Only Schedules With Results That Have No Assignment: ◯ Yes   ⦿ No

Print Schedules Changed After Date: [ ] 📅

6. To print Schedule Cards to show all the requests the Batch Scheduler assigned and the requests the Batch Scheduler attempted to assign but couldn't choose the following parameters.

Suppress Requests That Have No Matching Assignment: ◯ Yes   ⦿ No

Position For Requests That Have No Matching Assignment: Before ⌄

Suppress Results That Have No Assignment: ⦿ Yes   ◯ No

Position Of Results That Have No Assignment: Before ⌄

Print Only Schedules With Results That Have No Assignment: ◯ Yes   ⦿ No

Print Schedules Changed After Date: [ ] 📅

7. To print Schedule Cards to see which students have unapproved requests choose the following parameters.

Suppress Requests That Have No Matching Assignment:	○ Yes ◉ No
Position For Requests That Have No Matching Assignment:	Before ▾
Suppress Results That Have No Assignment:	○ Yes ◉ No
Position Of Results That Have No Assignment:	Before ▾
Print Only Schedules With Results That Have No Assignment:	○ Yes ◉ No
Print Schedules Changed After Date:	📅

8. To print Schedule Cards for only students who still have unfulfilled requests choose the following parameters.
   a. Note the Schedule Cards can be run with this option before the Batch Scheduler is even executed.

Suppress Requests That Have No Matching Assignment:	○ Yes ◉ No
Position For Requests That Have No Matching Assignment:	Before ▾
Suppress Results That Have No Assignment:	○ Yes ◉ No
Position Of Results That Have No Assignment:	Before ▾
Print Only Schedules With Results That Have No Assignment:	◉ Yes ○ No
Print Schedules Changed After Date:	📅

Note: As of StudentInformation 16.0.0, the Load Settings tab has the option to select **Private** to make the report unavailable on the I Want To … menu or select **Available In "I Want To" Menu** to list the report on the the I Want To … menu. This setting cannot be changed. The report must be deleted and re-created to change the privacy setting.

Schedule Card Formatter (R701)

From this screen, you can select parameters to generate a report.

| Selection Criteria | Selection Summary | **Load Settings** |

	Name	Private	Available In "I Want To" Menu	Creator	Date Created
🗑	format 3	☐	☑	Recker, Amy (amy.recker)	Aug 04, 2016

Default Settings On Startup: Load Last Parameters ▾

Current Settings

Name:* [   ]

Private: ☑
Available In "I Want To" Menu: ☑

Save

Appendix A: - How to schedule one grade level at a time updating the same schedule result set each time.

1. Follow the steps in *Task #4 Configure Batch Scheduler job parameter to schedule the entire school* except in *step #6a* in the *Grade Levels to Schedule* filter pull over the grade level you would like to schedule first.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	Course Sequencing Rules	Teacher Link Groups	Submit

Grade Levels to Schedule:*

```
05 - 05
06 - 06          12 - 12
07 - 07
08 - 08
```

Course Terms to Schedule:*

```
                  1st Semester Course
                  2nd Semester Course
                  All Year Course
```

🛈 Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled:*

```
Student Number ASC        Student Requesting Group
Student Number DESC       Student Random
Student Schedule Priority
Grade Level DESC
```

Section Overfilled Percent: [5]

Course Group Locking: [Honor Course Group Locks ▾]   Balance By Ethnicity: [No Balancing ▾]

🛈 Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student:* [60]

[Next >]

    a. Continue on with the remainder of the steps in *Task #4*.

2. Now, follow the steps in *Task #5 Run the Batch Scheduler* except in *step #8* SI State Support recommends naming the Schedule Job Name *One grade at a time*.
    a. Continue following the remainder of the steps in *Task #5 Run the Batch Scheduler*.
3. Follow all steps in *Task #6 Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules*.
4. Run the Batch Scheduler for the same grade level again if needed until the desired results for that grade level are achieved.
5. After the Batch Scheduler has completed and the student's schedules are the way you want them you can now schedule another grade level.
6. Follow the steps in *Task #5* again except before clicking on the **Execute Job and Update Existing Schedule Result** in step #2 click on the Edit Pencil icon to edit the job parameter set.
    a. In the *Grade Levels to Schedule* filter clear the filter and select the next grade level to be scheduled.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

Grade Levels to Schedule: *

09 - 09		11 - 11
10 - 10		
12 - 12		
13 - 13		

Course Terms to Schedule: *

		1st Semester Course
		2nd Semester Course
		All Year Course

ℹ Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled: *

Student Number ASC		Student Requesting Group
Student Number DESC		Student Random
Student Schedule Priority		
Grade Level DESC		

Section Overfilled Percent: 5

Course Group Locking: Honor Course Group Locks ⌄   **Balance By Ethnicity:** No Balancing ⌄

ℹ Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student: * 60

[Next >] [Cancel]

b. After the Batch Scheduler has completed and the student's schedules are the way you want them you can now schedule another grade level.

7. Now go edit the job parameter again and clear out the filter and select the next grade level to be scheduled.

8. Continue the process until all the desired grade levels have been scheduled.

Appendix B - How to run the Batch Scheduler creating a new result set each time.

This method is more complicated then it appears and extreme caution is advised before attempting to schedule using this method.

When it comes time to finalize the 21/22 schedule, only one schedule result set can be chosen from the dropdown in SI Options.

1. Complete Tasks 1-6 in this checklist.
2. Once you are ready to run the Batch Scheduler for the 2nd time navigate to *StudentInformation* **»** *Management* **»** *School Administration* **»** *Scheduling Administration* **»** *Scheduler* **»** *Job Parameter Sets*.
3. Click on the 4th icon **Execute Job and Create New Schedule Result** of the job parameter you wish to rerun.
   a. You will be brought to the Submit tab.
   b. In the *Master Schedule* dropdown choose a master schedule. Most schools will only have one master schedule in the dropdown.
   c. In the *New Schedule Result Name* field enter a descriptive name that will help you and other users remember which schedule result set is the latest and greatest.
   d. Some suggested names are *2nd try all grades, added 1 sec of 1912,* or *Add Art1 2/12 9:29.*
   e. The more descriptive you are with the *Schedule Result Name* the less likely you another user will accidentally pick the wrong one and begin making schedule changes on the wrong result set.
   f. Enter an optional description in the *New Schedule Result Description.*
   g. Since we have already run the Batch Scheduler once we have the option of copying the results from the first run into the 2nd run.
   h. In the *Copy from Existing Schedule Result Set* dropdown choose the schedule result you created in the first run.

i. Now you have the option of which course section assignments from the result set you want to copy to the new result set.
j. SI State support recommends only choosing to place a checkbox in *Copy Schedule Results Created Manually*.
k. By choosing to copy the results that were scheduled manually the new schedule result set will contain all the assignments with a *Type* of *Manual* from the original result set. This means any assignment that was directly added to a student's schedule and any request that was manually turned into an assignment will be copied to the new result set.
l. If *Copy Schedule Results Created by the Batch Scheduler* is checked all the course section assignments with the *Type* of *Batch* will be copied to the new result set. SI State Support recommends leaving this option unchecked.
m. If *Copy Schedule Results Created by the Single Student Scheduler* is checked all course sections assignments with the *Type* of *Online* will be copied to the new result set. SI State Support recommends leaving this option unchecked.

		Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
🗑	✏	4010	MODERN WORLD HISTORY	1	1 (134)		All Year Course	Online	Assigned	Aug 29, 2016
🗑	✏	HR	HOMEROOM	39	HR (204)		All Year Course	Manual	Assigned	Aug 29, 2016
🗑	✏	0263	LEISURE GAMES & ACTIVITIES	3	2 (GYM)		1st Sem	Manual	Assigned	Aug 29, 2016
🗑	✏	7513	CAREER & LIFE PLANNING	2	2 (108)		2nd Sem	Manual	Assigned	Jan 23, 2017
🗑	✏	9210	SCULPTURE & CERAMICS I	2	3 (110)		All Year Course	Online	Assigned	Aug 29, 2016
🗑	✏	2120	CP MATH I	1	3 (203)		All Year Course	Batch	Assigned	Aug 29, 2016
🗑	✏	LUNCH1	LUNCH TERM 1	4	4 (159A)		1st Sem	Batch	Assigned	Aug 29, 2016

n. In the *Schedule Job Name* field enter a descriptive name. SI State Support recommends just copying the same name you entered in the *New Schedule Result Name* in step #3c above.

Schedule Job Wizard

From this screen, you can run the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

Master Schedule:* `Default Schedule ▽`

New Schedule Result Name:*

`2nd run 2/12 11:20`

New Schedule Result Description:

Copy from existing Schedule Result set:

🛈 Check one or more of the boxes below, in order to copy assignments from the existing Schedule Result set chosen in the dropdown at left, to the new Schedule Result set

`Default Result Set ▽`

☑ Copy Schedule Results Created Manually

☐ Copy Schedule Results Created by the Batch Scheduler

☐ Copy Schedule Results Created by the Single Student Scheduler

Schedule Job Name:* `2nd run 2/12 11:20`   Job Queue:* `EMST - EMIS Transfer ▽`

[Execute Schedule Job] [< Back] [Cancel]

o. In the **Job Queue** dropdown select a queue. It doesn't matter which one you select.

p. Click **Execute Schedule Job.**

4. Now, follow the steps in **Task #8 Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules**.

5. When you are finished making adjustments to the master schedule and requests and are ready to rerun the Batch Scheduler by following steps 2, 3, and 4 again of **Appendix B** until you achieved the desired scheduling results.

6. Once you are satisfied with results of the Batch Schedule and wish to start making manual adjustments to student's schedules continue on with **Tasks #10-13** to finish out the scheduling process.

Appendix C - How to run the Batch Scheduler for one grade level at a time creating a new result set each time.

This method is more complicated then it appears and extreme caution is advised before attempting to schedule using this method.

 When it comes time to finalize the 21/22 schedule only one schedule result set can be chosen from the dropdown in SI Options.

Please make sure you do not create a separate result set for each grade level. Please make sure you are copying the results from a previous run to the new run.

The Key to Success: If you are choosing to schedule one grade level at a time and create a new result set each time the key to success is to schedule one grade level, then schedule the next grade level and copy the scheduling results from the 1st grade level to the 2nd grade level. Once you've achieved the desired results with the 2nd grade level then schedule the 3rd grade level and copy the scheduling results from the result set that has the first two grade levels combined and so on.

1. Complete Tasks 1-3 in this checklist.
2. Follow the steps in *Task #4 Configure Batch Scheduler job parameter to schedule the entire school* except in *step #6a* in the *Grade Levels to Schedule* filter pull over the grade level you would like to schedule first.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

Grade Levels to Schedule:*

05 - 05		12 - 12
06 - 06		
07 - 07		
08 - 08		

Course Terms to Schedule:*

	1st Semester Course
	2nd Semester Course
	All Year Course

ℹ️ Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled:*

Student Number ASC	Student Requesting Group
Student Number DESC	Student Random
Student Schedule Priority	
Grade Level DESC	

Section Overfilled Percent: 5

Course Group Locking: Honor Course Group Locks ▾   Balance By Ethnicity: No Balancing ▾

ℹ️ Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student:* 60

Next >

3. Continue on with the remainder of the steps in *Task #4*.
4. Complete the steps in *Task #5 Run the Batch Scheduler* and *Task #6 Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules*.
5. Once you are ready to run the Batch Scheduler for the 2nd time navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Job Parameter Sets**.
   a. Click on the Edit Pencil icon of the job parameter you ran previously.
   b. On the *Pass Level Parameters* tab clear out the *Grade levels to Schedule* filter and pull over the next grade level to the right that you want to schedule.
   c. Now flip to the *Submit* tab and click *Save Schedule Parameter*.
   d. The page will refresh and you will be brought back to the J*ob Parameter Sets* page.
6. Click on the 4th icon **Execute Job and Create New Schedule Result** of the job parameter set you just edited.
   a. You will be brought to the *Submit* tab.
   b. In the *Master Schedule* dropdown choose a master schedule. Most schools will only have one master schedule in the dropdown.

c. In the **New Schedule Result Name** field enter a descriptive name that will help you and other users remember which schedule result set is the latest and greatest.

d. Some suggested names are **12 + 11 1st try, 11th and 12th #1**, or **add 11th to 12th**

e. The more descriptive you are with the **Schedule Result Name** the less likely you another user will accidentally pick the wrong one and begin making schedule changes on the wrong result set.

f. Enter an optional description in the **New Schedule Result Description.**

g. Since we have already run the Batch Scheduler once we have the option of copying the results from the first run into the 2nd run.

h. In the **Copy from Existing Schedule Result Set** dropdown choose the schedule result you created in the first run.

i. Now you have the option of which course section assignments from the original result set you want to copy to the new result set.

j. Since all the course section assignments for the first grade level are contained in the first result set we would want to put a check in all three boxes.

k. **Copy Schedule Results Created Manually** will copy all assignment with a **Type** of **Manual**. This means any assignment that was directly added to a student's schedule and any request that was manually turned into an assignment will be copied to the new result set.

l. **Copy Schedule Results Created by the Batch Scheduler** will copy all the course section assignments with the **Type** of **Batch** to the new result set.

m. **Copy Schedule Results Created by the Single Student Scheduler** will copy all course sections assignments with the **Type** of **Online** to the new result set.

		Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
🗑	✏	4010	MODERN WORLD HISTORY	1	1 (134)		All Year Course	Online	Assigned	Aug 29, 2016
🗑	✏	HR	HOMEROOM	39	HR (204)		All Year Course	Manual	Assigned	Aug 29, 2016
🗑	✏	0263	LEISURE GAMES & ACTIVITIES	3	2 (GYM)		1st Sem	Manual	Assigned	Aug 29, 2016
🗑	✏	7513	CAREER & LIFE PLANNING	2	2 (108)		2nd Sem	Manual	Assigned	Jan 23, 2017
🗑	✏	9210	SCULPTURE & CERAMICS I	2	3 (110)		All Year Course	Online	Assigned	Aug 29, 2016
🗑	✏	2120	CP MATH I	1	3 (203)		All Year Course	Batch	Assigned	Aug 29, 2016
🗑	✏	LUNCH1	LUNCH TERM 1	4	4 (159A)		1st Sem	Batch	Assigned	Aug 29, 2016

n. In the **Schedule Job Name** field enter a descriptive name. SI State Support recommends just copying the same name you entered in the **New Schedule Result Name** in step #6c above.

o. In the **Job Queue** dropdown select a queue. It doesn't matter which one you select.

p. Click **Execute Schedule Job.**

Schedule Job Wizard

From this screen, you can run the Scheduler

| Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit |

Master Schedule: Default Schedule

New Schedule Result Name:
add 11th graders to 12th grade result set

New Schedule Result Description:

Copy from existing Schedule Result set:

Default Result Set

ⓘ Check one or more of the boxes below, in order to copy assignments from the existing Schedule Result set chosen in the dropdown at left, to the new Schedule Result set

☑ Copy Schedule Results Created Manually

☐ Copy Schedule Results Created by the Batch Scheduler

☐ Copy Schedule Results Created by the Single Student Scheduler

Schedule Job Name: 1th graders to 12th grade result set   **Job Queue:** Gen - Generic

[Execute Schedule Job]   [< Back]   [Cancel]

7. Now follow the steps in Task #8 ***Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules***.
8. When you are finished making adjustments to the master schedule and requests and are ready to rerun the Batch Scheduler by following steps 5 and 6 again of ***Appendix C*** until you achieved the desired scheduling results.
9. Once you are satisfied with results of the Batch Scheduler and wish to start making manual adjustments to student's schedules continue on with ***Tasks #10-13*** to finish out the scheduling process.

Appendix D - How to create multiple master schedules and run the Batch Scheduler for multiple master schedules.

This method is more complicated then it appears and extreme caution is advised before attempting to schedule using this method.

Why would you want to create multiple master schedules?
Example: Your school has a levy on the ballot in May. The district is not sure if the levy will pass or not. If the levy doesn't pass the district will need to lay off 5 teachers and eliminate 30 course sections. The first master schedule would contain all the course sections if the levy passes and the school could schedule students using the Batch Scheduler or manually using the 1st master schedule and result set. The 2nd master schedule wouldn't contain the 30 course sections that will be eliminated if the levy doesn't pass. The school could schedule students using the Batch Scheduler or manually using the 2nd master schedule and result set.

1. To create a 2nd master schedule navigate to ***StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Master Schedule***.
    a. Click the double paper icon of the ***Default Schedule*** to copy the schedule.
    b. The ***Name*** field defaults to ***Copy of Default Schedule.***
    c. SI State Support recommends changing the name to be more descriptive. Example: ***Schedule if levy doesn't pass.***
    d. Click ***Save.***
    e. Change the wording in the Description field to match the new name of the master schedule.
    f. Leave the ***Copy Result Set*** dropdown empty.
    g. In the ***Copy Options*** section choose to copy ***Course Sections*** and ***Course Group Sections.***
    h. Click ***Save.***

2. Next we will delete the 30 course sections that are being eliminated if the levy doesn't pass.
   a. Navigate to ***StudentInformation*** » ***Management*** » ***School Administration*** » ***Scheduling Administration*** » ***Course Maintenance*** » ***Course Sections.***
   b. In the **Working Schedule** dropdown select the master schedule named **Schedule if levy doesn't pass.**
   c. Click **Reload Screen** and **Search.**
   d. Inactivate the course sections that are being eliminated by editing the course section and removing the checkmark from the **Is Active** box.
3. Now we are ready to run the Batch Scheduler on both master schedules.
4. Follow **Tasks #1-13** for each master schedule.

Appendix E - How to clean out assignments made by the Batch Scheduler but leave the manual assignments.

Occasionally schools would like to start over and delete all assignments created by the Batch Scheduler but keep all the assignments the office staff created manually.

1. In 21/22 at the building level, navigate to ***StudentInformation » Management » School Administration » Scheduling Administration » Scheduler » Job Parameter Sets***.
2. Click the Edit Pencil icon of the job parameter you have been working with.
   a. In the ***Grade Levels to Schedule*** filter move all grade levels over to the left to clear out the filter.
   b. Move a grade level which wouldn't have any requests over to the right. Examples: GR, UG, IN, and 23.
   c. Click on the ***Submit*** tab
   d. Click ***Save Schedule Parameter***.
3. Next click on the 4th icon **Execute Job and Create New Schedule Result** icon of the job parameter you just edited.
   a. You will be brought to the ***Submit*** tab.
   b. In the ***Master Schedule*** dropdown choose a master schedule. Most schools will only have one master schedule in the dropdown.
   c. In the ***New Schedule Result Name*** field enter a descriptive name. Example: ***New result set.***
   d. In the ***Copy from Existing Schedule Result Set*** dropdown choose the schedule result set which contains all the course section assignments created manually and by the Batch Scheduler.
   e. Place a check in the box next to ***Copy Schedule Results Created Manually.***
   f. This will copy all the assignments the office staff hand entered but since we aren't checking either of the other options the assignments created by the Batch Scheduler or Single Student Scheduler will not be copied.
   g. In the ***Schedule Job Name*** field enter the same name you used in step #3c. which is ***New Result Set.***
   h. In the ***Job Queue*** dropdown select any queue.
   i. Click ***Execute Scheduler Job.***
4. Wait for the job to finish and then go to a student's Request Assignments page and choose the new schedule result in the dropdown.
   a. You'll notice all the student's requests are still there but only the assignments that were entered manually are still scheduled.
5. Now go edit the job parameter again and clear the grade levels filter and pull the appropriate grade levels that you want to schedule over the right again.
   a. Flip to the ***Submit*** tab and click ***Save Schedule Parameters.***
6. Follow ***Tasks #5-13*** to finish scheduling.

Contact Editing in ParentAccess

Configure Editing

- Individual Contact records are marked as Publicly Viewable.

- Each Contact Type is marked as Publicly Viewable.

- Contact Editing is turned on in ParentAccess.

Notes:

- Contacts are a live read from StudentInformation to GradeBook and ParentAccess
- The above settings only affect ParentAccess, all contacts are viewable in GradeBook, regardless if they are marked Publicly Viewable or Contact Editing is turned on in ParentAcccess
- Changes made in ParentAccess to contacts are immediately reflected in StudentInformation and GradeBook and vice versa.

Link ParentAccess Accounts to StudentInformation Contacts

You can link ParentAccess accounts to StudentInformation contacts. This will help you identify which contact is using a specific ParentAccess account. You can also manage security access to viewing and editing contact information in ParentAccess.

Link ParentAccess Accounts

You can search for ParentAccess accounts going to **ParentAccess Account Administration** - **ParentAccess Account (old)** or **ParentAccess Accounts** screens.

ParentAccess Account Administration – ParentAccess Account (old)
    StudentInformation > Management > District Administration > ParentAccess Account (old)

The ParentAccess Account Administration screen displays a listing of the ParentAccess accounts for the district in context.

Note – The Active column is for display only and cannot be edited.

To include both Active and Inactive ParentAccess accounts in the list, select the **Show Inactive ParentAccess Accounts** checkbox.

To search for a specific ParentAccess account, enter all or part of the account name or user's name in the **Find by name** field and then click **Search**.

To view more details about the ParentAccess account, click on the ParentAccess Account. This will bring you to the new **ParentAccess Accounts** screen.

ParentAccess Accounts
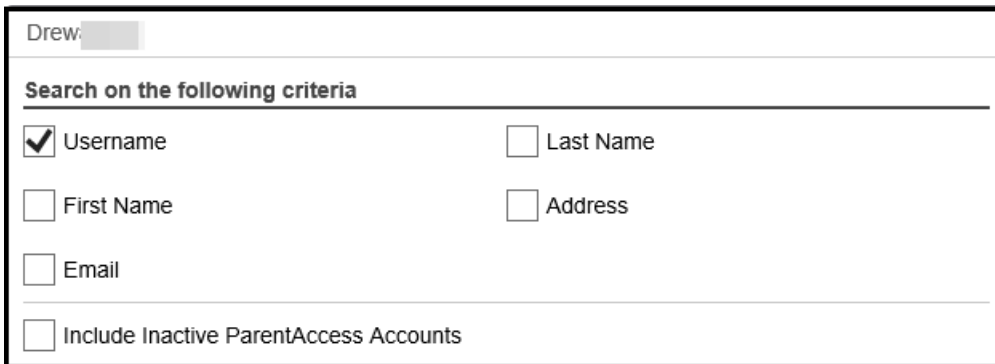
ParentAccess Accounts	Search...	▼ Search
	Use the search box to search for accounts.	

To search for a specific ParentAccess account, enter all or part of the account name or user's name in the search box and then click **Search**.

To filter the listing, you can click on the thumbtack next to the search box and select criteria. Also, you can choose to Include Inactive ParentAccess Accounts.

Drew:

Search on the following criteria
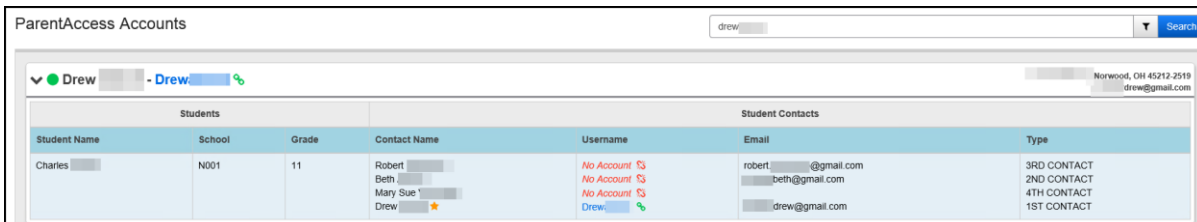
- ☑ Username   ☐ Last Name
- ☐ First Name   ☐ Address
- ☐ Email
- ☐ Include Inactive ParentAccess Accounts

The details include the Student Name, School, Grade, Contact Name, UserName, Email and Contact Type.

ParentAccess Accounts   drew   ▼ Search

∨ ● Drew   - Drew   ⚲   Norwood, OH 45212-2519
                                                        drew@gmail.com

	Students				Student Contacts		
Student Name	School	Grade	Contact Name	Username	Email		Type
Charles	N001	11	Robert	No Account ⚲	robert. @gmail.com		3RD CONTACT
			Beth	No Account ⚲	beth@gmail.com		2ND CONTACT
			Mary Sue	No Account ⚲			4TH CONTACT
			Drew ★	Drew ⚲	drew@gmail.com		1ST CONTACT

The Active icon (green dot) is for display only and cannot be edited.

In the header row, when the ParentAccess Account is linked to a contact, the Username displays in blue with a green link next to it. When the ParentAccess Account is not linked to a contact, the Username displays in black with a red open link.

To link the ParentAccess account to a contact, click on the red open link on the header row or in the Username column of the details section. A **Link Account To Contact** window displays.

From the header row, when you click on the red open link, all contacts associated with the student appear as options.

From the details section, when you click on the red open link next to a contact name, only that contact associated with the student appears.

From the available contacts, in the row of the contact you want to link to the ParentAccess account in context, click **Link**. The screen refreshes and displays **Success! The account was Successfully Saved.** Then the ParentAccess Account shows the username in blue with a green link to indicate it is linked.

Only one contact can be linked to one ParentAccess account at any time. To change the linked contact, you must first unlink the current contact and then choose a new contact to link.

Unlink ParentAccess Accounts

To unlink a ParentAccess account, on an existing linked account, click on the green link. The **Unlink Account** window displays. Click **Yes, Unlink Account**. The ParentAccess Accounts screen refreshes and no longer shows a linked account. You can now link the ParentAccess account to a different contact.

Edit ParentAccess Account Security Access

You can grant/remove permissions for a ParentAccess account to view/edit a student's contacts data through the **ParentAccess Accounts** screen. This determines which contacts the ParentAccess account holder can view and/or edit through their account.

On the ParentAccess Accounts screen, click on the blue username in the header or details section.
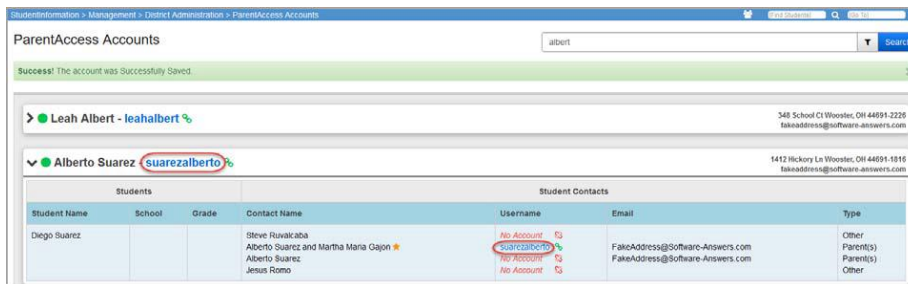
The **Account Permissions** window displays.
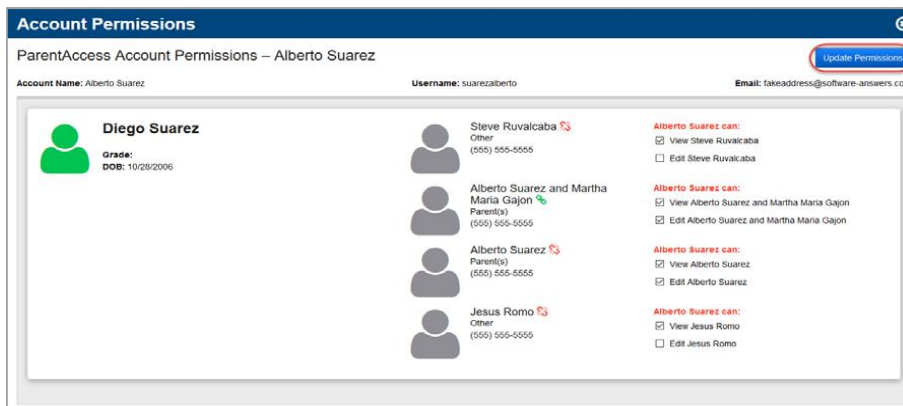
For each associated contact, you can select the checkboxes to indicate which associated contacts the ParentAccess account in context can view and/or edit through ParentAccess.

Note: If you select **Edit,** you must also select **View** in order to grant the ParentAccess account Edit permissions.

To remove permissions for the ParentAccess account in context, uncheck the appropriate View/Edit checkboxes corresponding to each contact.

After granting/removing the permissions, click **Update Permissions** to save the changes.

Course and Course Section Setup
Course Group and Course Group Section Setup
Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
3/30/21	Courses – Task #4	Add Course Type of Online
11/5/20	Entire document	Review and update
4/3/20	Course Sections	Updated screenshot
11/27/19	Entire document	Review and update
1/15/19	Course Groups	Updated screenshots
11/26/18	Entire document	General updates

Table of Contents

Courses

Task #1 – Enter new courses and verify current courses

1. Change your context to the building level and the school year you are working with.
2. Run the *Course Curriculum (CRSE)* report. This report allows you to select up to ten customized fields which will help you verify the course weight, course abbreviations, course names, etc.

REPORT: SI - REPO CRSE   Galion High School   COURSE CURRICULUM

SCHOOLYEAR: 2019-2020

PAGE   1   OF   9

RUN AT 11:28 AM 10/24/2019

COURSE CODE	COURSE NAME	GR	Incld Crdt	Incld GPA	Credit Units	Active	High Sch Crd	Schd Pri	DEMD CNT	Abbreviation	CRSE WEIGHT
0H0SH1	Academic Assistance/Study Hall	09;10;11;12	N	N	0.000000	Y	N	5	0	SH1	10.0000
0H0SH2	Academic Assistance/Study Hall	09;10;11;12	N	N	0.000000	Y	N	5	0	SH2	10.0000
0H0SHF	Academic Assistance/Study Hall	09;10;11;12	N	N	0.000000	Y	N	2	0	SHF	10.0000
0H0030	CP ENGLISH 9	09	Y	Y	1.000000	Y	Y	9	35	CP ENG 9	10.0000
0H0031	CP ENGLISH 10	10	Y	Y	1.000000	Y	Y	9	23	ENG 10	10.0000
0H0032	CP ENGLISH 11	11	Y	Y	1.000000	Y	Y	9	13	C ENG 11	10.0000
0H0034	CP ENGLISH 12	12	Y	Y	1.000000	Y	Y	9	30	ENG. 12	10.0000
0H0038	READING FUNDAMENTALS - Sect. 1	09;10;11;12	Y	Y	0.500000	Y	Y	5	5	READ FUN	10.0000
0H0038	READING FUNDAMENTALS - Sect. 2	09;10;11;12	Y	Y	0.500000	Y	Y	5	5	READ FUN	10.0000
0H0051	ALGEBRA I	09;10;11;12	Y	Y	1.000000	Y	Y	9	34	ALG. I	10.0000
0H0053	ALGEBRA II	10:11;12	Y	Y	1.000000	Y	Y	9	18	ALG II	10.0000

3. Navigate to *StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Courses*.
4. Click **Add Course.** The next five tasks explain each tab of the course setup.

Reminder! Courses are school year specific which means if you add a course, for example, in the future school year, the course will not automatically be added to the current school year.

Task #2 – Courses – General tab

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** » ***Management*** » ***School Administration*** » ***Scheduling Administration*** » ***Course Maintenance*** » ***Courses***.
3. Either click **Add Course** or edit a course by clicking on the **edit pencil** icon.
4. The **General** tab is displayed.
   a. The **Code** field can be up to 15 characters, but EMIS only accepts up to 10 characters and will truncate any code longer than 10 characters.
   b. The **Name** field can be up to 30 characters long.
   c. The **Abbreviation** field can be up to 8 characters long.
   d. The **Short Name** field can be up to 15 characters long.
   e. The **Description** field can be up too 1000 characters long.
   f. The **Hours of Instruction** field details the average amount of instruction the student receives for EMIS reporting.
   g. The **Scheduling Priority** field is used by the Batch Scheduler. If the Batch Scheduler is ran with #10 Order Requests by Priority selected then the Batch Scheduler will schedule the student into courses of higher priority before courses of lower priority. Nine is the highest priority and 1 is the lowest. Some districts assign courses with only one section (Singletons) as a priority of 9 so the Batch Scheduler will schedule them first. Other districts assign Advanced Placement and Honors courses as a priority of 9. Elective courses are typically given low priorities. Please see the *Batch Scheduler Procedural Checklist* for more information about this feature.
   h. The **Display on Public Module** checkbox determines if a course is available on the Public Course Requests module for students to request.
   i. The **Is High School Credit** checkbox determines if a course is included in a student's high school cumulative credit count and included in the student's high school GPA.
   j. The **Roll course to next year** checkbox determines if a course copies to next year when School Year Initialization (SYI) is run. The course must also be active in order for it to copy to next year during SYI.
   k. The **College Prep** checkbox determines if a course should be marked as college prep. This field is used with the eTranscript product.
   l. The **Display on ParentAccess** checkbox determines if a course should display on the **Schedule** screen in ParentAccess.
   m. The **Is Active** checkbox determines if a course can be scheduled and used.
   n. The **Is In Update History** checkbox determines if a course appears on a student's Course History page.

o. The **Core Course** checkbox is no longer used as of FY09 Period K. The Core Course on the Subject Code table (defined at the ITC level) is now used to determine HQT values. However, the Core Course checkbox on the Courses – General tab is still being passed to ProgressBook.
p. The **Dual Credit** checkbox determines if a course should be marked as dual credit. This field is used with the eTranscript product.
q. The **NCAA Core Course** checkbox determines if a course counts toward NCAA core course requirements.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | | Next: 0H0031 > |

ℹ While the Code can be up to 15 characters, 10 characters or less is recommended.

Code:* 0H0030   Abbreviation:* CP ENG 9

Name:* CP ENGLISH 9   Short Name:* CP ENGLISH 9

Description:

Hours of Instruction:* 120   Scheduling Priority:* 9

Display on Public Module: ✔   Is Active: ✔
Is High School Credit: ✔   Is In Update History: ✔
Roll course to next year: ✔   Core Course: ✔
College Prep: ✔   Dual Credit:
Display on ParentAccess: ✔   NCAA Core Course

Save   Cancel

Task #3 – Courses – Marks tab

1. Click on the **Marks** tab.
   a. The **Course Weight** field is only used by the Batch Scheduler. The Maximum Variation of Course Weights Between Schedule Terms parameter on the Batch Scheduler is optional and looks at the Weight value filled out on each course and balances the student's scheduled courses so all terms are equally weighted. The Course Weight value defaults to 10.0000. Please see the *Batch Scheduler Procedural Checklist* on how to set up this feature.
   b. The **Level of Difficulty** dropdown is optional and determines if a course uses a difficulty point scale when the GPA is calculated. Please see the *GPA Procedural Checklist* on how to set up this feature.
   c. The **GPA Add-on Level** dropdown is optional and determines if a specific point value is added to the calculated GPA. Please see the *GPA Procedural Checklist* on how to setup this feature.
   d. The **Credit Units** field is required and is used in several modules in StudentInformation. One of the modules is the Public Course Requests Module (PCR). In the PCR Module, schools can specify a minimum and maximum number of credits a student can request while logged into the PCR Module. Please see the *Public Course Requests Procedural Checklist* for further details. The Credit Units field is also used by the GPA calculation. Please see the *GPA Procedural Checklist* for further details.
   e. The **Mark Bump** dropdown is used by the Jackson GPA method which is explained in detail in the *GPA Procedural Checklist*.
   f. The **Rank Weight** dropdown is used by several custom GPAs and is explained in detail in the *GPA Procedural Checklist*.
   g. The **College Credit Hours** field is used to specify the number of credit hours if this course counts for college credit hours.
   h. The **CCP Location IRN** field is the IRN of the college if the course counts for college credit.
   i. The **College Location** field automatically populates when you have entered or selected an IRN in the CCP Location IRN field. You can then modify the name, if desired.
   j. The **In Honor Roll** checkbox determines if the course is included in the Honor Roll. NOTE: In order for a student to be on the Honor Roll, they have to have a GPA calculated since the Honor Roll is based off the GPA. Please see the *GPA Procedural Checklist* for further details.
   k. The **Include in Total Credits** checkbox determines if the course is included in the student's total credits.
   l. The **Include in GPA** checkbox determines if the course is included in the student's GPA. NOTE: Include in GPA is misleading, the checkbox determines if the course is included in any GPA calculation – even the student's middle school GPA, not only the cum GPA. If you want a course to be included in a student's high school GPA, the Is High

School Credit and Include in Total Credits checkboxes must both be marked.

m. The **Is Honors Course** checkbox determines if the course shows up when filtering on honors courses and is used by the Honors GPA formula which is explained in detail in the *GPA Procedural Checklist*.

n. The **Include on Permanent Record** checkbox determines if the course prints on the R700 when it is run with the option *Print Report In Permanent Record Label Format* set to yes.

o. The **Print on Report Card** checkbox determines if the course prints on the R700.

Task #4 – Courses – Miscellaneous tab

1. Click on the **Miscellaneous** tab.
   a. The **Department** dropdown is optional and is a way to group similar classes together.
   b. The **Area of Study** dropdown is optional and is a way to group similar classes together and is used by the Graduation Verification module.
   c. The **Subject Area** dropdown is optional and is a way to group similar classes together and is used by the Graduation Verification module.
   d. The **Course Type** dropdown determines if a course appears on the *Student Marks* page. If the course type is ***Class, ESC Course, Satellite Course, College Credit Plus, Vocational or Online****,* the course will show on the ***Student Marks*** page. If the course type is ***Study Hall***, when the Study Hall Wizard is run, open time periods on the student's schedule will be filled in with courses that have a course type of Study Hall. If the course type is ***Case Management***, the course will **not** show on the student's ***View Schedule*** page. The course type of ***Spare*** is used for courses such as **Intervention and Office Help**. The course type of ***Blank – Legacy*** is a carryover from the previous student software. Course types of ***Spare*** and ***Blank – Legacy*** do **not** show on the ***Student Marks*** page, but **do** show on student's **schedule**.
   e. The **Language Code** dropdown details the language the course is taught in and is used for EMIS reporting. Example: A Math class taught in Spanish.
   f. The **In Graduation / Eligibility** checkbox determines if the course is included in Graduation Verification module. Please see the *Graduation Eligibility Procedural Checklist.*
   g. The **Gender Directive** field is used by the Batch Scheduler to balance the gender composition of the course. If ***Balance Males across Sections, and Balance Females across Sections*** is chosen from the dropdown, the Batch Scheduler attempts to balance filling counts in course sections, but it does not strictly enforce balancing. If 134 female students request a course with gender balancing enabled, the Batch Scheduler will attempt to evenly distribute the female students into course sections. The Batch Scheduler does not balance male to females in a course section. The Batch Scheduler orders the course sections in ascending order based on the % that each section is filled for that student's gender. If the Batch Scheduler is unable to schedule a student into the course section with the lowest % filled then it moves onto the next section until it finds one it can schedule the student into. If two or more sections have the exact meeting time and capacity and gender balancing is enabled for the course then the filling counts for those sections should not differ more than one student. If either **Restrict to Females** or **Restrict to Males** is chosen, the Batch Scheduler will not schedule a student of the wrong gender into the

course. A request status message of "Requested course is restricted to the opposite gender" will display on the Requests page.

h. The **Grade Levels Selected** filter determines which students see the course on the Public Course Requests module (PCR). If grades 11 and 12 are selected then only 11th and 12th graders can see the course on the Public Course Requests module (PCR). The Grade Levels Selected filter does not prevent office staff from assigning a 9th grade student a request for the course or even assigning the course directly to the student.

Note: The selected Grade Levels on the Course load into GradeBook and are used for setting up Standard Based Report Cards.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | | Next: 0H0031 > |

0H0030 - CP ENGLISH 9

Department:	ENG - ENGLISH ▼	Course Type:*	C - Class ▼
Area Of Study:	ENG - ENGLISH ▼	Language Code:	▼
Subject Area:	▼	In Graduation / Eligibility:	✔

Gender Directive: None ▼

ⓘ Selecting the 'Balance...' option in the Gender Directive dropdown will only affect the batch and single student schedulers. The schedulers will attempt to balance the filling percentage in the course's sections for each gender separately.

Grade Levels Available   Grade Levels Selected*

IN	09
PS	
KG	
01	
02	
03	

Save   Cancel

Task #5 – Courses – EMIS tab

1. Click on the **EMIS** tab.
   a. The **EMIS Location IRN** field is the IRN of the building where the course is held. If left blank, this defaults to the school in context where the course record exists in.
   b. The **EMIS Location Description** field is the description of the EMIS Location IRN. This field is only enabled if the value in the EMIS Location IRN textbox is '999999', in which case the user is allowed to enter their own value for the EMIS Location Description. If the value in the EMIS Location IRN textbox is not '999999', this textbox is disabled and is populated with the name from the EMIS IRN table that is associated with the EMIS Location IRN.
   c. The **EMIS Staff Provider IRN** field is the district IRN of the entity in contract with the reporting school district.
   d. The **EMIS Course Level** field designates the level of the course. This provides distinctions between courses that are taken in a series or have prerequisites such as French I and French II.
   e. The **EMIS Subject Code** field details the subject of the course being reported.
   f. The **EMIS Subject Area for Credit** field indicates the subject for courses offered in which high school credit toward graduation is being applied, whether at the middle school or high school level.
   g. The **EMIS Language Used** field is the language used by the teacher when presenting to the students.
   h. The **CORE Subject Area** field is the subject area and/or CORE requirement area in which a student has earned credit/units towards graduation.
   i. The **End Of Course Assessment Area** field is the End of Course Assessment Area associated with the course.
   j. The **CTE College Credit** field indicates if a career-technical course provides an opportunity for students to earn college credit.
   k. The **Curriculum** field is the curriculum source/model/program for a specific course.
   l. The **Delivery Method** field identifies the means by which instruction is provided/communicated to the student(s) in the course.
   m. The **Educational Option** field identifies the Educational Option status for a course per Ohio Administrative Code 3301-35-06(G).
   n. The **Student Population** field identifies the attributes of the group of students for which the course is intended.
   o. The **Highly Qualified Teacher IRN** field is the IRN used to group courses for calculation of the percent of core courses taught by highly qualified staff and the percent of core courses taught by properly certified staff.

p. The **Credit Flex** field designates if an alternate way of earning credit applies to the course.

q. Finally, the **Report to EMIS** checkbox should be checked if the course needs to be reported to EMIS.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | | Next: 0H0031 > |

0H0030 - CP ENGLISH 9

Field	Value
EMIS Location IRN:	[ ] 🔍 (Only required if different from the current building, optional if same as current building)
EMIS Location Description:*	[ ] (Only required if EMIS Location IRN = '999999')
EMIS Staff Provider IRN:*	****** 🔍
EMIS Course Level:*	* - Not applicable ▼
EMIS Subject Code:*	050160 - Integrated English Language Arts I ▼
EMIS Subject Area for Credit:*	ENG - English Credit ▼
EMIS Language Used:*	E - English (Default) ▼
CORE Subject Area:*	ENG - English Language Arts Units ▼ (Only required when Is High School Credit is checked)
End Of Course Assessment Area:	ELA1 - English Language Arts 1 ▼
CTE College Credit:*	N ▼
Curriculum:*	OT - Curriculum Not Specifically Covered By Another Option ▼
Delivery Method:*	FF - Face to Face Classroom Instruction ▼
Educational Option:*	NO - Not an Educational Option Course ▼
Student Population:*	RG - Regular/General Students K-12 ▼
Highly Qualified Teacher IRN:	[ ] 🔍
Credit Flex:	N - The course is not a Credit Flexibility Course ▼
Report to EMIS:	✔

Save   Cancel

Task #6 – Courses – Pre/Co-requisites tab

Pre/Co-requisites are not used by the Batch Scheduler. When the Batch Scheduler runs, it assumes all Pre/Co-requisites have been met or the student has special permission to take the course even though the Pre/Co-requisites have not been met.

1. Click on the **Pre/Co-requisites** tab.
   a. Pre/Co-requisites are only used when entering course requests. Pre/Co-requisites determine if a student is allowed to request the course. When the Batch Scheduler runs, it assumes all Pre and Co-requisites have been met.
   b. Click **New requisite.**
2. 1 Pre-requisite: A course requires another course be taken first. Example: English 9 must be taken before English 10.
   a. Enter the course code for English 9 in box 1 under the **Pre-requisites** section.
   b. Click **Save requisite**.
   c. The screen now looks as follows:

3. Alternate Pre-requisite: A course requires any one of multiple courses be taken first. Example: English 10 requires either English 9, CP English 9, or Fundamentals of English 9.
   a. Enter the course code for English 9 in box 1 under the **Pre-requisites** section.
   b. Click **Save requisite**.
   c. Next, click **New requisite** again.
   d. Enter the course code for CP English 9 in box 1 under the **Pre-requisites** section.
   e. Click **Save requisite**.
   f. Click **New requisite**.

g. Enter the course code for Fundamentals of English 9 in box 1 under the **Pre-requisites** section.

h. Click **Save requisite.**

i. The screen now looks as follows:

4. 2 or more Pre-requisites: A course requires multiple courses be taken first. Example: English 11 requires both English 10 and English 9 be taken first.

a. Enter the course code for English 10 in box 1 and the course code for English 9 in box 2 under the **Pre-requisites** section.

b. Click **Save requisite.**

c. The screen now looks as follows:

5. <u>Pre-requisite and Co-requisite</u>: A course requires both a pre-requisite and a co-requisite. Example: Biology requires Physical Science and co-requires Biology Lab.
   a. Enter the course code for Physical Science in box 1 under the **Pre-requisites** section.
   b. Select **And** as the Operator.
   c. Enter the course code for Biology Lab in box 1 under the **Co-requisites** section.
   d. Click **Save requisite**.
   e. The screen now looks as follows:

6. <u>Pre-requisite or Co-requisite</u>: A course requires either a pre-requisite or a co-requisite course. Example: Biology requires Physical Science to be taken before or at the same time.
   a. Enter the course code for Physical Science in box 1 under the **Pre-requisites** section.
   b. Select **Or** as the Operator.
   c. Enter the course code for Physical Science again in box 1 under the **Co-requisites** section.
   d. Click **Save requisite.**
   e. The screen now looks as follows:

From this screen you can display or change information regarding courses

		Pre 1	and Pre 2	and Pre 3	and Pre 4	Operator	Co 1	and Co 2	and Co 3	and Co 4	Is Active
🗑	✏	0033				O	0033				🟢

General | Marks | Miscellaneous | EMIS | Pre/Co-requisites

0031 - BIOLOGY A

New requisite

☑ Show Active Only

Save   Cancel

7. <u>Multiple Pre-requisites or 1 Co-requisite</u>: A course requires either multiple pre-requisite courses or a co-requisite course. Example: Anatomy requires Biology and Chemistry or co-requires AP Biology.
   a. Enter the course code for Biology in box 1 and Chemistry in box 2 under the **Pre-requisites** section.
   b. Select **Or** as the Operator.
   c. Enter the course code for AP Biology in box 1 under the **Co-requisites** section.
   d. Click Save Requisite.
   e. The screen now looks as follows:

From this screen you can display or change information regarding courses

General | Marks | Miscellaneous | EMIS | Pre/Co-requisites

0035 - Anatomy

New requisite

		Pre 1	and Pre 2	and Pre 3	and Pre 4	Operator	Co 1	and Co 2	and Co 3	and Co 4	Is Active
🗑	✏	0031	0037			O	0032				🟢

☑ Show Active Only

Save   Cancel

Note: Requests that do not meet gender restrictions, grade restrictions, pre-requisites and co-requisites defined on Course Maintenance, will show as warnings on the R401 – Student Course Request Verification report.

Course Sections

Note: Course sections in StudenInformation that do not have any students assigned to them still go over to GradeBook. Teachers linked to these course sections (with no students) then need to hide these classes in GradeBook. It is recommended to either inactivate these course sections before turning on the PB Integration or change the teacher on these course sections to someone who does not teach other classes. However, if you choose to inactivate these course sections, the School Year Initialization process will not roll these course sections over to the next year.

Task #1 – Enter new course sections and verify current course sections

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Course Sections***.
3. Click **Add Course Section** to enter a new course section.

Course sections are school year specific which means if you add a course section, for example, in the future school year, the course section will not automatically be added to the current school year.

If you are on course sections or course groups in a future year, you will need to select a **Working Schedule** from the dropdown.

Run the R407 for a listing of course sections. You may even want to use different colored highlighters or markers to signify the changes you want to make. Then when you make the adjustments to the course sections or groups, the changes you want to make will be easily identifiable.

Make any changes to staff, room and periods as needed.

Task #2 – Course Sections – General tab

1. Change your context to the building level and the school year you are working with.
2. Navigate to *__StudentInformation__* » *__Management__* » *__School Administration__* » *__Scheduling Administration__* » *__Course Maintenance__* » *__Course Sections__*.
3. Either click **Add Course Section** or edit a course section by clicking on the **edit pencil** icon.
4. The **General** tab is displayed.
   a. The **Course** field is the Course Code. If you are entering a new course section and do not know the Course Code, click on the **elipse** button to search for the Course Code.
   b. After entering the code, click on **Default Section & Capacity** button and StudentInformation will automatically default the course section you are adding to the next number in succession. Example: If 1047 section 1 already exists and you add another section of 1047 and click the *Default Section and Capacity* button, the new section will automatically be added as section 2. The capacity always defaults to 25, but can be changed.
   c. The **Section Number** field indicates the section of the course. As stated above, you can use the default to set the section number to the next number in succession or enter a section number by hand.
   d. The **Capacity** field is the number of students allowed to take the course section. If the capacity is set to 20 and a user attempts to schedule 21 students into the course section, the user will not be allowed to schedule the 21st student unless the user has extra permissions to overfill course sections.
   e. The **Course Term** field indicates which course term the course section is taught.
   f. The **Is Active** checkbox details if the course section is actively being used.
   g. The **Roll section to next year** checkbox determines if a course section will copy up to the next school year during School Year Initialization (SYI). NOTE: A course section must be active and marked as Roll section to next year in order for it to copy to next year.
   h. The **Meeting Time Description** field details which periods and days the course section meets. StudentInformation determines the Meeting Time Description based off the Meeting Times tab which will be discussed in the next task. When StudentInformation cannot translate complex meeting times, the phrase *See Schedule* will display in the *Meeting Time Description* field. You can place a check in the **Custom** checkbox and type in your own descriptive meeting time and the custom description will print on the student's schedule.

Course Sections - 0H0030 - CP ENGLISH 9 (1)

From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override |

Next: 0H0030 #2 >

Course:* 0H0030 [...] **Default Section & Capacity**

Section Number:* 1

Capacity:* 25

Course Term:* FULL ▼

Is Active: ✔

Roll section to next year: ✔

Meeting Time Description: 1 (C205)   Custom

Save Course Section   Cancel

Task #3 – Course Sections – Meeting Times tab

1. Click on the **Meeting Times** tab.
2. StudentInformation has three types of meeting times.
   a. The first type of meeting times are **Basic** meeting times. For a course section to qualify as having a Basic meeting time, the course section must have the same teacher, same location, and must meet the same periods each day throughout the entire length of the course term.
   b. The second type of meeting times are **Intermediate** meeting times. For a course section to qualify as having an Intermediate meeting time, the course section can have multiple teachers, meet in multiple rooms, meet multiple periods throughout the entire length of the course term.
   c. The third type of meeting times are **Advanced** meeting times. For a course section to qualify as having an Advanced meeting time, the course section must have a different teacher, room location, or period for one or more schedule terms.

The key to understanding Advanced Meeting Times is the course has a different teacher, or location, or periods in one or more schedule terms.

Meeting Time Examples:

BASIC
One teacher, one room, one period
Course 0126-23 meets Monday thru Friday 2nd period with teacher A in room A108 all year long.

Course Sections - 0126 - US HISTORY (23)
From this screen you can display or change information regarding course sections

| General | **Meeting Times** | Memberships | Attendance | Teacher History | EMIS Override | | Next: 0126 #33 > |

◉ Basic ○ Intermediate ○ Advanced

Teacher: * [_____ ▾]

Location: * [A108 - MRS. _____ ▾]

Periods (All Days): * ☐ 01 ☑ 02 ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐ 07 ☐ 08 ☐ 09 ☐ 10

[Save Course Section] [Cancel]

BASIC
One teacher, one room, multiple periods
Course 0126-23 meets Monday thru Friday 2nd and 3rd period with teacher A in room A108 all year long.

Course Sections - 0126 - US HISTORY (23)
From this screen you can display or change information regarding course sections

| General | **Meeting Times** | Memberships | Attendance | Teacher History | EMIS Override | | Next: 0126 #33 > |

◉ Basic ○ Intermediate ○ Advanced

Teacher: * [_____ ▾]

Location: * [A108 - MRS. _____ ▾]

Periods (All Days): * ☐ 01 ☑ 02 ☑ 03 ☐ 04 ☐ 05 ☐ 06 ☐ 07 ☐ 08 ☐ 09 ☐ 10

[Save Course Section] [Cancel]

INTERMEDIATE
Multiple teachers, multiple rooms, multiple periods
Course 0126-23 meets Monday thru Friday 2nd period with teacher A in room A105 all year long and also meets Monday thru Friday 3rd period with teacher B in room A108 all year long.

Course Sections - 0126 - US HISTORY (23)
From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override | | Next: 0126 #33 > |

○ Basic ● Intermediate ○ Advanced

Add Meeting Time

		Teacher	Location	Start	End	Periods
🗑	✏		A108 - MRS.	Aug 17, 2016	May 24, 2017	M: 03; T: 03; W: 03; R: 03; F: 03
🗑	✏		A105 - MR.	Aug 17, 2016	May 24, 2017	M: 02; T: 02; W: 02; R: 02; F: 02

Save Course Section   Cancel

INTERMEDIATE
One teacher, multiple rooms, same period
Course 0126-23 meets Monday, Wednesday, Friday 3rd period with teacher A in room A108 but meets Tuesday and Thursday 3rd period with teacher A in room A167 all year long.

Course Sections - 0126 - US HISTORY (23)
From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override | | Next: 0126 #33 > |

○ Basic ● Intermediate ○ Advanced

Add Meeting Time

		Teacher	Location	Start	End	Periods
🗑	✏		A108 - MRS.	Aug 17, 2016	May 24, 2017	M: 03; W: 03; F: 03
🗑	✏		A167 - MRS.	Aug 17, 2016	May 24, 2017	T: 03; R: 03

Save Course Section   Cancel

ADVANCED
One teacher, multiple rooms, one period, different schedule terms
Course 0126-23 meets Monday thru Friday 3rd period with teacher A in room A105 during the 1st Quarter, in room A110 during the 2nd Quarter, in room A114 during 3rd Quarter and in room A167 during 4th Quarter.

Course Sections - 0126 - US HISTORY (23)
From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override | Next: 0126 #33 > |

◯ Basic ◯ Intermediate ⦿ Advanced
Add Meeting Time

		Teacher	Location	Start	End	Periods
🗑	✏		A105 - MR.	Aug 17, 2016	Oct 14, 2016	M: 03; T: 03; W: 03; R: 03; F: 03
🗑	✏		A110 - MRS.	Oct 18, 2016	Dec 21, 2016	M: 03; T: 03; W: 03; R: 03; F: 03
🗑	✏		A114 - MR.	Jan 04, 2017	Mar 10, 2017	M: 03; T: 03; W: 03; R: 03; F: 03
🗑	✏		A167 - MRS.	Mar 13, 2017	May 24, 2017	M: 03; T: 03; W: 03; R: 03; F: 03

Save Course Section   Cancel

ADVANCED
Two teachers, one room, same period, different schedule terms
Course 0126-23 meets Monday thru Friday 1st period in room A105 with teacher A during 1st and 2nd quarter, but with teacher B during the 3rd and 4th quarter.

Course Sections - 0126 - US HISTORY (23)
From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override | Next: 0126 #33 > |

◯ Basic ◯ Intermediate ⦿ Advanced
Add Meeting Time

		Teacher	Location	Start	End	Periods
🗑	✏		A105 - MR.	Aug 17, 2016	Dec 21, 2016	M: 01; T: 01; W: 01; R: 01; F: 01
🗑	✏		A105 - MR.	Jan 04, 2017	May 24, 2017	M: 01; T: 01; W: 01; R: 01; F: 01

Save Course Section   Cancel

Meeting Time Reminders

If a course section has the custom meeting time description field filled out on the General tab and the meeting time is changed to a Basic Meeting Time, do not forget to uncheck the **Custom** checkbox so the new meeting time description will be filled in by StudentInformation.

Also, changes made on the Meeting Times tab are not automatically made on the Teacher History tab. Changes on the Teacher History tab must be made separately.

Task #4 – Course Sections - Memberships tab

1. Click on the **Memberships** tab.
   a. If the course section is a member of a course group, the course group will be listed in the grid.

Course Sections - 9883 - ALGEBRA II (1)

From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override |

Course Group	Group Section
ALGEBRA II	1

Save Course Section   Cancel

Task #5 – Course Sections – Attendance tab

1. Click on the **Attendance** tab.
   a. If the course section meets only one period, the Attendance tab will automatically be defaulted to that period.

   b. If the course section meets more than one period, each period will be checked on the Attendance tab, but editable. If a course section meets 2nd and 3rd period, you can choose to only take attendance 2nd period or 3rd period or both.

   c. If you make changes to the Attendance tab, do not forget to click **Save Course Section**.

Task #6 – Course Sections - Teacher History tab

1. Click on the Teacher History tab.
    a. The Teacher History tab displays the Staff Course (CU) records in a grid. Verify the information on the Teacher History tab coincides with the information on the Meeting Times tab.
    b. Click **Save Course Section**.

Changes made on the Teacher History tab are not automatically made on the Meeting Times tab. Changes on the Meeting Times tab must be made separately.

Task #7 – Course Sections – EMIS Override tab

1. Click on the **EMIS Override** tab.
   a. Fill in any values that differ from the course in Course Maintenance.
   b. Click **Save Course Section**.

Course Sections - 0309 - English 9 (1)
From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override | < Prev: 0308 #2 | Next: 0309 #2 > |

EMIS Staff Provider IRN: [   ] 🔍

EMIS Subject Code: [▼]

Curriculum: [▼]

Delivery Method: [▼]

Student Population: [▼]

Highly Qualified Teacher IRN: [   ] 🔍

EMIS Location IRN: [   ] 🔍

EMIS Location Description: * [   ]   (Only required if EMIS Location IRN = '999999')

Start Date: [   ] 📅

Stop Date: [   ] 📅

Dual Credit: [ ]

Save Course Section   Cancel

Course Groups and Course Group Sections

Task #1 – Enter new course groups and group sections and verify current course groups and group sections

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Course Maintenance*** *»* ***Course Groups***.
3. Click **Add Course Group** to enter a new course group.

A course section can only be assigned to one course group at a time. Example: Course section 1047-1 is part of course group section Math-1. 1047-1 cannot be linked to course group Alge until course section 1047-1 is deleted from the course group Math.

Course groups are school year specific which means if you add a course group, for example, in the future school year, the course group will not automatically be added to the current school year.

Task #2 – Course Groups – Group tab

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Course Maintenance*** *»* ***Course Groups***.
3. Either click **Add Course Group** or edit a course group by clicking on the edit pencil icon.
4. The **Group** tab is displayed.
   a. The **Code** field can be up to 15 characters long and is a symbol for the group. Consider state reporting limitations when specifying course group codes. EMIS only accepts up to 10 characters and will truncate any code longer than 10 characters.
   b. The **Name** field can be 30 characters long.
   c. The **Description** field is optional and can be used to detail which courses are part of the group and holds 200 characters.
   d. The **Abbreviation** field can be 8 characters long.
   e. The **Short Name** field can be 15 characters long.
   f. The **Capacity** field indicates how many students the course group can accommodate.
   g. The **Scheduling Priority** field is used by the Batch Scheduler. If the Batch Scheduler is ran with #10 Order Requests by Priority selected then the Batch Scheduler will schedule the student into courses of higher priority before courses of lower priority. Nine is the highest priority and 1 is the lowest. Some districts assign courses with only one section (Singletons) as priority of 9 so the Batch Scheduler will schedule them first. Other districts assign Advanced Placement and Honors courses as priority 9. Elective courses are typically given low priorities. Please see the *Batch Scheduler Procedural Checklist* for more information about this feature.
   h. The **Is Locked** checkbox is not currently functioning on the Group tab at this time. Use the Is Locked checkbox on the Courses / Sections tab instead.
   i. The **Display Courses Individually** checkbox determines whether courses that are members of the course group will be displayed individually on the Public Course Requests module (PRC).
   j. The **Display on Public Module** checkbox indicates whether a course group will be displayed on the Public Course Requests module (PRC).
   k. The **Is Active** checkbox indicates whether a course group can be requested and scheduled.

Course Groups

From this screen you can display or change information regarding course groups

Group	Courses / Sections

Code:* `784` ✕   Abbreviation: `784`

Name:* `CBI`   Short Name:* `CBI`

Capacity: `10`

Description: `CBI`

Scheduling Priority:* `5`

Is Locked: ☐

Display Courses Individually: ☐

Display on Public Module: ☑

Is Active: ☑

Save   Cancel

Task #3 – Course Groups – Courses/Sections tab

1. Click on the **Courses / Sections**
2. The top section lists which courses are part of the group.

	Member Course	Memberships	Membership Sum Capacity	Course Is Active
🗑	783 - CBI ORIENTATION	784	10	🟢
🗑	785 - CBI SOCIAL STUDIES 2	784	10	🟢

   a. To add a member course, below the list of current member courses, enter a course code or use the **elipse** icon to select a course and then click **Add Course**.
   b. The course appears in the grid.
   c. If you would like to remove a course from the group, click on the **trash can** icon to the left of the course.
   d. In the next section, you tell StudentInformation which sections of the course belong to the group section.
   e. Click **Add Section**. The page refreshes.
   f. The courses that are part of the group are displayed.

   g. The section number automatically defaults to the next section number available, but you can change it.
   h. Enter a capacity for the group section in the **Capacity** field. NOTE: For example, if course section 9883-1 has a capacity of 27, but the group section only has a capacity of 20, this means up to 20 students can be scheduled into the group, but if students have an individual request for course section 9883-1, it can accommodate up to 27 students. So, making the group capacity lower than the course section capacity allows room for students who requested the individual course to be scheduled into the course section.

i. The **Is Locked** checkbox determines whether a student with a request for a course within the course group, but who does not have a request for the course group itself will be scheduled into the individual course. Please see the *Batch Scheduler Procedural Checklist* for further details on this feature.

j. If you delete a course group section, the course sections associated with the group section are automatically disassociated from the group section and are now available to be assigned to another course group.

Entering Course Requests Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
7/7/20	Entire document	Review and update
11/15/19	Entire document	Review and update
11/26/18	Entire document	Update

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Course Requests can be entered in any combination of the following three ways:

1. Enter requests student by student on either the *Requests* page or the *Request Assignments* page. This method is discussed in this document.
2. Bulk assigning requests to a group of students using the *Request Update Groups* page. This method is also discussed in this document.
3. Students enter their course requests for the upcoming school year using the internet and the Public Course Request Module. This method is discussed in the *Public Course Requests Procedural Checklist* document.

Example of using all three methods of course request entry:

StudentInformation High School has a group of 100 students who will take band next school year. The office staff created a Course Request Mass Update Rule to assign the group of 100 students a request for Band with a couple clicks of the mouse. Next, the office staff manually entered requests for individual students who required specific courses such as AP Chemistry or AP Biology. Finally, the school configured the Public Course Request Module to allow students to go online and enter requests for courses they want to take in the upcoming school year.

If your school is not using the Batch Scheduler to schedule courses then there is no need to add requests. You can add the students directly into the assignments. Please see the *Elementary Scheduling Procedural Checklist* document for more information.

Course groups do not have a gender directive. If you give a student a request for a course group, the Batch Scheduler will not honor the gender directives set up on the courses that comprise the course group.

Task #1 – Bulk Assigning Requests to groups of students using the *Course Requests Mass Update Groups* page.

Note: You may want to wait on Bulk Assigning Requests, until after manual entry and/or public entry has been completed, and the NORQ - Students with No Requests or Assignments report or Uncommitted Requests report have been ran.

1. Change the context to the building level and the school year you are working with.
2. Navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Request Update Groups.**
3. Click **Add Course Request Mass Update Group**.
4. Enter a **Code**, **Name**, and optional **Description**.
5. Click **Save**.
6. In this example, a Request Mass Update Group was created to assign requests for 9th grade required courses.

7. Click on the **green arrow** icon to enter the individual rules.
8. Now, click **Add Mass Update Rule**.
9. Enter a **Rule Name** and **Rule Description**.
10. The first rule will be named 9th grade English. This rule will give all active and non-resident students a request for English 9.
11. You can use the **Student Status** filter to narrow down the list of students who will be assigned the request.
12. In the **Student Status** filter, pull over A - active resident student and N – Non-resident student to the right.
13. In the **Grade** filter, pull over grade 09 to the right.
14. No other filters were chosen.
15. In the bottom section, enter the course code for 9th grade English in the **Add Course** field.
16. Click **Save**.
17. The following message will display: **The Course Request Mass Update Rule was saved successfully.**

18. To add another rule, click **Add Mass Update Rule** and follow the previous steps.
19. When you are finished entering rules, click **Execute this Rule Group** to kick off the job that mass assigns the requests to the designated students.
20. A job will be sent to the Management screen. Wait for the job to complete.
21. Verify the mass assignment of requests was successful by going to the request page for a couple of students and verify the requests were added.

Task #2 – How to bulk remove a request which will in turn bulk remove any assignments associated with the request.

1. Change the context to the building level and the school year you are working with.
2. Navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Request Update Groups**.
3. Click **Add Course Request Mass Update Group**.
4. Enter a **Code**, **Name**, and optional **Description.**
5. Click **Save**.
6. In the following example, a Request Mass Update Group will be created to delete all requests for Spanish1 which will also delete any associated assignments for Spanish1.
7. The rule will be called *Delete Spanish1*. This rule will delete all requests and associated assignments for Spanish1.
8. Click on the **green arrow** icon to enter the individual rules.
9. Now, click **Add Mass Update Rule**.
10. Enter a **Rule Name** and **Rule Description**.
11. No other filters were chosen. However, if you wanted to delete the request for Spanish1 for only certain grade levels or groups of students, use the filters to narrow down the list of students.
12. In the **Drop Course** field, enter the course code for Spanish1.
13. Click **Save**.
14. The following message will display: **The Course Request Mass Update Rule was saved successfully**.
15. Click **Execute this Rule Group** to kick off the job that mass deletes the requests and associated assignments from the designated students.
16. A job will be sent to the Management screen. Wait for the job to complete.
17. Verify the mass deletion of requests and the associated assignments was successful by going to the Request page of a couple of students and verify the requests/assignments were deleted.

Task #3 – Assigning requests to individual students using the Request Assignments page.

1. Change the context to the building level and the school year you are working with.
2. To assign requests using the Request Assignments page, navigate to the following page with a student in context: **StudentInformation** **» SIS » Student » Student Schedule » Request Assignments**.
3. Choose a **Working Schedule** and **Result** and then click **Reload Screen**.
4. Click **Add Request**.
5. Use the **ellipse** icon to select a Course or type in the Course Code in the **Primary Course** field.
6. If you would like to enter an alternate request, enter the Course Code in the **Alternate Course** field. The Batch Scheduler can be configured to schedule alternate course requests if the primary request is not available. Please see the Batch Scheduler Procedural Checklist for details.
7. You can leave the **Priority** field empty and the priority will be filled in with the priority on the Course or you can enter a priority that will override the Priority value on the Course record in Course Maintenance.
8. If the student should be assigned to a course section taught by a particular teacher, choose the teacher from dropdown next to **Teacher**. If the student should be excluded from a certain teacher's sections then choose the teacher from the dropdown and check **Exclude**.
9. Likewise, if the student should be assigned to a course section taught in a certain period, choose the period from dropdown next to **Period**. If the student should be excluded from being scheduled into a certain period then choose the period from the dropdown and check **Exclude**.
10. Typically, if a student has restrictions for a specific teacher or period, the assignments are done manually to ensure the student gets in the proper course section. If the assignment is done manually, there is no need to enter a request for the course.
11. The **Request Status** section is for informational purposes only. Please see the Key in the Appendix section at the rear of this document.
12. Click **Save.**
13. The following message will display: **Request Saved**.
14. The request you added will display in the left section of the grid titled

15. Continue adding requests using the above steps until all the desired requests for students have been entered.

Task #4 - Assigning Requests to individual students using the Requests page.

1. Change the context to the building level and the school year you are working with.
2. To assign requests using the Student Requests page, navigate to the following page with a student in context: **StudentInformation** » **SIS** » **Scheduling** » **Requests**.
3. With a student in context, choose a schedule from the 1st dropdown on the left.
4. Click **Add Request**.
5. Use the **ellipse** icon to select a Course or type in the Course Code in the **Primary Course** field.
6. If you would like to enter an alternate request, enter the Course Code in the **Alternate Course** field. The Batch Scheduler can be configured to schedule alternate course requests if the primary request is not available. Please see the Batch Scheduler Procedural Checklist for details.
7. You can leave the **Priority** field empty and the priority will be filled in with the priority on the Course or you can enter a priority that will override the Priority value on the Course.
8. If the student should be assigned to a course section taught by a particular teacher, choose the teacher from dropdown next to **Teacher**. If the student should be excluded from a certain teacher's sections then choose the teacher from the dropdown and check **Exclude**.
9. Likewise, if the student should be assigned to a course section taught in a certain period, choose the period from dropdown next to **Period**. If the student should be excluded from being scheduled into a certain period then choose the period from the dropdown and check **Exclude**.
10. Typically, if a student has restrictions for a specific teacher or period, the assignments are done manually to ensure the student gets in the proper course section. If the assignment is done manually, there is no need to enter a request for the course.
11. The **Request Status** section is for informational purposes only. Please see the Key in the Appendix section at the rear of this document.
12. Click **Save.**
13. You will receive the following message: **The Request saved successfully.**
14. Continue adding requests using the above steps until all the desired requests for students have been entered.

Task #5 - Run scheduling reports to verify scheduling data

1. The scheduling reports will help you verify requests, determine if you have enough course sections to accommodate the requests, and the course section meeting times are not creating conflicts for key courses.
   a. Scheduling reports can be found by navigating to **StudentInformation** **» SIS » Scheduling » Scheduling Reports**.
   b. All the following reports are optional, however it is highly recommended that you run and verify these reports before proceeding. Scheduling reports do not have to be run in order to use the Batch Scheduler, but the reports will help verify students have the proper requests and you have the proper course sections setup to accommodate the requests before you run the Batch Scheduler.
2. Run the **Course Curriculum (CRSE)** report. This report allows you to select up to ten customized fields which will help you verify the course weight, course abbreviations, course names, etc.
3. TIP #1: Run CRSE report to see if study halls are marked as Course Type = Study Hall so when the Study Hall Wizard is run, the study halls will be assigned properly.
4. TIP #2: Run CRSE report to see if courses have the correct course priority, demand count, etc.
5. Next, run the **Students with No Requests or Assignments (NORQ).** This report produces a list of students who do not have any requests and therefore will not be scheduled by the Batch Scheduler.
6. TIP: Run the NORQ report for Active and Non-Resident students to see which students have not put in requests yet.
7. The **Students Course Requests (REQU)** report allows you to print a list of each student's course requests. This report will not tell you if their requests have a **Pending** status.
8. If you would like a listing of students who used the Public Module and their requests have a Pending status, you can navigate to:
   StudentInformation » Management » School Administration **» Public Administration » Uncommitted Requests**.
   a. Choose either **Unapproved by Parent/Guardian** or **Uncommitted by Student.**
   b. The **Uncommitted Requests** page will give you a list of students whose requests do not have an **Approved** status. If you need to print this page, you can click **File – Print.**
9. The **Course Request Labels (R206)** can be run to generate student labels to affix to course request sheets.
10. Next, to ensure students have met all pre and co-requisites for a request, do not have any invalid course requests, or they do not meet the gender or grade requirements of the course, run the **Student Course Request Verification (R401)**.

a. The report will list each student's requests. The report also has the option to only print students with error messages.

b. The The **R401** Error Code Key is as follows:

ALT	Alternate Course ID not valid for Group
INV	Invalid Course ID
SEX	Sex restriction not met
GRD	Grade restriction not met
OTH	Other restrictions to be checked manually
DUP	Duplicate Course Requests
PRQ	Prerequisites not met
COQ	Co-requisites not met

11. Next, the **Tally Of Student Course Requests (R402)** will list each course and the number of students requesting each course. You can use this report to ensure the course sections have enough capacity to accommodate all the requests.

12. The **Potential Course Conflicts Matrix (R403)** report can be used to generate a matrix listing of each course ID against all other course IDs in order to determine the number of conflicts that would result if two courses were offered only 1 time (singleton) within the same block/period of the day. The forecasted number of conflicts will be printed at the intersection point on the matrix corresponding to each pair of courses. You can use the report to analyze requests to determine how many sections of a course are needed, and if the requests create any time conflicts.

13. The **Student Who Requested A Specific Course (R404)** report allows the user to receive a list of students that have requested a specific course. The report also has the ability to list the courses that have less than a specified number of requests.

14. The **Students Requesting A Specific Course Pair (R405)** report produces a list of students that have requested a specified pair of courses. Once you have determined which courses are singletons by running either the **R403** or **R406** report, you can run the **R405** report to see which students will actually have a conflict if the meeting times on the two courses are left the same (singleton).

15. The **Potential Course Conflicts (R406)** report is used to generate a table listing each course ID against all other course IDs that have been jointly requested by one or more students, in order to determine the number of conflicts that would result if the two courses were offered only one time (singleton) within the same block/period. Optionally, this report can be based on only those courses where the number of students requesting the course is less than or equal to the number specified on the report submission screen.

16. Next, the **Course Request Verification Slip (R416)** can be run to create verification slips to pass out to students so they can verify their course requests for accuracy. The report has the option to print one student per page and also has the option to print student's current schedule in 19/20 and their requests for 20/21.

Appendix A: Request Status Key

1. **Request Status: StudentInformation**:
   a. **Mass Request Rule Created**: Denotes if the request was added by using the Course Request Mass Update Groups page.
   b. **Locked**: Denotes if a request was added by the office staff either manually for a single student or by using the Course Requests Mass Update Groups page. If a request is locked, the request will show on the Public Course Request Module, but the student cannot delete the request or change the request.
   c. **Approved**: Denotes any request added directly to a student's Requests page, Request Assignments page, or added in bulk using the Course Request Mass Update Groups page and is automatically marked as Approved. If the request was added by the student using the Public Course Request Module, the request is marked Approved after the student hits Commit. Please see the Public Course Requests Procedural Checklist for more details.
2. **Request Status: Guardian**: – used in conjunction with the Public Course Request Module.
   a. **Guardian Created**: Denotes if a guardian account was used to add the request. Please see the Public Course Requests Procedural Checklist for more information on Guardian accounts.
   b. **Guardian Pending**: Denotes if the guardian account entered requests, but forgot to click Commit. Please see the Public Course Requests Procedural Checklist for more information on Guardian accounts.
   c. **Guardian Locked**: Denotes if the guardian account entered and locked the request, not allowing the student to edit or delete the request. Please see the Public Course Requests Procedural Checklist for more information on Guardian accounts.
   d. **Guardian Approved**: Denotes if the request was entered by the guardian and the guardian hit Commit.
3. **Request Status: Student**: - used in conjunction with the Public Course Requests Module.
   a. **Student Created**: Denotes if the request was entered by the student using the Public Course Requests Module.
   b. **Student Pending**: Denotes if the request was entered by the student using the Public Course Request Module and the request is pending because the student has not clicked Commit yet.

c. **Student Committed**: Denotes if the request was entered by the student using the Public Course Requests Module and the student has finalized their requests by clicking Commit.

Only requests that are marked as **Approved** are scheduled by the Batch Scheduler.

ProgressBook
StudentInformation

How to Create Discipline Letters

Change Log

Date	Section Number/Name	Change Description
5/6/20	Entire document	Review and Update
1/13/20	Step 15	Updated screenshot
1/3/19	Entire document	Updates

1. Open a Word document (**discipline letters must be saved as .docx**), and go to File >> Options >> Advanced and check the option to Show bookmarks (under Show document content):
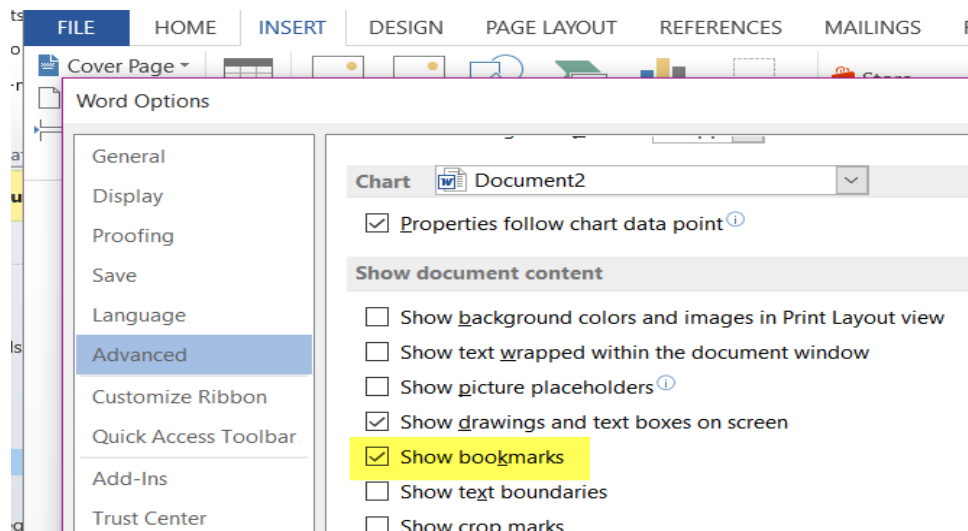
2. In the document, enter some placeholder text, for example 'StudentFirstName'.

3. Select/highlight that text and either press Ctrl+Shift+F5 or go to Insert >> Link >> Bookmark in Word to bring up the Bookmarks dialog:
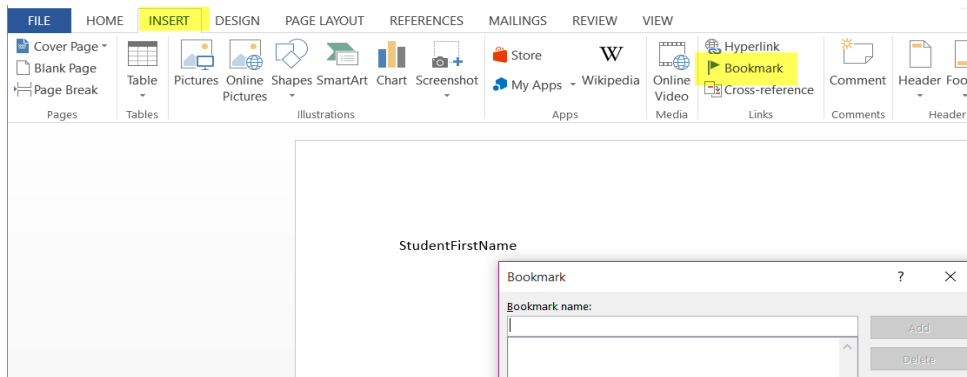
4. In the dialog, enter the bookmark name **StudentName** and click **Add**.
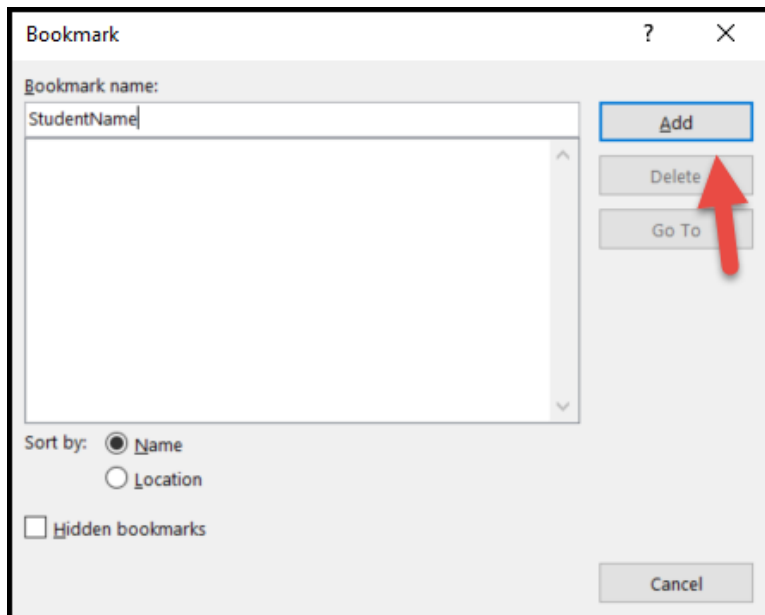
5. This will result in brackets being placed around the bookmark name to indicate it is a bookmark:

6. You will need to do the step above for each bookmark you want in the letter. A complete listing of bookmarks is at the end of this document.

7. To print a bookmark multiple times, use _x2, _x3, etc at the end of the bookmark.

Example:
    StudentFirstName will print the student's first name.
    StudentFirstName_x2 will print the student's first name a 2nd time in the letter.
    StudentFirstName_x3 will print the student's first name a 3rd time in the letter.
    Each one of the StudentFirstName(s) must be added as a bookmark.
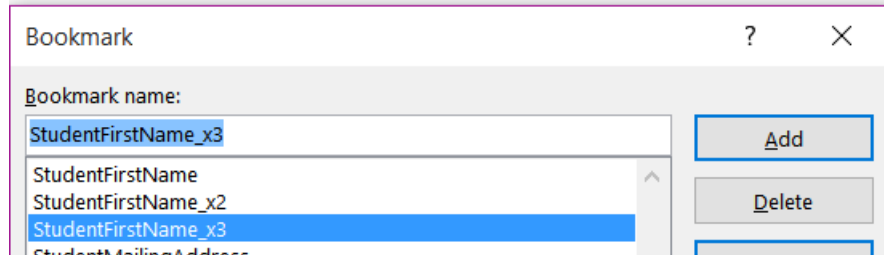
8. To print multiple Actions, Infractions, or Parental Involvement on one letter:
   a. Enter the appropriate bookmark (DisciplinaryActionType).
   b. Highlight that bookmark and insert RepeatForEach_Action (_Infraction, _ParentalInvolvement) on top of this bookmark. This will place additional brackets around the bookmark and it will print each Action entered on the discipline incident.
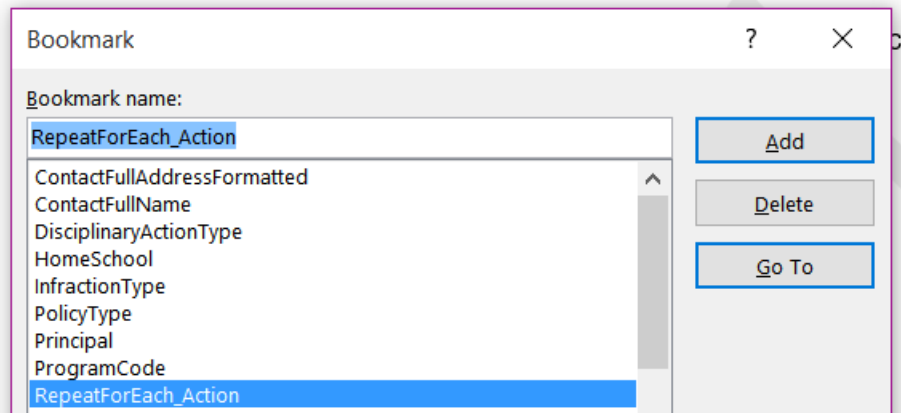
9. Once the Discipline Letter template is complete, upload the template in StudentInformation. At the district level, go to **StudentInformation > Management > District Administration > Report Template Administration.**

10. On the **Report Template Administration** screen, click **New Template**.

11. On the **Upload Template** window, in the Select Report drop-down list, select the type of Letter with which you want to associate the template. The **Available Bookmarks in Report** section displays the bookmarks for the letter that you selected to customize your template. In the **Template Description**, enter the description that you want to display in the StudentInformation to identify this template. Click **Choose File**, navigate to and select the file you want to use as a template. Click **Upload**.
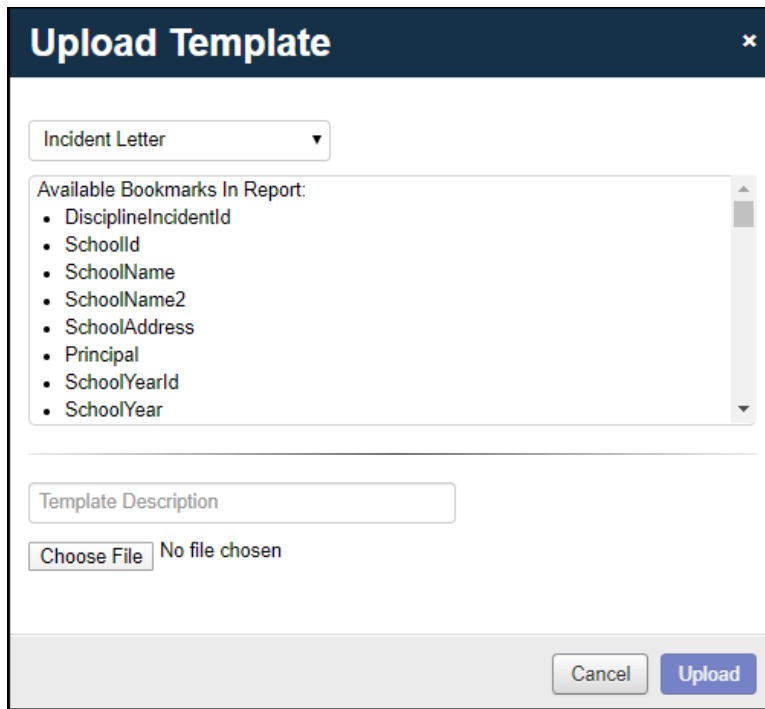
The uploaded template displays in the list.
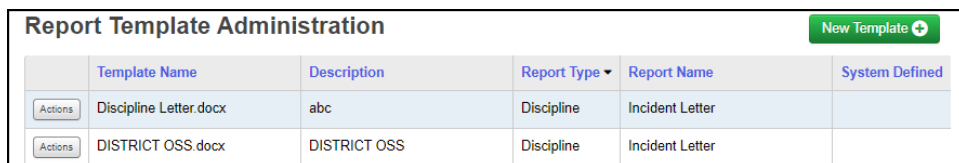
12. To download the report templates, still on the **Report Template Administration** screen, in the row of the template you want to download, click **Actions** and select **Download**. **Save** the file.

13. To print a Discipline Letter, go to **StudentInformation > SIS > Discipline > Discipline Incidents**.

14. For the incident in which you want to print a letter, click **Actions** and select **View/Edit**. On the **Offenders** tab, under the picture, click **Print Letter**.

15. Select the desired letter from the list and click **Run Report**.

Available Bookmarks for Discipline Letters:

- DisciplineIncidentId
- SchoolId
- SchoolName
- SchoolName2
- SchoolAddress
- Principal
- SchoolYearId
- SchoolYear
- DisciplineOffenderId
- SchoolPhoneFormatted
- SchoolPhone
- IncidentNumber
- IncidentName
- IncidentDate
- IncidentDescription
- IncidentTimeFrameType
- IncidentStatus
- IncidentPlaceType
- IncidentLocation
- IncidentAgainstPropertyInd
- OfficeNotes
- IncidentBuildingIRN
- Referrer
- ReferrerType
- IncidentCategory1
- IncidentCategory2
- IncidentDateModified
- IncidentModifiedBy
- IncidentModifiedByUserId
- StudentId
- StudentName
- StudentNumber
- StudentLastName
- StudentFirstName
- StudentMailingAddress
- ProgramCode
- HomeSchool
- OffenderType
- OffenderAge
- AltEducationInd
- GradeLevelAtTimeOfIncident

- InjurySustainedInd
- InjurySeverityType
- LLENotifiedInd
- LLEContactedName
- AdjudicationType
- ArrestType
- WeaponDetectedInd
- WeaponDetectedMethod
- WeaponDetectedComment
- WeaponType
- OffenderDateModified
- OffenderModifiedBy
- OffenderModifiedByUserId
- RepeatForEach_Infraction
- DisciplineOffenderInfractionId
- PolicyType
- PolicyDescription
- InfractionType
- InfractionDescription
- InfractionComment
- WeaponCount
- InfractionDateModified
- InfractionModifiedBy
- InfractionModifiedByUserId
- InfractionCount
- RepeatForEach_Action
- DisciplineOffenderDisciplinaryActionId
- DisciplinaryActionType
- DisciplinaryActionDescription
- DisciplinaryActionComment
- StartDate
- EndDate
- DisciplinaryActionDuration
- Demerits
- HasServedInd
- ModifiedExpulsionInd
- ReceivedServicesInd
- ActionDateModified
- ActionModifiedBy
- ActionModifiedByUserId
- ActionCount
- RepeatForEach_ParentInvolvement
- DisciplineOffenderParentInvolvementId

- ParentInvolvementType
- ParentInvolvementParentFirstName
- ParentInvolvementParentLastName
- ParentInvolvementDate
- ParentInvolvementComment
- ParentInvolvementDateModified
- ParentInvolvementModifiedBy
- ParentInvolvementModifiedByUserId
- ParentInvolvementCount
- ContactFirstName
- ContactLastName
- ContactFullName
- ContactFullAddressFormatted
- ContactAddress
- ContactAddress2
- ContactCity
- ContactState
- ContactZip

Discipline Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
5/6/20	Entire document	Review and update
1/8/20	Entire document	Review and update
12/6/19	Entire document	Review and update
1/7/19	Entire document	Updated screenshots

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Understand Discipline Code Types

Required Discipline Codes

Discipline Code Type	Description	Examples
Action Code	Disciplinary action taken by your school or district in response to any reported discipline incident(s)	• detention • in school suspension • out of school suspension • expulsion
Infraction Type Code	Infraction committed by a student that resulted in a punishment (action)	• bullying • assault • fighting • bomb threats • possession of weapon • vandalism
DisciplineIncidentCategory	Incident category for Civil Rights Reporting	• bullying • religious intolerance • sexual orientation

Optional Discipline Codes

Discipline Code Type	Description	Examples
Adjudication Code	Court decision applied to a discipline incident resulting in an arrest	• citation • conviction • fine • probation
Arrest Code	Decision whether or not to arrest a student involved in an incident and details related to any arrest	• arrest pending • arrested for weapons violation • arrested but not for weapons violation • not arrested
Contact Type Code	Type of communication made between your school and a student's contact person(s)	• call to guardian • letter to guardian

Optional Discipline Codes

Discipline Code Type	Description	Examples
Incident Place Code	Location where an incident occurred	• on school grounds • bus • field trip • school sponsored event • playground • athletic stadium
Incident Time Frame Code	Time of day when an incident occurred	• before school • during school • after school
Injury Severity Code	Seriousness of an injury sustained by any party as a result of an incident	• fatal injury • major injury • minor injury
Offender Code	Classification of person who committed a disciplinary offense	• student • adult visitor • intruder • district employee • parent
Parent Involvement Code	Method of involving a parent of a student involved in a discipline incident for purposes of information and/or remediation	• telephone conference • school conference • written notification • family counseling • law enforcement/legal involvement
Policy Code	Discipline policy specific to your school district that was violated in relation to a discipline incident	• unauthorized touching • fighting • attendance • behavior • bullying
Victim Type Code	Classification of a victim of an incident	• student • adult visitor • district employee • parent
Weapon Code	Type of weapon used in an incident	• knife • firearm • mace
Weapon Detected Method Code	How a weapon was detected	• scanner/security • detected by fellow student • detected by school staff

Task #1 - Add / Edit Discipline Codes

Navigation: StudentInformation – Management – School Administration – Discipline Administration – Discipline Code Types

1. On the **Discipline Code Types** screen, in the **Discipline Code Type** drop-down list, select the type of discipline code you want to add.

> **Discipline Code Types**
>
> *From this screen, you can display, add, change and delete data pertaining to Discipline codes.*
>
> Discipline Code Type: -- Select a Discipline Code Type --
> Action Code
> Adjudication Code
> Arrest Code
> Contact Type Code
> DisciplineIncidentCategory
> Incident Place Code
> Incident Time Frame Code
> Infraction Type Code
> Injury Severity Code
> Offender Code
> Parent Involvement Code
> Policy Code
> Victim Type Code
> Weapon Code
> Weapon Detected Method Code

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Task #2 - Add Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, click **New Incident**.
   The add-edit version of the screen displays.
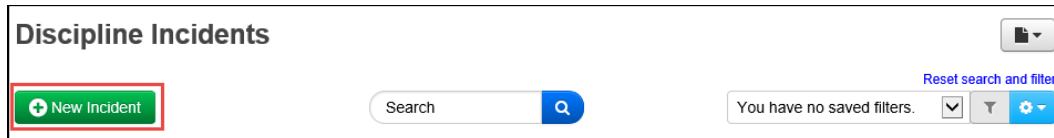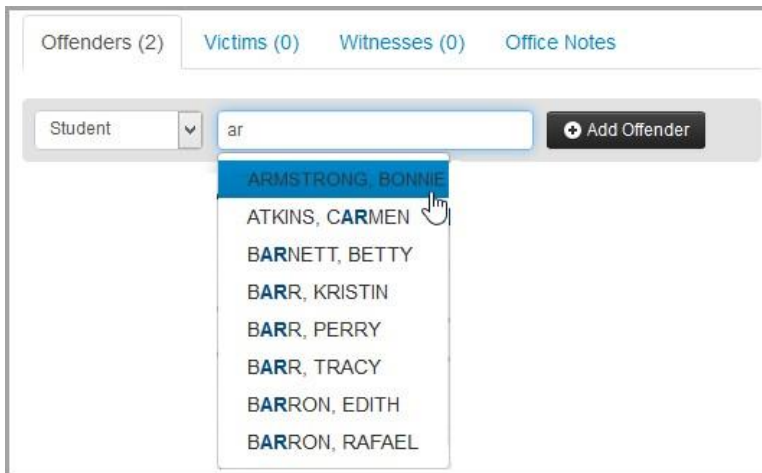
2. In the main area at the top of the screen, enter or select the following information:
   - Name you want to assign to the incident
   - Date, time and (optional) time frame during which the incident occurred (defaults to current date, current time and During school hours)
   - Optional: Description of the incident (maximum character length is 1950)
   - Optional: For Civil Rights reporting purposes, in the **Incident Category** area, select the appropriate check box(es).
   - Optional: General and specific location where the incident occurred (defaults to On School Property)
   - Optional: If the incident involved physical damage to school property, select the **Against Property** check box.
   - IRN/name of the school (defaults to building in context)
   - Optional: Person who created the referral (can be Staff, Student or Other)

3. At the bottom of the screen, click **Create Incident**.

4. StudentInformation creates the incident with an **Open** status, assigns it a number and displays a confirmation message.

Task # 3 - Add Offenders – required

You can add one or more offenders to each documented incident.

1. On the **Offenders** tab, in the drop-down list, select **Student**.
   a. In the **Search** box, enter the first couple letters of the offender's first or last name or Student ID.
   b. In the search results that display beneath the field, select the correct offender.

2. Click **Add Offender**.

*Note: To view his/her student profile, click the offender's name. To delete an offender, click on the **trash can** icon.*

3. To document the district policy that was violated and the infraction that occurred:
   a. Click on the **plus** sign to open the **Policies / Infractions** section, select the appropriate policy and infraction.
   b. If applicable, enter the number of weapons involved in the incident, as well as any comments about this policy violation/infraction.
   *Note: To document additional policies/infractions, click the **plus** sign.*
   *To delete a policy/infraction, click on the **trash can** icon.*

4. To document disciplinary action taken in response to the incident:
   a. Click on the **plus** sign to open the **Disciplinary Actions** section, select the appropriate disciplinary action taken and the start date and end date of the action.
   b. Enter the # of days covered by the disciplinary action (for example, 2 days of detention).
   c. If applicable, enter any Demerits assigned to the offender and any comments about this action.

d. If any of the following situations apply as a result of this action, select the appropriate check box(es):
- **Alt Education Assigned** – Student assigned to an alternative education program
- **Received Services** – Student received special education services
- **Served** – Student completed the required disciplinary action (for example, served the detention or attended anger management classes)

e. If applicable, select whether the offender received a **Modified Expulsion**.

f. If the offender is in preschool through 3rd grade and received a Disciplinary Action of Expulsion or Out of School Suspension, select the applicable **PS-3 Discipline Reason.**

*Note: To document additional disciplinary actions, click the **plus** sign. To delete a disciplinary action, click on the **trash can** icon.*

5. To document your contact with the offender's parents/guardians:
   a. In the **Parent Involvement** section, click the **plus** sign.
   b. Select the name of the parent or guardian you contacted, the form of contact (such as telephone conference or written notification) and the date, as well as any additional comments.
   *Note: To document additional parental contacts, click the **plus** sign. To delete a parental contact, click the **trash can** icon.*
   Note: If you will see (*) next to the contact name, this indicates it is inactive.

6. To document any injuries and whether this offender requires a discipline letter:
   a. In the **Other** section, click the **greater than** symbol.
   b. If you want to specify an offender type, select an offender type.
   c. If you want to include a discipline letter for this offender in the **Discipline Letter Export**, select the **Needs Letter** check box.
   d. If the offender was injured as a result of the incident, select the severity of the injury and who caused the injury.
   e. In the **Offender Comments** field, enter any other notes as needed.

7. To document your contact with police related to this incident:
   a. In the **Law Enforcement** section, click the **greater than** symbol.
   b. Enter the law enforcement officer's name.
   c. If applicable, select the type of arrest and adjudication that occurred for the incident.

8. To document weapons involved in the incident:
   a. In the **Weapon Involvement** section click the **greater than** symbol.
   b. Select how the weapon(s) were detected, the type and any comments.

9. Click **Update Incident**.

Offenders (1) Victims (0) Witnesses (0) Office Notes

| Student ▼ | Search... | ⊕ Add Offender |

BARKER, DEBRA   **Grade Level: 12**   **Age: 17**   **Gender: F**   🗑

NO PHOTO AVAILABLE

🔔 Schedule
📅 Attendance
👤 Contacts
🖨 Print Letter
📄 Show History
⚠ Past Incidents
$

⊕ Policies / Infractions

| Select policy... ▼ | Weapons [ ] | Policy/Infraction Comments | 🗑 |
| Minor-Truancy ▼ | | | |

⊕ Disciplinary Actions

After School Detention ▼	Demerits [ ]	Action Comments	🗑
01/09/2020 📅 – 01/10/2020 📅	# of Days [2]		
Alt Education Assigned * - Not Applicable ▼			
Modified Expulsion * - Not Applicable ▼		☐ Received Services ☐ Served	
PS-3 Discipline Reason * - Not Applicable ▼			

⊕ Parent Involvement

| KATHY BARKER ▼ | 01/08/2020 📅 | Comments | 🗑 |
| School conference ▼ | | | |

⌄ Other

| Select offender type... ▼ | ☐ Needs Letter | Offender Comments |
| Select injury severity type... ▼ | | |

⌄ Law Enforcement

| Law Enforcement Contact Name | Select arrest type... ▼ | Select adjudication type... ▼ |

⌄ Weapon Involvement

| Select detection method... ▼ | Select weapon type... ▼ | Weapon Comments |

Update Incident   Cancel

Task #4 - Add Victims – optional

You can add one or more victims to each documented incident.

1. On the **Victims** tab, in the drop-down list, select whether the victim is a Student, Staff or Other.

2. If you selected Other, enter the victim's first and last name. If you selected Student or Staff, in the search box, search for the victim as follows:
   a. Enter the first couple letters of the victim's first or last name or Student ID.
   b. In the search results that display beneath the field, select the correct victim.

3. Click **Add Victim**. The victim's information displays.
   *Note: To delete a victim, click the **trash can** icon.*

4. To document additional details about the victim:
   a. Select a further classification (type) for the victim.
   b. If the victim was injured as a result of the incident, select the severity of the injury.
   c. If the injury required medical treatment, select the **Medical Treatment Required** check box.
   d. If you referred the victim for non-medical assistance (such as counseling), select the **Student Assistance Program Referral** check box.
   e. If applicable, enter any comments about the victim.

5. Click **Update Incident**.

Task #5 - Add Witnesses – optional

You can add one or more witnesses to each documented incident.

1. On the **Witnesses** tab, in the drop-down list, select whether the witness is a Student, Staff or Other.

2. If you selected Other, enter the witness's first and last name. If you selected Student or Staff, in the search box, search for the witness as follows:
   a. Enter the first couple letters of the witness's first or last name or Student ID.
   b. In the search results that display beneath the field, select the correct witness.

3. Click **Add Witness**.
   Note: *To delete a witness, click the* ***trash can*** *icon.*

4. Enter any comments related to the witness.

5. Click **Update Incident**.

Task #6 - Add Notes – optional

You can add internal notes to each documented incident. This is to capture information that should not be shared except with school staff who have access to discipline incidents in StudentInformation.

1. On the **Office Notes** tab, enter this internal information.

2. Click **Update Incident**.

Offenders (1)   Victims (1)   Witnesses (1)   **Office Notes**
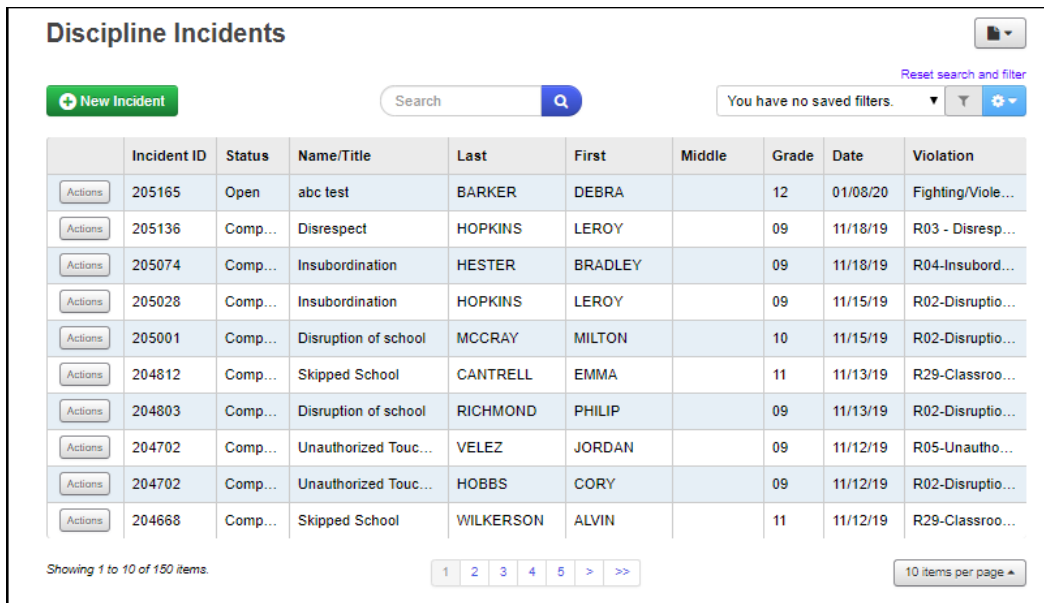
Bonnie and Ana have been having issues getting along since Bonnie's father married Ana's mother. May want to consider recommending family counseling.

Update Incident or Cancel

Task #7 - View All Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, review the list of all incidents for the building and school year in context. Incident statuses are as follows:
   - **New** – Referral created in StudentInformation or GradeBook, but not yet opened in the Discipline Incidents screen.
   - **Open** – Incident opened or created in StudentInformation; in process of being investigated.
   - **Complete** – No further action needed; case is closed; you can reopen later.
   - **Cancelled** – Not needed (for instance, in the case of a duplicate incident); you can uncancel later.

Discipline Incidents

	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	205165	Open	abc test	BARKER	DEBRA		12	01/08/20	Fighting/Viole...
Actions	205136	Comp...	Disrespect	HOPKINS	LEROY		09	11/18/19	R03 - Disresp...
Actions	205074	Comp...	Insubordination	HESTER	BRADLEY		09	11/18/19	R04-Insubord...
Actions	205028	Comp...	Insubordination	HOPKINS	LEROY		09	11/15/19	R02-Disruptio...
Actions	205001	Comp...	Disruption of school	MCCRAY	MILTON		10	11/15/19	R02-Disruptio...
Actions	204812	Comp...	Skipped School	CANTRELL	EMMA		11	11/13/19	R29-Classroo...
Actions	204803	Comp...	Disruption of school	RICHMOND	PHILIP		09	11/13/19	R02-Disruptio...
Actions	204702	Comp...	Unauthorized Touc...	VELEZ	JORDAN		09	11/12/19	R05-Unautho...
Actions	204702	Comp...	Unauthorized Touc...	HOBBS	CORY		09	11/12/19	R02-Disruptio...
Actions	204668	Comp...	Skipped School	WILKERSON	ALVIN		11	11/12/19	R29-Classroo...

Showing 1 to 10 of 150 items.   1 2 3 4 5 > >>   10 items per page ▲

2. Optional: To view additional incidents, use the options at the bottom of the screen to page through incidents or change the number of incidents that display per page.

Task #8 - View Student's Discipline Incidents

Navigation: StudentInformation – SIS – Student – View Profile

1. With a student in context on the **View Profile** screen, in the **I want to...** drop-down list, select **View A Student's Discipline Incidents**.

The **Discipline Incidents** screen displays with only those incidents in which the student in context is an offender.

2. Optional: To view discipline incidents for all students, click **Remove student filter**.
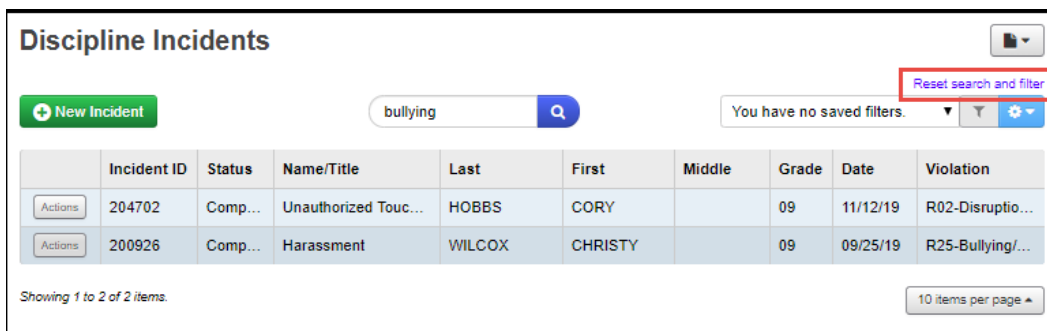
Task #9 - Search for Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, in the Search box at the top of the screen, enter any of the following search criteria:
   - Incident ID
   - Status (For example, to search for referrals you have not yet viewed, enter New)
   - Title of the incident
   - Student offender's first name, last name or grade
   - Date of the incident
   - Violation

2. Click on the **magnifying glass** or press <**Enter**>.

3. Optional: To clear the search criterion and return to the default view, click **Reset search and filter**.

Task #10 - Create Filter

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, in the filters area at the top of the screen, Click the **gear** icon (Filter settings).

1. In the drop-down list, select Create.
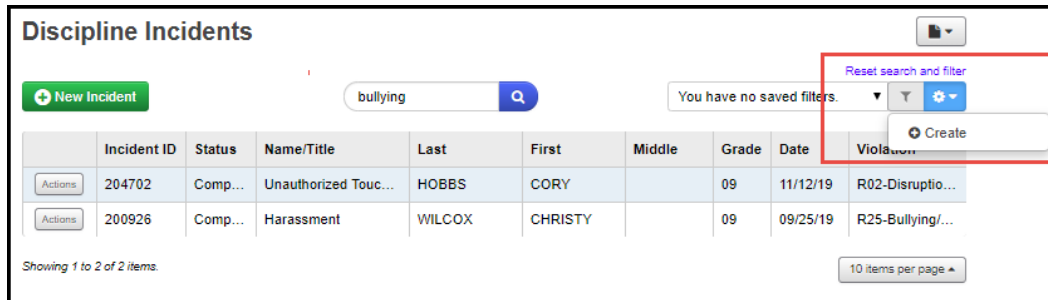
3. On the **Create Filter** window, in the top section, enter a name for the filter.

4. Optional: If you want the customized filter/sort you are creating to default every time you access the **Discipline Incidents** screen, select the **Use as default** check box.

5. In the middle (sort) section of the window, set your sort options as follows:
   a. Select the field on which to sort the results.
   b. Select whether the sort should be Ascending or Descending.

6. In the lower (filter) section of the window, set your filter options as follows:
   a. Select a column on which to filter the results.
   b. Select the operator for the filter.
   c. Select the criterion.
   d. Optional: To create an additional filter:
      i. Click the **plus** sign
      ii. In the **And/Or** drop-down list that displays to the left of the filter section, select **And** or **Or**.
      iii. Repeat the process of entering filter criteria.

7. Click **Submit**.

Task #11 - View Offender's Past Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

You can check to see if an offender has any past disciplinary incidents within the same school district and view details of those events.

1. Access the list of the offender's past incidents in one of the following ways:
   From the main grid view of the **Discipline Incidents** screen:
   a. In the row of the incident for the offender whose past incidents you want to view, click **Actions**.
   b. In the drop-down list, select **View Past Incidents**.

View Past Incidents From Grid View

- From within the incident detail view (Add/Edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Past Incidents**.

View Past Incidents From Incident Detail View

The **Incidents** window displays, and you can review a list of the offender's past incidents.

2. Optional: To view details of a past incident, click the **Incident ID**.

Note: *The link is only enabled for incidents from the school year in context. To open an incident from a previous school year, first put that school year in context.*

List of Offender's Past Incidents
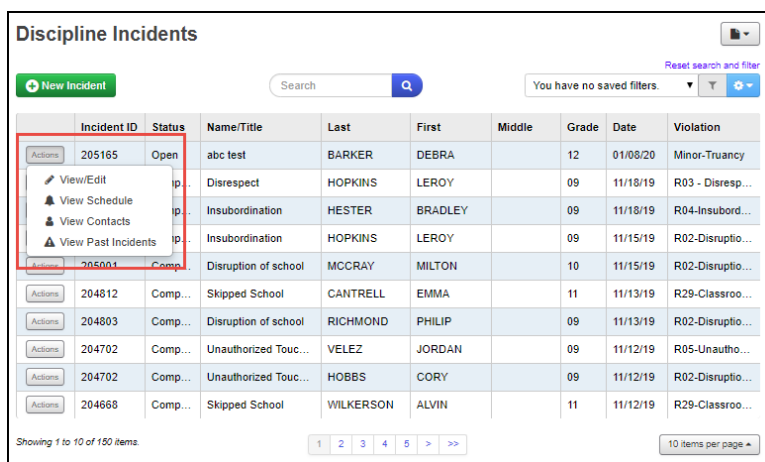
The incident detail view opens, and you can review the past incident.

Task #12 - View Offender's Schedule

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents - Add/Edit Discipline Incident

If you want to find the offender's current class location (for example, to call him/her to your office), you can look up the offender's schedule in one of the following ways:

1. From the main grid view of the **Discipline Incidents** screen:
   a. In the row of the incident for the offender whose schedule you want to view, click **Actions**.
   b. In the drop-down list, select **View Schedule**.

View Schedule From Grid View

- From within the incident detail view (Add/Edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Schedule**.

View Schedule From Incident Detail View

Task #13 - View Offender's Attendance Records

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents – Add/Edit Discipline Incident

1. On the Add/Edit version of the **Discipline Incident** screen, at the bottom of the screen on the **Offenders** tab, click **Attendance**.

- On the **Attendance** window, review the attendance records.

Task #14 - Contact Offender's Parents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

If you want to contact the offender's parents/guardians, you can look up their contact information.

1. Access the parent contact information in one of the following ways:
   From the main grid view of the **Discipline Incidents** screen:
   a. In the row of the incident for the offender whose contacts you want to view, click **Actions**.
   b. In the drop-down list, select **View Contacts**.

- From within the incident detail view (Add/Edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Contacts**.

The **Contacts** window displays, and you can review the parent contact information. The student's primary contact is denoted by the gold star. Any contact who should receive a copy of discipline letters is denoted by a green checkmark in the Copied On Correspondence column.

2. Optional: To email the parent directly from this window, click the email address, and proceed to send the email using your preferred application.

Contacts ✕

BARKER, DEBRA

Type	Name / Address	Phone	Email	Copied On Correspondence
Mother	KATHY BARKER ⭐ 626 BARKER Road GALION, OH 44833	Home: (419) 555-9607	abc@yahoo.com	✔
Father	Bob Barker 626 BARKER Road GALION, OH 44833			✔

Elementary Scheduling Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
03/01/21	Entire document	Updates for 2021/2022
02/27/20	Entire document	Updates for 2020/2021
02/12/18	Entire document	Update dates for 2018/2019, replaced icons with text
04/20/17	Task #27	Added new task

Table of Contents

Before Elementary Scheduling can be started the following steps need to be performed in order:

1. School Year Initialization: Refer to the *School Year Initialization Procedural Checklist* for details.

2. Creating Sub-Calendars: Refer to the *Calendar NON EMIS or Calendar with EMIS Exceptions Procedural Checklist* for details.

3. Promoting Students to 21/22 school year: Refer to the *Student Promotion/Bulk Enrollment Procedural Checklist*.

Before continuing make sure you have your class lists ready of which students are going to be in what teacher's class.

Make sure you have a Default Schedule Result before continuing.

How to tell if you need a Default Schedule Result:

1. At the building level in 21/22, navigate to **_StudentInformation_** **»** **_SIS_** **»** **_Scheduling_** **»** **_Course Section Assignments_**.
2. Check the **Schedule Result** dropdown.
3. If the dropdown is empty, you do not have a default schedule result and will need to create one. Follow the steps below.
4. If the dropdown is populated, skip the Create Default Result Set instructions below.

Create Default Result Set

1. At the building level in 21/22, navigate to **_StudentInformation_** **»** **_Management_** **»** **_School Administration_** **»** **_Scheduling Administration_** **»** **_Scheduler_** **»** **_Schedule Result Sets_** to create a Schedule Result Set.
   a. On the **_Schedule Result Sets_** page in the **_Filter By Schedule_** dropdown, choose a Master Schedule. Typically, there is only one schedule in the dropdown.
   b. Click **_Add Schedule Result_**.
   c. Enter a name in the **_Name_** field. State Support recommends naming it **_Default Schedule Result_**.
   d. Click **_Save_**.

For grades K-12, report all students in individual classes for all courses.

- All students in grades Kindergarten and up are to be reported in separate classes by subject area.
- Preschool courses will continue to be reported as self-contained courses. DO NOT create a separate course for each subject in which the student is participating. Refer to Appendix C of the EMIS Guide for the proper subject codes to use.
- In a team teaching situation (more than one teacher teaching the course), mark each teacher as the teacher of record. Each course master record, with the exception of the local classroom code element and highly qualified element is most likely identical for these two teachers. Best practice suggests that the students should be equally split between the teachers. (Chapter 5 of the EMIS manual)

Special Education:

- Self-contained classrooms, where courses are taught by a special education teacher, need to have the courses reported separately, too.

- Special Education classes for K-12 must have a Student Population of SE. Special Education classes for K-12 visually/hearing impaired must have a Student Population of SP. (Chapter 3 of the EMIS manual)

- A course is not required when students with disabilities are pulled-out of the regular classroom in order to receive supplemental special education services, such as tutoring, speech and language, etc.

Gifted Students:

- Gifted courses taught to gifted students in grades K-12 are required to be reported separately, even if these courses are taught by the same teacher. A Course Master Record is required for each subject in which the teacher teaches. If a teacher teaches seven subjects, then a unique local classroom code is required to be reported on each Course Master Record for each of the seven courses.
- Gifted courses must have a Student Population of GE.

Reminder! **If gifted and special education courses are not part of a group, then you will need to add them as follows:**

1. Add a Course record for each course you will be reporting as a separate class. Complete the EMIS tab and include the proper subject code (see EMIS Guide, Appendix C), course level, and student population.
2. If you are just adding a course section to a pre-existing course, be certain to update the appropriate values on the EMIS Override tab to reflect the course section is for gifted students.
3. Make sure the teacher instructing the course is defined as a Staff Member. Include the teacher's Credential ID (State Staff ID) on the teacher's Staff Member record, as this ties student data to staff data.
4. Add a Course Section for each course and meeting time. Courses may have multiple sections if different teachers teach the same course.
5. Since these are extra classes, assign each of these Course Sections to a period other than the period of the day the course meets, to prevent time conflicts on student schedules.
6. Add a Course Section Assignment for each student in the course/section.

Reminder! **ESCs:**
- No longer report student data (with the exception of Preschool students). Home schools are to report ESC students as if they are attending the home district, and must therefore report courses and class lists for all courses taught by the ESC (except for Preschool).
- You will need to set up a Staff Member record for each ESC instructor, using their credential ID in the State Staff ID field, and set up Course, Course Section and Course Section Assignment records for all courses, course sections, and students who are instructed by ESC-contracted staff for school age only.
- For ESC courses, the Course ID should be different from the local Course IDs, as the Program Provider IRN and the Location IRN would be different. The EMIS Transfer will not update the Staff Master Record correctly if ESC courses have identical Course IDs to local Courses.

Task #1 - Verify Homeroom Terms are set up correctly

1. Change your context to the building level and the next school year.
2. Navigate to ***StudentInformation*** » ***Management*** » ***School Administration*** » ***Scheduling Administration*** » ***Initialization*** » ***Homeroom Terms***.
   a. Click the Edit Pencil icon to edit the homeroom term.

Name	Start Date	End Date	Include
08/25/2020	Aug 25, 2020	Oct 23, 2020	✔
10/26/2020	Oct 26, 2020	Jan 08, 2021	✔
01/11/2021	Jan 11, 2021	Mar 19, 2021	✔
03/22/2021	Mar 22, 2021	May 21, 2021	✔

   b. Ensure the appropriate schedule terms are checked.
   c. Click **Save** to commit changes.

				Code	Name	Schedule Terms	Start Date	End Date	Planned Days	Actual Days	Sort Order	Active
🗑	✏	👤x		FullYear	Full Year	08/25/2020, 10/26/2020, 01/11/2021, 03/22/2021	Aug 25, 2020	May 21, 2021	194.00	194.00	1	🟢

✔ Show Active Only

Task #2 - Verify Rooms/Locations

Rooms and Locations aren't school year specific. If you change the capacity, for example, of a room in 21/22 it will change the capacity of the room/location in 20/21. This is by design. The only item this will affect is if you would print a student's schedule in 20/21 the room numbers might not be correct.

1. Change your context to the building level and the next school year.
2. Navigate to ***StudentInformation*** » ***Management*** » ***School Administration*** » ***School Building Administration*** » ***Rooms/Locations***.
   a. Click the Edit Pencil icon to edit an existing room/location or Click **Add Location** to enter a new room/location.
   b. Enter up to 4 digits in the **Code** field.
   c. Enter a name for the room/location in the **Name** field.
   d. Enter an optional description in the **Description** field.
   e. In the **Location Type** dropdown select the type of room/location it is. This dropdown is currently only used for informational purposes.
   f. Enter the capacity in the **Capacity** field.
   g. The **Is Schedulable** checkbox currently serves no purpose.
   h. If the room/location is also a homeroom place a checkbox in **Is Homeroom**. If the **Is Homeroom** box is checked the room/location will appear in the room/location dropdown list when you add a new homeroom.
   i. The **Is Active** box should be checked.
   j. Click **Save** or **Save and New** to commit your changes.

Reminder! Rooms and Locations aren't school year specific which means if you change the capacity, for example, in the future school year it will change the capacity in the current school year.

Room/Location Maintenance

From this screen, you can display, add, change and delete data pertaining to locations.

[Add Location]

		Code	Name ▲	Description	Location Type	Capacity	Schedulable	Homeroom	Active
🗑	✏	151	151		Regular Classroom	30	☑	☑	🟢
🗑	✏	152	152		Regular Classroom	30	☑	☑	🟢
🗑	✏	153	153		Regular Classroom	30	☑	☑	🟢
🗑	✏	154	154		Regular Classroom	30	☑	☑	🟢
🗑	✏	155	155		Regular Classroom	30	☑	☑	🟢
🗑	✏	156	156		Regular Classroom	30	☑	☑	🟢
🗑	✏	157	157		Regular Classroom	30	☑	☑	🟢
🗑	✏	157L	157L		Laboratory	40	☑	☐	🟢
🗑	✏	CAFE	CAFETERIA		Cafeteria	150	☑	☑	🟢
🗑	✏	CA	Career Academy		Shop	30	☑	☑	🟢
🗑	✏	CEC	CEC North ESC		Off Campus	5	☑	☐	🟢
🗑	✏	CH	CHILDREN'S HOME		Off Campus	5	☑	☑	🟢
🗑	✏	DL	Digital Lab		Shop	150	☑	☑	🟢
🗑	✏	GAMA	EXTRACURR/AWAY		Unknown	0	☑	☑	🟢

Task #3 - Verify existing homerooms to ensure each teacher has a homeroom

1. Change your context to the building level and the next school year.
2. Navigate to *__StudentInformation__* » *__Management__* » *__School Administration__* » *__School Building Administration__* » *__Homerooms__*.
   a. Click on the **Edit Pencil** icon to edit an existing homeroom or click **Add Homeroom** to add a new homeroom.
   b. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   c. Enter up to 6 digits in the **Code** field.
   d. Enter a name in the **Name** field.
   e. Choose a room/location from the **Location** dropdown. Remember, only rooms/locations that were marked as **Is Homeroom** will be included in the dropdown.
   f. Enter a capacity in the **Capacity** field.
   g. Select a counselor from the **Counselor** dropdown.
   h. If the homeroom is for certain grade levels pull the grade levels over to the right in the **Grade Levels** filter.
   i. The **Is Active** box should be checked.
   j. Click **Save** or **Save and New** to commit your changes.

Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

			Homeroom ▲	HR Term	Teacher	Room	Grades	Capacity	Remaining	Counselor	Active
🗑	✏	👤✕	02 - 02	FullYear	Mrs. Martin	02 - HOMEROOM - 2	01, 02, KG	30	30		🟢
🗑	✏	👤✕	07 - 07	FullYear	Mrs. Kreimer	07 - HOMEROOM 7	02	30	30		🟢
🗑	✏	👤✕	08 - 08	FullYear	Ms. Warren	08 - HOMEROOM 8	02	30	30		🟢
🗑	✏	👤✕	09 - 09	FullYear	Mrs. Dillon	09 - HOMEROOM 9	02	30	30		🟢
🗑	✏	👤✕	10 - 10	FullYear	Mrs. Kreimer	10 - HOMEROOM 10	02	30	30		🟢
🗑	✏	👤✕	12 - 12	FullYear	Ms. Wilson	12 - HOMEROOM 12	02	30	30		🟢
🗑	✏	👤✕	13 - 13	FullYear	Ms. Howard	13 - HOMEROOM 13	01	30	30		🟢
🗑	✏	👤✕	15 - 15	FullYear	Mrs. Patrick	15 - HOMEROOM 15	01	30	30		🟢
🗑	✏	👤✕	16 - 16	FullYear	Mrs. Eads	16 - HOMEROOM 16	01	30	30		🟢

Reminder! Homerooms are school year specific which means if you change the capacity, for example, in the future school year it will not affect the capacity in the current school year.

Courses

Task #4 - Enter new courses and verify current courses

1. Change your context to the building level and the school year you are working with.
2. Navigate to **_StudentInformation_** **»** **_Management_** **»** **_School Administration_** **»** **_Scheduling Administration_** **»** **_Course Maintenance_** **»** **_Courses_**.
   a. Click **Add Course** and follow the next five tasks to setup a new course.

Courses are school year specific which means if you add a course, for example, in the future school year, the course will not automatically be added to the current school year.

Run the **CRSE** report to get a listing of all courses.

Task #5 - Ensure the General tab is setup correctly

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *» **Management*** *» **School Administration*** *» **Scheduling Administration*** *» **Course Maintenance*** *» **Courses***.
3. Edit a course by clicking on the **Edit Pencil** icon.
4. The **General** tab is displayed.
   a. The **Code** field can be up to 15 characters, but EMIS only accepts up to 10 characters and will truncate any code longer than 10 characters.
   b. The **Name** field can be up to 30 characters long.
   c. The **Abbreviation** field can be up to 8 characters long.
   d. The **Short Name** field can be up to 15 characters long.
   e. The **Hours of Instruction** field details the average amount of instruction the student receives for EMIS reporting.
   f. The **Scheduling Priority** field is used the Batch Scheduler. Please see the ***Batch Scheduler Step by Step Checklist*** for more information about this feature.
   g. The **Display on Public Module** checkbox determines if a course is available on the Public Course Requests Module for students to request.
   h. The **Is High School Credit** checkbox determines if a course is included in a student's high school cumulative credit count and included in the student's high school GPA.
   i. The **Roll course to next year** checkbox determines if a course copies to next year when School Year Initialization (SYI) is run. The course must also be active in order for it to copy to next year during SYI.
   j. The **College Prep** checkbox determines if a course should be marked as college prep. This field is used with the eTranscript product.
   k. The **Is Active** checkbox determines if a course can be scheduled and used.
   l. The **Is In Update History** checkbox determines if a course appears on a student's Course History page.
   m. The **Core Course** is no longer used as of FY09 Period K. The Core Course on the Subject Code table (defined at the ITC level) is now used to determine HQT values. However, the Core Course checkbox on the Courses – General tab is still being passed to ProgressBook.
   n. The **Dual Credit** checkbox determines if a course should be marked as dual credit. This field is used with the eTranscript product.
   o. The **Display on ParentAccess** checkbox determins if a course will display in ParentAccess on the student schedule.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | | Next: ART4 > |

ℹ While the Code can be up to 15 characters, 10 characters or less is recommended.

Code:* ART3

Abbreviation:* ART3

Name:* ART 3

Short Name:* ART3

Description:

Hours of Instruction:* 50

Scheduling Priority:* 9

Display on Public Module: ✔
Is High School Credit: ☐
Roll course to next year: ✔
College Prep: ☐
Display on ParentAccess: ✔

Is Active: ✔
Is In Update History: ✔
Core Course: ✔
Dual Credit: ☐

Save   Cancel

Task #6 - Ensure the Marks tab is setup correctly

1. Change your context to the building and the school year you are working with.
2. Navigate to **_StudentInformation_** **»** **_Management_** **»** **_School Administration_** **»** **_Scheduling Administration_** **»** **_Course Maintenance_** **»** **_Courses_**.
3. Edit a course by clicking on the **Edit Pencil** icon.
   a. The **General** tab is displayed.
   b. Click on the **Marks** tab.
   c. The **Course Weight** field is only used by the Batch Scheduler. The **_Maximum Variation of Course Weights Between Schedule Terms_** parameter on the Batch Scheduler is optional and looks at the **_Weight_** value filled out on each course and balances the student's scheduled courses so all terms are equally weighted. The Course Weight value defaults to 10.0000. Please see the Batch Scheduler Step by Step Checklist on how to set up this feature.
   d. The **Level of Difficulty** dropdown is optional and determines if a course uses a different point scale when the GPA is calculated. Please see the **_GPA and Honor Roll Step by Step Checklist_** on how to set up this feature.
   e. The **GPA Add-on Level** dropdown is optional determines if a specific point value is added to the calculated GPA. Please see the **_GPA and Honor Roll Step by Step Checklist_** on how to setup this feature.
   f. The **Credit Units** field is required and is used in several modules in StudentInformation. One of the modules is the Public Course Requests Module (PCR). In the PCR Module schools can specify a minimum and maximum number of credits a student can request while logged into the PCR Module. Please see the **_Public Course Request Step by Step Checklist_** for further details. The **_Credit Units_** field is also used the GPA Calculation. Please see the **_GPA and Honor Roll Step by Step Checklist_** for further details.
   g. The **Mark Bump** dropdown is used by the Jackson GPA method which is explained in detail in the **_GPA and Honor Roll Step by Step Checklist_**.
   h. The **Rnak Weight** dropdown is used by several custom GPA's and is explained in detail in the **_GPA and Honor Roll Step by Step Checklist_**.
   i. The **In Graduation Count** checkbox is not functional. Please see the "In Graduation / Eligibility" checkbox on the Courses – Miscellaneous tab.
   j. The **Include in Total Credits** checkbox determines if the course is included in the student's total credits.
   k. The **Include in GPA** checkbox determines if the course is included in the student's GPA. NOTE: Include in GPA is misleading, the checkbox

determines if the course is included in any GPA calculation – even the student's middle school GPA not only the cum GPA. If you want a course to be included in a student's high school GPA the Is High School Credit and Include in Total Credits checkboxes must both be marked.

l.   The **In Honor Roll** checkbox determines if the course is included in the Honor Roll. NOTE: In order for a student to be on the Honor Roll they have to have a GPA calculated since the Honor Roll is based off the GPA. Please see the GPA and Honor Roll Step by Step Checklist for further details.

m. The **Is Honors Course** checkbox determines if the course shows up when filtering on honors courses and is used by the Honors GPA formula which is explained in detail in the *GPA and Honor Roll Step by Step Checklist*.

n.   The **Include on Permanent Record** checkbox determines if the course prints on the R700 when is run with the option *Print Report in Permanent Record Label Format* is set to yes.

o.   The **Print on Report Card** checkbox determines if the course prints on the R700.

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Rev.3/1/2021

Task #7 - Ensure the Miscellaneous tab is setup correctly

1. Change your context to the building level and the school year you are working with.
2. Navigate to _**StudentInformation**_ » _**Management**_ » _**School Administration**_ » _**Scheduling Administration**_ » _**Course Maintenance**_ » _**Courses**_.
3. Edit a course by clicking on the **Edit Pencil** icon.
   a. The **General** tab is displayed.
   b. Click on the **Miscellaneous** tab.
   c. The **Department** dropdown is optional and is a way to group similar classes together.
   d. The **Area of Study** dropdown is optional and is a way to group similar classes together and is used by the Graduation Verification Module.
   e. The **Subject Area** dropdown is optional and is a way to group similar classes together and is used by the Graduation Verification Module.
   f. The **Course Type** dropdown determines if a course appears on the _**Student Marks**_ page. If course type is _**Class, ESC Course, Satellite Course, Post secondary Course**_, or Vocational the course will show on the _**Student Marks**_ page. If a course is marked as _**Type = Study Hall**_ when the Study Hall Wizard is run open time periods on the student's schedules will be filled in with courses that have a _**Course Type**_ of _**Study Hall**_.
   g. Note: If you are adding lunches to student schedules to use in HB410 calculations ensure they are setup as **Course Type** of **Lunch**.
   h. The **Language Code** dropdown details the language the course is taught in and is used for EMIS reporting. Example: A Math class taught in Spanish.
   i. The **In Graduation/Eligibility** checkbox determines if the course is included in Graduation Verification Module in StudentInformation. Please see the _**Graduation Verification Procedural Checklist**_.
   j. The **Gender Directive** field is only used by the Batch Scheduler to balance the gender composition of the course. Please see the _**Course Setup and Course Group Setup Step by Step**_ and _**Batch Scheduler Step by Step**_ for more information.
   k. The **Grade Levels Selected** filter determines which students see the course on the Public Course Requests Module (PCR). If grades 11 and 12 are selected then only 11th and 12th graders can see the course on the Public Course Requests Module (PCR). The Grade Levels Selected filter doesn't prevent office staff from assigning a 9th grade student a request for the course or even assigning the course directly to the student.
   Note: The selected Grade Levels on the Course load into GradeBook and are used for setting up Standard Based Report Cards.

I. The **Location Types Selected** filter is not currently used in StudentInformation.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | Next: ART4 > |

ART3 - ART 3

Department:	ART - ART ▾	Course Type:*	C - Class ▾
Area Of Study:	▾	Language Code:	▾
Subject Area:	▾	In Graduation / Eligibility:	☐

Gender Directive: None ▾

ℹ Selecting the 'Balance...' option in the Gender Directive dropdown will only affect the batch and single student schedulers. The schedulers will attempt to balance the filling percentage in the course's sections for each gender separately.

Grade Levels Available

```
01
02
04
05
06
07
```

Grade Levels Selected*

```
03
```

← →
◄◄ ►►

Location Types Available

```
Unknown
Not Specified
Library
Gymnasium
Music room
Cafeteria
```

Location Types Selected

← →
◄◄ ►►

Save **Cancel**

Task #8 - Ensure the EMIS tab is setup correctly

1. Change your context to the building level and the school year you are working with.
2. Navigate to *__StudentInformation__* » *__Management__* » *__School Administration__* » *__Scheduling Administration__* » *__Course Maintenance__* » *__Courses__*.
3. Edit a course by clicking on the **Edit Pencil** icon.
   a. The **General** tab is displayed.
   b. Click on the **EMIS** tab.
   c. The **EMIS Location IRN** field is the IRN of the building where the course is held. If left blank, this defaults to the school in context where the course record exists in.
   d. The **EMIS Location Description** field is the description of the EMIS Location IRN. This field is only enabled if the value in the EMIS Location IRN textbox is '999999', in which case the user is allowed to enter their own value for the EMIS Location Description. If the value in the EMIS Location IRN textbox is not '999999', this textbox is disabled and is populated with the name from the EMIS IRN table that is associated with the EMIS Location IRN.
   e. The **EMIS Staff Provider IRN** field is the district IRN of the entity in contract with the reporting school district. Report ****** if not applicable.
   f. The **EMIS Course Level** field designates the level of the course. This provides distinctions between courses that are taken in a series or have prerequisites such and French I and French II.
   g. The **EMIS Subject Code** field details the subject of the course being reported.
   h. The **EMIS Subject Area for Credit** field indicates the subject for courses offered in which high school credit toward graduation is being applied, whether at the middle school or high school level.
   i. The **EMIS Language Used** field is the language used by the teacher when presenting to the students.
   j. The **CORE Subject Area** field is the subject area and/or CORE requirement area in which a student has earned credit/units towards graduation.
   k. The **End of Course Assessment Area** field is the End of Course Assessment Area associated with the course.
   l. The **CTE College credit** field indicates if a career-technical course provides an opportunity for students to earn college credit.
   m. The **Curriculum** field of the curriculum source/model/program for a specific course.
   n. The **Delivery Method** field identifies the means by which instruction is provided/communicated to the student(s) in the course.

o. The **Educational Option** field identifies the Educational Option status for a course per Ohio Administrative Code 3301-35-06(G).
p. The **Student Population** field identifies the attributes of the group of students for which the course is intended.
q. The **Highly Qualified Teacher IRN** field is the IRN used to group courses for calculation of the percent of core courses taught by highly qualified staff and the percent of core courses taught by properly certified staff.
r. The **Credit Flex** field designates if an alternate way of earning credit applies to the course
s. Finally the **Report to EMIS** checkbox should be checked if the course needs to be reported to EMIS.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | Next: ART4 > |

ART3 - ART 3

Field	Value	Note
EMIS Location IRN:		(Only required if different from the current building, optional if same as current building)
EMIS Location Description:*		(Only required if EMIS Location IRN = '999999')
EMIS Staff Provider IRN:*	******	
EMIS Course Level:*	* - Not applicable	
EMIS Subject Code:*	020012 - Visual Art (K-12)	
EMIS Subject Area for Credit:*	*** - Not Applicable (Does not qualify for High School Credit)	
EMIS Language Used:*	E - English (Default)	
CORE Subject Area:*	FAR - Fine Arts Units	(Only required when Is High School Credit is checked)
End Of Course Assessment Area:		
CTE College Credit:*	N	
Curriculum:*	OT - Curriculum Not Specifically Covered By Another Option	
Delivery Method:*	FF - Face to Face Classroom Instruction	
Educational Option:*	NO - Not an Educational Option Course	
Student Population:*	RG - Regular/General Students K-12	
Highly Qualified Teacher IRN:		
Credit Flex:	N - The course is not a Credit Flexibility Course	
Report to EMIS:	✔	

Save   Cancel

Task #9 - Ensure the Pre/Co-requisites tab is setup correctly

Elementary Schools typically do not use Pre/Co-requisites. If you would like detailed information on the Pre/Co-requisites screen functions, please see the Courses and Course Groups Set Up Procedural Checklist.

Course Sections

Do not forget to make multiple sections of courses such as gym, art, and music. StudentInformation will only let you assign a section to one course group. Example: If a school only had 8 sections of Art, one section for each grade level, the school could not assign Art-1 to 1st grade group 1A and assign the same section to the other 1st grade group 1B. The school would need two different sections.

Note: Course sections in StudenInformation that do not have any students assigned to them still go over to Grade Book. Teachers linked to these course sections (with no students) then need to hide these classes in GradeBook. It is recommended to either inactivate these course sections before turning on the PB Integration or change the teacher on these course sections to someone who does not teach other classes. However, if you choose to inactivate these course sections, the School Year Initialization process will not roll these course sections over to the next year.

Task #10 - Enter new course sections and verify current course sections

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *» **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Course Sections***.
    a. Click ***Add Course Section*** to enter a new course section and follow the next four tasks.
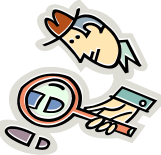
Run the R407 for a listing of course sections. You may even want to use different colored highlighters or markers to signify the changes you want to make. Then when you make the adjustments to the course sections or groups the changes you want to make will be easily identifiable.

Course sections are school year specific which means if you add a course section, for example, in the future school year the course section will not automatically be added to the current school year.

Task #11 - Ensure the General tab is setup correctly

1. Change your context to the building level and the school year you are working with.
2. Navigate to *__StudentInformation__* » *__Management__* » *__School Administration__* » *__Scheduling Administration__* » *__Course Maintenance__* » *__Course Sections__*.
3. Edit a course section by clicking on the **Edit Pencil** icon.
4. The **General** tab is displayed.
   a. The **Course** field is the course code. If you are entering a new course section and do not know the course code, click on the **Ellipse** button to search for the course code.
   b. After entering the code click on **Default Section & Capacity** button and StudentInformation will automatically default the course section you are adding the next number in succession. Example: If 1047 section 1 already exists and you add another section of 1047 and click the *Default Section and Capacity* button. The new section will automatically be added as section 2. The capacity always defaults to 25 but can be changed.
   c. The **Section Number** field indicates the section of the course. As stated above you can use the default the section number to the next number in succession or enter a section number by hand.
   d. The **Capacity** field is the number of students allowed to take the course section. If the capacity is set to 20 and a user attempts to schedule 21 students in the course section the user will not be allowed to schedule the 21st student unless the user has extra permissions to overfill course sections.
   e. The **Course Term** field indicates which course term the course section is. Example: 1047-1 is a 1st Semester Only course.
   f. The **Is Active** checkbox details if a course section is actively being used.
   g. The **Roll section to next year** checkbox determines if a course section will copy up to the next school year during School Year Initialization (SYI) NOTE: A course section must be active and marked as Roll section to next year in order for it to copy to next year.
   h. The **Meeting Time Description** field details which periods and days the course section meets. StudentInformation determines the Meeting Time Description based off the Meeting Times tab which will be discussed in the next task. When StudentInformation can't translate complex meeting the phrase *See Schedule* will display in the *Meeting Time Description* field. You can place a check in the **Custom** box and type in your own descriptive meeting time and the custom description will print on the student's schedule.
5. Click *Save Course Section* to save any changes or *Cancel* to delete any changes made.

Course Sections - ART3 - ART 3 (1)

From this screen you can display or change information regarding course sections

Working Schedule: [Default Schedule ▼] Result: [Default Schedule Result Set ▼] [Reload Screen]

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override | | Next: ART3 #2 > |

Course:* [ART3] [▦] [...] [Default Section & Capacity]

Section Number:* [1] ▲▼

Capacity:* [30] ▲▼

Course Term:* [All ▼]

Is Active: ☑

Roll section to next year: ☑

Meeting Time Description: [M: 06 (53)] [ ] Custom

[Save Course Section] [Cancel]

Task #12 - Ensure the Meeting Times tab is setup correctly

1. Change your context to the building level and the school year you are working with.
2. Navigate to *__StudentInformation__* » *__Management__* » *__School Administration__* » *__Scheduling Administration__* » *__Course Maintenance__* » *__Course Sections__*.
3. Edit a course section by clicking on the **Edit Pencil** icon.
4. Click the **Meeting Times** tab.
5. StudentInformation has three types of meeting times.
   a. The first type of meeting times are Basic meeting times. For a course section to qualify as having a Basic meeting time the course section must have the same teacher, same location, and must meet the same periods each day throughout the entire length of the course term.
   b. The second type of meeting times are Intermediate meeting times. For a course to qualify as having an Intermediate meeting time the course sections can have multiple teachers, meet in multiple rooms , meet multiple periods throughout the entire length of the course term.
   c. The third type of meeting times are Advanced meeting times. For a course section to qualify as having an Advanced meeting time the course section must have a different teacher, room location, or period for one or more schedule terms.
6. Note: If you are scheduling lunch course sections to use in HB410 calculations, ensure the start & stop times are entered for the applicable periods on **Periods of the Day Maintenance** for each rotation day.

Typically Elementary Schools use Basic Meeting Times. Two examples of Basic Meeting Times are outlined in this document. Examples of Intermediate and Advanced Meeting Times are documented in the Courses and Course Groups Set Up Step by Step Checklist.

Meeting Time Examples:

BASIC
One teacher, one room, one period
Course 1047-1 meets Monday thru Friday 2nd period with Martha Abbott in room A191 all year long.

| General | **Meeting Times** | Memberships | Attendance | Teacher History | EMIS Override |

◉ Basic ◯ Intermediate ◯ Advanced

Teacher:*   `MARTHA ABBOTT ▾`

Location:*   `A191 - STAFF ▾`

Periods (All Days):* ☐ 01 ☑ 02 ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐ 07 ☐ 08 ☐ 09 ☐ 10

[Save Course Section] [Cancel]

BASIC
One teacher, one room, multiple periods
Course 1047-1 meets Monday thru Friday 1st and 2nd period with Martha Abbott in room A191 all year long.

| General | **Meeting Times** | Memberships | Attendance | Teacher History | EMIS Override |

◉ Basic ◯ Intermediate ◯ Advanced

Teacher:*   `MARTHA ABBOTT ▾`

Location:*   `A191 - STAFF ▾`

Periods (All Days):* ☑ 01 ☑ 02 ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐ 07 ☐ 08 ☐ 09 ☐ 10

[Save Course Section] [Cancel]

INTERMEDIATE
One teacher, one room, meeting 2 days/week
Course 5180-54 meets All Year with Timothy Allen in room 1301 on Mondays & Wednesdays during 3rd period.

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override |

○ Basic ● Intermediate ○ Advanced

Add Meeting Time

		Teacher	Location	Start	End	Periods
🗑	✏	ALLEN, TIMOTHY	1301 - MUSIC	Aug 17, 2016	May 24, 2017	M: 03; W: 03

Save Course Section   Cancel

Task #13 - Review the Memberships tab

1. Change your context to the building level and the school year you are working with.
2. Navigate to **_StudentInformation_** » **_Management_** » **_School Administration_** » **_Scheduling Administration_** » **_Course Maintenance_** » **_Course Sections_**.
3. Edit a course section by clicking on the **Edit Pencil** icon.
4. Click on the **Memberships** tab.
   a. If the course section is a member of a course group the course group will be listed in the grid.

General	Meeting Times	Memberships	Attendance	Teacher History	EMIS Override

Course Group	Group Section
FIFTH	50

Save Course Section   Cancel

Task #14 - Review the Attendance tab

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Course Maintenance*** *»* ***Course Sections***.
3. Edit a course section by clicking on the **Edit Pencil** icon.
4. Click on the **Attendance** tab.

a. If the course section meets only one period the Attendance tab will automatically be defaulted to that period and the checkboxes are grayed out – which is by design.

b. If the course section meets more than one period each period will be checked on the Attendance tab but editable. If a course section meets 1st and 2nd period, you can choose to only take attendance 1st period or 2nd period or both.

c. If you make changes to the Attendance tab, do not forget to click **Save Course Section.**

| General | Meeting Times | Memberships | **Attendance** | Teacher History | EMIS Override |

ⓘ Please select the meeting times for which attendance will be collected.
You must select at least one period on each day the course section meets.

Day	Periods
M	01 02 03 04 05 06 07 08 09 10 11 12 ☑ ☑ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
T	01 02 03 04 05 06 07 08 09 10 11 12 ☑ ☑ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
W	01 02 03 04 05 06 07 08 09 10 11 12 ☑ ☑ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
R	01 02 03 04 05 06 07 08 09 10 11 12 ☑ ☑ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
F	01 02 03 04 05 06 07 08 09 10 11 12 ☑ ☑ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Save Course Section   Cancel

Task #15 - Review the Teacher History tab

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Course Maintenance*** *»* ***Course Sections***.
3. Edit a course section by clicking on the **Edit Pencil** icon.
4. Click on the **Teacher History** tab.
5. This tab is for EMIS reporting and should be in sync with the Meeting Times tab. After the schedule has been finalized but prior to the first day of school districts should navigate to ***StudentInformation > EMIS > Maintenance > Teacher History Maintenance*** to sync these tabs. Click on **Wipe and New** tab and sync the Teacher History Tab with Meeting Times tab. After school has started use the **Add Missing** tab to populate missing teacher history records.

Course Sections - 5030 - 5TH GRADE MATH (50)

From this screen you can display or change information regarding course sections

| General | Meeting Times | Memberships | Attendance | Teacher History | EMIS Override |

Add New

		Teacher Name	Start Date	End Date	Role	Teacher Of Record
🗑	✏	FITZGERALD, EDITH	08/17/2016	05/24/2017	LT	☑

Save Course Section   Cancel

Task #16- Review the EMIS Override tab

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Course Maintenance*** *»* ***Course Sections***.
3. Edit a course section by clicking on the **Edit Pencil** icon.
4. Click on the **EMIS Override** tab.
5. Fill in any values that differ from the course in Course Maintenance.

Course Sections - ART3 - ART 3 (1)

From this screen you can display or change information regarding course sections

| Working Schedule: | Default Schedule ▼ | **Result:** | Default Schedule Result Set ▼ | Reload Screen |

| General | Meeting Times | Memberships | Attendance | Teacher History | **EMIS Override** | | Next: ART3 #2 > |

EMIS Staff Provider IRN: [   ] 🔍

EMIS Subject Code: [▼]

Curriculum: [▼]

Delivery Method: [▼]

Student Population: [▼]

Highly Qualified Teacher IRN: [   ] 🔍

EMIS Location IRN: [   ] 🔍

Dual Credit: ☐

[**Save Course Section**] [Cancel]

Course Groups and Course Group Sections

F.Y.I.

A course section can only be assigned to one course group at a time. Example: Course section 1047-1 is part of course group section Math-1. 1047-1 cannot be linked to course group Alge until course group 1047-1 is deleted from the Math group.

Task #17 - Enter new course groups and sections and verify current course groups and sections

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Course Maintenance*** *»* ***Course Groups***.
   a. Click **Add Course Group** and follow the next two tasks to setup a new course group.

Reminder!

Course groups are school year specific which means if you add a course group, for example, in the future school year the course group will not automatically be added to the current school year.

Task #18 - Ensure the Group tab is setup correctly

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *» **Management*** *» **School Administration*** *» **Scheduling Administration*** *» **Course Maintenance*** *» **Course Groups***.
3. Edit a course group and section by clicking on the **Edit Pencil** icon.
4. The **Group** tab will display.
    a. The **Code** field can be up to 15 characters long and is a symbol for the group. Consider state reporting limitations when specifying course group codes.
    b. The **Name** field can be 30 characters long.
    c. The **Description** field is optional and can be used to detail which courses are part of the group and holds 200 characters.
    d. The **Abbreviation** field can be 8 characters long.
    e. The **Short Name** field can be 15 characters long.
    f. The **Capacity** field indicates how many students the course group can accommodate.
    g. The **Scheduling Priority** field is used the Batch Scheduler. Please see the ***Batch Scheduler Step by Step Checklist*** for more information about this feature.
    h. The **Is Locked** checkbox is not currently functioning on the Group tab at this time. Use the Is Locked on the 2nd tab instead.
    i. The **Display Courses Individually** checkbox determines whether courses that are members of the course group will be displayed on the Public Course Requests Module (PRC).
    j. The **Display on Public Module** checkbox indicates whether a course group will be displayed on the Public Course Requests Module (PRC).
    k. The **Is Active** checkbox indicates whether a course group can be requested and scheduled.

Course Groups

From this screen you can display or change information regarding course groups

Group	Courses / Sections

Next: 2505 >

Code:* `2506` ×   Abbreviation: _____

Name:* `FIFTH`   Short Name:* `FIFTH`

Capacity: `20`

Description: [text area]

Scheduling Priority:* `5`

Is Locked: ☐
Display Courses Individually: ✔
Display on Public Module: ✔
Is Active: ✔

Save   Cancel

Task #19 - Ensure the Courses / Sections tab is setup correctly

1. Change your context to the building level and the school year you are working with.
2. Navigate to _**StudentInformation**_ _**» Management**_ _**» School Administration**_ _**» Scheduling Administration**_ _**» Course Maintenance**_ _**» Course Groups**_.
3. Edit a course group and section by clicking on the **Edit Pencil** icon.
   a. Click on the **Courses/Sections** tab.
   b. The top section lists which courses are part of the group.
   c. Enter a course code or use the **Ellipse** icon to select a course click **Add Course**.
   d. The course appears in the grid.
   e. If you would like to remove a course from the group click on the **Trash Can** icon to the left of the course.
   f. In the next section, you tell StudentInformation which sections of the course belong to the group section.
   g. Click the **Add Section** button. The page refreshes.
   h. The courses that are part of the group are displayed.
   i. The section number automatically defaults to the next section number available, but you can change it.
   j. Enter a capacity for the group section in the **Capacity** field. NOTE: In the screenshot above course section 5030-51 has a capacity of 75, but the group section only has a capacity of 20, this means up to 20 students can be scheduled into the group, but if students have an individual request for course section 5030-51, it can accommodate up to 75 students. So, making the group capacity lower than the course section capacity allows room for students who requested the individual course to scheduled into the course section.
   k. If the **Is Locked** checkbox determines whether a student with a request for a course within the course group but who doesn't have a request for the course group itself will be scheduled into the individual course. Please see the _**Batch Schedule Procedural Checklist**_ for further details on this feature.

Course Groups

From this screen you can display or change information regarding course groups

Group	Courses / Sections		Next: 2505 >

		Member Course	Memberships	Membership Sum Capacity	Course Is Active
	🗑	5030 - 5TH GRADE MATH	2501 , 2502 , 2504 , 2505 , 2506		🟢
Course Group	🗑	5040 - 5TH GRADE LANGUAGE ARTS	2501 , 2502 , 2504 , 2505 , 2506		🟢
Code: 2506	🗑	5060 - 5TH GRADE SCIENCE	2501 , 2502 , 2504 , 2505 , 2506		🟢
Name: FIFTH	🗑	5080 - 5TH GRADE SOCIAL STUDIES	2501 , 2502 , 2504 , 2505 , 2506		🟢
Capacity:	🗑	5120 - 5TH GRADE ART	2501 , 2502 , 2504 , 2505 , 2506		🟢
	🗑	5180 - 5TH GRADE MUSIC	2501 , 2502 , 2504 , 2505 , 2506		🟢

[_____] [...]   **Add Course**

Add Section

	Group / Course	Section	Capacity	Is Locked	Is Active
🗑	2506 - FIFTH	51 ▲▼	75 ▲▼	☐	☑
	5030 - 5TH GRADE MATH*	Section 51: 01 (2504) (Cap. 75) ⌄			
	5040 - 5TH GRADE LANGUAGE ARTS*	Section 51: 02 (2506) (Cap. 75) ⌄			
	5060 - 5TH GRADE SCIENCE*	Section 51: 04 (2502) (Cap. 75) ⌄			
	5080 - 5TH GRADE SOCIAL STUDIES*	Section 51: 05 (2502) (Cap. 75) ⌄			
	5120 - 5TH GRADE ART*	Section 51: 08 (1303) (Cap. 75) ⌄			
	5180 - 5TH GRADE MUSIC*	Section 51: 08 (1302) (Cap. 75) ⌄			

Task #20 - Bulk assign students into homerooms

You'll need the class lists for this step.

1. Change your context to the building level and the next school year.
2. Navigate to ***StudentInformation*** » ***Management*** » ***Ad-Hoc Updates*** » ***Homeroom Bulk Assignment***.
   a. The **Single Homeroom** tab will display.
   b. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   c. In the **Homeroom** dropdown select a homeroom.
   d. Once a homeroom is selected the page will refresh.
   e. Leave the check in **Enforce Homeroom Grade Level**.
   f. You can either assign homerooms by searching for students or by typing in their student IDs.
   g. If you want to search for students because you do not know their student id numbers then in the student search area choose **Select Students By: Search Criteria**.
   h. Use the filters to find students. It will probably be easiest to filter by grade level. Example: If you are assigning students into homeroom 1A then in the **Grade Level** dropdown select grade 1.
   i. Click **Preview Students**.
   j. Place a check mark next to the students you want to assign into the homeroom.
   k. Click **Assign Students** .
   l. Repeat these steps for all other homerooms.
   m. If you know the student's id numbers then choose **Select Students By: Student IDs** .
   n. Enter each student id separated by a coma in the white box.
   o. Put a check in **Students Selected by Default** and click **Preview Students**.
   p. Click **Assign Students**.
   q. Repeat these steps for all other homerooms.

Run the R201-A to verify you have the students in the correct homerooms.
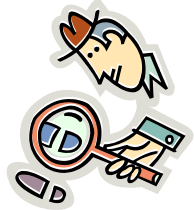
Task #21 - Bulk Assign Course Groups using Homerooms

Run R407 again to verify all course sections and course groups are set up correctly Bulk Assigning students in the groups

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation » SIS » Scheduling » Bulk Assign***.
   a. Select a **Working Schedule** and **Result** from the dropdowns.
   b. Click **Reload Screen**.
   c. In the **Create a list of students** section click **Search Mode: Search for Students**.
   d. The page will refresh.
   e. In the **Homeroom** dropdown select a homeroom.
   f. Click **Create New List**.
   g. Click **Next** to advance to the 2nd tab.
   h. Enter the course section or course group section or use the **Ellipse** to select the course group or section. Click **Add Section**.
   i. Note: You can add more than one course section or group section.
   j. Click **Next** to move to the third tab.
   k. The **Assignment date** field will default to today's date if the course term has already started and the first day of the term if it has not started yet.
   l. Click **Assign**.

m. The page will refresh and if any conflicts exist they will display in the grid.

The following conflicts were found.

You may choose to allow a conflict to be saved if desired by clicking the box next to the student.

	Number	Student	Course Code	Course Name	Section
5030 - 5TH GRADE MATH 54					
☐	30554	FERRELL, MARY	5030	5TH GRADE MATH	51
☐	16518	FRENCH, LAWRENCE	5030	5TH GRADE MATH	51
☐	16575	HANSEN, ALLEN	5030	5TH GRADE MATH	51
☐	15085	MORRISON, KELLY	5030	5TH GRADE MATH	51
☐	12224	VELAZQUEZ, JEAN	5030	5TH GRADE MATH	51
5040 - 5TH GRADE LANGUAGE ARTS 54					
☐	30554	FERRELL, MARY	5040	5TH GRADE LANGUAGE ARTS	51
☐	16518	FRENCH, LAWRENCE	5040	5TH GRADE LANGUAGE ARTS	51
☐	16575	HANSEN, ALLEN	5040	5TH GRADE LANGUAGE ARTS	51
☐	15085	MORRISON, KELLY	5040	5TH GRADE LANGUAGE ARTS	51
☐	12224	VELAZQUEZ, JEAN	5040	5TH GRADE LANGUAGE ARTS	51

n. Put a check in the box next to the students you wish to create a scheduling conflict for or click **Return** to go back to the Assignment Start Date tab.
o. Click **OK**
p. The following message will appear **Assignments were successfully saved**.
q. If you do not have the Extra Systems Security to create conflicts for students, you will only have the **Return** option and you will be forced to remove the students from your list of students or pick different classes that do not conflict with the student(s)
r. Repeat these steps for each homeroom.

Task #22 - Verify Student Assignments

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *» **SIS** » **Scheduling** » **Course Section Assignments**.
   a. Enter a student name or id in the **Find Students** box and verify the course group was assigned.
   b. State Support recommends checking one student from each homeroom.

Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

		Group	Group Section	Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date	End Date
🗑	✏	2506	51	5030	5TH GRADE MATH	51	01 (2504)	EDITH FITZGERALD	All Year	Manual	Assigned	Aug 16, 2017	
🗑	✏	2506	51	5040	5TH GRADE LANGUAGE ARTS	51	02 (2506)	ANGELA SCHNEIDER	All Year	Manual	Assigned	Aug 16, 2017	
🗑	✏	2506	51	5060	5TH GRADE SCIENCE	51	04 (2502)	HOLLY CAIN	All Year	Manual	Assigned	Aug 16, 2017	
🗑	✏	2506	51	5080	5TH GRADE SOCIAL STUDIES	51	05 (2502)	HOLLY CAIN	All Year	Manual	Assigned	Aug 16, 2017	
🗑	✏	2506	51	5120	5TH GRADE ART	51	08 (1303)	ELLA HOOD	All Year	Manual	Assigned	Aug 16, 2017	
🗑	✏	2506	51	5180	5TH GRADE MUSIC	51	08 (1302)	BRITTANY BRYAN	All Year	Manual	Assigned	Aug 16, 2017	
🗑	✏	2506	51	5200	5TH GRADE PHYSICAL EDUCATION	51	08 (GYMA)	RICHARD MILLER	All Year	Manual	Assigned	Aug 16, 2017	

Task #23 - Add any needed assignments by bulk such as band

You can also use the Bulk Assign screen to schedule students into courses that are independent of their homeroom such as band.

1. Navigate to ***StudentInformation*** *» **SIS** » **Scheduling** » **Bulk Assign***.
   a. Select a **Working Schedule** and **Result** from the dropdowns.
   b. Click **Reload Screen**.
   c. Create the list of students by using one of the search modes.
   d. Click **Create New List.**
   e. Click **Next** to advance to the 2nd tab
   f. Enter the course section or course group section or use the **Ellipse** to select the course group or section. Click **Add Section**.
   g. Note: You can add more than one course section or group section.
   h. Click **Next** to move to the third tab.
   i. The **Assignment date** field will default to today's date if the course term has already started and the first day of the term if it has not started yet.
   j. Click **Assign**.

k. The page will refresh and if any conflicts exist they will display in the grid.

The following conflicts were found.

You may choose to allow a conflict to be saved if desired by clicking the box next to the student.

	Number	Student	Course Code	Course Name	Section
5030 - 5TH GRADE MATH 54					
☐	30554	FERRELL, MARY	5030	5TH GRADE MATH	51
☐	16518	FRENCH, LAWRENCE	5030	5TH GRADE MATH	51
☐	16575	HANSEN, ALLEN	5030	5TH GRADE MATH	51
☐	15085	MORRISON, KELLY	5030	5TH GRADE MATH	51
☐	12224	VELAZQUEZ, JEAN	5030	5TH GRADE MATH	51
5040 - 5TH GRADE LANGUAGE ARTS 54					
☐	30554	FERRELL, MARY	5040	5TH GRADE LANGUAGE ARTS	51
☐	16518	FRENCH, LAWRENCE	5040	5TH GRADE LANGUAGE ARTS	51
☐	16575	HANSEN, ALLEN	5040	5TH GRADE LANGUAGE ARTS	51
☐	15085	MORRISON, KELLY	5040	5TH GRADE LANGUAGE ARTS	51
☐	12224	VELAZQUEZ, JEAN	5040	5TH GRADE LANGUAGE ARTS	51

l. Put a check in the box next to the students you wish to create a scheduling conflict for or click **Return** to go back to the Assignment Start Date tab.
m. Click **OK**
n. The following message will appear **Assignments were successfully saved**.
o. If you do not have the Extra Systems Security to create conflicts for students you will only have the **Return** option and you will be forced to remove the students from your list of students or pick different classes that do not conflict with the student(s).

Task #24 - Add individual course section assignments if needed

After bulk assigning students into course groups or course sections, you may need to make individual adjustments to student's schedules.

1. Change your context to the building level and the school year you are working with.
2. To add a manual assignment using the *Course Section Assignments* page navigate to *StudentInformation » SIS » Scheduling » Course Section Assignments*.
   d. Put a student in context.
   e. Click *Add Course Assignment.*
   f. The page refreshes.
   g. In the *Course/Section* fields, enter the course and section number.
   h. If you do not know the course and or section number use the **Ellipse** icon.
   i. If you clicked on the **Ellipse** icon a new window pops up that shows each section of the course and the capacity and filling count.

   j. Click on the blue link for the section number **'Section 1'** and the section number will be automatically filled in for you.
   k. The *Assignment Start Date* field defaults to the first day of school. If the course is a 2nd Semester only course the start date will automatically correct itself to the 1st day of 2nd Semesters.

l. Tthe *Assignment Stop Date* will be disabled so no date can be entered here.

m. Click *Save*.

n. The page refreshes and the following message is displayed **The Coruse Section Assignment was marked to be saved. Click the save changes button to commit to the database.**

o. Click *Save Changes* again to commit the changes to the database.

p. If click *Save Changes* is not clicked,the course section will not be assigned.

q. Notice if the course is 2nd semester only the *Start Date* automatically updates to the 1st day of the 2nd semester even though the first day of school was used.

3. Manual assignments may also be added on the *Request Assignments* page.

4. Navigate to ***StudentInformation » SIS » Student » Student Schedule » Request Assignments***.

a. Select a *Working Schedule* and *Result* from the dropdowns.

b. Click *Reload Screen*.

Student Requests & Assignments - FERRELL, MARY
From this screen you can manage a student's requests and course section assignments

Working Schedule: Default Schedule   Result: Default Schedule Result Set   Reload Screen

View Display Options | Close Assignments | View Schedule Graph

Request		Assignment					
Primary	Alt.			Course	Sec	Start	Drop
		🗑	✏	👥 2506	51		
		🗑	✏	👤5030	51	8/16/2017	
		🗑	✏	👤5040	51	8/16/2017	
		🗑	✏	👤5060	51	8/16/2017	

c. Click *Add Assignment*.

d. The right side of the screen refreshes.

e. In the *Choose Course or Course Section* fields, enter the course section number or use the **Ellipse** icon to select the course section.

Add Assignment

Choose Course/Group (required) and section (optional) ⓘ:

[   ] [   ] [...]

Next >   Cancel

f. Click *Next* or hit the *Tab* key on the keyboard.

g. All sections of the course will appear.

h. Click the *Assign* button of the section you would like to assign to the student.

Add Assignment

Choose Course/Group (required) and section (optional) ⓘ:

| 5200 | | ... |

Action	Course/Group	Sec	Meeting Times	Term	Filling			
Assign	5200	43	08 (GYMA)	All Year	0.00 / 75	ⓘ	⚑	
Assign	5200	50	08 (GYMA)	All Year	0.00 / 75	ⓘ	⚑	

i.   The right side of the screen refreshes again.
j.   The ***Course/Section*** fields are grayed out – which is correct since we selected which section we wanted by clicking Assign in the previous step.
k.   If you selected the wrong course section click ***Cancel***.
l.   In the ***Assignment Start Date*** field either today's date or the first day of the term.
m.   NOTE: If today's date is entered, StudentInformation automatically corrects the date and makes the assignment start date the 1st day of the term.
n.   Click ***Save Assignment***.

Task #25 - Removing Individual Course Section Assignments

F.Y.I.

If the schedule has not been finalized in DASL Options, a school will only be allowed to do a remove which will permanently delete the student from the course. The course will no longer appear on the course section assignments page, even when dropped and removed are checked, and there will be no record the student was ever in the class.

F.Y.I.

If a student is accidentally assigned to a course group, use the **Drop All Assignments** button on the Course Section Assignments page to remove all classes from the student's schedule.

1. Change your context to the building level and the school year you are working with.
2. To remove an assignment from the *Course Section Assignments* page navigate to *StudentInformation » SIS » Scheduling » Course Section Assignments* with a student in context.
   a. Click on the trash can next the assignment you want to remove.
   b. The **Remove/Delete** is selected by default.
   c. Click **Save**.
   d. The page will refresh and the following message will be displayed: **The selected Course Section Assignment was marked for deletion. Click save changes button to commit to the database.**
   e. Click **Save Changes**.
   f. The course sections will no longer be displayed and there is no evidence the student was ever in the class.
   g. You can also remove an assignment from the Request Assignments page.
   h. Navigate to *StudentInformation » SIS » Student » Student Schedule » Request Assignments*.
   i. Click on the trash can next the assignment you want to remove.
   j. The **Remove/Delete** is selected by default.
   k. Click **Save**.

Task #26 - Bulk Removing Course Section Assignments

Occasionally, it is necessary to remove students from a course section in bulk.

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Bulk Course Section Management***.
   a. Select a **Working Schedule** and **Result** from the dropdowns.
   b. Click **Reload Screen**.
   c. The first tab named **Choose Section** will display.
   d. Enter a course section number in the fields or use the **Ellipse** to select a course section.
   e. Click **View**.
   f. The list of students currently assigned to the course section appear in the **Students to be transferred** section.

	Number	Student	Gender
🗑	17378	CASTILLO, FRANK	M
🗑	15075	COFFEY, DAISY	F
🗑	16463	LEON, LEO	M

Male:2 Female:1 Total:3

Term	All Year
Course	5060 - 5TH GRADE SCIENCE
Section	51
Capacity	75
Meeting Times	04 (2502)
Start	8/16/2017

   g. If you would like to keep any of the students listed in the course section click on the trash can next to their name to remove them from the list.
   h. Click **Next** to move to the 2nd tab named **Choose Action**.
   i. If the schedule has not been finalized, the only option you will be allowed to perform is **Remove/Delete**.
   j. Click **Next**.
   k. You will be brought to the 4th tab named **Summary**.
   l. Click **Submit** to complete the transaction.
   m. The following message will display **Remove was successful.**

Task #27 – Moving a student to another homeroom or adding a new student mid-year

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation > SIS > Student > Homeroom Assignment*** or ***StudentInformation > SIS > Student > Edit Profile*** Additional tab.
   a. In either location manually select the applicable homeroom or use the Auto-Assign option to randomly assign an available grade-level appropriate homeroom to the student.
   b. The homeroom selected & saved will display on the Homeroom Assignment screen and in the Student Context area

3. Navigate to ***StudentInformation > SIS > Scheduling > Course Section Assignments.***
   a. If you need to remove a student's current assignments, select **Drop All Assignments**.
   b. To add a new course group section to a student, select **Add Course Assignment** and enter the applicable course group and section number.
   c. The Assignment start date will default to the today's date, edit this date if necessary.
   d. Click **Save.**
   e. The page refreshes and the following message is displayed **The Course Section Assignment was marked to be saved. Click the save changes button to commit to the database**
   f. Click ***Save Changes*** again to commit the changes to the database and the following message is displayed **The Course Section Assignments have been successfully saved**
   g. If click ***Save Changes*** is not clicked, the course group section will not be assigned.
   h. The start date for each course section will default to the first day of school if the term hasn't started yet or it will remain as the date entered when the course group section was selected.

Family Groups & Contacts Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
7/22/21	Task #1	Added information regarding the Uses Family Groups option and updated screenshot
6/14/21	Task #1	Added information regarding SPM - Special Program Management and updated screenshot
4/14/20	Entire document	Review and update
9/26/19	Entire document	Update document
10/17/18	Entire document	Update document

Table of Contents

When setting up Family Groups for the first time, in order for the Family Groups Wizard to recognize new students, the default school year must be the year the new students will start in. For example, if you are registering new KG students with an admission date of 8/1/21, then you would need for the default school year to be 2021-2022 when running the Family Groups Wizard.

Task #1 – Select Uses Family Groups, Family Courier option & Family Group editing options

1. With the district in context, navigate to : ***StudentInformation » Management » District Administration » District Options***.
2. In the **Family Groups** section, select the **Uses Family Groups** option.
3. In the **Select a Method to assign a Family Courier** section, select a courier assignment method.
4. Next, as an option, in the **Select grade levels that will be excluded from being a family group courier** section, if you want to exclude students in certain grade levels (for example, preschool) from being selected as the courier for family groups, in the Grade multiselect list, select the grade(s) to exclude by moving them from the left side to the right side.
5. Next, in the **Select a method to edit Family Group Contacts** section, choose an edit method.
   a. If **Allow edits per school** is selected, the student in a family group can only be edited when the building they are actively enrolled in is in context or if the district is in context.
   b. If **Allow edits per district** is selected, a student in a family group can be edited regardless of what building is in context or if the district is in context.
6. The remaining sections on this screen are for other functions in the application. In the **Report Cards** section, check the **Disable Cards on ParentAccess Portal for Students with Unpaid Fees** option if you want to disable report cards on the ParentAccess Portal for students with unpaid fees. In the **Graduation Points Service** section, check the **Recalculate Student Graduation Points daily** option if you want the scheduled job to run daily that will refresh the Grad Points Summary data. In the **Unattended Email Address** section, enter a no-reply **Email Address** for the district for notification emails. In the **Special Education Program s**ection, select the appropriate Special Education Program. If you select **SPM**, you are prompted to enter the integration key for your district.
7. Click **Save**.

District Options

From this screen, you can display and change District Options.

Family Groups

☑ Uses Family Groups

Select a method to assign a Family Courier

○ No Family Courier assignment
◉ Assign Family Courier to youngest family member
○ Assign Family Courier to oldest family member

Select grade levels that will be excluded from being a family group courier

Grade

| AG - AG |
| IN - Infant/Toddler (Ages 0-2) |
| PS - PS |
| K - K |

Select a method to edit Family Group Contacts

◉ Allow edits per school
○ Allow edits per district

Report Cards

☐ Disable Report Cards on ParentAccess Portal for Students with Unpaid Fees

Graduation Points Service

☑ Recalculate Student Graduation Points daily

Unattended Email Address

Email Address: no-reply@YourDomain.com

Special Education Program

SpS Refresh ▾

Save

Task #2 – Create multiple Family Groups at one time using the Family Groups Wizard

1. Change the context to the building or district level of the current year. (Family Group creation can be done at either level)
2. Navigate to : ***StudentInformation*** **»** ***Management*** **»** ***District Administration*** **»** ***Family Groups Wizard***.
3. On the **General** tab, select **Build groups with single and multiple students**.
4. Match criteria checkboxes appear. Select the fields you would like to match on. Keep in mind, the more fields you check – the less matches you will have. Click **Next**.
5. Review your selections on the **Selection Summary** tab.
6. Click **Next** to advance to the final tab.
7. On the **Display Groups** tab, Family Groups were tentatively created based on your selections.
8. Ten Family Groups will display at a time, but this can be adjusted using the **Number of Family Groups Per Page** option. Place a check next to any group you wish to keep. Students assigned to the group will display in the right-hand column.

9. Click **Save**.
10. If two Family Groups need to be combined, click the edit pencil next to one of the groups. In the example below – two Allen Family Groups were created. The students in each Allen Family Group need combined.

🗑	✏	ALLEN	ALLEN Family Group	8291 ALLEN Road	✉ALLEN, MARCUS ALLEN, MARIO	🟢
🗑	✏	ALLEN	ALLEN Family Group	8291 ALLEN Road	✉ALLEN, ANNE	🟢

11. Go to *StudentInformation » Management » District Administration » Family Groups.* Now add Anne Allen to the Family Group that already contains Marcus and Mario Allen by clicking the edit pencil for the 1st Allen Family Group.
12. Once the 2nd tab named **Students** of the Allen Family Group displays, type "allen" into the **Student Name** search field. This will search the entire district for any student whose name contains allen.
13. Click **Search**.
14. Students matching the search criteria will be show at the bottom in a grid.
15. Place a check in the box next to the students you want to add to the Family Group and then click **Add Selected Students**.

Family Groups
From this screen you can display or change information regarding family groups

< Prev Group: ALLEN	Next Group: ALLEN >

Group	Students	Contacts

		Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
	🗑	✉	ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327	8291 ALLEN Road	M	🟢
Family Group	🗑	✉	ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327	8291 ALLEN Road	M	🟢
Name: ALLEN	✔ Show Active Only							↻ This student is enrolled in a future school year		

Student Name: allen   Phone Number:
Street Address: [   ] Search

Back

Add Selected Students

☐	FirstName ▲	LastName	MiddleName	Grade	Student Number	Phone Number	Address	BirthDate	Gender	Is Active	Family Groups
☑	ANNE	ALLEN		09	21088	(419) 555-3821	8291 ALLEN Road	03/27/2003	F		ALLEN
☐	CLIFFORD	ALLEN		12	18396	(419) 555-7401	8291 ALLEN Road	12/17/1998	M		ALLEN
☐	FRANCISCO	ALLEN		07	23307	(419) 555-9394	8291 ALLEN Road	02/18/2005	M		ALLEN

Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: ALLEN	Next Group: ALLEN >

Group   Students   Contacts

		Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
	🗑	✉	ALLEN, ANNE	09	ELIDA HIGH SCHOOL	21088	(419) 555-3821	8291 ALLEN Road	F	🟢
	🗑	✉	ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327	8291 ALLEN Road	M	🟢
	🗑	✉	ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327	8291 ALLEN Road	M	🟢

Family Group

Name: ALLEN

☑ Show Active Only   ⟳ This student is enrolled in a future school year

Student Name: allen ✕ **Phone Number:**

Street Address: **Search**

Back

16. Continue the process until you have all students in the Family Group.

Task #3 – Create a single Family Group

1. Navigate to ***StudentInformation*** » ***Management*** » ***District Administration*** » ***Family Groups.***
2. Click **Add Family Group**.
3. Enter a Name and an optional Description.

4. Click the 2ⁿᵈ tab named **Students**.
5. Use any of the three filters to search for students to add to the Family Group and click **Search**.
6. Students matching the search criteria will show at the bottom in a grid.
7. Place a check in the box next to the students you want to add to the Family Group and then click **Add Selected Students**.

8. The green envelope icon next to the student signifies that the student is the Courier for the family group.

Task #4 – How to view which Family Group a student is a member of

1. Put a student in context at either the district or building level.
2. Click on their name in the context area or navigate to ***StudentInformation » SIS » Student » View Profile***.
3. If the student is in a Family Group, it will show at the bottom of the page.

DAY, KEVIN

From this screen, you can view the student's profile.

I want to... ▼

Address of Residence:	2262 DAY Road GALION, OH 44833
Mailing Address:	2262 DAY Road GALION, OH 44833
Phone Number:	(419) 555-6195 ☐ Unlisted
Student Email:	student@donotuse.com
Primary Contact's Email:	test@donotuse.com
Parent/Guardian:	DAY, MARIAN H: (419) 555-2399 W: (419) 555-0111 M: (419) 555-6195
Parent/Guardian:	DAY, JULIO H: (419) 555-6176 W: (419) 555-5580 M: (419) 555-6176

NO PHOTO AVAILABLE

Student Status:	ACTIVE RES
Birthdate:	9/22/2002
Ethnicity:	CAUCASIAN
Program:	
Graduation Year:	2021
Academic Locker:	633
Admission History:	8/26/2008 - Enrolled

EMIS Situation:	9 - Resident attending but takes JVS satellite courses P/T
Percent of Time:	87%
Report to EMIS:	☑
Effective Date:	1/6/2020

Parking Permit Number: ABC123
Parking Space: 1234

✉ Student is courier for family group
↻ Student is enrolled in a future school year

Family Group	Description	Student Address	Students In Group	
DAY	DAY Family Group	2262 DAY Road	✉ DAY, KEVIN	Galion High School

4. You can also use the I want to menu to View A Student's Family Group. If you do not have access to the Family Groups page, you will not have the I want to option in the dropdown.

5. The link will take you to the following page: ***StudentInformation » Management » District Administration » Family Groups.***

Task #5 – Review existing District Family Groups

1. Navigate to ***StudentInformation*** *» **Management*** *» **District Administration*** *» **Family** **Groups.***
2. Enter text in the **Family Group Name** field to filter down results or leave the field blank to return all Family Groups in the district.
3. To delete a Family Group, click the trash can icon next to the group.

Family Groups

From this screen you can display or change information regarding family groups

Search By: Family Group Name ⌄

| allen | × | Search |

Add Family Group

✉ Student is courier for family group
🔄 This student is enrolled in a future school year

Number of Family Groups Per Page: 10 ⌄

4 FamilyGroups Found

		Family Group ▲	Description	Student Address	Students In Group	Active
🗑	✏	ALLEN	ALLEN Family Group	9738 MIRANDA Road	ALLEN, CLIFFORD BRIGHT, ROBERTO ✉MIRANDA, PATRICIA MORSE, ARLENE MORSE, PERRY	●
🗑	✏	ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, ANNE ALLEN, LEROY ✉ALLEN, MARCUS ALLEN, MARIO Allen, Sam	●
🗑	✏	ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, FRANCISCO ✉ALLEN, MICHEAL	●
🗑	✏	ALLEN	ALLEN Family Group	8291 ALLEN Road	✉ALLEN, THEODORE	●
✔ Show Active Only						

4. To edit a Family Group, click on the edit pencil icon next to the group. The **Students** tab will display.
5. To add students to the existing Family Group, use the filters to search for students.
    a.   Any student that matches the search criteria will display, even if they are already assigned to another Family Group.
    b.   A student can be a member of more than one Family Group.
    c.   Place a check in the box next to the student(s) you want to add to the Family Group and then click **Add Selected Students**.

d.   To remove a student, click the trash can icon next to their name. The student is hard deleted from the group once you click the icon.

Task #6 – Consolidate Family Group Contacts

1. To consolidate contacts for the Family Group members, choose the **Contacts** tab.
   a.   All members of the Family Group will display across the top.
   b.   If you are at the District level or the student resides in the building in context, the student's name will appear as a blue link that you can click to take you to the student's Contact Summary page *(**StudentInformation » SIS » Student » Contacts Summary**)*.

   c.   Hover the mouse over a contact to see more details.

d. To link a contact to a student, check the box in the corresponding column and row.

e. If you uncheck all the boxes for a contact in the row, the contact will be hard deleted once you leave the page. There is no save button on the page. Edits are saved automatically on the page.

f. A student can have one primary contact, which is denoted by the gold star. To make a contact the primary contact, click the star in the corresponding row for that student.

g. Example: student Sam Allen, we unchecked the Parent(s) contact Marge Allen and checked the Parent(s) contact Margie Allen. Once we leave the page the edit automatically saves. Since Parent(s) contact Marge Allen no longer has any columns checked, this contact will be deleted when we leave the page.

Task #7 – Add a contact to a Family Group or Student

1. To add a contact to an individual student, put the student in context and navigate to ***StudentInformation » SIS » Student » Contacts Summary***.
2. Click the **Add Contact** button to add a new contact.
3. A new Add Student Contact screen will pop up.
   a. First, select a contact type from the dropdown at the top.
   b. Next, fill in the appropriate fields for salutation and name.
   c. To add a phone #, click the plus sign next to **Phone Number**.
   d. To add a home address immediately begin typing in the address fields. If the contact's address is the same as the student's address, check **Same As Student Address**.
   e. To add additional addresses besides Home address, click the plus sign next to **Address,** choose a type from the dropdown.
   f. Click the plus sign next to **Email Address** to add an email address for the contact.
   g. Fill in the contact's work information, custody code, and language preferences, if desired.
   h. The **Legal District of Residence Change Date** is for community schools only. It is the effective date a legal guardian's district of residence changed.
   i. The following fields are student specific: Publicly Viewable determines if the contact is viewable in ParentAccess.

   j. Click **Save** when finished.

Task #8 – How to create a Professional Contact for the district and link the Professional Contact to multiple students

1. To add a new Professional contact to an existing family group, navigate to ***StudentInformation*** » ***Management*** » ***District Administration*** » ***Family Groups.***
2. Enter text in the **Family Group Name** field to filter down results or leave the field blank to return all Family Groups in the district.
3. Select the Family Group by clicking on the edit pencil icon next to the group. The **Students** tab will display.
4. Move to the 3rd tab named **Contacts**.
5. To add a contact to an individual student, put the student in context and navigate to ***StudentInformation*** » ***SIS*** » ***Student*** » ***Contacts Summary***.
6. Click the **Add Contact** button to add a new contact.
7. NOTE: A Professional contact must be added to a Family Group or individual student before it can be added to other students and/or Family Groups in the district.
8. A new screen will pop up.
   a. First, select a contact type from the dropdown at the top.
   b. The following contact types are Professional Contacts. At this time, there is no way to add an additional Professional Contact Type.
      a. Probation Officer
      b. Day Care Center
      c. Dentist
      d. Parole Officer
      e. Therapist
      f. Doctor
      g. Social Worker
      h. Hospital
   c. Next, fill in the appropriate fields and click **Save** when finished.

9. Now that the Professional Contact is created, you can add the contact to any student or Family Group.
10. From the Family Groups – Contacts page, start typing in the **Search Professional Contacts** field.
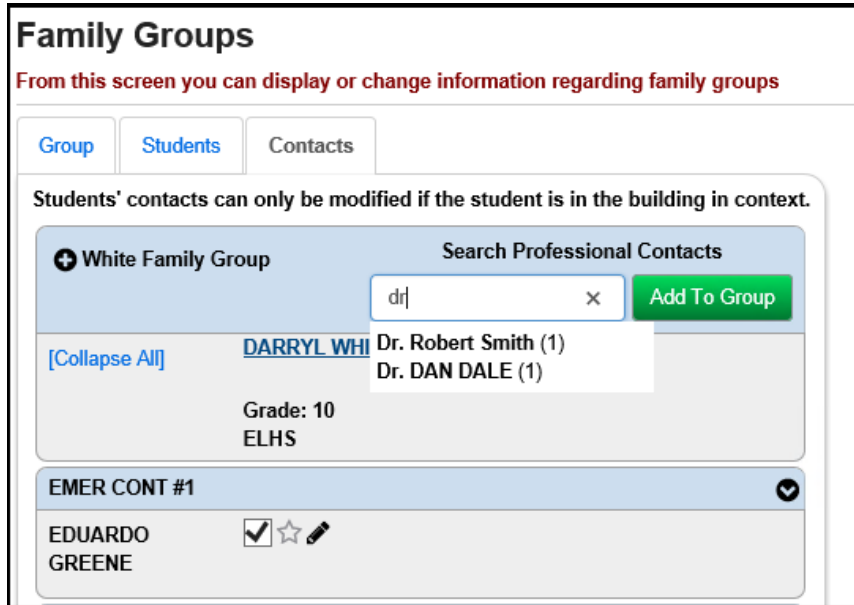
11. Once the Professional Contact is selected, click **Add to Group**.
12. The Professional Contact is automatically linked to every student in the Family Group.

13. To add the Professional Contact to another student from the Contacts Summary page, with a student in context, start typing in the Search Professional Contacts field.

14. Once the Professional Contact is selected, click **Add**.

Fees Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
04/23/20	Entire document	Update screenshots
08/06/19	Task #21	Updated note
10/03/17	Entire doc	Update screenshots

Before Using Fee Accounting

Verify that all necessary codes and parameters are defined properly before using the Fee Accounting module. If you are confident that these steps have been properly completed previously, then you may continue to the second part of this checklist, "Using Fee Accounting." *Unless otherwise noted, see Fees End User Documentation for details.*

Please note that the entire Fee Accounting module is optional. You may use as much or as little of the Fee Accounting module as needed for your building situation.

Fee Entry Hint – The valid range for fee amounts is 0.01 to 99999.99. If you have a fee for less than a dollar, it must be entered with the leading zero – i.e. 0.99. You will receive an error message if you do not enter the leading zero as the dollar amount.

Table of Contents

Task #1: Verify StudentInformation Options

Verify StudentInformation Options - Fees tab and adjust as necessary. If students with a "Free/Reduced Lunch Status" of "Free" or "Reduced" should have waivers applied to their fees for all or part of their fees, respectively, check the appropriate Fee Waivers checkboxes and enter a "Reduced Fee – Fraction Applied to Student" for the amount reduced by Waiver for "Reduced" status students. Schools not using these Waivers should set this value to 0.00. The Ignore checkboxes determine how past, future or other buildings' fees affect all fees pages and reports.

See School Setup and Configuration End User Documentation for detail.

StudentInformation Options

From this screen, you can display and change data pertaining to school year configuration functions.

| Scheduling | Marks | Fees | Attendance | Prog Track | INFOhio Export |

Uses Fees: ✔
Has Fees Assigned: ✔

Reduced Fee - Fraction Reduced from Fee: * 0.50
Use General Fee Waivers: ☐
Use Course Fee Waivers: ✔
Use Program Fee Waivers: ☐
Use Membership Fee Waivers: ☐
Show Fees from Past School Years: ✔
Show Fees from Future School Years: ✔
Show Fees from All Buildings: ☐

Save

Trainer Tips:
- "Uses Fees" and "Has Fees Assigned" options must both be marked or the fees program will not work correctly.
- Select "Show Fees from Past School Years" to display fees that a student owed from previous years.
- Select "Show Fees from Future School Years" to display future fees that have been assigned to the student for future charges in a future year. Note: At this time, there is no way to ignore 2nd semester fees owed.
- Select "Show Fees from All Buildings" to display fees the student owes while enrolled at another building in the district.

Task #2: Define Accounting Codes (optional)

Define Accounting Codes to be used with various types of fees for accounting and reporting purposes. Accounting Codes are specific to each school building.

IMPORTANT NOTE: Accounting Code can be up to 8 characters in StudentInformation. However, if you are using the StudentInformation STUFEES Export, please note that the USAS STUFEES Import only accepts 6 characters for Accounting Code. You will need to rename your codes to fit into this 6 character limit if you are using the StudentInformation STUFEES Export with the USAS STUFEES Import.

Accounting Codes Maintenance

From this screen, you can display, add, change and delete Accounting codes.

Add Accounting Code

		Accounting Code	Allocation Code ▲	Active
🗑	✏	001-1212	001-1212-9005 APEX - Summer School	🟢
🗑	✏	001-1219	001-1219 APEX-Credit Recovery High School Fee	🟢
🗑	✏	1860	001-1860 Prosecutor Fee	🟢
🗑	✏	001-1860	001-1860 Returned Check Fee	🟢
🗑	✏	0000	009-1740-003 High School Fees	🟢

Task #3: Define Prorated Fee Schedules (Optional - Highly Recommended)

Define Prorated Fee Schedules to be used with general, course, and program fee assessments and credits. As of 11.3.0.1154, the Prorated Fee Schedules are school year specific to facilitate the viewing of historic data.

NOTE: If you are using fees, you should use Prorated Fee Tables. If you don't use Prorated Fee Schedules, fees will not be dropped when a student withdraws (even before the start of school), and course fees will not be dropped if the student's schedule changes.

Prorated Fee Schedules can also be used to assign partial fees to students who enroll or add a class after the start of the school year (or withdraw or drop before the end of the school year). Prorated Fee Schedules are building-specific. Once Prorated Fee Schedules are set up, the building must assign Prorated Fee Schedules to the fees they wish prorated.

The Start Day/ End Day for general and program fees are based off the school year. The Start Day/End Day for course fees are based off the course term for each course. Membership fees and miscellaneous fees are not prorated. The Prorated Fee Schedule answers the question, "How much will the student be refunded if he drops the course on a specific day of the year?"

Prorated Fee Schedules Maintenance

From this screen, you can display, add, change and delete Prorated Fee Schedules.

Add Schedule ✔ Show Active Only

ADM SEM - ADMISSION - SEMESTER LONG CLASS 🗑 ✏
Last Modified: 4/23/2020 11:08:00 AM By: devin

Start Day	End Day	Proration Ratio
1	21	100%
22	45	50%

ADM YR - ADMISSION - YEAR LONG CLASS 🗑 ✏
Last Modified: 4/23/2020 11:08:00 AM By: devin

Start Day	End Day	Proration Ratio
1	21	100%
22	90	75%
91	135	50%
136	180	0%

WDR SEM - WITHDRAWAL - SEMESTER LONG CLASS 🗑 ✏
Last Modified: 4/23/2020 11:08:00 AM By: devin

Start Day	End Day	Proration Ratio
1	21	100%
22	45	50%

WDR YR - WITHDRAWAL - YEAR LONG CLASS 🗑 ✏
Last Modified: 4/23/2020 11:08:00 AM By: devin

Start Day	End Day	Proration Ratio
1	21	100%
22	90	75%
91	135	50%
136	180	0%

Task #4: Define Course Fees

 Define Course Fees to be assigned to specific course and/or course sections. Different sections of the same course may have different fees if the building determines that is appropriate. Course Fees are specific for each school year and school building. (If you have not yet finalized a Schedule, you will need to select a Schedule from the Schedule Result Selector drop-down and click the Reload Screen button.)

Course Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Course Fees.

Add Course Fee

		Course Code	Course Name	Course Section	Fee Code	Fee Text	Fee Amount	AD	WD	Acct Code	Active
🗑	✏	CT2CH	Advanced Computer Hardware		CT2CH	Advance Computer Hardware	$5.00	03	01	TECH-WEB-PROGRAMMING	🟢
🗑	✏	AG1FN	Ag. Food & Natural Resources		AG1FN	Ag. Food/Natural Resource	$20.00	03	01	FFA	🟢
🗑	✏	AG2AS	Animal and Plant Science		AG2AS	Animal Science/Technology	$20.00	03	01	FFA	🟢
🗑	✏	EN4AP	AP English Language		EN4AP	AP English 12	$15.00	03	01	ENGLISH	🟢
🗑	✏	AR1	Art I		AR1	Art Fundamentals	$25.00	03	01	ART	🟢

Task #5: Define General Fees

Define General Fees to be assigned to all students or a specific group of students. The Student Fee Assignment batch process assigns General Fees automatically. General Fees are specific to a school building, a school year, and/or grade level. They can be limited according to gender and/or grade level.

General Fees Maintenance

From this screen, you can display, add, change and delete general fees.

Add General Fee

		Fee Code ▲	Grade Year	Gender	Fee Text	Fee Amount	AD	WD	Acct Code	Active
🗑	✏	03			Paper Fee	$5.00			009-1740-003 High School Fees	🟢
🗑	✏	04			AGENDA	$5.95			009-1740-003 High School Fees	🟢

Task #6: Define Program Fees

Define Program Fees to be assigned to specific student programs. Vocational schools often use this fee to assign different fees to different student programs.

Program Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Program Fees.

[Add Program Fee]

		Fee Code ▲	Fee Text	Program	Grade Year	Gender	Fee Amount	AD	WD	Acct Code	Active
🗑	✏	AUTO	Automotive	ACT1			$65.00				🟢
🗑	✏	COS1	58.00	COS1			$41.00				🟢

☑ Show Active Only

Task #7: Define Membership Fees

Define Membership Fees to be assigned to specific student memberships. Students enrolled in groups can be assessed fees by using Membership Fees.

Note: Membership fees cannot be prorated.

Membership Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Membership Fees.

[Add Membership Fee]

		Fee Code ▲	Fee Text	Membership	Grade	Gender	Fee Amount	Acct Code	Active
🗑	✏	BB	Basketball	420003 - Basketball			$50.00		🟢

☑ Show Active Only

Task #8: Define Miscellaneous Fees

Define Miscellaneous Fees to be applied to students as needed. These are fees that do not fit into any other fee type. Fees could include fees for lost textbooks or damage to books or lockers. The same fee can be assessed to a student multiple times.

Note: Miscellaneous fees can not be prorated.

Miscellaneous Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to miscellaneous fees.

Add Misc Fee

		Fee Code ▲	Fee Text	Fee Amount	Acct Code	Active
🗑	✏	02	PRIOR YR FEES	$1.00		🟢
🗑	✏	AB	AGENDA BOOK	$7.00	009-1720-009	🟢
🗑	✏	AG	AG FEE	$17.00	001-1311-511-010000-009	🟢

Using Fee Accounting

 Follow these steps to add Fees to students in StudentInformation and to use the full functionality of the Fee Accounting module.

Please note that the entire Fee Accounting module is optional. You may use as much or as little of the Fee Accounting module as needed for your building situation.

Task #9: Clear Fees if needed

Perform Clear Fees to zero out various types of fees. Typically, a clear fee is performed before fees are calculated for the new school year. The process will apply an unrefunded payment (type "U") to fees with a credit balance. An additional option will allow the user to zero all outstanding fees. This will be performed at the end of the school year in a building that does not wish to carry outstanding fee balances forward for the next school year. Fee payment records with a pay status of "A" (Amnesty) will be posted.

   See Ad-Hoc Updates End User Documentation for detail.

Trainer Tip: A School could also mark "Ignore Past Fees" and then StudentInformation would not include any prior year's fees owed in the current year's fee balance. (See Verify StudentInformation Options section for explanation).

Clear Fees

Enter the criteria for the fees to zero. Click Submit to create a batch job which will zero the fees.

Clear Credit Fees:	☑
Clear Debit Fees:	☐
Pay reference for credit balance fees:	Unrefunded
Pay reference for fees owed:	Amnesty
Pay Date: *	10/3/2017 🛗

Fee Types to process:

General Fees: ✓   Course Fees: ✓   Misc Fees: ✓   Program Fees: ✓   Membership Fees: ✓

[Submit Job]

Task #10: Student Fee Assignment
(aka Bulk Assignment of Fees)

This processes the bulk assignment of fees.

Before Assigning Fees:
1. Schedule must be finalized.
2. Setup proration tables and link the proration tables to course fees, general fees, and programs fees.
3. Check fee amounts in Fees Maintenance for accuracy before you assign fees.
4. Go into StudentInformation Options – Fees tab. Check "Uses Fees" and "Has Fees Assigned" options.

Attention: "Uses Fees" and "Has Fees Assigned" must both be checked in order for the Fees Module to work properly in StudentInformation.

Attention: If a student drops a course with a fee and proration tables are not set up, the student will not get a refund.

See the Trainer Tips under StudentInformation Options of this document.
See Ad-Hoc Updates End User Documentation for detail.

Student Fee Assignment

Create and update student fee assignments in bulk

Students	Assignments	Options	Confirmation	Results

Select Students By: ● Search Criteria   ○ Ad-Hoc Membership

Grade Level

```
PS - PS
08 - 08
09 - 09
10 - 10
11 - 11
```

Homeroom

```
H-IMC - SALAZAR (Full Year Term)
H101 - ARMSTRONG (Full Year Term)
H117 - BUSH (Full Year Term)
H118 - LAMBERT (Full Year Term)
H119 - FREEMAN (Full Year Term)
```

Student Status

```
A - ACTIVE RES
ACDD - MARIMOR
AJVS - RES ATTENDS APOLLO FT
ALT - ALTERNATIVE SCHOOL
ASP - AUTISM SCHOLARSHIP PROGRAM
```

Gender

```
F
M
```

[Cancel]   [Next >]

Student Fee Assignment

Create and update student fee assignments in bulk

Students	Assignments	Options	Confirmation	Results

Fee Date: * 09/13/2017 📅

Fee Types to Assign:

☐ **General Fees**

☐ **Course Fees (schedule result must be finalized)**

☐ **Program Fees**

☐ **Membership Fees**

☐ **Miscellaneous Fees**

Existing Fee Assignments:

● Skip fee assignment if assignment already exists

○ Replace fee assignments if fee definition has changed (non-Misc fees)

○ Create adjustment fees/waivers if fee definition has changed (non-Misc fees)

○ Ignore existing assignments, possibly creating duplicate assignments

○ Reset Fees - Remove fee assignments and don't create new assignments

○ Clear Fee Balances - Zero fee balances with credits/debits

○ Apply All Waviers

[Cancel]   [< Back]   [Next >]

Skip Fee Assignment… - If a student was already assigned the fee, they will not get a duplicate assignment of this fee.

Replace Fee Assignment… - If you changed a fee amount after fees were already assigned, you could run the bulk assignment with this option checked. As a result, the new fee amount would be charged, replacing the old amount, provided the student hasn't made any payments or had any waivers applied to the fee definition that changed. This does not apply to Miscellaneous Fees. The fees are matched based on just the Fee ID, so any assignment of that fee, for whatever amount, counts as a duplicate.

Create adjustment fees/waivers… - If a specific fee has already been assigned to the student and subsequently, the fee amount has changed, this option will create an adjustment or waiver fee for the difference between the old and new fee. It will not adjust the existing fee amount. This does not apply to Miscellaneous Fees. The fees are matched based on just the Fee ID, so any assignment of that fee, for whatever reason, counts as a duplicate.

Ignore Existing Assignments… - USE THIS FEATURE WITH CAUTION! If students were already assigned fees and you choose to run the bulk assignment of fees with this option checked, then the student fees will most likely double as a result.

Reset Fees… - Use this option to delete all fees in order to start over again with fee assignments. Important: If the fee has been paid or a waiver has been applied, the fees can not be deleted.

Clear Fee Balances… - Provides the same functionality as the StudentInformation – Management – Ad-Hoc – Clear Fees feature. The fees will still remain on the student's fee page (whereas Reset Fees deletes them), but will show the student owes zero.

Apply All Waivers – Applies all fee waivers (except for miscellaneous fees), including retroactively waiving fees for students with free or reduced lunch status.

Note: The Options Tab will display different options per assignment type chosen.

Student Fee Assignment

Create and update student fee assignments in bulk

| Students | Assignments | Options | Confirmation | Results |

Miscellaneous Fee:*   39 - SHOP SUPPLIES

Miscellaneous Fee Amount:* 25.00

[Cancel] [< Back] [Next >]

Student Fee Assignment

Create and update student fee assignments in bulk

| Students | Assignments | Options | Confirmation | Results |

Fee Date: 9/13/2017
Included General Fees: Not Selected
Included Course Fees: Not Selected
Included Miscellaneous Fees: 55
Included Program Fees: Not Selected
Included Membership Fees: Not Selected
Students to be Processed: 943
Existing Fee Assignments: 1
Existing Fee Handling: Skip fee assignment if assignment already exists

[Cancel] [< Back] [Finish]

Student Fee Assignment

Create and update student fee assignments in bulk

| Students | Assignments | Options | Confirmation | Results |

The following assignments could not be made

Student	Fee Type	Fee Code	Fee Amount	Reason for Failure
There are no records to display				

The following fee assignments were made

Student	Grade	Status	Fee Type	Fee Code	Fee Amount	Details
ACOSTA, CHRIS	12	A			$25.00	New student fee created
ADAMS, WANDA	11	NROE			$25.00	New student fee created
AGUILAR, JEAN	09	A			$25.00	New student fee created

Trainer Tip: Create a printout of this screen using Print Screen on your keyboard.

Example: The most common way to bulk assign fees from the Student Fee Assignment page:

1st Tab Students
- o Select all grade levels
- o Select "A" and "N" status
- o Select no other filters (in most cases)

2nd Tab Assignments
- o Fee Date = today's date
- o Fee Types to assign = all fee types your school uses
- o Existing Fee Assignments = select "Skip fee assignment if assignment already exists"

3rd Tab Options
- o Complete the options based on the assignment type chosen.

4th Tab Confirmation
- o Verify your selections (choose the Back button if necessary)
- o Click Finish to assign the fees

5th Tab Results
- o This page will list all students updated by the bulk process. A student might be listed more than once depending on the number of courses and general fee associated with the student.
- o HINT: Print this page for your records.

Special Notes regarding the Bulk Assignment of Fees:
1. The Bulk Assignment of Fees can be run multiple times. As long as you select "Skip fee assignment if assignment already exists" option, the fees will not double.
2. You can delete the fees you already assigned by choosing the "Reset Fee" option. Any assigned fee that has already had a payment or waiver applied will not be deleted. The only way to delete fees in which payments or waivers were applied is through the StudentInformation State Support Database Administrator.
3. Use the "Ignore Existing Assignments" option with extreme caution.

Task #11: Students Needing Adjustment

View Students Needing Adjustment for a list of all students with credit (overpaid) fees. Payments on these fees may be refunded, zeroed, or transferred to other fees.

Students Needing Adjustment

From this screen, you can view students' overpaid fees.

Total Fees: $356.40

Student ▲	Grade	Homeroom	Fees Flagged
AGUILAR, LESTER	12		$30.00
ARNOLD, JACQUELINE	10		$20.00
AYERS, BYRON	10		$5.00
BASS, KURT	11		$5.00
BEACH, REGINALD	10		$5.55
BROCK, MAE	11		$0.50

Task #12: Student Open Fees

View Student Open Fees for a listing of the detailed fees for a selected student. This screen will display all fees that are unpaid or have a credit balance.

Student Open Fees

This page lists all of the student's fees that have a balance or credit due

Total Fees Assessed	$998.25
D - Drop	$40.00
P - Payment	$943.25
R - Refund	($10.00)
Overall Balance	**$25.00**

Fee Options
- ☑ Show Fees from Past School Years
- ☑ Show Fees from Future School Years
- ☑ Show Fees from All Buildings

I want to... ▾

School Year ▾	Grade Level	Fee Type	Fee Code	Date	Course	Section	Description	Amount Assessed	Amount Paid	Amount Owed	School Code
2017	12	Misc	39	Sep 13, 2017			SHOP SUPPLIES	$25.00	$0.00	$25.00	ELHS
2016	11	Course Fee	CHEM 111	Mar 28, 2017	Basic Chemistry Lecture (UF)		CCP - CHEM	$30.00	$0.00	$30.00	ELHS
2016	11	Course Fee	1232~11	Aug 12, 2016	CHEMISTRY II		CHEMISTRY II	$30.00	$60.00	($30.00)	ELHS
							Total	**$85.00**	**$60.00**	**$25.00**	

Task #13: Add Fees

Add fees to a selected student.

Add a Student Fee

Select the fee type and fee to add.

Fee Type:* General Fee ▾

Fee:* 02 - AGENDA ▾

Fee Amount:* 6.00

Fee Date:* 09/25/2017 ✕ 📅

[Save] [Cancel]

⭐ Trainer Tip: You can add a course fee to a student using the Add Fees option. NOTE: When adding a Miscellaneous Fee, once the Fee is chosen, a Misc Fee Description field displays allowing the user to enter a description (free form text) for the Miscellaneous Fee.

Task #14: Apply Payment

To apply a Full Payment, select Apply a Payment. The amount in the Total Payment Amount box defaults to the full payment amount. Click Go to allocate payment. If desired, specify a Payment Type and enter a Reference Description, and then enter the Payment Date. Click Make Payments.

Apply a Student Payment

Enter the total payment amount and apply the payment to fees

Total Payment Amount:* 45.00 [Go] Press GO to allocate payment

Payment Type: [▼]

Payment Date: 4/23/2020 📅

Reference Description: [ ]

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
General Fee	SENIOR	Aug 14, 2019			SENIOR CLASS DUES	$5.00	5.00
General Fee	TECHPREM	Aug 14, 2019			TECHNOLOGY USAGE PREMIUM	$40.00	40.00

[Recalculate] Payment Amount Remaining: 0.00

[Make Payments] [Cancel] ✔ Show Receipt

Task #15: Partial Payment

To apply a Partial Payment, select Apply a Payment. Enter the amount of the partial payment in the Total Payment Amount box. Click Go to allocate payment, the textboxes in the table will be enabled and the user will enter the amount of payment to be applied to each fee and click Recalculate. If desired, specify a Payment Type and enter a Reference Description, and then enter the Payment Date. Click Make Payments.

Apply a Student Payment

Enter the total payment amount and apply the payment to fees

Total Payment Amount:* 5.00   [Go]   Press GO to allocate payment

Payment Type: [▼]

Payment Date: 4/23/2020 📅

Reference Description: [ ]

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
General Fee	SENIOR	Aug 14, 2019			SENIOR CLASS DUES	$5.00	5.00
General Fee	TECHPREM	Aug 14, 2019			TECHNOLOGY USAGE PREMIUM	$40.00	0.00

[Recalculate] Payment Amount Remaining: 0.00

[Make Payments] [Cancel] ✔ Show Receipt

Task #16: Apply Overpayment

To apply an Overpayment, select Apply a Payment. Enter the amount of the overpayment in the Total Payment Amount box. Click Go to allocate payment, the textboxes in the table will be enabled and the user will enter the amount of payment to be applied to each fee and click Recalculate. The overpayment value must be fully allocated to the fees. The Payment Amount Remaining value must be zero before the payment can be made. If desired, specify a Payment Type and enter a Reference Description, and then enter the Payment Date. Click Make Payments.

Apply a Student Payment

Enter the total payment amount and apply the payment to fees

Total Payment Amount:* 70.00 [Go] Press GO to allocate payment

Payment Type: [▾]

Payment Date: 10/3/2017 📅

Reference Description: [ ]

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
Misc	39	Sep 13, 2017			SHOP SUPPLIES	$25.00	37.00
General Fee	02	Oct 27, 2016			AGENDA	$6.00	6.00
General Fee	01	Oct 27, 2016			SUPPLY FEE	$25.00	25.00
General Fee	03	Oct 27, 2016			TECHNOLOGY FEE	$2.00	2.00

[Recalculate] Payment Amount Remaining: 0.00

Task #17: Issue Refund

Issue a fee refund to a selected student with a credit balance. Enter the amount of the refund and press the Submit button. A user cannot apply a fee refund greater than the credit balance.

Issue a Student Refund

Enter the total refund amount and apply the refund to fees

Total Refund Amount:* 12.00 [×] [Go]

Refund Date: 10/3/2017

Reference Description:

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
Misc	39	Sep 13, 2017			SHOP SUPPLIES	($12.00)	12.00

Refund Amount Remaining: 0.00

◉ Standard Refund Payment ○ Unrefunded Payment

[Submit] [Cancel] ✓ Show Receipt

Task #18: Transfer Payment

Transfer payment from a fee with a credit balance to an unpaid fee for a selected student. The transfer amount will default to the total credit balance. If the transfer is less than the credit balance, enter the amount and tab to the specific fee receiving the transfer. Enter the amount and press Process Transfer.

Trainer Tip: If the student has a credit for one fee but owes for another, the credit isn't automatically applied to the outstanding balance. You should use the Transfer Payment function to transfer the credit balance to the outstanding fee.

Transfer a Student Payment

Enter the total transfer amount and apply the refunds and payments

Total Transfer Amount: * 5.00   Go

Transfer Date: 10/3/2017

Reference Description:

Fees with Credit Balances:

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
Course Fee	640-7	Aug 12, 2016	LATIN IV		LATIN IV	($5.00)	5.00

Refund Amount Remaining: 0.00

Outstanding Fees:

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
Misc	39	Sep 13, 2017			SHOP SUPPLIES	$25.00	5.00

Payment Amount Remaining: 0.00

Process Transfer   Cancel

Task #19:Apply Waiver

Apply a fee waiver to a selected student when a payment is no longer required. Enter the amount of the waiver and tab if it is a less than the total fees. If the total fee amount is to be forgiven, press Apply Waivers.

Apply a Student Waiver

Enter the total Waiver amount and apply the Waiver to fees

Total Waiver Amount:* 40.00 [Go]

Waiver Date: 4/23/2020

Reference Description:

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
General Fee	SENIOR	Aug 14, 2019			SENIOR CLASS DUES	$5.00	0.00
General Fee	TECHPREM	Aug 14, 2019			TECHNOLOGY USAGE PREMIUM	$40.00	40.00

Waiver Amount Remaining: 0.00

[Apply Waivers] [Cancel]

Task #20: Issue a Miscellaneous Credit

Issue a miscellaneous credit to a student as a refund or waiver even if the student has no outstanding fee balance (for example: a student who paid for a trip but now cannot attend). Enter the amount of the Misc Credit, tab and click GO. If the total fee amount is to be forgiven, press Issue Misc Credit.

Issue a Misc Credit

Enter the total Misc Credit amount and apply the credit to fees

Total Misc Credit Amount:* 0.00 [Go]

Credit Date: 10/3/2017

Reference Description:

Fee Type	Fee Code	Date	Course	Section	Description	Fee Amount	Total Waivers	Existing Misc Credit	Max Misc Credit	
General Fee	01	Aug 23, 2005			Workbook	$78.00	$0.00	$0.00	$78.00	0.00
General Fee	F TRIP	Oct 02, 2006			FIELD TRIP	$8.00	$5.00	$0.00	$3.00	0.00
Misc	39	Sep 13, 2017			SHOP SUPPLIES	$25.00	$0.00	$0.00	$25.00	0.00

Credit Amount Remaining: 0.00

[Issue Misc Credit] [Cancel] ✓ Show Receipt

Task #21:View Fee Details

View and/or delete fee details for a selected student. This screen will display all fees and any associated payments. Click the trash can to delete a fee. Fees can only be deleted if they have no payments applied.   It is possible to delete a fee if all associated payments are removed. Click the trash can to delete a payment. Only payment types Payment (P), Refund (R), Unrefunded (U), and Waiver (W) may be deleted. All other payments cannot be removed.

Important: Once you delete a waiver, it is permanently deleted. Fee payments are not hard deleted, they are set to inactive & will be displayed below the fee assignment with date, time & user whom deleted the payment. Fee assignments are also set to inactive & can be displayed by unchecking Display Active Fees on the Student Fee Details page.

Task #22: Perform Homeroom Fee Collection

Teachers can perform fee collection by homeroom. See the StudentInformation Teacher Menu End User Documentation.

Homeroom Fee Collection

Select the students making exact payments and click 'Submit'

Collection Date: 10/3/2017 × 🗓 Go

Select a homeroom for which to collect fees: 2JK ▾

Student	Fees	Payment Reference	Paid in Full
BOYLE, BERNICE	$0.00	No Outstanding Fees	
BRADLEY, ERIN	$42.00		☐
CARSON, BILLY	$91.50		☐

Trainer Tip: Teachers can only collect full payments. Partial payments must be submitted through the student fee pages.
Use the Payment Reference box to record a check # or special note. *Only full payments are recorded on this page.*

Task #23: Run Fee Payments By Accounting Code Detail

Run StudentInformation > SIS > Fees > Fee Reports > Fee Payments By Accounting Code Detail to generate a detailed fee payment listing by accounting code.

Task #24: Run Fee Payments By Accounting Code Summary

Run StudentInformation > SIS > Fees > Fee Reports > Fee Payments By Accounting Code Summary to generate a fee payment summary by accounting code.

Task #25: Run Students Eligible for a Refund

Run StudentInformation > SIS > Fees > Fee Reports > Students Eligible for a Refund to generate a listing of students with a credit balance. The unrefunded fee is generated when a student pays an assessed fee and then drops the course for which the fee was assessed. This results in a credit balance. The building can either choose to refund the money or apply the amount to another fee for the selected student. Students with a $0 balance will not display on the report.

Task #26: Run Student Fees Requiring Adjustment

Run StudentInformation > SIS > Fees > Fee Reports > Student Fees Requiring Adjustment to generate a detailed listing of students needing a payment adjustment for the selected school year. Payment adjustments are needed when a student has paid their fees in full and then has a schedule change where a portion or the entire fee amount originally charged to the student is dropped or credit to the student's account causing the school to owe the student money. The student may or may not have a credit balance depending on whether the student has other outstanding fee amounts on this account. This report can only be generated if the school is using Fee Accounting. Records will be selected only for the school year displayed in the context area.

Task #27: Run Student Fee Payment (R111)

Run StudentInformation > SIS > Fees > Fee Reports > Student Fee Payment (R111) to generate a list of payments received from each student.

Report: R111								HIGH SCHOOL
Printed Tue, Oct 03, 2017, 2:12 PM								
Date Range: 8/1/2017 - 10/3/2017								Student Fee Payment

00020311	**ARNOLD, JACQUELINE**		Grade: 10 Sts: A		Gender: F		Program: 05		
Fee Type	**Fee Code**	**Fee Description**	**Fee Date**	**Fee Amt.**	**Pmt. Date**	**Pmt. Reference**	**Type**	**Amt.**
General	02	AGENDA	08/12/2016	$ 6.00	08/15/2017		P	$ 6.00
Course	1217B-11	PHYSICAL SCIENCE-PHYSICS	08/12/2016	$ 8.00	08/15/2017		P	$ 8.00
General	01	SUPPLY FEE	08/12/2016	$ 25.00	08/15/2017		P	$ 25.00
Course	510A~11	PERSONAL FINANCIAL MGMT	08/12/2016	$ 15.00	08/15/2017		P	$ 35.00
Course	1217~11	PHYSICAL SCI.	08/12/2016	$ 8.00	08/15/2017		P	$ 8.00
Course	910-11	ENGLISH 9	08/12/2016	$ 11.00	08/15/2017		P	$ 11.00
Course	1310-11	WORLD STUDIES 9	08/12/2016	$ 14.00	08/15/2017		P	$ 14.00
Course	200~1	ART FUNDAMENTAL	08/12/2016	$ 25.00	08/15/2017		P	$ 25.00
General	03	TECHNOLOGY FEE	08/12/2016	$ 2.00	08/15/2017		P	$ 2.00

Total Assessed:		**$114.00**
Total Paid Within Date Range:		**$134.00**
Outstanding Balance Within Date Range:		**-$20.00**

Total Assessed equals total fees owed in which a payment was applied during the selected payment date range.

Outstanding Balance Within Date Range equals the remaining balance of partial payments within the selected date range.

Task #28: Run Student Fee Detail (R109)

Run StudentInformation > SIS > Fees > Fee Reports > Student Fee Detail (R109) to generate a detailed listing of fees assessed for each student. Specific selections of programs or students can create a detailed list for a specific group. The user will have the option of whether to show payment information, and whether to include students with a zero balance for their fees.

Task #29: Run Student Fees Summary (R110)

Run StudentInformation > SIS > Fees > Fee Reports > Student Fees Summary (R110) to generate a summary by student and fee type of all fees that are currently outstanding for a selected school year. The report will display a grand total for all fee types at the end of the report.

Task #30: Run Student Fee Invoice (R108-C)

Run StudentInformation > SIS > Fees > Fee Reports > Student Fee Invoice (R108-C) to generate a list of fees assessed to individual students. The report is structured so that only one student is printed per page and the report can act as a receipt for fees paid.

Task #31: Run Student Fee Collection Summary (R108-B)

Run StudentInformation > SIS > Fees > Fee Reports > Student Fee Collection Summary (R108-B) to generate a list of fees assessed to students. The list will include student information, all fees assessed, and their detail information – fee code, fee type, fee description, and fee amount. This report may be helpful in tracking fee and corresponding payments.

Task #32: Run Student Fee Collection Detail (R108-A)

Run StudentInformation > SIS > Fees > Fee Reports > Student Fee Collection Detail (R108-A) to generate a list of students, all fees assessed, and detail fee information. This report will commonly be used as an aid in collecting fees. The list will include student information, all fees assessed, and their detail information – fee code, fee type, fee description, and fee amount.

Appendix A: How Fees are affected by student schedule changes

Adding a course section – StudentInformation looks at proration tables and acts accordingly. If proration tables aren't defined then student will be charged the full fee.

Dropping a course section - StudentInformation looks at proration tables and acts accordingly. If proration tables aren't defined then student will receive zero refund.

Removing a course section – If no fee activity then the entire fee inactivated. If the fee does have activity (a payment) then the fee is not inactivated. StudentInformation will post a credit equal to the amount originally charged when the student added the section. Removes ignore proration tables.

Transfer to same course but different section – No change to fee

Transfer to different course - If no activity StudentInformation will do inactivate the fee for original section and then charge the student the new fee. If there is activity on the original fee then StudentInformation gives a credit and then charges the student the fee for the new section.

GPA Procedural Checklist

GPA calculations will include applicable course history 15 years from the year in context.

Change Log

Date	Section Number/Name	Change Description
4/6/21	Task #1	Updated screenshot
3/23/20	Task #2 Other areas of document	New field on Calculations tab for Formula STDA - Use Class of 2020 Graduation Option for GPA Also updated some screenshots
11/12/19	Entire document	Updated screenshots

Table of Contents

Task #1 - Verify Marks and Courses are set up correctly.

1. Change the context to the building level and the current year.
2. Navigate to *StudentInformation > Management > School Administration > Marks Administration Menu > Marks*.
   a. The following columns on the Marks Maintenance page are used the GPA: *Point Value*, *Min and Max Numeric Mark*, *Credit Multiplier*, *Is Credit Earned*, *Is Included in GPA*, and *Is Dq Mark*.

   b. Each mark used in the GPA calculation should have the **Is Included in GPA** box checked.
   c. The **Credit Multiplier** field on each mark should be 1.0000.
   d. Verify the **Point Value** of each mark.
   e. If the receives credit for the mark they received check the **Is Credit Earned** box. HINT: **Is Credit Earned** box for a F should *not* be checked.
   f. If the mark disqualifies the student from receiving a GPA put a check in the box **Is Dq Mark**. Example: Students who receive a grade of Incomplete are disqualified from getting a GPA.
3. Next, verify the Marking Patterns are set up correctly.
4. StudentInformation has the ability to define a credit multiplier for each grade level. This option should be used with extreme caution. If you set up a Grade Level Credit Multiplier for grade 9, every 9th grader will have their calculated GPA inflated by the multiplier. To set up the Grade Level Multiplier navigate **to *StudentInformation > Management > School Administration > Marks Administration Menu > Grade Level Credit Multiplier.***
   a. Remember: Use the Grade Level Credit Multiplier with extreme caution.
5. Next verify the courses used in the GPA calculation are properly set up.
6. Navigate to *StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Courses*
   a. If you would like a course to print on a student's high school transcript and be included in their high school GPA ensure there is a check in the box next to **Is High School Credit** on the General tab of the Course.
   b. If you would like a course to appear on the Course History screen put a check in the box next to **Is In Update History** on the General tab of the course.
7. Next on the Marks tab, verify the applicable **Level of Difficulty** and **GPA Add-on Level** are defined if desired.

a. Also verify the **Credit Units** field is correct. The **Credit Units** field is the amount of credit awarded if the student receives a passing grade.

b. HINT: The only GPA calculations that don't use the **Credit Units** field in the GPA calculation are the GPA by Course Count and Mansfield Method GPAs.

c. If you want the course to be included in a student's total credit earned toward graduation then mark the box next to **Include in Total Credits.**.

d. NOTE: If you have a middle school course that is marked as **Include in Total Credits** but isn't marked as **Is High School Credit** the course will not be included in the student's high school GPA or the transcript or count towards the student's total graduation credit since the course is marked as **Is High School Credit** = No.

e. Next verify **Include in GPA** box is marked if you want the course to be included in the GPA calculation.

f. Again if you have a middle school course that is not marked as **Is High School Credit** but the middle school course is marked as **Include in GPA** the course will be included in the student's middle school GPA but not the student's high school GPA, since the **Is High School Credit** box is not marked.

g. If the course is to be included in honor roll mark the **In Honor Roll** box.

h. If the course is a honors course mark the box next to **Is Honors course**.

i. The **Is Honors Course** flag is used as a method of filtering on courses marked as Is Honors when you choose the ellipsis to use the Course Selection Wizard pop-up to select courses on the Course Maintenance and scheduling pages.

j. Please see Appendix H of this document for more detailed explanation of what each combination of flags will do.

8. Finally verify the students are marked as **Include in Ranking** and **Include in Honor Roll** on the Additional tab of their profile.

a. If **Include in Ranking i**sn't marked the student will still get a GPA but will not be ranked.

b. Also verify **Include in Honor Roll** is marked. If the student shouldn't be included in the Honor Roll calculation uncheck the box next to **Include in Honor Roll**.

Task #2 - Set up GPA Sets

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1. Navigate to : ***StudentInformation > Management > School Administration > Course History Administration > GPA Sets***.
2. Click the **Add GPA Set** button.
3. The General tab will display.
   a. Enter up to a 4 digit code in the **Code** field.
   b. Enter a name in the **Name** field.
   c. Enter an optional description in the **Description** field.
   d. In the **Mark Credit Types** section select the correct progress level. Example: If the school wants a GPA of 1st Qtr marks put a checkmark in Progress 1. The progress level selected is based off the marking pattern rules.
   e. In the **Previous Years** section select the progress level of the marks from prior years. If the GPA you are calculating only includes this year's mark do not check any boxes.
   f. In the **Grade Levels** section select the grade levels you want the GPA to calculate for.
   g. In the **Reporting Terms** filter select the appropriate reporting term. If you are calculating the GPA for 1st Quarter then pull over reporting term Quarter 1 to the right.
   h. In the **Mark Type** filter select the appropriate mark type. If you are calculating the GPA for 1st Quarter pull over a mark type of Quarter Mark.
   i. NOTE: The **Reporting Terms** and **Mark Type** filters only apply to the current year's marks, not prior year marks.

   ## GPA Set Maintenance
   From this screen, you can display, add, change and delete data pertaining to GPA sets.

General	Calculations	Rank

   GPA Set: Next >

   Code:* Hon1   Description: Quarter 1 GPA

   Name:* Quarter 1 GPA

   Mark Credit Types:*

   ☐ Not Used ✔ Progress 1 ☐ Progress 2 ☐ Progress 3 ☐ Progress 4 ☐ Earned

   Previous Years:

   ☐ Not Used ☐ Progress 1 ☐ Progress 2 ☐ Progress 3 ☐ Progress 4 ☐ Earned

   Grade Levels:*

   ☐ PS ☐ KG ☐ 01 ☐ 02 ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐ 07 ☐ 08 ✔ 09 ✔ 10 ✔ 11 ✔ 12 ☐ 13 ☐ 23 ☐ GR

   Reporting Terms:*   **Mark Type:***

   Quarter 2   Quarter 1   Avg   Mark
   Exam 1   Exam
   Semester 1   Final
   Quarter 3

   Ad-Hoc Membership:

   -- Select an Ad-Hoc Membership -- ▾

   Public And Private ☐

4. Next click the Next button to move to the 2nd tab named Calculations.
   a. Choose a GPA formula from **Formula** dropdown.

b. For this example the **STDA- Standard GPA Calculation (Alpha)** formula was chosen. The STDA is the most widely used formula.

c. Each formula is explained in the Appendix section at the end of this document.

d. Enter a **Precision** amount. Precision is the number of decimal places in the GPA. The Precision can be set from zero – five.

e. If zero precision is selected every student will get a GPA of 4.0000, 3.0000, and 2.0000, etc.

f. If one precision is selected every GPA will be 3.9000, 2.7000, etc.

g. In the **Missing Marks Handling** dropdown choose how the GPA Set should treat students missing marks.

h. If **Ignore Mark** is chosen, any courses missing grades will not count against the student. This is option is the most widely used. Example: Sally is missing a grade for 1st quarter in Spanish1 because the teacher hasn't submitted grades yet. Sally will not be penalized for missing a grade and the GPA will be calculated off of marks she does have.

i. If **Ignore Student** is chosen, a student with any missing mark in the current reporting term or any prior reporting term will not get a GPA.

j. If **Use 0** is selected it is just like giving the student a F for any course missing a mark used in the GPA calculation.

k. If the GPA is calculated using Difficulty Points, check the **Use Difficulty Points** box.

l. How to set up Difficulty Point scales is explained in the Appendix section of this document.

m. If students have course history in multiple buildings within your district for the current school year that you want included in the GPA calculation, check the **Include Other Schools** box.

n. If the GPA is calculated using Add-on points check the **Use Add-On Points** box.

o. How to set up Add-on Point scales is explained in the Appendix section of this document.

p. If the GPA is calculated using prorated credit check the **Use Prorated Credit** box.

q. Prorated Credit is further explained in the Appendix section of this document.

r. If you want the GPA to use the course's full credit amount when figuring the GPA, then leave the Use Prorated Credit box unchecked.

s. The **Use Class of 2020 Graduation Option for GPA** option is used with the GPA optional pathway for graduation on the Student Exceptions/Requirements screen. The formula must be STDA – Standard GPA Calculation (Alpha) and this option must be checked. Once the GPA Set is configured and calculated, you can view the student's calculations on the Student GPA History screen to determine whether the student has met the GPA optional pathway for graduation. You must still select the GPA checkbox on the Student

Exemption/Requirements screen to indicate that the student has completed the requirement.

t. The **Use Manual Course History Mark Credit Detail** option will use the Mark Attemped Credit amount of the manully entered course history (Tab 2) and use it in the GPA calculation.

u. The **Use Manual Course History Course Credit** option will use Attempted Credit amount on Tab 1 of the manually entered course history record.

NOTE: See Appendix I for futher clarification.

v. If you want marks from dropped courses to be included in the GPA calculation leave the **Ignore Dropped Course Sections** unchecked. If you don't want dropped courses to be included in the GPA calculation check the box. Example: Sally received a 1st quarter grade for Math101. She then dropped Math101 during 2nd quarter. If you don't want the Math101 grade from 1st quarter to be included in her 1st quarter GPA check **Ignore Dropped Course Sections**.

5. Click Next to move to the 3rd tab named Rank.

a. In the **Source** dropdown choose how you want the students to be ranked.

b. If **GPA** is chosen student will be ranked from highest to lowest GPA. Choosing to rank by GPA is the most popular method.

c. If **Credits** is chosen students will be ranked from highest to lowest based on the number of credits they earned on the courses used in the GPA calculation.

d. If **Points** is chosen students will be ranked from highest to lowest according to the number of points they have for classes included in the GPA. Points are figured by multiplying the point value of the mark and the attempted credit amount.

e. Please refer to Appendix G located in the document for details on the Custom Rank Methods.

6. Next, determine how GPA rank will handle ties.

a. If you choose **Count all students as the same** it will rank students with the same GPA as the same rank. Example: If the first four students have GPA of 4.00, and **GPA** is chosen as the rank method, all four students would be ranked #1 and the next student would be ranked #5 and so on.

b. The **Count each student separately** method doesn't allow ties and each student will be ranked separately.

7. If you would like students who overall status is inactive to be included in the GPA check the option to **Include inactive students**. Overall student status is determined by Overall Student Status column on the *Student Status Codes Maintenance* page.

8. The option to **Include students with no marks** isn't currently functioning.

9. Click **Save** to save your changes or click **Save and New** to save the current GPA configuration and create another GPA Set. Click Cancel to delete the changes.

Task #3 - Refresh a GPA Set

1. Navigate to *StudentInformation > Management > School Administration > Course History Administration > GPA Sets*.
2. Click the **Refresh** button for the GPA you want to refresh.
   a. The following message will appear: **The GPA Set Job has been submitted for recalculation.**
   b. A job will be sent to your **Mgmt** screen.
   c. Wait for the job to complete.

Task #4 - Verify student received GPAs.

1. Navigate to *__StudentInformation__ » __SIS__ » __Course History__ » __Student GPA/Rank__*.
2. Select the GPA set you are working with from the **GPA Set** dropdown.
   a. Next select a grade from the **Grade Level** dropdown.
   b. Click View.
   c. Verify the students are receiving a GPA by glancing down the list.
   d. If the students aren't receiving a GPA follow the troubleshooting steps in the Appendix section of this document.
   e. If the students are getting GPAs, but the GPAs are incorrect, follow the troubleshooting steps in the Appendix section of this document.

Appendix A - Troubleshooting steps for students not receiving a GPA

Question:	Diagnosis:	Possible Solution:	Outcome:
1. Is Missing Marks Handling on the GPA set marked as Ignore Student?	If the student is missing any marks in the current or any prior reporting term the student will not get a GPA.	Change the Missing Marks Handling to Ignore Mark or Use Zero or fill-in the missing marks.	Refresh the GPA. If the student doesn't get a GPA continue onto the next question.
2. Are you running the GPA for a middle school or elementary that doesn't have credit amounts on the courses in course maintenance?	The Course Count and Mansfield GPA formulas are the only formulas that don't take the credit value of the course into account.	Edit the GPA Set and change the formula to Course Count or edit each course and enter a credit value on the course. Remember – as long as the middle school or elementary course isn't marked as Is High School Credit it won't be included in the student's high school GPA and won't count as high school credit earned.	Refresh the GPA. If the student doesn't get a GPA continue onto the next question.
3. On the General tab of the GPA Set are the proper grade levels selected?	Occasionally, a grade level will be unchecked by accident. If the grade level is not checked, the GPA will not calculate for that grade.	Edit the GPA Set and mark the appropriate grade levels.	Refresh the GPA. If the student doesn't get a GPA continue onto the next question.
4. Are marks entered for the reporting term selected on the GPA Set?	If the GPA Set is marked to include Quarter 3, but no grades have been entered yet, the students will not receive a GPA.	Enter marks in Quarter 3 or edit the GPA Set and choose another reporting term with marks.	Refresh the GPA. If the student doesn't get a GPA continue onto the next question.
5. Is the combination of reporting terms, mark types, and mark credit types valid according to the marking pattern rules set up?	If the GPA Set is marked to include P1 marks in Quarter 1, with a mark type of average, no student will get a GPA because quarter marks are typically a mark type of quarter mark not a mark type of average.	Edit the GPA Set and make the reporting terms, mark type, and mark credit types a valid combination according the marking patterns.	Refresh the GPA. If the student doesn't get a GPA continue onto the next question.
6. Are the courses marked as Include in GPA?	If a course should be in the GPA calculation the course needs to be marked as Include in GPA on the Marks tab of the course.	Edit each course and mark the course as Include in GPA.	Refresh the GPA. If the student doesn't get a GPA submit a Help Desk ticket.

| 7. Did student receive a mark that is marked as "Is disqualified mark" on the Marks Maintenance page? | If a student receives a grade that is marked as Is disqualified mark in the current year or prior year the student will not receive a GPA. | Edit the mark and uncheck Is Disqualified Mark. | Refresh the GPA.

If the student doesn't get a GPA submit a Help Desk ticket. |
| --- | --- | --- | --- |

Appendix B - Troubleshooting steps for students receiving the wrong GPA.

Question:	Diagnosis:	Possible Solution:	Outcome:
1. Is the Credit Multiplier of each mark set to 1 on the Marks Maintenance page?	All marks should have a credit multiplier of 1, even failing marks.	Edit the Marks Maintenance table and correct any Credit Multiplier that isn't 1.	Refresh the GPA. If the GPA is still incorrect continue onto the next question.
2. Is the correct GPA formula being used?	Marking the Use Prorated Credit checkbox on the 2nd tab of the GPA Set will yield a different calculated GPA as opposed to not checking Use Prorated Credit.	Edit the GPA Set and uncheck or check Use Prorated Credit.	Refresh the GPA. If the GPA is still incorrect continue onto the next question.
3. Is the Precision set to the correct amount of tab 2 of the GPA Set?	If the Precision is set to zero each student will receive a GPA of 4.000,3.000, etc. If the Precision is set to one, every student will receive a GPA of 3.9,3.8, 3.7, etc.	Edit the GPA Set and correct the precision.	Refresh the GPA. If the GPA is still incorrect continue onto the next question.
4. Have you calculated the GPA by hand and compared your hand calculation to the SI calculation? Are the points or credit amounts used by the SI calculation different than your hand calculation?	Knowing exactly what numbers are divided helps determine where the differences lie between the SI calculation and your hand calculation.	After calculating the GPA by hand compare each courses to see which course or courses are different from the SI calculation.	Refresh the GPA. If the GPA is still incorrect continue onto the next question.
5. Is a Grade Level Credit Multiplier set up?	Schools should use the Grade Level Credit Multiplier with extreme caution. It will inflate each student's GPA for the grade level specified.	Navigate to StudentInformation » Management » School Administration » Marks Administration Menu » Grade Level Credit Multiplier and delete the Grade Level Credit Multiplier.	Refresh the GPA. If the student doesn't get a GPA submit a Help Desk ticket.

| 6. Is the student's State Equivilant Grade field set to the proper grade? | Students with a State Equivilant Grade of 9-12, 13 or 23 will have only courses marked as Is High School credit included in their GPA. | Verify the students State Equivilant Grade level field on the FD-Attributes tab is correct. | Refresh the GPA.

If the student doesn't get a GPA submit a Help Desk ticket. |

Appendix C - How to set up a 7 Semester GPA

Issue: The high school needs a 7 Semester GPA that looks at this year's 1st semester averages and this year's earned credit and all prior year's earned credit.

1st Scenario: Setting up a 7 Semester GPA to simply calculate P2 and Earned won't work because we would get 1st Semester Averages for all year courses, which is what we want, but we would also get 1st Semester Averages (P2) and 1st Semester Finals (Earned) for 1st Semester Only classes and we want one or the other not both.

We also can't set up the GPA for just P2 because would get 1st Semester Averages for all year and 1st Semester Only course (P2's) but we wouldn't get any manual course history that only had an earned mark.

Solution:
1. Edit the all year marking pattern and change the progress level on the 1st Semester Average to be Progress 3.
2. Create GPA Set that will look at Progress 3 and Earned marks for the current year and earned marks for prior years. Since the 1st Semester Average on the all year marking pattern was changed to P3 the GPA will pull all year's 1st Semester Average, 1st Semester Only classes Final, and any manual course history with a Final.

Marking Pattern Rules - Full Year

From this screen, you can display, add, change and delete data pertaining to marking pattern rules.

Add Pattern Rule **Cancel and Return**

		Name	Mark Type	Sequence Number	Reporting Term ▲	Significance	Credit Percentage	Marks Start Date	Marks Cutoff Date
🗑	✏	Mrk1	Mark	1	Quarter 1	Progress 1	25		
🗑	✏	Mrk2	Mark	2	Quarter 2	Progress 1	25		
🗑	✏	Ex1	Exam	3	Exam 1	Not Used	0		
🗑	✏	Sem1	Avg	4	Semester 1	Progress 3	50		
🗑	✏	Mrk3	Mark	5	Quarter 3	Progress 1	25		
🗑	✏	Mrk4	Mark	6	Quarter 4	Progress 1	25		
🗑	✏	Ex2	Exam	7	Exam 2	Not Used	0		
🗑	✏	Sem2	Avg	8	Semester 2	Progress 2	50		
🗑	✏	Fin	Final	9	Final	Earned	100		

2nd Scenario: The school is a home school and loads course history from the local JVS for 1st semester only courses that have a Semester Average and Final Mark. How would the school set up a 7 semester GPA to only look at the Final Mark for these 1st semester only courses?

Solution: Load/import the Semester Average as a P3 and the Final Mark as Earned. On the 7 semester GPA, set Mark Credit Types to P2 and Earned and Previous Years to Earned. This way the P2 will grab the all year courses Semester Average and any JVS manual course history that is 1st semester only course Final. Since the 1st semester only course Average was loaded as a P3, those marks won't be included – which is correct since we are pulling the Final for the JVS 1st semester only classes.

Appendix D - Non – Custom GPA Formulas

Appendix D-1. STDA – Standard GPA Calculation (Alpha)

1. Most commonly used GPA calculation
2. Can be used by any school which has credit values on courses in Course Maintenance.
3. STDA (Alpha) can be used by Alpha or Numeric schools and will yield GPAs of 3.69 or 4.00.

GPA Calculation in words:
Sum of the point value of each mark multiplied by the attempted credit amount of the course divided by the sum of the attempted credits for all courses in the GPA calculation.

How to calculate the GPA by hand:

Appendix D-2. STDA – Standard GPA Calculation (Numeric)

1. Can only be used by numeric schools that have a credit amount on courses in Course Maintenance.
2. Will yield GPAs of 99.60, 85.00, etc.

GPA Calculation in words:

Sum of the numeric value of each mark multiplied by the attempted credit amount of the course divided by the sum of the attempted credits for all courses in the GPA calculation.

Appendix D-3. GPA by Course Count

1. Simplest of all calculations.
2. Credit value of course isn't taken into account.
3. Ideal for middle schools and elementary schools who don't use credit amounts on their courses.

GPA Calculation in words:

Sum of points divided by number of marks.

Appendix E - Additional Options for Non-Custom GPAs

Appendix E-1. Use Difficulty Points
Appendix E-2. Use Add-on Points
Appendix E-3. Use Prorated Credit

Appendix E-1. Use Difficulty Points

StudentInformation has the option to award courses with a higher or lower level of difficulty a different point value then what is denoted on the Marks Maintenance scale in StudentInformation.

Example:
 Sally is taking Advanced Placement Chemistry and receives an A+. According to the school Marks Maintenance a mark of A+ is worth 4 points. Since this is an Advanced Placement course the school wants to reward Sally for her hard work and wants a mark of A+ to be worth 5 points.
The school can set up a Level of Difficulty table in StudentInformation and link it to the course.

How to set up a Level of Difficulty table

1. To set up the difficulty points scale first navigate to *StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Course Difficulty* to create a Difficulty Level Code.
   a. Click **Add Code** or click the edit pencil to edit an existing code.
   b. Enter up to 4 digits in the **Code** field.
   c. Enter a name in the **Name** field.
   d. Enter an optional description in the **Description** field.
   e. **Is Active** should be checked.
   f. Click **Save**.

		Code	Name ▲	Description	Active
🗑	✏	CCP	CCP	CCP	🟢

☑ Show Active Only

2. Next, navigate to *StudentInformation > Management > School Administration > Marks Administration Menu > Difficulty Point Scale* to set up the levels for the *Difficulty Level* code you defined in the previous steps.
   a. Click **Add Point Value**.
   b. Choose level of difficulty code in the **Level of Difficulty** dropdown.
   c. Enter the new point value of the mark in the **Point Value** field.
   d. Select the mark from the **Mark** dropdown or select a mark group from the **Combined Mark Group.**.
   e. The following message will display and the point value will be added: **The Point Value was saved successfully.**

		Level of Difficulty ▼	Mark	Combined Mark Group	Point Value
🗑	✏	CCP	A		4.250000
🗑	✏	CCP	A+		4.500000

3. Finally, link the **Difficulty Level** to the course in the current year by going to **StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Courses** and editing the course and choosing a Level of Difficulty code from the dropdown on the Marks tab of the course.|

4. If you need to link level of difficulty scales to manually entered course history you will need to link the Level of Difficulty each individual course history record by editing each course history record. Simply editing the course record in prior years and marking the level of difficulty on the course record will not trickle down to the manual course history. Each course history record needs updated by hand or a mass update done the Database Administrator.

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | Next: 0H0031 > |

0H0030 - CP ENGLISH 9

Course Weight:	10.0000		In Honor Roll:	✔ Is Honors Course:	☐
Level of Difficulty:	CCP - CCP ▾		Include in Total Credits: ✔	Include on Permanent Record:	✔
GPA Add-on Level:	▾	Include in GPA: ✔	Print on Report Card:	✔
Credit Units:*	1.000000
Mark Bump:	▾
Rank Weight:	▾
College Credit Hours:	0.000000
CCP Location IRN:	Q
College Location:	

Appendix E-2. Use Add-on Points

Add-on points were designed to reward students for courses taken with added difficulty. Unlike calculating a GPA using difficulty points, the GPA using Add-on is calculated based off the point values in Marks Maintenance and then the add-on points are added to the resulting GPA.

How to set up an Add-on table

1. Navigate to *StudentInformation > Management > School Administration > Marks Administration Menu > Add-On Level Codes* to create the Add-on Level code.
   a. Click Add.
   b. Enter up to 4 characters in the **Code** field.
   c. Enter up to 30 characters in the **Name** field.
   d. Leave the **Is Active** box checked.
   e. Leave the **Use Credit Percentage** checkbox unchecked. It is used for the Findlay custom GPA.
   f. Click Save.

		Code ▲	Name	Active	Use Credit Percentage
🗑	✏	AP	Advanced Placement Add-On	🟢	☐

✔ Show Active Only

2. Next, navigate to *StudentInformation > Management > School Administration > Marks Administration Menu > Add-On GPA* to set up the add-on levels for the add-on code you set up in the preceding step.
   a. Click Add.
   b. Select the **Add On Level** from the dropdown.
   c. Next select a mark from the **Mark** dropdown or select a combined mark group from the **Combined Mark Group** dropdown.
   d. If the add-on level applies to only a certain grade level select the grade level from the **Student Grade Level** dropdown, otherwise leave the **Student Grade Level** field blank.
   e. Enter the additional points added to the calculated GPA in the **Additional GPA Point Value** field.
   f. Click Save.

		Add On Level	Mark ▲	Combined Mark Group	Student Grade Level	Additional GPA Point Value
🗑	✏	AP	A	A's		0.500000

3. Finally, link the *Add-on Level* to the desired courses in the current year by going to *StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Courses* and editing the course and choosing an add-on level code from the dropdown on the Marks tab of the course.

4. If you need to link add-on level scales to manually entered course history you will need to link the add-on level scale each course history record by editing each course history record. Simply editing the course record in prior years and marking the add-on level on the course record will not trickle down to the manual course history. Each student's course history record needs updated by hand or a mass update done by the Database Administrator.

Example 1: In the following example an Add-on has been linked to course OH0067 at the high school.
The 1st screen shot is the student's GPA without the add-on included.

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Cumulative GPA	Standard GPA Calculation (Alpha)	Fin	Earned	☐	☐	☑

Calculations:

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	11/11/2019 1:48 PM	50.500	15.000	3.367
Last time GPA was recalculated	11/11/2019 1:28 PM	50.500	15.000	3.367

Details:

Year	Code	Abbr	Term	Include in Total Credits	Include in GPA	Is HS Credit	Type	Mark	Crd Type	Is Earned	In GPA	Pt Val	Crd Att	Crd Earn	Crs Crd
2017-2018	090150	FRENI	FULL	✔	✔	✔	Final	B	Earned	✔	✔	3.000	1.000	1.000	1.000
2018-2019	0H0030	CP ENG 9	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000
2018-2019	0H0051	ALG. I	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000
2018-2019	0H0063	BIOLOGY	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000
2018-2019	0H0071	AM HIST	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000
2018-2019	0H0090	CONCHOIR	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2018-2019	0H0110	HEALTH	SEM2	✔	✔	✔	Final	B	Earned	✔	✔	3.000	.500	.500	.500
2018-2019	0H0151	FREN II	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2018-2019	0H0310	ART I	SEM1	✔	✔	✔	Final	A	Earned	✔	✔	4.000	.500	.500	.500
2019-2020	0H0031	ENG 10	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2019-2020	0H0055	GEOM	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2019-2020	0H0062	PHYS SCI	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2019-2020	0H0067	ANATOMY	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2019-2020	0H0070	WL ST EC	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2019-2020	0H0090	CONCHOIR	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000
2019-2020	0H0152	FREN.III	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000

Example 2: The next screen shot is of the same student but with add-on used on the GPA.

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Cumulative GPA	Standard GPA Calculation (Alpha)	Fin	Earned	☑	☐	☑

Calculations:

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	11/11/2019 1:57 PM	50.500	15.000	3.867
Last time GPA was recalculated	11/11/2019 1:57 PM	50.500	15.000	3.867

Details:

Year	Code	Abbr	Term	Include in Total Credits	Include in GPA	Is HS Credit	Type	Mark	Crd Type	Is Earned	In GPA	Pt Val	Crd Att	Crd Earn	Crs Crd	Add On
2017-2018	090150	FRENI	FULL	✔	✔	✔	Final	B	Earned	✔	✔	3.000	1.000	1.000	1.000	.000
2018-2019	0H0030	CP ENG 9	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000	.000
2018-2019	0H0051	ALG. I	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000	.000
2018-2019	0H0063	BIOLOGY	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000	.000
2018-2019	0H0071	AM HIST	FULL	✔	✔	✔	Final	C	Earned	✔	✔	2.000	1.000	1.000	1.000	.000
2018-2019	0H0090	CONCHOIR	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000
2018-2019	0H0110	HEALTH	SEM2	✔	✔	✔	Final	B	Earned	✔	✔	3.000	.500	.500	.500	.000
2018-2019	0H0151	FREN II	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000
2018-2019	0H0310	ART I	SEM1	✔	✔	✔	Final	A	Earned	✔	✔	4.000	.500	.500	.500	.000
2019-2020	0H0031	ENG 10	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000
2019-2020	0H0055	GEOM	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000
2019-2020	0H0062	PHYS SCI	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000
2019-2020	0H0067	ANATOMY	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.500
2019-2020	0H0070	WL ST EC	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000
2019-2020	0H0090	CONCHOIR	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000
2019-2020	0H0152	FREN.III	FULL	✔	✔	✔	Final	A	Earned	✔	✔	4.000	1.000	1.000	1.000	.000

Appendix E-3. Use Prorated Credit

F.Y.I.

This option applies credits based on the Credit Percentage configured for the associated Marking Pattern Rule. If using percentages on the marking pattern rules, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times value of the mark, for one-third of the mark to be included in the calculation. Total prorated credits would be used as the divisor in the calculation.

F.Y.I.

Prorated Credit should be used when granting credit prior to a Final mark, and is equivalent to the "Divided by Terms" qualifier from SIS.

Example:
If we calculate Sally's 1st Quarter GPA using the Standard Formula with Full Credit her GPA equals 3.151. (17.330 points divided by 5.5 credits)

If we calculate Sally's 1st Quarter GPA using prorated credit her GPA equals 3.222. (4.833 points divided by 1.5 credits)

Appendix F - Custom GPAs

Appendix F-1. FNDLY – Findlay Method
Appendix F-2. HNRS – Honors GPA
Appendix F-3. JKSN – Jackson Method
Appendix F-4. MTV – Mt Vernon Method
Appendix F-5. Mansfield Custom GPA

Appendix F-1. Custom GPAs - FNDLY – Findlay Method

Created for Findlay HS, a member of NOACSC, but can be used by any school.

How the Custom Findlay GPA is calculated?

At Semester time:
First, the GPA is calculated using the Standard GPA Calculation (Alpha) using prorated credit. Next, if a student has taken a honors course (which is denoted if the "Is Honors" checkbox is marked on the course) the student will receive a specified add-on amount for each honors course if the grade they receive is O, A, or B. If the course is an all year course the student will receive ½ of the add-on points since the course is still in progress. The add-on points are then added to the calculated GPA which results in Findlay's Custom GPA.

At Year End:
First, the GPA is calculated using the Standard GPA Calculation (Alpha) using prorated credit. Next, if a student has taken a honors course (which is denoted if the "Is Honors" checkbox is marked on the course) the student will receive a specified add-on amount for each honors course if the grade they receive is O, A, or B. The add-on points are then added to the GPA. Finally the student can receive a 2nd bonus based on the number of credits earned (not GPA credits) that exceeds 20 divided by 40. The 2nd add-on bonus is only used at year end.

The Custom Findlay GPA requires the following to be set up:

1. Add-on levels. See Appendix E of this document for detailed instructions on how to set up Add-on level codes.
   a. When setting up add-on levels make sure the option to **Use Credit Percentage** is checked on the Add-On Level Codes Maintenance page. The **Use Credit Percentage** option allows the Custom Findlay GPA to award partial bonus points at semester time for all year courses.
   b. Findlay has setup two different add-on levels. One level is for all year courses and is marked to use **Use Credit Percentage**. The other add-on level is for semester only courses and isn't marked to **Use Credit Percentage.**

		Code ^	Name	Active	Use Credit Percentage
✕	✏	Hon	Honors Course	💡	☑
✕	✏	HSem	Honors 0.50 Credit	💡	☐
☑ Show Active Only					

2. Next, each course that receives the bonus points needs to be marked as **Is Honors Course** and the **GPA Add-on Level** field on the course record must be filled in.
   a. If the course is manually entered **Is Honors** needs checked and the **Add On Category** must be filled in.
3. Finally, set up the GPA Set. Navigate to **StudentInformation > Management > School Administration > Course History Administration > GPA Sets**
   a. Follow the instructions in Task #2 of this Step by Step but on the 2nd tab named **Calculations** make sure **FNDLY – Findlay Method** is chosen in the **Formula** dropdown.
   b. Also, **Use Add-on Points** and **Use Prorated Credit** must also be marked.
   c. When you choose the Findlay Method in the dropdown the page refreshes and two new fields appear named **Honors Base Credit Value** and **Honors Credit Divisor**.
   d. If you are trying to get a Semester GPA put 100 in the **Honors Base Credit Value** and 40 in the **Honors Credit Divisor**.
   e. If you are calculating the GPA at year end time fill in the two fields as follows

Honors Base Credit Value	20
Honors Credit Divisor	40

   f. On the **Rank** tab the **Source** dropdown **GPA** should be chosen.

g. Click **Save**.
4. Now, recalc the GPA by clicking the **Refresh** icon.

Honors Credit Divisor – The Honors Credit Divisior is the number divided into the number of credits which exceeds the Honors Base Credit Value. Ex. A student earns 29 credits. One of the credits is a honors course. To figure the 2nd bonus add-on level at the end of year, take 29 minus 20 and divide that number by 40 to get the 2nd add-on bonus. 9/40 = .225 add-on bonus.

Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

Year End

$$GPA = \left(\frac{sum\ of\ c}{sum\ of\ b}\right) + \left(sum\ of\ f\right) + \frac{total\ credits - 20}{40}$$

$$\left(\frac{116}{29}\right) + 5.66 + \left(\frac{29.50 - 2.0}{40}\right) = 4.8035$$

GPA Set:

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Honors GPA	Findlay Method	FNL	Earned	☒	☐	☒

Calculations:

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	08/11/2008 11:40 AM	116.00000	29.00000	4.80350
Last time GPA was recalculated	08/11/2008 8:17 AM	116.00000	29.00000	4.80350

Details:

Appendix F-2. Custom GPAs - HNRS – Honors GPA

The Honors GPA awards students who are taking a heavier course load and was developed for LACA.

Example: Josh and Joel both had the same number of points (50.00) and same GPA (4.00) until Junior year. In their Junior year both students decided to take two honor courses and received the same grades in both classes but Josh decided to take on another non-honor courses. Both students have all A's. Josh now has 61.8 points and Joel has 59.8 points but Josh is receiving a lower GPA even though he took a heavier load and still got all A's. Had Josh not taken the extra non-honors course he would have had the same GPA as Joel. The following is an example of their GPA calculation using the Standard formula with difficulty points. As you can see Joel's GPA is 4.1241 and he is ranked #1 and Josh's GPA is 4.12 and he is ranked 2nd. So, Josh is being penalized for taking a heavier load than Joel.

Comparison screen shot of Joel and Joshua's GPAs using the Standard GPA Calculation. Notice Joshua is ranked 2nd even though he took a heavier load.

Student GPA & Rank List
From this screen, you can view GPA rankings.

GPA Set: Cumulative GPA   Grade Level: 11   View

Student	Grade	Rank ^	GPA	Points	Earned Credits	Attm Credits
Student60714, JOEL	11	1	4.124100	59.800000	14.500000	14.500000
Student57978, JOSHUA	11	2	4.120000	61.800000	15.000000	15.000000

If the Custom Honors formula is used the students are on a level playing field and both ranked #1.

Student GPA & Rank List
From this screen, you can view GPA rankings.

GPA Set: Honors GPA   Grade Level: 11   View

Student	Grade	Rank ^	GPA	Points	Earned Credits	Attm Credits
Student57978, JOSHUA	11	1	4.120000	62.800000	15.250000	15.250000
Student60714, JOEL	11	1	4.120000	59.800000	14.500000	14.500000

How to set up the Honor GPA:

Honor GPA Grade Level Weighting Factor

From this screen, you can add and delete Honor GPA grade level weighting factors.

Grade Level: [▾]   **Weight Factor:** [0.00] ⬍ [Add]

	Grade Level ^	Weighting Factor
✕	09	4.00
✕	10	8.00
✕	11	13.00
✕	12	18.00

[Return to GPA Set Maintenance]

GPA Set Maintenance

From this screen, you can display, add, change and delete data pertaining to GPA sets.

| General | Calculations | **Rank** |

Ranking: [< Back]

Source: [GPA ▾] ⚡   ☐ Include inactive students

Ties: [Count all students as the same ▾] ⚡   ☐ Include students with no marks

[Save]   [Save and New]   [Cancel]

Required Set up items:
1. Difficulty point scales need set up in current year and prior years.
2. Difficulty point scales need linked to all course history. Simply creating a difficulty scale in a prior year and linking the difficulty scale to the course will not automatically link the scale to the course history. A mass update will need to be performed to link the new difficulty scale to the course history.
3. Configure Honor GPA Weighting Factor table. The Honor GPA Grade Level Weighting Factor can only be reached thru the GPA Set Calculation tab when the Honors formula is chosen. The Weighting Factor is the minimum number of credits a student should have. Example: A 12th grader should have at least 18 credits according the districts policy. Weighting Factors will differ from district to district.
4. Honors courses should have the **Is Honors Course** box checked.

Honors Formula:

$$\frac{[(\text{Weighting Factor})(\text{STD GPA w/out honors courses included})] + [\text{Sum of (Each Honor Credit x Each Honor Point)}]}{\text{Weighting Factor} + \text{Total Number of Honors Credits}}$$

Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

GPA Set:

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Honors GPA	Honors GPA		Earned	☐	☒	☒

Calculations:

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	04/8/2008 1:44 PM	61.800	15.000	4.120
Last time GPA was recalculated	04/8/2008 1:44 PM	61.800	15.000	4.120

Step #1: Calculate the GPA using the Standard formula and don't include honors courses.

$$GPA = \frac{\text{sum of column C}}{\text{sum of column b}} = \frac{52}{13} = 4.0$$

Step #2: Plug the values into the Honors Formula.

$$\frac{[(13)(4.00)] + [(\,)\times 5] + (\,\times 4.8)}{13 + 2}$$

$$\frac{52 + 9.8}{15} = 4.12$$

Details:

Year	Code	Abbr	Terms	Incl in Total Credit	Incl in GPA	Is HS Credit	Type	Mark	Crd Type	Is Earned	In GPA	GPA Crd	Pt Val	Crd Att	Crd Earn	Crs Crd	Tot Pt	
2004-2005	839	A MATH 3	YEAR	✓	✓	✓	Final	A	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2005-2006	1527	ACC GEOM	YEAR	✓	✓	✓	Final	A	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2005-2006	1100	BAND	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2005-2006	1218	PBO	YEAR	✓	✓	✓	Final	A	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2005-2006	1310	WLD STUD	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2005-2006		~~PE-ENG~~	LM	✓	✓	✓	Final	B	Earned			15.000						n/a
2005-2006	613	LATIN 1	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2005-2006	711	~~PE-B~~		✓		✓	Final	B	Earned			15.000						n/a
2005-2006	410	ENG 9	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2006-2007	1537	ACCALG 2	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2006-2007	1220	BIO 1	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2006-2007	1320	US SS 10	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2006-2007	620	LATIN II	YEAR	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2006-2007	713	HEALTH	LM	✓	✓	✓	Final	A+	Earned	✓	✓	15.000	4.000	.500	.500	.500	4.000	2
2006-2007	711	~~PE-B~~		✓			Final	B	Earned			15.000						n/a
2006-2007	901	A ENG 10	YEAR	✓	✓	✓	Final	A	Earned	✓	✓	15.000	4.000	1.000	1.000	1.000	4.000	4
2007-2008	1557	AP CAL		✓	✓	✓	Final	A	Earned	✓	✓	15.000	5.000	1.000	1.000	1.000	5.000	Honors
2007-2008	240	D & P IV		✓	✓	✓	Final	A-	Earned	✓	✓	15.000	4.800	1.000	1.000	1.000	4.800	Honors
2007-2008	1721	COMB ED		✓	✓	✓	Final	A	Earned	✓	✓	15.000	4.000	.500	.500	.500	4.000	2

b = 13   Σ of C = 52

Weighting Factor = Total Number of Honors Credits

[Weighting Factor](STD GPA w/out honors courses included) + (Sum of (Each Honor Credit × Each Honor Point))

Appendix F-3. Custom GPAs - JKSN – Jackson Method.

Formerly know as Marks Bump.

Appendix F-4. Custom GPAs - MTV – Mt Vernon Method

The Mt Vernon Method takes into account that students in each grade level should have a certain number of earned credits at semester time and end of year.

Required Set up items:

GPA Minimum Credit Table which is reachable only by choosing the MTV – Mt Vernon Method from **Formula** dropdown on the **Calculations** tab of the GPA Set. Once the Mt Vernon Method formula is chosen the page will refresh and a new link named **Configure GPA Minimum Credits**.

The GPA Minimum Credits table should be set up for the required number of credits a student should have at Semester time, then when end of year comes the table will need edited and the Minimum Credit amount adjusted to reflect how many credits a student needs at the end of the year.

1. After configuring the first tab of the GPA Set named **General** click **Next** to move to the second tab named **Calculations**.
2. In the **Formula** dropdown select **MTV – Mt Vernon Method**.
3. Enter the appropriate **Precision**
4. Choose how you want StudentInformation to handle student missing marks in the **Missing Marks Handling** dropdown.
5. If you would like to **Use Difficulty Points, Use Add-on Points, Use Prorated Credit** or **Ignore Dropped Course Sections** place checkmarks in the corresponding boxes.
6. If you have any questions on what any of the options or fields do refer to Appendix E of this document.
7. The **Configure GPA Minimum Credits** link to set up the GPA Minimum Credits is grayed out until you save the GPA Set.
8. Click **Next** to move to configure the **Rank** tab.
9. Please refer to Task #2 of this checklist on the different option on the **Rank** tab.
10. Click **Save**.
11. Next, click the **Edit Pencil** to edit the GPA Set you created.
12. Click **Next** to move to the **Calculations** tab.
13. Click on the **Configure GPA Minimum Credits** link. The GPA Minimum Credits screen is only reachable by clicking on the link inside the GPA Set.
14. In the **Grade level** dropdown select a grade level.
15. Enter a credit amount in the **Minimum Credit** field.
16. Click **Add**.

17. Do these three steps for each grade level in the building.

	Grade Level ▲	MinimumCredits
🗑	09	2.50
🗑	10	7.50
🗑	11	12.50
🗑	12	17.50

18. Click **Return to GPA Set Maintenance**.
19. Click **Next** to move to the **Rank** tab and click **Save**.
20. Finally click **Refresh icon** to refresh the GPA and wait for the job to finish on your **Management** screen.

Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

GPA Set:

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Cumulative	Mt. Vernon Method	Progress 2	☐	☐	☐	

Mt. Vernon Formula

$$\frac{\text{(Total Points)} + .50\,\text{(Total Credits - Minimum Credits)}}{\text{Total Credits}}$$

Calculations:

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	04/9/2008 7:52 AM	106.705	27.000	4.128
Last time GPA was recalculated	04/7/2008 10:48 AM	106.705	27.000	4.128

Details:

(Handwritten annotations:)

$$\frac{\text{(Sum of column c)} + .5\,(\text{sum of column b} - \text{min. credits})}{\text{sum of column b}}$$

$$\frac{106.705 + .5(27 - 17.50)}{27}$$

$$\frac{106.75 + 4.75}{27}$$

$$GPA = 4.128$$

(column totals:) b = 27   C = 106.705

(Detail table of courses — small/illegible text, columns: Year, Code, Abbr, Terms, Include in Total Credit, Include in GPA, Is HS Credit, Type, Mark, Crd Type, Is Earned, In GPA, GPA Crd, Pt Val, Crd Att, Crd Earn, Crs Crd, Tot Pt)

Appendix F-5. Custom GPAs – Mansfield Custom GPA

Mansfield High School uses a custom formula to calculate Cum GPA. The Cum GPA is calculated based on all quarter marks and exam marks. Mansfield High School's quarter marks are Progress 1 and Exam are Progress 3. The Course Count formula is used but additional multipliers are set up so that each quarter grade counts as 1 and every exam grade counts as a half of a grade when figuring the GPA points and number of marks used in the divisor of the Course Count formula.

How to set up Mansfield's Custom GPA:

1. Navigate to *StudentInformation > Management > School Administration > Course History Administration > GPA Sets.*
2. On the first tab select **Progress 1** and **Progress 3** in the **Mark Credit Types** section.
3. In the **Previous Years** section mark **Progress 1** and **Progress 3** as well.
4. Select the appropriate grade levels in the **Grade Levels** section.
5. In the **Reporting Terms** filter select Qtr1, Qtr2, Qtr3, Qtr4, Exam1, and Exam 2.
6. In the **Mark Type** filter select Mark and Exam.
7. Click **Next**.
8. In the **Formula** dropdown select **CRCT – GPA by Course Count**.
9. Enter the appropriate precision and choose how you want to handle missing marks.
10. In the **Mark Types   Multipliers** enter the following

11. Note: The **Mark Types   Multipliers** section is populated based on the mark types you selected on the **General** tab in the **Mark Type** filter section.
12. Click **Next**.
13. In the **Source** dropdown select the **Mansfield Method**.
14. The **Mansfield Method** ranking method will be explained in further details in the Custom Rank section in this document.
15. Choose how you want StudentInformation to handle ties in the **Ties** dropdown
16. Click **Save**.
17. Now click the **Refresh icon** to refresh the GPA.
18. Wait for the job on your **Management** screen to complete.

Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

GPA Set:

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Cum GPA	GPA by Course Count	Qtr1,Qtr1.Ex1,Qtr3,Qtr4,Ex1	Progress 1, Progress 3	☐	☐	☐

Calculations:

Calculation	Date	Points	Course Count	GPA
GPA based on current GPA configuration	06/13/2008 1:04 PM	136.300	9	3.886
Last time GPA was recalculated	06/13/2008 11:01 AM	136.300	9	3.886

Details:

(handwritten annotations)

GPA = Sum of column a / # of marks

$$\frac{136}{35} = 3.886$$

remember: Exams count as .5 a mark

a = 136

35 marks

Appendix F-6. Custom GPAs – QP - Quality Points

The Quality Points formula takes the point value of the mark times the attempted credit amount divided by the number of marks.

Appendix G - Custom Ranks

Appendix G-1. Lake Method
Appendix G-2. Mansfield Method
Appendix G-3. Wapak Rank Method

Appendix G-1. Lake Method

The Lake Method multiplies the student's GPA using the Standard GPA formula by 25 and then adds the number of earned credits to achieve a number used to rank students. If the student has over 28 earned credits only 28 of those earned credits will be added to the GPA.

How to configure the Lake custom rank method:

1. After configuring the first tab of the GPA Set named **General** click **Next** to move to the second tab named **Calculations**.
2. In the **Formula** dropdown select **STDA – Standard GPA Calculation (Alpha)**.
3. Enter the appropriate **Precision**
4. Choose how you want StudentInformation to handle student missing marks in the **Missing Marks Handling** dropdown.
5. If you would like to **Use Difficulty Points, Use Add-on Points, Use Prorated Credit** or **Ignore Dropped Course Sections** place checkmarks in the corresponding boxes.
6. If you have any questions on what any of the options or fields do refer to Appendix E of this document.
7. Click **Next** to move to the third tab named **Rank**.
8. In the **Source** dropdown choose **Lake Method**.
9. Select how you want to handle ties from the **Ties** dropdown.
10. Enter 25 in the **Rank Multiplier** field.
11. Enter 28 in the **Maximum Credits** field.
12. Click **Save**.
13. Click the **Refresh icon** and wait for the job to finish on your **Management** screen.

Student GPA & Rank List
From this screen, you can view GPA rankings.

GPA Set: CUM   Grade Level: 12   View

Student	Grade	Rank ^	GPA	Points	Earned Credits	Attm Credits	Rank Value
Bo , Austin	12	1	4.000000	112.000000	28.000000	28.000000	128.000000
Gala , Ber	12	1	4.000000	110.000000	27.500000	27.500000	128.000000
Mokl , Laure	12	3	3.969400	107.175000	27.000000	27.000000	127.235000
Orc , Kat	12	4	3.988000	109.670000	27.500000	27.500000	127.200000
You , Al	12	5	3.927600	108.010000	27.500000	27.500000	126.190000
Dy , An	12	6	3.954300	100.835000	25.500000	25.500000	125.857500
Joes. ., Dan.	12	7	3.900900	104.350000	26.750000	26.750000	125.522500
Hea. , Pat	12	8	3.974600	103.340000	26.000000	26.000000	125.365000
Mesz , John	12	9	3.993500	100.835000	25.250000	25.250000	125.337500
Gros , An.	12	10	3.926300	106.010000	27.000000	27.000000	125.157500
Li , Nat	12	11	3.869300	108.340000	28.000000	28.000000	124.732500
Jus , Ashle	12	12	3.866000	110.180000	28.500000	28.500000	124.650000

Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

GPA Set:

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
CUR	Standard GPA Calculation (Alpha)	FIN	Earned	☐	■	■

Calculations:

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	06/12/2008 2:04 PM	110.1800	28.5000	3.8660
Last time GPA was recalculated	06/12/2008 9:30 AM	110.1800	28.5000	3.8660

Details:

	Course						Mark				Calculation Values			
Year	Code	Abbr	Terms	Include in Total Credits	Include in GPA	Is Intl Credit	Type	Mark	Crd Type	Is Earned	Is GPA	Pt Val	Crd Att	Crd Earn	Crs Crd
2004-2005	0001	Algebra		✓	✓	✓	Final	A-	Earned	✓	✓	3.6700	1.0000	1.0000	1.0000
2004-2005	0002	Ogl Over		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2004-2005	0003	English		✓	✓	✓	Final	A-	Earned	✓	✓	3.6700	1.0000	1.0000	1.0000
2004-2005	0004	Phys. Sc		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2004-2005	0005	World H		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2004-2005	0006	PE		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	.2500	.2500	.2500
2004-2005	0007	Spanish		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2004-2005	0008	Geometry		✓	✓	✓	Final	A-	Earned	✓	✓	3.6700	1.0000	1.0000	1.0000
2004-2005	0009	Choir		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2005-2006	0001	Health		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	.5000	.5000	.5000
2005-2006	0002	English		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2005-2006	0003	Biology		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2005-2006	0004	US Hist		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	.5000	.5000	.5000
2005-2006	0005	US Hist		✓	✓	✓	Final	A-	Earned	✓	✓	3.6700	.5000	.5000	.5000
2005-2006	0006	PE		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	.2500	.2500	.2500
2005-2006	0007	Spanish		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2005-2006	0008	Inc Mat		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2006-2007	0240	1 Math 4		✓	✓	✓	Final	A-	Earned	✓	✓	3.6700	1.0000	1.0000	1.0000
2006-2007	0234	Chem Hon		✓	✓	✓	Final	B+	Earned	✓	✓	3.3300	1.0000	1.0000	1.0000
2006-2007	8171	Cosmo La		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	3.0000	3.0000	3.0000
2006-2007	8172	Cosmo 1		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2006-2007	8002	Eng 3 FV		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2006-2007	8008	AM Gov F		✓	✓	✓	Final	A	Earned	✓	✓	4.0000	.5000	.5000	.5000
2006-2007	8012	Economic		✓	✓	✓	Final	A-	Earned	✓	✓	3.6700	.5000	.5000	.5000
2007-2008	G808	Cosmo2 L	AY	✓	✓	✓	Final	A	Earned	✓	✓	4.0000	3.0000	3.0000	3.0000
2007-2008	G807	Cosmo2 S	AY	✓	✓	✓	Final	A	Earned	✓	✓	4.0000	1.0000	1.0000	1.0000
2007-2008	W003	PS Math	SEM1	✓	✓	✓	Final	B	Earned	✓	✓	3.0000	.5000	.5000	.5000
2007-2008	W003	PS Math	SEM2	✓	✓	✓	Final	A	Earned	✓	✓	4.0000	.5000	.5000	.5000
2007-2008	W011	PS Aci	SEM1	✓	✓	✓	Final	A	Earned	✓	✓	4.0000	.5000	.5000	.5000
2007-2008	Z121	Eng 4 FV	AY	✓	✓	✓	Final	B	Earned	✓	✓	3.0000	1.0000	1.0000	1.0000

Handwritten annotations:

$$GPA = \frac{\text{sum of } c}{\text{sum of } b} = \frac{110.18}{28.50} = 3.866$$

$$RANK = (GPA \times \text{Rank Multiplier}) + \text{max credit amount or earned credits (whichever is lower \#)}$$

$$(3.866 \times 25) + 28 = 124.65$$

$$a \times b = c$$

b = 28.5

C = 110.18

Appendix G-2. Mansfield Method

The Mansfield rank method is used in conjunction with the Mansfield Custom GPA detailed in Appendix F-4 of this document. The Mansfield Rank method requires the set up of the Course Rank Weight Maintenance table and linked the values to the courses and course history. The rank is calculated by taking the marks point value times the rank weight.

How to set up the Mansfield Custom GPA Rank Method?

1. Navigate to *StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Course Rank Weight*.
2. Click **Add Code**.
3. In the **Code** field enter up to 4 characters.
4. Enter a name in the **Name** field.
5. Enter an optional **Description**.
6. Enter the rank multiplier in the **Multiplier** field.
7. Ensure the **Is Active** box is checked.
8. Click **Save**.

		Code	Name ▲	Description	Multiplier	Active
🗑	✏	R	1	1	1	🟢
🗑	✏	A	1.5	1.5	1.5	🟢
🗑	✏	H	2	2	2	🟢

☑ Show Active Only

9. Next ensure the rank multiplier is linked to the courses in Course Maintenance and linked to manual course history.
10. The **Rank Weight** is located on the **Marks** tab of the course or the **Course Details** of the manually entered course history record.
11. Now we are ready to calculate the GPA.
12. See Appendix F-4 on how to set up the GPA for Mansfield.
13. On the **Rank** tab choose **Mansfield Method** from the **Source** dropdown.
14. Click **Save**.
15. Next click the **Refresh icon** recalculate the GPA.
16. Wait for the job on your **Management** screen to complete.

Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

RANK = Sum of column C

GPA Set:

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Cum GPA	GPA by Course Count	Qtr1,Qtr1Ex1,Qtr3,Qtr4Ex1	Progress 1, Progress 3			

Calculations:

Calculation	Date	Points	Course Count	GPA
GPA based on current GPA configuration	06/16/2008 11:31 AM	136.000	9	3.806
Last time GPA was recalculated	06/13/2008 11:31 AM	136.000	9	3.806

Details:

	Course						Mark				Calculation Values			a×b = rank weight	= C rank points
Year	Code	Abbr	Term				Type	Mark	Crd Type	Is Earned	In GPA	a Pt Val	Crd Earn	Crs Crd		
2007-2008	1910	SPAN I	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	1.5	6
2007-2008	1910	SPAN I	Full	✓	✓	✓	Exam	A	Progress 3	✓	✓	2.000	1.000	1.000	1.5	3
2007-2008	1910	SPAN I	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	1.5	6
2007-2008	1910	SPAN I	Full	✓	✓	✓	Exam	A+	Progress 3	✓	✓	2.000	1.000	1.000	1.5	3
2007-2008	1910	SPAN I	Full	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	1.000	1.000	1.5	6
2007-2008	1910	SPAN I	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	1.8	
2007-2008	2080	GIRL PE	Sem1	✓	✓	✓	Mark	A-	Progress 1	✓	✓	3.700	.250	.250	1	3.7
2007-2008	2080	GIRL PE	Sem1	✓	✓	✓	Exam	B	Progress 3	✓	✓	3.000	.250	.250	1	1.5
2007-2008	2080	GIRL PE	Sem1	✓	✓	✓	Mark	B-	Progress 1	✓	✓	2.700	.250	.250	1	2.7
2007-2008	2130	HEALTH	Sem2	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	.500	.500	1	4
2007-2008	2130	HEALTH	Sem2	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	.500	.500	1	2
2007-2008	2130	HEALTH	Sem2	✓	✓	✓	Exam	A	Progress 3	✓	✓	2.000	.500	.500	1	4
2007-2008	3180	H ENG 9	Full	✓	✓	✓	Exam	A+	Progress 3	✓	✓	2.000	1.000	1.000	2	4
2007-2008	3180	H ENG 9	Full	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	3180	H ENG 9	Full	✓	✓	✓	Exam	A	Progress 3	✓	✓	2.000	1.000	1.000	2	4
2007-2008	3180	H ENG 9	Full	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	3180	H ENG 9	Full	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	3180	H ENG 9	Full	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	4000	W HIST A	Sem1	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	.500	.500	1.5	6
2007-2008	4000	W HIST A	Sem1	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	.500	.500	1.5	6
2007-2008	4000	W HIST A	Sem1	✓	✓	✓	Exam	A+	Progress 3	✓	✓	2.000	.500	.500	1.5	3
2007-2008	4040	W HIST B	Sem2	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	.500	.500	1.5	6
2007-2008	4040	W HIST B	Sem2	✓	✓	✓	Exam	A+	Progress 3	✓	✓	2.000	.500	.500	1.5	3
2007-2008	4040	W HIST B	Sem2	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	.500	.500	1.5	6
2007-2008	5460	H GEOM	Full	✓	✓	✓	Exam	A+	Progress 3	✓	✓	2.000	1.000	1.000	2	4
2007-2008	5460	H GEOM	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	2	4
2007-2008	5460	H GEOM	Full	✓	✓	✓	Mark	A-	Progress 1	✓	✓	3.700	1.000	1.000	2	7.4
2007-2008	5460	H GEOM	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	5460	H GEOM	Full	✓	✓	✓	Exam	A	Progress 3	✓	✓	2.000	1.000	1.000	2	4
2007-2008	5460	H GEOM	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	6790	PHD HEAL	Full	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	1.000	1.000	1	4
2007-2008	6790	PHD HEAL	Full	✓	✓	✓	Mark	A+	Progress 1	✓	✓	4.000	1.000	1.000	1	4
2007-2008	6790	PHD HEAL	Full	✓	✓	✓	Exam	A+	Progress 3	✓	✓	2.000	1.000	1.000	1	2
2007-2008	6790	PHD HEAL	Full	✓	✓	✓	Exam	A-	Progress 3	✓	✓	1.850	1.000	1.000	1	1.85
2007-2008	6790	PHD HEAL	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	1	4
2007-2008	6790	PHD HEAL	Full	✓	✓	✓	Mark	B+	Progress 1	✓	✓	3.300	1.000	1.000	1	3.3
2007-2008	7180	H BIOL	Full	✓	✓	✓	Exam	A+	Progress 3	✓	✓	2.000	1.000	1.000	2	4
2007-2008	7180	H BIOL	Full	✓	✓	✓	Mark	A-	Progress 1	✓	✓	3.700	1.000	1.000	2	7.4
2007-2008	7180	H BIOL	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	7180	H BIOL	Full	✓	✓	✓	Mark	A-	Progress 1	✓	✓	3.700	1.000	1.000	2	7.4
2007-2008	7180	H BIOL	Full	✓	✓	✓	Mark	A	Progress 1	✓	✓	4.000	1.000	1.000	2	8
2007-2008	7180	H BIOL	Full	✓	✓	✓	Exam	A-	Progress 3	✓	✓	1.850	1.000	1.000	2	3.7

(214.95)

Appendix G-3. Wapak Rank Method

The Wapak Custom Rank method takes into account the number of honor courses the student is taking, the student's max ACT or Plan Composite score and their total credits. Honors courses must have the **Is Honors Course** box checked on the course record in order to be included in the rank calculation. Wapak chooses the **STDA – Standard GPA Calculation (Alpha)** from the **Formula** dropdown on the **Calculations** tab of the GPA Set and chooses **WAPAK Method** rank method in the **Source** dropdown on the **Rank** tab.

Student GPA & Rank List
From this screen, you can view GPA rankings.

GPA Set: Custom Ranking   Grade Level: 12   View

$$RANK = 10\left[\left(\frac{5}{4}\right)(GPA) + \frac{.25}{15}\left(\begin{array}{c}\#\ of\\honors\\courses\end{array}\right) + \frac{.15}{36}\left(\begin{array}{c}Max\\ACT\ or\\Plan\end{array}\right) + \frac{.1}{28}\left(\begin{array}{c}total\\earned\\credits\end{array}\right)\right]$$

$$10[.4165 + .2000 + .125 + .126574]$$

$$= 9.500714$$

Student	Grade	Rank ^	GPA	Points	Earned Credits	Attm Credits	Rank Value
BROW . ZAC	12	1	3.972000	141.000000	35.500000	35.500000	9.500714
KROC , KAIT	12	2	3.975000	107.330000	27.000000	27.000000	9.409226
MA , KYLE	12	3	4.000000	108.000000	27.000000	27.000000	9.357143
BUR , BRIAN	12	4	3.989000	115.670000	29.000000	29.000000	9.331488
MCCLIN , KYLE	12	5	4.000000	108.000000	27.000000	27.000000	9.315476
HER , DAVID	12	6	3.929000	110.010000	28.000000	28.000000	9.220774

Appendix H – Flag Settings

Scenario	Is High School Credit	Include in Total Credits	Include in GPA	Outcome
High School course marked as:	Yes	Yes	Yes	Course will be included in total HS credits and will be included in the HS GPA.
High School course marked as:	Yes	Yes	No	Course will be included in total HS credits but not the HS GPA.
High School course marked as:	Yes	No	Yes	Course will be included in HS GPA but not total HS credits.
High School course marked as:	Yes	No	No	Course will not be included in either the HS GPA or total HS credits.
High School course marked as:	No	Yes	Yes	Course will not be included in either the HS GPA or total HS credits.
High School course marked as:	No	No	No	Course will not be included in either the HS GPA or total HS credits.

Scenario	Is High School Credit	Include in Total Credits	Include in GPA	Outcome
Middle School course marked as:	Yes	Yes	Yes	Course will be included in the student's MS total credits and HS total credits, as well as the MS and HS GPA.
Middle School course marked as:	Yes	Yes	No	Course will be included in the student's MS and HS total credits, but not included in either the MS or HS GPA.
Middle School course marked as:	Yes	No	Yes	Course will not be included in the student's MS or HS total credit, but the course will be included in the MS and HS GPA.
Middle School course marked as:	No	Yes	Yes	Course will only be included in the student's MS total credits and MS GPA, not the student's HS GPA or credits.

Middle School course marked as:	No	No	Yes	Course will only be included in the student's MS GPA, not in the student's MS total credit, HS total credit, or HS GPA.
Middle School course marked as:	No	Yes	No	Course will only be included in the student's MS total credit, not in the student's MS GPA, HS GPA, or HS total credits.
Middle School course marked as:	No	No	No	Course will not be included in MS or HS credit nor in the MS or HS GPA.

Appendix I – Full Credit versus Prorated Credit Flags

In the following example the course is worth 1.0 credit and the GPA is calculated by using 1st sem avg marks

Option used:	Courses on Student Marks page	Courses in Manual Course History
Use Manual Course History Mark Credit Detail	Full credit amount it used (1.00)	Attempted credit amount on tab2 of cohi is used (partial credit) (.50)
Use Manual Course History Course Credit	Full credit amount is used (1.00)	Attempted credit amount on tab1 is used (full credit) (1.00)
Use Prorated Credit	Partial credit amount is used – gpa looks at credit % (.50)	Attempted credit amount on tab2 of cohi is used (partial credit) (.50)

Graduation/Eligibility Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
3/3/21	Task #6 and 10	Update regarding numeric miscellaneous values
4/14/20	Entire document	Review and update
1/22/20	Entire document	Review and update
3/1/19	Entire document	General updates - screenshots

Table of Contents

Task #1: Verify Departments

If you plan to use Department requirements, verify that you have Department codes defined correctly in the current year **and** in any previous years being evaluated for graduation/eligibility. To have consistent eligibility requirements, your Department codes must match between all years being evaluated, and on all student course history.

NOTE: The Department field is not available on manual course history records.

Course Department Maintenance

From this screen, you can display, add, change and delete Course Department codes.

		Code	Name ▲	Description	Active
🗑	✏	ART	ART	ART	🟢
🗑	✏	AIN	ART/IND. ARTS	ART/IND. ARTS	🟢
🗑	✏	BUS	BUSINESS	BUSINESS	🟢
🗑	✏	FLG	FORGN. LANGUAGE	FORGN. LANGUAGE	🟢
🗑	✏	HME	HOME ECONOMICS	HOME ECONOMICS	🟢

Task #2: Verify Subject Areas

If you plan to use Subject Area requirements, verify that you have Subject Area codes defined correctly in the current year **and** in any previous years being evaluated for graduation/eligibility. To have consistent eligibility requirements, your Subject Area codes must match between all years being evaluated, and on all student course history.

Navigation: StudentInformation – Management – School Administration – Scheduling Administration – Course Maintenance – Course Subject Area

Course Subject Area Maintenance

From this screen, you can display, add, change and delete Course Subject Area codes.

Add Code					
		Code	**Name ▲**	**Description**	**Active**
🗑	✏	ALII	ALGEBRA II	ALGEBRA II OR EQUIVILANT	🟢
🗑	✏	BUS	BUSINESS	BUSINESS	🟢
🗑	✏	CTA	CAREER/TECHNICAL (VOCATIONAL)	VOCATIONAL CAREER/TECH UNITS	🟢
🗑	✏	HEC	FAMILY & CONSUMER SCIENCES	FAMILY & CONSUMER SCIENCES	🟢

Task #3: Verify Areas of Study

If you plan to use Area of Study requirements, verify that you have Area of Study codes defined correctly in the current year **and** in any previous years being evaluated for graduation/eligibility. To have consistent eligibility requirements, your Area of Study codes must match between all years being evaluated, and on all student course history.

Navigation: StudentInformation – Management – School Administration – Scheduling Administration – Course Maintenance – Course Area of Study

Course Area Of Study Maintenance

From this screen, you can display, add, change and delete Course Area of Study codes.

Add Code					
		Code	**Name ▲**	**Description**	**Active**
🗑	✏	ELE	ELECTIVES	ELECTIVES	🟢
🗑	✏	ENG	ENGLISH	ENGLISH	🟢
🗑	✏	HEA	HEALTH	HEALTH	🟢
🗑	✏	MTH	MATH	MATH	🟢

Task #4: Verify EMIS CORE Subject Area

Any course that is Report to EMIS and marked as **Is High School Credit** is required to have a CORE Subject Area filled in.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | **EMIS** | Pre/Co-requisites |

0005 - ENGLISH 9

EMIS Location IRN: [ ] 🔍 (Only required if different from the current building, optional if same as current building)

EMIS Location Description:* [ ] (Only required if EMIS Location IRN = '999999')

EMIS Staff Provider IRN:* [******] 🔍

EMIS Course Level:* [* - Not applicable ▾]

EMIS Subject Code: [050160 - Integrated English Language Arts I ▾]

EMIS Subject Area for Credit:* [ENG - English Credit ▾]

EMIS Language Used:* [E - English (Default) ▾]

CORE Subject Area: [ENG - English Language Arts Units ▾]

End Of Course Assessment Area: [ELA1 - English Language Arts 1 ▾]

CTE College Credit:* [N ▾]

Manually Entered Course

From this screen, you can display, add, change and delete data pertaining to manually entered courses.

School Year of Manually Entered Course: [2019-2020 ▾]

| Course Details | Student Marks |

Select a course from the school year selected to auto populate the fields:

Course: [ ] [...] [Auto Populate]

Code:* [ ]   **Subject Area:** [▾]

Abbreviation:* [ ]   **Area of Study:** [▾]

Short Name:* [ ]   **Level of Difficulty:** [▾]

Name:* [ ]   **Add On Category:** [▾]

Section: [ ]   **Hours of Instruction:** [ ]

Transfer Code: [▾]   **Attempted Credits:*** [ ]

Date Completed: [ ] 📅   **Mark Bump:** [▾]

Ratio Denominator: [100]   **Rank Weight:** [▾]

College Credit Hours: [ ] ℹ️ Only required if the course is for college credit

Grade Level:* [11 - 11 ▾] ℹ️ This is the student's grade level from the student profile for the selected school year

Teacher Name: [ ]

Course Description: [ ]

Credit Flex: [N - The course is not a Credit Flexibility Course ▾]

EMIS Subject Code: [▾]

EMIS Subject Area for Credit: [▾]

CORE Subject Area:* [▾] (Only required when Is High School Credit is checked)

End Of Course Assessment Area: [▾]

Task #5: Verify Courses

Verify that the Department, Area of Study, Subject Area, CORE Subject Area and Include in Graduation/Eligibility is correct on all courses.

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites |

0005 - ENGLISH 9

Department: LGA - LANGUAGE ARTS

Course Type:* C - Class

Area Of Study: ENG - ENGLISH

Language Code:

Subject Area: English   In Graduation / Eligibility: ☑

From this screen you can display or change information regarding courses

| General | Marks | Miscellaneous | EMIS | Pre/Co-requisites |

0005 - ENGLISH 9

EMIS Location IRN: 🔍 (Only required if different from the current building, optional if same as current building)

EMIS Location Description:* (Only required if EMIS Location IRN = '999999')

EMIS Staff Provider IRN:* ****** 🔍

EMIS Course Level:* * - Not applicable

EMIS Subject Code: 050160 - Integrated English Language Arts I

EMIS Subject Area for Credit:* ENG - English Credit

EMIS Language Used:* E - English (Default)

CORE Subject Area: ENG - English Language Arts Units

The ***Course Curriculum (CRSE)*** report allows you to select up to ten customized fields which will help you verify which courses are marked as In Graduation / Eligibilty.

Task #6: Define Miscellaneous Items
You can define Miscellaneous Items as either Numeric (graduation requirements will ask for an exact value) or True/False (you can define the graduation requirement for either true or false). You can define Miscellaneous Items at either the building level or at the district level for all buildings in the district to use (but not edit or delete).

Navigation: StudentInformation – Management – School Administration – Graduation / Eligibility – Miscellaneous Items

Graduation / Eligibility Miscellaneous Items

From this screen users can view / edit / and delete graduation / eligibility miscellaneous items.

[Add Item]

		Code ▲	Name	Description	Data Type	Active
🗑	✏	PORT	Senior Portfolio	Senior Portfolio	True/False	🟢

☑ Show Active Only

Task #7: Create Rule(s)
You can create Graduation/Eligibility Rules at the district level or at the building level. If created at the district level, rules must be fully set up at the district level, and all buildings in the district using that Rule must have identical Area of Study and Subject Area codes, if those codes are used.

Navigation: StudentInformation – Management – School Administration – Graduation / Eligibility – Rule Maintenance

Graduation / Eligibility Rule Maintenance

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

[Add Rule]

				Code ▲	Name	Description	Is Active
🗑	✏	🔧	⎘	2013CORE	2013 Grad CORE Requirements		🟢
🗑	✏	🔧	⎘	2014CORE	2014 & Beyond CORE Requirements		🟢
🗑	✏	🔧	⎘	2014EO	Earned Only Credit		🟢
🗑	✏	🔧	⎘	CRED	Credits		🟢
🗑	✏	🔧	⎘	EMIS	ODE/EMIS CORE Credit Check		🟢

☑ Show Active Only 🔧 Setup Rule ⎘ Copy Rule

The General tab contains the Rule's code, name, description, and the text that will appear on grade cards if the Rule is met or not met.

Graduation / Eligibility Rule Maintenance

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

| General | Maximum Credit Groups | Total CORE Credits Line Item Options | < Prev: CRED |

Code:*   EMIS

Name:*   ODE/EMIS CORE Credit Check

Description: ODE/EMIS CORE Credit Check

Meets requirements text: Student has met the requirements for graduation.

Does not meet requirements text: Student has not met the requirements for graduation.

IsActive: ✓

[Save] [Cancel] [Go to setup]

The Maximum Credit Groups tab is currently not functional.

The Total CORE Credits Line Item Options tab only works with line items that are Total CORE Credits.

Graduation / Eligibility Rule Maintenance

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

| General | Maximum Credit Groups | Total CORE Credits Line Item Options | < Prev: CRED |

Rule Selection

CORE Overflow Rule:*   ODE/EMIS CORE OVERFLOW RULE ∨   ⓘ Overflow rule to apply to credit selection. ⓘ This tab only works in conjunction with Total CORE Credits Line Items

Credit Selection

Include Current Courses: ✓   ⓘ Include credit for courses in progress.

Missing Marks Handling: Project Pass ∨   ⓘ How to handle missing marks in current courses.

Include Current Requests: ☐   ⓘ Include credit for requested courses.

High school credit only: ✓   ⓘ Include only courses that have been marked as Is High School Credit.

[Save] [Cancel] [Go to setup]

Task #8: Define CORE Overflow if using Total CORE Credit Line Items

CORE Overflow rules only work with Total CORE Credit line items.

Core Overflow

From this screen, you can manage school core overflow values and settings.

		Name
🗑	✏	ODE/EMIS CORE OVERFLOW RULE
🗑	✏	2013CORE OVERFLOW
🗑	✏	2014CORE OVERFLOW

Add New Overflow

Overflow Name: * ODE/EMIS CORE OVERFLOW ×

Core Subject Area	Core Required Value	Subject Area Overflow
BUS	0.00 *	*** ⌄
CTA	0.00 *	*** ⌄
ELE	5.00 *	*** ⌄
ENG	4.00 *	*** ⌄
FAR	0.00 *	*** ⌄
FLR	0.00 *	*** ⌄
HEC	0.00 *	*** ⌄
HTH	0.50 *	*** ⌄
JTC	0.00 *	*** ⌄
MTA	1.00 *	*** ⌄
MTO	3.00 *	*** ⌄
PHE	0.50 *	*** ⌄
SCA	1.00 *	*** ⌄
SCL	1.00 *	*** ⌄
SCO	0.00 *	*** ⌄
SCP	1.00 *	*** ⌄
SOG	0.50 *	*** ⌄
SOH	0.50 *	*** ⌄
SOO	2.00 *	*** ⌄
TEC	0.00 *	*** ⌄

20 Records Displayed   Back To Top

Save

Task #9: Set Up Rule
For each Rule, either click the **Setup Rule wrench** icon, or click the **Go to setup** button while adding or editing the Rule.

Navigation: StudentInformation – Management – School Administration – Graduation / Eligibility – Rule Maintenance

The left pane lists the Line Items included in this Rule. Add Line Items with the **Add Line Item** button, which will open the **Add Line Item** pane to the right.

Task #10: Set Up Line Items

For each Line Item, click the **Setup Line Item wrench** icon. Line Item Elements are listed in the order they are created. You can arrange Line Item Elements in groups using the **And** and **Or** operators, the Indent/Outdent arrows or the)(Split Group operator. Line Item Elements connected with **And** require all Elements to pass for the student to pass the Line Item. Line Item Elements connected with **Or** will pass the Line Item for the student if either Element is passed. Indented Line Item Elements are considered part of the Element above the indentation for purposes of operators, and can have their own operators and indentation. By using the Split Group operator, you cause the group to be split into two groups.

Assessment Element: Select Assessment Type and Part if applicable, and enter a Minimum Score, if desired. If no Minimum Score is entered, the assessment part's default minimum score will be used to determine if the Element passes or not.

Line Item:OGT

					Element
✏	🗑		↓	→	Assessment [OGT - MATH] Default minimum score
✏	🗑	↑	↓	→	And Assessment [OGT - READ] Default minimum score
✏	🗑	↑	↓	→	And Assessment [OGT - SSC] Default minimum score
✏	🗑	↑	↓	→	And Assessment [OGT - SCI] Default minimum score
✏	🗑	↑		→	And Assessment [OGT - WRI] Default minimum score

↑ Move Up ↓ Move Down ← Outdent → Indent) (Split Group / Start New Group
Std: Areas of Study **IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:** High School credit courses only

[Select type to add] ▾ Add Element   Close

Community Service Element requirements refer to the SIS – Student – Community Service page, totaling all hours marked as **Include In Graduation / Eligibility.**

Line Item:Community Service

				Element
✏	🗑		→	Community Service >= 10

↑ Move Up ↓ Move Down ← Outdent → Indent) (Split Group / Start New Group
Std: Areas of Study **IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:** High School credit courses only

Community Service ▾ Add Element   Close

Course Element may be checked to include currently-assigned courses, and to include currently-requested courses.

Note: The Eligibility will include requests from future years as well as the current year, as long as **Include Current Requests** is specified and the year (current or future) has no finalized schedule result.

Line Item:Health					Element
✏	🗑			➡	Course [Health] required. IC IR

⬆ Move Up ⬇ Move Down ⬅ Outdent ➡ Indent) (Split Group / Start New Group
Std: Areas of Study**IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:**High School credit courses only

Course ⌄ | **Add Element** | Close

Exemption Element reflects the 3 FN Exemptions on the FN-Graduate tab of the profile. Exemption line items can be used in conjunction with Total CORE Credits line items.

Line Item:Fine Arts					Element
✏	🗑		⬇	➡	Total Core Credits >= 1 CoreStd[FAR] IC MM-Pass HS
✏	🗑	⬆		➡	Or [Exemption From Fine Arts] = True

⬆ Move Up ⬇ Move Down ⬅ Outdent ➡ Indent) (Split Group / Start New Group
Std: Areas of Study**IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:**High School credit courses only

Course ⌄ | **Add Element** | Close

GPA Element must have a minimum GPA, and can be restricted to a specific GPA Set.

Line Item:GPA					
					Element
✏	🗑			➡	GPA [CUM] >= 3.0

⬆ Move Up ⬇ Move Down ⬅ Outdent ➡ Indent) (Split Group / Start New Group
Std: Areas of Study**IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:**High School credit courses only

| GPA ▾ | **Add Element** | Close |

Miscellaneous (true/false) Element must have True or False selected. If **True**, the Line Item passes if the student has that Miscellaneous Item marked **True**. If **False**, the Line Item passes if the student has that Miscellaneous Item marked **False**. Handle missing values option is also set for students that have no value for the miscellaneous item.

Miscellaneous (numeric) Element must have a value entered. The Line Item passes if the student has a value equal to the value marked for that Miscellaneous Item. Handle missing values option is also entered for students that have no value for the miscellaneous item.

Line Item:MISC ITEM					
					Element
✏	🗑		⬇	➡	Miscellaneous Item [MEET] required value 2
✏	🗑	⬆		➡	And Miscellaneous Item [PORT] required value True

⬆ Move Up ⬇ Move Down ⬅ Outdent ➡ Indent) (Split Group / Start New Group
Std: Areas of Study**IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:**High School credit courses only

| Miscellaneous ▾ | **Add Element** | Close |

Total Credits Element must have a minimum credit total entered, and may be checked to include currently-assigned courses, to include currently-requested courses, and/or to include High School credit only courses. If Areas of Study, Subject Areas, and Departments are left blank, the Element will count all courses. If Areas of Study, Subject Areas, or Departments are entered, the Element will only count courses in the entered Areas of Study, Subject Areas, or Departments. If specific Areas of Study, Subject Area, and Department requirements are intended, it is recommended that Areas of Study be included in one Line Item, and Subject Areas in a different Line Item, and Departments in a third Line Item.

Note: The Eligibility will include requests from future years as well as the current year, as long as **Include Current Requests** is specified and the year (current or future) has no finalized schedule result.

Line Item:Total Credits					Element
✏	🗑			➡	Total Credits >= 20 Sub [CCP,CTA,ELE,ENG,FAR,FLR,MTA,NCC,SCA,SCI,SS,TEC] IC MM-Pass HS

⬆ Move Up ⬇ Move Down ⬅ Outdent ➡ Indent) (Split Group / Start New Group
Std: Areas of Study **IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:** High School credit courses only

[Total Credits ⌄] [Add Element] [Close]

Total CORE Credit Element must have a minimum credit total entered and at least one CORE Subject Area selected. The Total CORE Credit line items only work in conjunction with the CORE Overflow tab.

Line Item:Math					Element
✏	🗑		⬇	➡	Total Core Credits >= 3 CoreStd[MTO] IC MM-Pass HS
✏	🗑	⬆		➡	And Total Core Credits >= 1 CoreStd[MTA] IC MM-Pass HS

⬆ Move Up ⬇ Move Down ⬅ Outdent ➡ Indent) (Split Group / Start New Group
Std: Areas of Study **IC:** Include current courses
Sub: Subject Areas **IR:** Include requests
Dept: Departments **HS:** High School credit courses only

[Total Credits ⌄] [Add Element] [Close]

Task #11: Eligibility Rule Assignments

The Eligibility Rule Assignments page can be used to search for students missing primary and/or secondary rules, or with a specified rule or grade level. Selected students can then be bulk assigned primary or secondary rules with a choice of overriding existing rules.

Navigation: StudentInformation – SIS – Graduation / Eligibility – Eligibility Rule Assignments

Eligibility Rule Assignments
From this screen, you can manage student eligibility rule assignments.

Ad-hoc Membership: ☐ [...] ☐ Public and Private

Grade Level: ☐   Active Students Only: ☑

Primary Rule: ☐   Secondary Rule: ☐ [Search]

Fill out the search criteria and click **Search** to display students meeting that criteria.

Eligibility Rule Assignments
From this screen, you can manage student eligibility rule assignments.

Mass Update Options: [New Search]

Primary Rule: ☐   ☐ Override current primary rule

Secondary Rule: ☐   ☐ Override current secondary rule [Update Selected]

Search Results:

	Number	Student	Grade Level ▲	Primary Rule	Secondary Rule
☐	701007015	ADKINS, ASHLEY	10		
☐	17127	BAIRD, HERMAN	10		
☐	11394	BARKER, DEREK	10		
☐	11027	BASS, SHELLY	10		
☐	701016909	BECKER, KATHERINE	10		

Enter the Mass Update Options. Clicking the Override checkbox will override the specified rule with the new Mass Update Option rule that was selected.

Select the students to be updated by checking the checkbox beside their Student Number in the Search Results grid. All students can be selected/de-selected by checking the check box beside the Number column header.

Click **Update Selected** to update the selected (checked) students with the selected Mass Update Options. The screen will refresh and display the new Primary and Secondary Rule.

Task #12: Student Profile Bulk Update
Update the Primary Graduation Rule or Alternate Graduate Rule of selected students via the Student Profile Bulk Update.

Navigation: StudentInformation – Management – Ad-Hoc Updates – Student Profile Bulk Update

Student Profile Bulk Update
Make bulk updates to students' profiles

Selected ad hoc membership: 12th graders Madison HS
Number of students in selected ad hoc membership: **12**

| Select ad hoc | Student record | Annual record | FS-Standing & FD-Attributes-Effective Date | FN-Attributes-No Date | FN-Graduate | Review updates |

ℹ Select the checkbox next to the field(s) you wish to edit.
If a checkbox is selected and the value left blank, any existing value(s) in the field(s) are cleared from student profiles unless they are otherwise noted as required.

[< Back] [Next >]

Citizenship:
Country of Origin:
Native Language:
Home Language:
Local Ethnic Category:

Pri. Graduation Rule:
Alt. Graduation Rule:
Building Progression Track:
Birthdate Verified With:
Requires Paper Copy of Report Card:

ℹ Hispanic/Latino and Racial Group(s) can only be bulk updated as a group, not individually.

Task #13: Student Profile Update – Additional tab
Update the Primary Graduation Rule or Alternate Graduate Rule of a selected student via the Student Profile – Additional tab.

Navigation: StudentInformation – SIS – Student – Edit Profile

Edit Student Profile
From this screen, you can display and change information regarding a students profile.

| General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | FN-Graduate | Transportation |

[Save] [Cancel]

Last Modified: 03/1/2019 2:49 PM by User: amy

Primary Building:*   MADISON HIGH SCHOOL
Special Ed: 0   Country of Origin:
Citizenship: 04 - United States citizen

Building Progression Track: HS - Hs   Graduation Year:
New School: MADISON HIGH SCHOOL

Pri. Graduation Rule: Alt. Graduation Rule:
Counselor: -- Select Counselor --   Scheduling Priority: 5

☑ Show grade appropriate counselors only   Locker Assignments: [Assign Primary Locker]

Team: Homeroom: [View / Assign Homeroom]

Include in Honor Roll: ☑   Flags: 1 2 3 4 5

Include in Ranking: ☑
Include in GPA: ☑
Requires Paper Copy of Report Card:

Task #14: Review Building Grade Level defaults
Primary and Alternate Graduation Rules can be defaulted by grade level.

Building Grade Levels Maintenance

From this screen, you can display, add, change and delete data pertaining to building grade levels.

Grade Level:*   09 - 09 ▾

Grade Specific Registration Default Data

Counselor:	-- Select Counselor -- ▾
Scheduling Priority:	1 ▾
Include in Honor Roll:	Yes ▾
Include in Ranking:	Yes ▾
Include in GPA:	Yes ▾
Pri. Graduation Rule:	▾
Alt. Graduation Rule:	▾
Expected Graduation Date:	📅

[Save] [Cancel]

Task #15: Set Student Miscellaneous Values
If you are using Miscellaneous Items for graduation requirements, you will need to set values for those Items for each student. Select from drop-down menus or enter numeric values, and click **Save** to save those values for that student. The trash can icon clears that Item's value for that student (though you still have to click "Save" to save the cleared value).

Graduation / Eligibility Miscellaneous Values

Users can view / edit / delete student graduation / eligibility miscellaneous items from this screen.

	Code	Name	Value
🗑	MEET	Meet with Counselor	2
🗑	PORT	Senior Portfolio	True ▾

[Save]

Task #16: Enter Student Community Service

If you are using Community Service for graduation requirements, you will need to enter community service. For Community Service hours to count towards graduation/eligibility rules, make sure to check the **Include in Graduation / Eligibility** checkbox.

Navigation: StudentInformation – SIS – Student – Community Service

Student Community Service Hours

From this screen, you can display, add, change and delete data pertaining to a student's community service hours.

Add Hours		School Year	Date Served	Description	Is Grad. (Hours)	Hours
		2016 - 2017			(5.00)	5.00
🗑	✏	2016-2017	08/01/2016	volunteer	✔	5.00

Task #17: Enter Exemptions on FN-Graduate tab

If you are using Exemptions in Graduation Eligibility line items, you will need to ensure the FN Exemptions are filled out on the student's FN-Graduate tab of their profile.

Navigation: StudentInformation – SIS – Student – Edit Profile

Edit Student Profile

From this screen, you can display and change information regarding a students profile.

| General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | **FN-Graduate** | Transportation |

Save   Cancel

Last Modified: 03/1/2019 2:57 PM by User: amy

CORE Economics and Financial Literacy Requirement Met:	N - District has not determined this student met requirement ⌄
CORE Fine Arts Requirement Met:	N - District has not determined this student met requirement ⌄
CORE Graduation Requirement Exemption:	* - Student has not opted out of Ohio Core requirements (default) ⌄
CORE Graduation Requirement Exemption Date:	📅
CORE Graduation Requirement Met:	☐
Exempted from Physical Education Graduation Requirement:	N - District not adopted policy or student has not met all of policy re ⌄
Expected Graduation Date:	📅 (Leave blank to use Grade Level default value: NOT SET)
Graduation Date:	📅
Diploma Type:	* - Not Applicable ⌄
OGT Graduation Alternative:	0 - Not Used ⌄
Military Compact Graduation Alternative:	0 - Student is not using the military compact alternative ⌄
Proficient Foreign Languages:	(European) Portuguese / Afrikaans / Akan-Twi / Albanian

Task #18: Student Eligibility Details
This screen allows the user to run Eligibility Rules on the fly and to view the details behind the eligibility rules for a selected student. This screen displays details for Eligibility, Assessment, Course Section Assignments, Community Service, Course History, GPA History, Miscellaneous Eligibility, and Course Requests by clicking on the appropriate link.

Navigation: StudentInformation – SIS – Student – Graduation / Eligibility – Student Eligibility Details

Eligibility Rule - DONOVAN, PEDRO Jr.

This screen allows you to review student eligibility details

| **Std:** Areas of Study | **Sub:** Subject Areas | **Dept:** Departments |
| **IR:** Include requests | **IC:** Include current courses | **HS:** High School credit courses only |

| Eligibility | Assessments | Assignments | Community | Crs History | GPA History | Misc Elig | Requests |

Description	Student	Required	Result
Rule: 2014 & Beyond CORE Requirements			Not Met
Line Item: Phys Ed			-
Total Core Credits >= 0.5 CoreStd[PHE] IC MM-Pass HS	.25	.50	-
Or [Exemption From PE] = True	False	True	-
Line Item: Math			Met
Total Core Credits >= 3 CoreStd[MTO] IC MM-Pass HS	3.00	3.00	Met
And Total Core Credits >= 1 CoreStd[MTA] IC MM-Pass HS	1.00	1.00	Met
Line Item: OGT			Met
Assessment [OGT - MATH] Default minimum score	Pass	Pass	Met
And Assessment [OGT - READ] Default minimum score	Pass	Pass	Met
And Assessment [OGT - SSC] Default minimum score	Pass	Pass	Met
And Assessment [OGT - SCI] Default minimum score	Pass	Pass	Met
And Assessment [OGT - WRI] Default minimum score	Pass	Pass	Met

Assessments

Testing Date	Test	Part	Test Type	Raw Score	Scaled Score	Reported Score	Passing	Building IRN
03/2015	OGT	MATH	STR	460	552.00	552	✔	001701
03/2015	OGT	READ	STR	360	442.00	442	✔	001701
03/2015	OGT	SCI	STR	405	457.00	457	✔	001701
03/2015	OGT	SSC	STR	395	455.00	455	✔	001701
03/2015	OGT	WRI	STR	350	429.00	429	✔	001701

Course Section Assignments

Total Assigned Course Credits:6.00   Total Earned Course Credits:0.00   Total Credits Remaining To Be Earned:6.00

Code	Course	Area Std	Subj Area	Dept	Crs Term	In Crs Hist	HS Cred	In Grad/Elig	Status	Start Date	End Date	Crs Credits	Earned Credits
0007	TRANS READ I	ELE		LGA	Semester 1	✔	✔	✔	Assigned	Aug 24, 2016		0.50	
INSTB	Inst Str	ELE			Semester 2	✔	✔	✔	Assigned	Jan 04, 2017		0.50	
0014	ENGLISH 12	ENG		LGA	All Year	✔	✔	✔	Assigned	Aug 17, 2016		1.00	
0109	WORLD GEOG/CULT	SOC		SST	Semester 2	✔	✔	✔	Assigned	Jan 04, 2017		0.50	
0189	FIT AWARENESS	ELE			Semester 1	✔	✔	✔	Assigned	Aug 24, 2016		0.50	

Community Service

Refresh Community Service

School Year	Date Served	Description	In Grad.	Hours
2016 - 2017			(5.00)	5.00
2016-2017	08/01/2016	volunteer	✔	5.00

Course History

Total Credit Earned:19.50

School	School Year	Code	Course	Area Std	Subj Area	Dept	Rpt Term	Mark Type	Mark	In Crs Hist	HS Cred	In Grad/Elig	Attempted	Earned
Batavia High School	2015-2016	0007	TRANS READ I	ELE		LGA	Fin	Final Mark	81.00	✔	✔	✔	0.50	0.50
Batavia High School	2015-2016	0007	TRANS READ I	ELE		LGA	Fin	Final Mark	78.15	✔	✔	✔	0.50	0.50
Batavia High School	2015-2016	0017	ENGLISH 11	ENG		LGA	Fin	Final Mark	70.16	✔	✔	✔	1.00	1.00
Batavia High School	2015-2016	0057	PHYSICS CONC A	SCI	SCP	SCI	Fin	Final Mark	67.93	✔	✔	✔	0.50	0.50
Batavia High School	2015-2016	0058	PHYSICS CONC B	SCI	SCP	SCI	Fin	Final Mark	93.89	✔	✔	✔	0.50	0.50
Batavia High School	2015-2016	0079	GEOMETRY	MTH		MTH	Fin	Final Mark	74.38	✔	✔	✔	1.00	1.00
Batavia High School	2015-2016	0117	GOVERNMENT	SOC	SOG	SST	Fin	Final Mark	47.70	✔	✔	✔	1.00	0.00
Batavia High School	2015-2016	0221	SPANISH I	ELE	FLA	FLG	Fin	Final Mark	62.98	✔	✔	✔	1.00	1.00

GPA History

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Cum Gpa	GPA by Course Count	Qtr1,Q1-2,Q1-3,Q1-4,Qtr2,Q2-2,Q2-3,Q2-4,Qtr3,Q3-2,Q3-3,Q3-4,Qtr4,Q4-2,Q4-3,Q4-4	Progress 1, Progress 2, Progress 3, Progress 4			✔

Calculation	Date	Points	Course Count	GPA
GPA based on current GPA configuration	03/1/2019 3:05 PM	369.000	31	3.618

	Course						Mark					Calculation Values		
Year	Code	Abbr	Term	Include in Total Credits	Include in GPA	Is HS Credit	Type	Mark	Crd Type	Is Earned	In GPA	Pt Val	Crd Earn	Crs Crd
2015-2016	299H	H ENG 9	FULL	✔	✔	✔	Mark	A-	Progress 1	✔	✔	4.000	1.000	1.000
2015-2016	299H	H ENG 9	FULL	✔	✔	✔	Mark	B+	Progress 1	✔	✔	3.000	1.000	1.000
2015-2016	299H	H ENG 9	FULL	✔	✔	✔	Mark	C+	Progress 1	✔	✔	2.000	1.000	1.000
2015-2016	299H	H ENG 9	FULL	✔	✔	✔	Mark	B+	Progress 1	✔	✔	3.000	1.000	1.000
2015-2016	421	SPAN 1	FULL	✔	✔	✔	Mark	A	Progress 1	✔	✔	4.000	1.000	1.000
2015-2016	421	SPAN 1	FULL	✔	✔	✔	Mark	A	Progress 1	✔	✔	4.000	1.000	1.000

Miscellaneous Eligibility

Refresh Miscellaneous Eligibility Data

Code	Name	Value
MEET	Meeting	2
PORT	Senior Portfolio	True

Course Requests

Requested Credits:7.00

SchoolYear	Code	Course	Priority	Request Status	Area Std	Subj Area	Dept	In Crs Hist	HS Cred	In Grad/Elig	Assigned Section	Course Credits
2018-2019	305	AP ENG	8	Approved	ENG		ENG	✔	✔	✔	1	1.00
2018-2019	424	SPANISH 4	2	Approved	FOR		LAN	✔	✔	✔		1.00
2018-2019	554	PRE-CALCULUS	8	Approved	MTH		MTH	✔	✔	✔		1.00
2018-2019	613	CONCERT CHOIR	2	Approved	EL		MUS	✔	✔	✔		1.00
2018-2019	813	IT CAPSTONE	8	Approved	EL		VOC	✔	✔	✔	1	1.00
2018-2019	814	DESGN TECHS	8	Approved	EL		VOC	✔	✔	✔	2	1.00
2018-2019	815	MULT/IMG MGT	8	Approved	EL		VOC	✔	✔	✔		1.00

Task #19: Eligibility Report (R208)
The Eligibility Report lists all students meeting various filters and lists the student's Graduation/Eligibility status for each selected Rule (Primary and/or Secondary), and/or for the Rule selected in the **Choose Rule** drop-down menu. Check **Recalculate** to recalculate student graduation/eligibility status. Check **Show Details** to view each Line Item Element's status.

Navigation: StudentInformation – SIS – Graduation / Eligibility – Eligibility Report (R208)

Report: R208
Printed Fri, Mar 01, 2019, 3:11 PM

MADISON HIGH SCHOOL

Eligibility Report

Id	Student Name Program	Counselor Team	Sex	Status	Grad Year Home School IRN	Grade	GPA	Rank	Birth
39153	MIKE DANIEL		M	A		12			12/28/2000
	8112 - IM II								

Description	Student Value	Required Value	Result
2014CORE - 2014 & Beyond CORE Requirements			Unmet
Phys Ed			Met
(Total Core Credits >= 0.5 CoreStd[PHE] IC MM-Pass HS	.50	.50	Met
Or [Exemption From PE] = True)	False	True	--
English			Met
Total Core Credits >= 4 CoreStd[ENG] IC MM-Pass HS	4.00	4.00	Met
Health			Met
Course [HEALTH] required. IC	650	650	Met
Math			Met
Total Core Credits >= 3 CoreStd[MTO] IC MM-Pass HS	3.00	3.00	Met
And Total Core Credits >= 1 CoreStd[MTA] IC MM-Pass HS	1.00	1.00	Met
Science			Met
Total Core Credits >= 1 CoreStd[SCL] IC MM-Pass HS	1.00	1.00	Met
And Total Core Credits >= 1 CoreStd[SCP] IC MM-Pass HS	1.00	1.00	Met
And Total Core Credits >= 1 CoreStd[SCA] IC MM-Pass HS	1.00	1.00	Met
Soc Studies			Met
Total Core Credits >= 0.5 CoreStd[SOH] IC MM-Pass HS	.50	.50	Met

Page 1 of 3

Task #20: Eligibility Letters
Eligibility Letters will be printed for students who match the selected criteria. Letters can be printed for eligible, ineligible, or both students for a particular graduation/eligibility rule.

Navigation: StudentInformation – SIS – Graduation / Eligibility – Eligibility Letters

MADISON HIGH SCHOOL
600 ESLEY LANE
MANSFIELD OH, 44905
(419) 589-2112

MIKE DANIEL   Friday, March 1, 2019
5000 DANIEL Road
Mansfield, OH 44905-2723

Homeroom:
Counselor: None

MIKE DANIEL has been assessed to see if he or she meets the requirements to be eligible to graduate.

2014CORE - 2014 & Beyond   Unmet   Student has not met the graduation requirements.
CORE Requirements

MIKE DANIEL is not eligible to graduate

Task #21: Grade Card Graduation/Eligibility Display

Eligibility information displays on certain grade card formats. Check the boxes to use student's Primary and/or Secondary Rules, and/or select a Rule from the **Choose Graduation Eligibility Rule** drop-down menu (please note that running an R700 with both Rules checked and a third Rule selected is likely to cause text to overlap on the R700 output). Check the **Recalculate Graduation Eligibility** box to recalculate students' status for the selected Rule(s). On the grade card, the Rule's **Passing Text** will display for each Rule if the student passes the Rule, and the Rule's **Failing Text** will display for each Rule if the student does not pass the Rule.

Student Graduation Eligibility Rule: ☐ **Primary**	ℹ️ Select to view the student(s) primary and secondary Graduation Eligibility rule(s) in the report.
☐ **Secondary**	
Choose Graduation Eligibility Rule: [_____▼]	ℹ️ Choose a Graduation Eligibility rule from the list to include in the report.
Mark Type:* [_____▼]	ℹ️ Choose the mark type to use in current year's total credits calculation. The mark type is only required if Primary, Secondary, or a specific Rule are chosen.
Recalculate Graduation Eligibility: ☐	ℹ️ Check recalculate to refresh the student's Graduation Eligibility data (slower) or Uncheck recalculate to view the student's cached Graduation Eligibility data (faster).

R700 Formats that have been formatted to fit Graduation/Eligibility information (you may need to adjust further or try a different format, as most R700 formats dynamically adjust size depending on the quantity of course/mark information):

- Formats 1, 2, 3, 4, 20, 21, 30, 31, 40, and 41
- Format AllYear2

If you are using a unique Custom format, you can use the keywords **RuleName** and **RuleResult** to display a Graduation/Eligibility Rule's Name and its Passing or Failing Text, respectively. See the *Report Formatters Design Specification* for more information on using these Custom Format keywords in your own custom formats.

Graduation Eligibility

GRADUATION ELIGIBILITY RULE NAME	GRADUATION ELIGIBILITY RULE RESULT
2014 & Beyond CORE Requirements	NOT MET

Task #22: Print Grad Ver line items on Transcripts

Transcripts have the ability to print line items for a Grad Ver rule setup in the building and year in context. Transcripts will print the following types of line items:

- Assessment
- Community Service
- Course
- Exemption
- GPA
- Miscellaneous
- Total Credit
- Total Core Credits

Student Transcript   10/22/2013

Kalida High School
301 N. 3RD STREET
KALIDA, OH 45853
Kalida Local SD

2009

GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FNL	CRED ATTM	CRED EARN
08	Kalida HS	HEALTH	Yes	A	0.500	0.500

2010

GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FNL	CRED ATTM	CRED EARN
09	Kalida HS	ALGEBRA I	Yes	A	1.000	1.000
09	Kalida HS	CHORALE	Yes	A+	1.000	1.000
09	Kalida HS	ENGLISH 9	Yes	A	1.000	1.000
09	Kalida HS	P.E.C.SCIENCE	Yes	A	1.000	1.000
09	Kalida HS	PHYSICAL EDUCATION 9/10	No	P	0.500	0.500
09	Kalida HS	PRINCIPLES BIOMEDICAL S	Yes	A	1.000	1.000
09	Kalida HS	SPANISH I	Yes	A	1.000	1.000
09	Kalida HS	WORLD STUDIES-1750 TO F	Yes	A	1.000	1.000

2011

GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FNL	CRED ATTM	CRED EARN
10	Kalida HS	ALGEBRA II	Yes	A	1.000	1.000
10	Kalida HS	AP U.S. HISTORY	Yes	A	1.000	1.000
10	Kalida HS	APPLIED BIOLOGY I	Yes	A	1.000	1.000
10	Kalida HS	CHORALE	Yes	A	1.000	1.000
10	Kalida HS	COMPUTER APPLICATIONS	Yes	A	0.630	0.630
10	Kalida HS	ENGLISH 10	Yes	A	1.000	1.000
10	Kalida HS	MONEY MATTERS	Yes	A	0.500	0.500
10	Kalida HS	SPANISH II	Yes	A	1.000	1.000

2012

GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FNL	CRED ATTM	CRED EARN
11	Kalida HS	CHEMISTRY	Yes		0.000	0.000
11	Kalida HS	CHORALE	Yes		0.000	0.000
11	Kalida HS	EASTERN WORLD STUDIES	Yes		0.000	0.000
11	Kalida HS	ENGLISH 11/WSU 101	Yes		0.000	0.000
11	Kalida HS	FICTION ON FILM	Yes	A	0.500	0.500
11	Kalida HS	GEOMETRY	Yes		0.000	0.000
11	James A. Rhodes State C	PS PSYCH.	Yes		0.000	0.000
11	Kalida HS	SPANISH III	Yes		0.000	0.000

Attendance

SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	KAHS	168.50	5.50	1.00
2010	KAHS	171.00	2.00	0.00
2011	KAHS	173.00	2.00	1.00
2012	KAHS	174.50	3.50	0.00

OGT

GRD	TEST PART	DATE	SCORE	P/F
10	Math	3/1/2012	484	Passed
10	Reading	3/1/2012	448	Passed
10	Science	3/1/2012	459	Passed
10	Social Studies / C	3/1/2012	460	Passed
10	Writing	3/1/2012	442	Passed

Total Credits

SCHOOL YEAR	SCHOOL NAME	CRED ATTM PRO	CRED EARN PRO
2009	Kalida High School	0.500	0.500
2010	Kalida High School	7.500	7.500
2011	Kalida High School	7.130	7.130
2012	Kalida High School	0.500	0.500
2012	Kalida High School	0.000	0.000
	Credits Total:	15.63	15.63

Credit Summary

DESCRIPTION	REQUIRED	CURRENT
English	4.000	3.500
Health	0.500	0.500
Math	3.000	3.000
Phys Ed	0.500	0.000
Science	3.000	3.000
Soc Studies	3.000	2.500
Electives	5.000	1.130
OGT	Yes	Yes
Total Credits	20.000	21.760
Course 1005	Yes	No
Community Service	Yes	No
Total credit	1.000	1.130
GPA	Yes	Yes
Misc	Yes	No

Home School Export and Import of Marks and Attendance / Student Import Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
2/8/21	Task 2: step 7	Override location IRN
2/6/20	Appendix A	Add Appendix A
10/2/19	Entire Document	Review and Update
2/6/19	Entire Document	Update screenshots Attendance File Layout updated for hours

Table of Contents

What is the Home School Export?
The Home School Export is the process used to export marks and attendance data out of one school into another school. The Home School Export can be used by any type of school, including community schools, JVS, non-public, etc.

What is the Home School Import?
The Home School Import is the process used to import student's marks and attendance sent by another school. The Home School Import can be used by any type of school, including community schools, JVS, non-public, etc.

The Home School Import of Course History creates manual cohi records on the Student Course History screen. Any cohi created by the import will have the following in the Comments sections of the cohi record:

Comments:	Loaded through the Home School Import screen

The Home School Export will only include courses that are a course type of Class, Post Secondary, or Vocational.

Effective FY09 Combined Year End EMIS Attendance for JVSD students is no longer reported. Home School can still import attendance for JVS students so the attendance prints on the student's transcript.

At year-end State Support recommends exporting 1st Sem Avg marks again along with 2nd Sem Avg and Final marks. By exporting 1st Sem Avg again any manual changes made to the 1st Sem Avg marks at the JVS will be updated at the home school.

Import/Export of Course History

Task #1 - Home School Export of Course History

The **Home School IRN** field on the General tab of a Student's Profile determines which school districts show in the dropdown on the Home School Export page. The Home School IRN field allows you to enter an IRN for a district or building, but only building IRNs will be recognized by the Home School Export.

1. Change context to the JVS building and the current school year.
2. Navigate to **_StudentInformation_** » **_Management_** » **_Import/Export_** » **_Home School Export_**.
3. You will be on the first tab named **Course History**.
4. The dropdowns will be populated according to the marking pattern rules at of the school in context. Please consult the Home School to determine which marks they want sent over before continuing.
   NOTE: Marking patterns with no rules selected will not export.
   NOTE: An error message will display reminding users that at least one mark must be selected for some row (or they will get an empty file):
   At least one mark must be selected
   a. Example: Some Home Schools want the Semester Average, and 1st Semester Final marks sent over at the end of 1st Semester. Other Home Schools want only the 1st Semester Averages sent over.
   b. Since a separate export file is created for each Home School, the JVS can tailor each file to the Home School's specific needs.
   c. In the screenshots in this section, 1st semester has just ended and the JVS is going to export the 1st Semester Average for all year and 1st semester only classes and 1st Semester Final grades to the Home School.
   d. The **Marks** tab lists each of the JVS's marking patterns. The JVS in the screen shot has 2nd Semester only, 1st Semester only, and All Year courses.

For each marking pattern, select the marking pattern rules to use for the exported marks

Marking Pattern	Term 1 Mark	Term 2 Mark	Term 3 Mark	Term 4 Mark	Final Mark
Full Year	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾
Semester 1	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾
Semester 2	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾

   e. In this scenario, the Home School wants 1st Semester Average and 1st Semester Final marks sent over.
   f. In the **Term 1 Mark** dropdown for 1st Semester Courses, choose 1st **Semester Average**.

g. Leave the **Term 2 Mark** dropdown for 1st Semester Courses blank.
h. Leave the **Term 3 Mark** dropdown for 1st Semester Courses blank.
i. Leave the **Term 4 Mark** dropdown for 1st Semester Courses blank.
j. In the **Final Mark** dropdown for 1st Semester Courses, choose **Final.**
k. Since 2nd semester hasn't started and there are no grades to export leave all the 2nd semester marking pattern dropdowns blank.
l. In the **Term 1 Mark** dropdown for All Year Courses, choose 1st **Semester Average.**
m. Leave the **Term 2 Mark** dropdown for All Year Courses blank.
n. Leave the **Term 3 Mark** dropdown for All Year Courses blank.
o. Leave the **Term 4 Mark** dropdown for All Year Courses blank.
p. Leave the **Final Mark** dropdown for All Year Courses blank since the courses are not completed yet and there no final grades to import.

For each marking pattern, select the marking pattern rules to use for the exported marks

Marking Pattern	Term 1 Mark	Term 2 Mark	Term 3 Mark	Term 4 Mark	Final Mark
Full Year	Sem1 ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾
Semester 1	Sem1 ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	Fin ▾
Semester 2	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾	-- Blank -- ▾

5. Next, choose to export by **State Student ID (SSID)** or **EMIS ID**.
   a. Whenever possible, choose to export by SSID versus EMIS ID. A student in multiple districts must have the same SSID, but can have varying EMIS IDs at each district.
   b. If you choose SSID and a student does not have an SSID, the export will use the EMIS ID. If a student does not have an EMIS ID or SSID that export field will be blank.
   c. If the school is a non-public and does not use SSIDs, the JVS would want to do the export by EMIS ID. If they choose SSID for the export file then nothing would be imported to the non-public school since they do not use SSIDs.
6. In the **Home District** dropdown, choose the Home School District you are exporting the grades for. Remember: The dropdown is populated based on what is appears in the **Home School IRN** field on the Student Profile General tab.
7. Click **Export**.
   a. A file is created.
   b. Save the file to your desktop.
   c. The file will be named ***StudentMarks045xxx***. The last six numbers of the file represent the Home School's district IRN.
   d. Email the file to the Home School, if necessary.

F.Y.I.   The file layout can be found at the end of this section.

Task #2 – Verify and Import the course history file received from the JVS into the Home School

Helpful Hint:

Before beginning the import make sure you have a clear understanding of which marks are in the file. Open the file from the JVS using Notepad and compare the file's content to the file layout so you know which marks are in the file before you import the marks. For example: The JVS sent over 1st Sem Avg as Mark 1 and Final as Mark 5. Mark 2,3, and 4 are blank.

If a district has several high school buildings, the export file sent by the JVS will need to be separated into a separate file for each building. The file sent by the JVS is already sub-divided by building so all you need to do is cut and paste each section of the original file into a separate file for each building.

Note: The Home School Import matches on course code and abbreviation when determining whether an incoming record matches an existing record.

1. Change context to the Home School and the current school year.
2. Navigate to : **_StudentInformation_** » **_Management_** » **_Import/Export_** » **_Home School Import_** .
3. Now you are on the first tab named **Course History**.
   a. Map the marks in the file to the appropriate **Term, Mark Type,** and **Credit Type.**
   b. In this scenario, we will load the marks as 1st Sem Averages and Finals.
   c. After reviewing the marks file in Task #1, we determined that the JVS exported a 1st sem average mark in the Mark 1 slot and a Final mark in the Mark 5 slot. Mark slots 2,3,and 4 are empty.
   d. The following screenshot shows how the home school will load the grades.

Mark	Term	Mark Type	Credit Type
Term 1 Mark	Semester 1	Avg - Avg	Progress 2
Term 2 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --
Term 3 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --
Term 4 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --
Term 5 Mark	Final	Fin - Final	Earned

   e. Every grade in the mark 1 slot in the file will be loaded as Sem1 AVG, mark type – average, and credit type – progress2.
   f. All grades in the mark 5 slot of the file will be loaded as final marks, mark type – final, and earned credit.

4. Next, the **Import Mode** section.
    a. First, we want to check the file for errors.
    b. Choose **Create Verification File Only, Do Not Perform Import**
5. The next section is named **Primary Student Identifier for Import.**
    a. Choose either **State Student ID (SSID)** or **EMIS ID**. Your selection will be determined by which ID the JVS used in the export file. If the JVS exported by SSID then you will need to do the import by SSID.
6. The next section is named **Marks Import Options**.
    a. State Support recommends leaving the checkboxes in the Ignore Area of Study If No Match to Existing Values and Ignore Subject Area If No Match To Existing Values options.
    b. If the school does not want the pluses and minuses from the JVS (A-, C+, etc) then make sure to mark the box next to the Remore Pluses And Minuses From Imported Alpha Marks option.
7. The next section is named **Override Location IRN.**
    a. Enter the corresponding IRN **only** if you wish to override the LocationIRN value in the import file. The entity name associated with the IRN automatically displays in the adjacent field.
8. The last section is named **Import File**.
    a. Click **Browse** and locate the file from the JVS.
9. Click **Import**.
10. Choose to open the file.
11. Error messages will appear at the top of the report and records that will be imported will display in the 2nd section.

12. Review and correct the errors. In the screenshot above Student66567 was not found. This is because StudentInformation could not find a student with the same SSID at the home school.
13. Now we are ready to import the marks.
14. Repeat the steps above, but this time choose *Perform Import and Create Verification File* in the **Import Mode** section.
15. The last section is named **Import File**.
    a. Click **Browse** and locate the file from the JVS.
16. Click **Import**.
    a. Open the file or save it to your computer.
    b. If the file contains any errors that were not corrected in the task above, they will be listed at the top of the file.

c. The most common error message is ***"XX3638769","KESS, DAVID","Student not found"***.
d. StudentInformation was unable to locate the student in the file. Either the student does not exist at the Home School or the SSID does not match.
e. Nothing will be imported for students who are not found.

17. Next, verify the marks were actually imported in course history.
a. Pick several students at random from the import file.
b. Navigate to ***StudentInformation » SIS » Student » Course History » Student Course History*** and make sure the marks were imported.
c. Hint: Make sure you have **All** selected in the **Credit Type** filter on the course history page so you can see the quarter and average marks that were imported and not just the earned credit.
d. If you notice the marks were not imported as the right term or mark type, you can delete the course history records that were imported. Navigate to ***StudentInformation » Management » Import/Export » Home School Import*** and go to the **Imported Marks History** tab. You can view the import audit records for the school year in context. Identify the row with the file that corresponds to the marks that need deleted. To view the mapping that was used when the marks were imported, click on the **Mapping** icon. Once the row is identified, click on the **trash can** icon. You will see a confirmation of how many records are going to be deleted. Once deleted, the import audit record will still display and be updated with the name of the person who deleted the marks and the date the records were deleted. The delete will be for the entire file. There is not a way to delete just certain records that were contained in an import file. Also, there are no security restrictions on deleting the imported marks. This will be available to anyone who has access to the Home School Import screen.
e. If you notice the marks were not imported as the correct progress level, you can redo the import and the marks will be overridden with the new progress level as long as the term and mark type are the same.
f. If you notice the marks were imported with pluses and minuses and realize you should have stripped the pluses and minuses, you can perform the import again with the option marked to **Remove Pluses and Minuses From Imported Alpha Marks** or vise versa. The marks will be overridden and will not create double entries as long as you choose the same term and mark type as you did when you originally imported the file.

Congratulations! You have just imported the marks from the JVS to the Home School.

If the grades imported from the JVS are numeric marks, the export file from the JVS will contain the numeric mark and alpha equivalent according the Marks

Maintenance scale setup at the JVS. So, if a student receives a numeric grade of 90.00 at the JVS and a 90.00 is equivalent to a mark of A at the JVS, but a mark of B+ at the Home School, the 90.00 will be imported into the Home School equivalent to an A. **In other words the Home School Marks Maintenance scale is ignored for numeric marks.**

Marks given at the JVS must also be on the Home School's Mark Maintenance page. However, the marks do not need to be the same point value. Example: JVS gives a mark of P worth four points. The Home School does not give a mark of P, but still needs to enter the mark on their Mark Maintenane page. The Home School can enter the P mark and give it a point value of zero.

Difficulty points given at the JVS must also be on the Home School's Difficulty Point Scale and Course Difficulty Maintenance pages.

If the JVS has an EMIS Location IRN populated on the course record, this IRN will be included in the import file and will display on the student's course history records so the home school will not have to manually update these records. If there is not an EMIS Location IRN on the course record, the import will use the Sending School IRN as it always has done in the past.

If you need to redo any exports for the 18/19 school year, any courses at the JVS that have the EMIS Location IRN will be loaded with that IRN and school name which could cause duplicates if the IRN was not changed on the record at the home school when it was initially loaded.

Marks File Layout:

StudentNumber	1-9	
GradeLevelCode	10-11	
LastName	12-29	
FirstName	30-43	
CalledName	44-51	
SSIDOrEMISID	52-60	
HomeSchoolCode	61-64	
SchoolYear	65-68	
Abbreviation	69-76	
SectionNumber	77-78	
CourseShortName	79-93	
CompletionDate	94-99	[Date, formatted yyyyMM]
SchoolCode	100-103	
-- BLANK --	104-109	[Filler Field for School Abbreviation]
CourseGradeLevelCode	110-111	
-- BLANK --	112	[Filler Field for Course Grade Level Count]
InCumGPA	113	[Boolean, Y or N]
InCumCredit	114	[Boolean, Y or N]
-- BLANK --	115	[Filler Field for Language Code]
-- BLANK --	116-118	[Filler Field for Hours of Instructions]
-- BLANK --	119	[Filler Field for Level of Difficulty]
AreaOfStudy	120-122	
SubjectArea	123-125	
TransferCode	126	
MarkAlpha1	127-129	
MarkNumeric1	130-135	
AttemptedCredit1	136-146	[Decimal, formatted ###0.000000, right justified]
EarnedCredit1	147-157	[Decimal, formatted ###0.000000, right justified]
MarkAlpha2	158-160	
MarkNumeric2	161-166	
AttemptedCredit2	167-177	[Decimal, formatted ###0.000000, right justified]
EarnedCredit2	178-188	[Decimal, formatted ###0.000000, right justified]
MarkAlpha3	189-191	
MarkNumeric3	192-197	
AttemptedCredit3	198-208	[Decimal, formatted

		###0.000000, right justified]
EarnedCredit3	209-219	[Decimal, formatted ###0.000000, right justified]
MarkAlpha4	220-222	
MarkNumeric4	223-228	
AttemptedCredit4	229-239	[Decimal, formatted ###0.000000, right justified]
EarnedCredit4	240-250	[Decimal, formatted ###0.000000, right justified]
-- BLANK --	251-253	[Filler Field for Cumulative Mark]
-- BLANK --	254-256	[Filler Field for Exam Mark]
-- BLANK --	257-259	[Filler Field for Average Mark]
MarkAlpha5	260-262	
MarkNumeric5	263-268	
AttemptedCredit5	269-279	[Decimal, 0.000000, right justified]
EarnedCredit5	280-290	[Decimal, 0.000000, right justified]
LevelOfDifficulty	291-298	
CourseCode	299-314	
EMISSubject	315-320	
-- BLANK --	321-322	filler
EMISSubjectAreaCredit	323-325	
-- BLANK --	326-330	filler
CORESubjectArea	331-333	
-- BLANK --	334-341	filler
CourseCredit	342-349	[Decimal, formatted 0.000000, right justified]
-- BLANK --	350-357	filler
CreditRatioDenominator	358-360	[Integer, formatted ###0, right justified]
CreditFlex	361	
IsDualCredit	362	"Y" = 1 "N" = 0 "*" = null (blank)
IsCollegePrep	363	"Y" = 1 "N" = 0 "*" = null (blank)
IsHonorRoll	364	"Y" = 1 "N" = 0 "*" = null (blank)
LocationIRN	365-370	[String, formatted 000000]
LocationName	371-420	

IsNCAACoreCourse	421	[Boolean, Y or N]
CollegeLocationIRN	422-427	[Decimal, formatted 000000]
CollegeLocationName	428-477	
EndOfCourseAssessmentArea	478-485	
CollegeCreditsEarned	486-493	[Decimal, formatted 0.000000]

Import/Export of Attendance

Task #1 - Home School Export of Attendance

The JVS typically exports attendance at mid-year and at year-end. When the JVS attendance is imported into the Home School, an entry is created on the student's External Absences page in StudentInformation, which will print on the student's transcript.
.

1. Change context to the JVS building and the current school year.
2. Navigate to *__StudentInformation__* » *__Management__* » *__Import/Export__* » *__Home School Export__*.
3. Go to the second tab named **Attendance**.
4. Choose the **Primary Student ID for Export**.
   a. Just like the Marks Export, you will want to choose State Student ID (SSID) whenever possible since a student in multiple districts must have the same SSID, but can have differing EMIS IDs.
5. In the **Home District** field, choose the Home School you are exporting the attendance for.
6. In the **Student Status** dual select, choose the statuses you would like to export or else leave the filter blank.
7. If you would like to perform the export for an Ad-Hoc, select the membership from the **Ad-Hoc** dropdown.
8. Click **Export**.
   a. A zip file is created.
   b. The zip file will be named **StudentAttendance045xxx**. The last six numbers of the file represent the home school's district IRN.
   c. Save the file to your desktop and email it to the home school, if necessary.

Helpful Hint:

Edit the file created in Notepad and create a ruler to ensure the values are in the correct slot according to the file layout.

NOTE: The Attended Days & Hours and Absence Days & Hours are all right justified.

```
                                                                          1111111111111111111111111111111
           0000000001111111111222222222233333333334444444444555555555566666666667777777777888888888899999999990000000000111111111122222222222
           1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890
030080     AB4267244    96.95  552.53    2.00   11.50   7.05   39.47   7.00   0.00   2018    SANCHEZ, ANNA
030080     RG4747465    96.71  550.08    2.91   16.71   6.39   36.72   1.00   0.00   2018    THORNTON, SHANE
030080     GE7361442    99.62  566.82    4.38   25.18   2.00   11.50   0.00   0.00   2018    NASH, ALFREDO
030080     OH4347547    99.87  568.23    6.00   34.50   0.13    0.77   6.00   0.00   2018    MARSH, THEODORE
030080     PL7648231    98.64  562.27    2.48   14.25   4.88   26.98   7.00   0.00   2018    DENNIS, CARL
```

The file layout can be found at the end of this section.

Task #2 – Verify and Import the Attendance file received from the JVS into the Home School

1. Change context to the Home School and the current school year.
2. Navigate to : ***StudentInformation*** **»** ***Management*** **»** ***Import/Export*** **»** ***Import***.
3. Go to the second tab named **Attendance**.
4. The first section is named **Import Mode**.
   a. State Supports suggests you first do option 2 first, which is **Create Verification File Only, Do Not Perform Import.**
   b. Please Note: There is no reason to perform the third option named **Perform Student Identifier Check Only, Do Not Perform Or Create Verification File** because when you choose the second option, it also performs the Student Identifier Check.
   c. The **Create Verification File Only, Do Not Perform Import** option allows you see if there are any errors on the file and correct the errors before performing the actual import.
5. The next section is named **Primary Student Identifier for Import**.
   a. Choose either **State Student ID (SSID)** or **EMIS ID**. Your selection will be determined by which ID the JVS used in the export file. If the JVS exported by SSID then you will need to do the import by SSID.
6. The last section is named **Import File**.
   a. Click **Browse** and locate the file from the JVS.
7. Click **Import**.
   a. A file is created.
   b. Open the file or save it to you computer.
   c. If the file contains any errors, they will be listed at the top of the file. The most common error message is **"XX3638769","KESS, DAVID","Student not found".**
   d. StudentInformation was unable to locate the student in the file. Either the student does not exist at the Home School or the SSID does not match.
   e. You can edit the file and delete the student from the file if he does not belong to the Home School, or edit the file and correct the SSID, or ignore the error and continue on with the import. Note: If the error is ignored, the student's attendance will not be imported.
8. Now that we have verified the file, we are ready to perform the actual import.

9. Repeat the steps above, but this time choose the **Perform Import and Create Verification File** option.
10. Click **Import**.
11. Open the file or save it to you computer.
    a. If the file contains any errors, they will be listed at the top of the file.
    b. The most common error message is **"XX3638769","KESS, DAVID","Student not found".**
    c. StudentInformation was unable to locate the student in the file. Either the student does not exist at the Home School or the SSID does not match.
    d. Nothing will be imported for students who are not found.
12. Next, verify the attendance was actually imported into the student's External Absences page.
    a. Edit the import file and choose several students at random.
    b. With one of the student's in context, navigate to ***StudentInformation » SIS » Student » Attendance » External Absences*** and verify an external absence entry was created for the JVS and this school year.
    c. When you import attendance again at the end of the year, the absences will be added to the entry already created. StudentInformation will not create a double entry.

Congratulations! You just imported Attendance to the Home School.

Import Data from Students' Vocational Schools

This screen will import files from students' vocational schools

| Course History | **Attendance** | Students | Imported Marks History |

Import Mode:
- ● Perform Import and Create Verification File
- ○ Create Verification File Only, Do Not Perform Import
- ○ Perform Student Identifier Check Only, Do Not Perform Import Or Create Verification File

Primary Student Identifier for Import: ● State Student ID (SSID) ○ EMIS ID

Import File:* [Browse] [   ]

[Import]

Attendance File Layout

Field	Start Position/End Position	Length	Comments
ExportedFromIRN	1/10	10	IRN of the building from which the attendance was exported
SSID/EMIS Id	11/19	9	State Student Id or EMIS Id. When you select to export by SSID, the export uses the SSID if the SSID is present or the EMIS ID if the SSID is not present. When you select to export by EMIS ID, the export uses the EMIS ID if the EMIS ID is present or the SSID if the EMIS ID is not present.
Attended	20/29 right justified	10	The sum of all calendar days minus absence days. Examples as follows: 1. Student's calendar day indicates 1 actual day of attendance and the student does not have an absence record on calendar day. The student is given 1 actual day of attendance. 2. Student's calendar day indicates 0.5 actual days and student does not have an absence record. The student is given 0.5 days of attendance for the calendar day. Student's calendar indicates 1 actual day of attendance and student has an absence record indicating 0.5 days of absence. The student is given 1 - 0.5 = 0.5 days of attendance on the calendar day.
AttendedHours	30/39 right justified	10	Sum of all calendar hours minus absence hours.
Absence Excused	40/49 right justified	10	Sum of all absence days marked as excused.
AbsentExcusedHours	50/59 right justified	10	Sum of all absence hours marked as excused.
Absence Unexcused	60/69 right justified	10	Sum of all absence days marked as unexcused.
AbsentUnexcusedHours	70/79 right justified	10	Sum of all absence hours marked as unexcused
Tardy	80/89 right justified	10	The number of absence records marked tardy.
OutOfSchoolSuspAbsenceHours	90/99	10	Sum of all absence hours marked

Field	Start Position/End Position	Length	Comments
	right justified		as Out of School Suspension
School Year	104/107	4	School year of absence data. This is not the fiscal year of the absence data.
Student Name	112/143	32	Student name (last name, first name)

```
v3.0
030080    AB4267244    96.95    552.53    2.00    11.50    7.05    39.47    7.00    0.00    2018    SANCHEZ, ANNA
030080    RG4747465    96.71    550.08    2.91    16.71    6.39    36.72    1.00    0.00    2018    THORNTON, SHANE
030080    GE7361442    99.62    566.82    4.38    25.18    2.00    11.50    0.00    0.00    2018    NASH, ALFREDO
030080    OH4347547    99.87    568.23    6.00    34.50    0.13    0.77     6.00    0.00    2018    MARSH, THEODORE
030080    PL7648231    98.64    562.27    2.48    14.25    4.88    26.98    7.00    0.00    2018    DENNIS, CARL
030080    RW5382860     0.00      0.00    0.00     0.00    0.00     0.00    0.00    0.00    2018    FREDERICK, ALFRED
030080    PI9708890      0.00      0.00    0.00     0.00    0.00     0.00    0.00    0.00    2018    PRICE, DEBRA
030080    KP3196654   108.00    621.00    0.00     0.00    1.00     5.75    0.00    0.00    2018    BRADY, MARIO
```

Student Import

Can be used to bulk register the following examples:
- Students from a non-StudentInformation district
- Students from another StudentInformation ITC
- Sixty preschool kids starting in the fall

All students are registered on the Default Calendar and a Primary Contact is created, if one is entered in the file.

The student import will find a strict match if the student's Social Security #, EMIS ID, or SSID match.
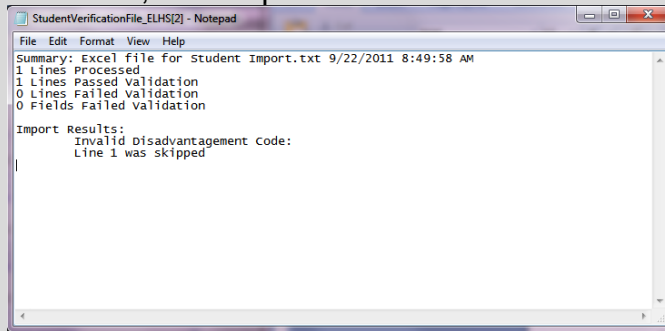
If a file is reimported duplicate students will be created, without warning, if the student's Social Security #, EMIS ID or SSID is not used in the file. The Student Import was not designed to find possible matches.

1. Open the Excel file for Student Import found on the documentation site under Procedural Checklists – Student section **(File Layout for Student Import)**.
2. Starting with line 2 of the Excel file and enter the information of the students that need registered.
   a. Pay close attention to required fields, data lengths, and capitalization.
3. Rename the file (example: importaug12) and save it to your preferred location as Save as type: **Text (Tab delimited).**
4. With the building in context, navigate to ***StudentInformation » Management » Import/Export » Home School Import***.
5. Choose the **Students** tab.
6. In the **Import Mode** section, choose **Perform Import and Create Verification File.**
7. Enter an **Admission Date, Admisison Reason** and **Student Status**.
8. NOTE: The **Admitted From IRN** field is enabled and required for students newly enrolled after July 1 with an admission reason 3, 6 or 7. Joint Vocational School Districts (JVSDs) and Education Service Centers (ESCs) are required to report ****** in this field. This field is defaulted to ****** and disabled when re-registering a student into a building in the same district as the building from which the student was withdrawn. This field is disabled and given a value of ****** when the school or district in

context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).
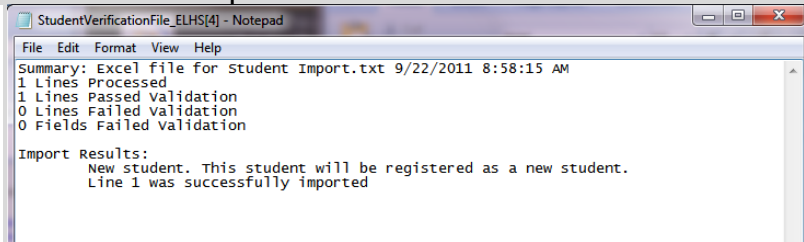
9. The **EMIS Situation** and remainder of the fields are pulled from the Registration Defaults page. Choose a different **EMIS Situation,** if desired.
10. Browse for the file and click **Import**.
11. The following message will appear: *Are you sure you want to import this information* – click **OK**.
12. On the file download pop-up, click **Open** to view the verification file.
13. If needed, clean up the errors and redo the import.

14. A successful import looks as follows

15. Verify the students were imported by searching for several of them.

Import Data from Students' Vocational Schools

This screen will import files from students' vocational schools

| Course History | Attendance | **Students** | Imported Marks History |

No additional information is needed to import Student data

Import Mode:
- ◉ Perform Import and Create Verification File
- ○ Create Verification File Only, Do Not Perform Import

Admission Date: * `7/1/2018` 📅

Admission Reason: * [▼]

Student Status: * [▼]

EMIS Situation: * [5 - Resident attending Full Time ▼] [...]

Admitted From IRN: `******` - [ ] 🔍 *

District Relationship: [1 - Stud. rcvg instr. in whole/part from rep. dist ▼]	**District of Residence:** `049452` - `Madison Local SD` 🔍
How Received: [* - Not Applicable ▼]	**How Received IRN:** `******` - [ ] 🔍
Percent of Time: `100` Percent of Time must be greater than 0 and less than or equal to 100	**Tuition Type:** [N - Non-tuition student (default) ▼]
Attending Building IRN: [022178 - Madison High School ▼]	**Assigned Building IRN:** `******` [▼]
County of Residence: [▼]	

Sent To 1:

Reason: [NA - Not sent to another district ▼]

IRN: `******` - [ ] 🔍

Percent of Time: `0`

Sent To 2:

Reason: [NA - Not sent to another district (default) ▼]

IRN: [ ] - [ ] 🔍

Percent of Time: `0`

Import File: * [Browse] [ ]

[Import]

Student File Layout:
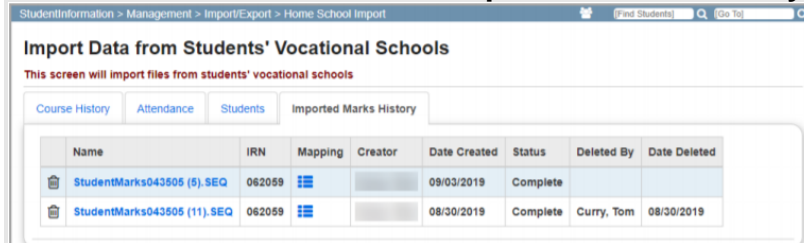
Column	Column Title	Valid options:
A	1. SS#	(999999999)
B	2. Filler	
C	3. Last Name – REQUIRED	(1-40 alpha-numeric)
D	4. First Name – REQUIRED	(1-40 alpha-numeric)
E	5. Filler	
F	6. Filler	
G	7. Sex – REQUIRED	M or F
H	8. Birth Date – REQUIRED	(MM/DD/YYYY)
I	9. Local Ethnicity	(1-40 alpha-numeric NOTE: must match Ethnicity name of receiving school)
J	10. Grade – REQUIRED	(99)
K	11. Filler	
L	12. Filler	
M	13. Street Address – REQUIRED	(1-40 alpha-numeric)
N	14. City – REQUIRED	(1-40 alpha-numeric)
O	15. State – REQUIRED	(XX)
P	16. Zip Code – REQUIRED	(5 or 9 numeric)
Q	17. Phone	(5555555555) or (555)555-5555
R	18. Filler	
S	19. Contact Type Name	(1-40 must match Contact Type Name of receiving school)
T	20. Filler	
U	21. Contact's Name	(1-40 NOTE: will load into Last name field only)
V	22. Contact's Title	(valid options are: Mr. Mrs. Ms. Dr.)
W	23. Filler	
X	24. Filler	
Y	25. Filler	
Z	26. Contact's Address	(1-40 alpha-numeric)
AA	27. Contact's City	(1-40 alpha-numeric)
AB	28. Contact's State	(XX – must be capital letters)
AC	29. Contact's Zip Code	(5 or 9 numeric)
AD	30. SSID	(XX9999999 – must be capital letters)
AE	31. Filler	
AF	32. Filler	

AG	33. Filler	
AH	34. Native Language	(XXX- must be capital letters)
AI	35. Disadvantagement	(**,1,2,3) Will default to ** if nothing filled out in file
AJ	36. Filler	
AK	37. Filler	
AL	38. Filler	
AM	39. Filler	
AN	40. Filler	
AO	41. Filler	
AP	42. Filler	
AQ	43. Disability Code	(valid options are: **,01,02,03,04,05,06,08,09,10,12,13,14,15,16) Will default to ** if nothing filled out in file
AR	44. EMIS ID	(X00000000 or 000000000)
AS	45. Home Language	(XXX – must be capital letter)
AT	46. Hispanic/Latino	(Y or N – case sensitive)
AU	47. Race White	(TRUE or FALSE - case sensitive)
AV	48. Race Black	(TRUE or FALSE - case sensitive)
AW	49. Race Asian	(TRUE or FALSE - case sensitive)
AX	50. Race American Indian	(TRUE or FALSE - case sensitive)
AY	51. Race Pacific Islander	(TRUE or FALSE - case sensitive)
AZ	52. Summative Race – REQUIRED	(A, B, I,P, W, M, H - case sensitive)
BA	53. County of Residence	(00 – use two digit numeric county code

Appendix A: Removing Imported Marks

Occassionally districts will need marks removed from student records due to importing them with incorrect mapping or with the wrong IRN.

1. Change context to the home school building and the school year the marks were loaded into.
2. Navigate to ***StudentInformation*** » ***Management*** » ***Import/Export*** » ***Home School Import***.
3. Go to the fourth tab named **Imported Marks History**.

4. Click on the icon in the mapping column to view how the course hstory was imported.
5. After confirming the file to be deleted, click on the **trash can** icon.
6. You will receive the message 'Are you sure you want to deleted all imported marks from **StudentMarksxxxxx.SEQ.txt**?
7. Click **OK.**
8. All marks loaded when that file was imported have been removed.

Homeroom Assignment Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
03/01/21	Entire document	Update screenshots
1/14/20	Task 4	Fix typo
2/14/18	Entire document	Update screenshots

Table of Contents

Task #1 – Ensure Homeroom Terms are configured correctly.

In order for homerooms to be assigned, schedule terms need to be linked to the homeroom terms. If the schedule terms are not linked to the homeroom terms, any homerooms that have already been assigned need to be deleted and the homerooms assigned again from scratch.

1. Change the context to the building level and the current year.
2. Navigate to : ***StudentInformation*** » ***Management*** » ***School Administration*** » ***Scheduling Administration*** » ***Initialization*** » ***Homeroom Terms***.
3. Edit each homeroom term by clicking on the **Edit Pencil** icon.
   a. In the **Schedule Terms** section ensure the proper schedule terms are checked.
   b. Example: If the homeroom term is for 1st semester only, make sure all the schedule terms that coincide with 1st semester are marked.
   c. Click **Save**.
   d. To add a new homeroom term click **Add Homeroom Term**.
   e. Enter up to 4 characters in the **Code** field.
   f. Enter a name in the **Name** field.
   g. Enter an optional description in the **Description** field.
   h. Place checkmarks in the boxes next to the corresponding schedule terms in the **Schedule Terms** section.

	Name	Start Date	End Date	Include
	08/20/2020	Aug 20, 2020	Oct 16, 2020	☑
Schedule Terms:	10/19/2020	Oct 19, 2020	Dec 18, 2020	☑
	01/04/2021	Jan 04, 2021	Mar 12, 2021	☑
	03/15/2021	Mar 15, 2021	May 26, 2021	☑
Is Active:	☑			

   i. Click **Save**.
   j. Once you are finished making changes on the page click **Save Changes**.

Task #2 – Ensure Homerooms are configured correctly.

1. Navigate to ***StudentInformation*** *» **Management*** *» **School Administration*** *» **School Building Administration*** *» **Homerooms***.
2. Click the **Edit Pencil** icon to edit an existing homeroom.
3. Click **Add Homeroom** to add a homeroom.
   a. In the **Homeroom Term** dropdown select the correct term.
   b. Enter up to 4 characters in the **Code** field.
   c. Enter a name in the **Name** field.
   d. In the **Location** dropdown select the location the homeroom will meet in.
   e. Please Note: In order for the location to show in the dropdown the **Is Homeroom** box must be checked on the room on the Room/Location Maintenance page. ***(StudentInformation*** *» **Management*** *» **School Administration*** *» **School Building Administration*** *» **Rooms/Locations)***
   f. In the **Teacher** dropdown, select the appropriate teacher. In order for a teacher to show in the dropdown, the staff member must be assigned the teacher job function in ***StudentInformation*** *» **Management*** *» **Security*** *» **View Staff Members***.
   g. Enter the number of students permitted in the homeroom in the **Capacity** field.
   h. In the **Counselor** dropdown, select the appropriate counselor, if applicable.
   i. In the **Grade Levels** filter, pull the appropriate grade levels to the right. If the homeroom is for any grade level leave the filter empty.
   j. Click **Save**.

Task #3 - Assigning Homerooms to students one at a time using the Additional tab of the profile.

1. Change the context to the building level and the current year.
2. Navigate to ***StudentInformation*** » ***SIS*** » ***Student*** » ***Edit Profile*** **Additional** tab.
3. If the school is using complex homerooms, which means they have more than one homeroom term the following will display **Homeroom: View/Assign Homeroom**.
4. Click the **View/Assign Homeroom** button.
5. You will be brought to the Student Homeroom Assignments page.

Term	Homeroom
Full Year Term	- None - ∨
Semester 1	- None - ∨
Semester 2	- None - ∨

☑ **Display grade appropriate homerooms only**

6. After determining which homeroom you want to assign choose a homeroom from the dropdown.
7. Click **Save**.
8. The following message will display **The Student Homeroom Assignment was saved successfully.**
9. If the school only has a single homeroom term the following will display on the **Additional** of the student's profile

Homeroom: [∨] OR [Auto-Assign]

ℹ Choose from drop down or click Auto-Assign which will randomly assign an available grade-level appropriate homeroom to the student.

10. Choose a homeroom from the dropdown or click **Auto-Assign**.
11. Click **Save**.
12. The homeroom will now show in the context area.

SMITH, JOE
2281533 / 02 / A ▼

Homeroom: 2-M   Calendar: DFLT
Counselor: Program:

13. A student's homeroom assignment can also be edited by going to the following page ***StudentInformation*** » ***SIS*** » ***Student*** » ***Homeroom Assignment***.

Task #4 – Single Homeroom Bulk Assignment by Search Criteria.

1. Navigate to ***StudentInformation*** *» **Management** » **Ad-Hoc Updates** » **Homeroom Bulk Assignment** .*
2. The page defaults to the **Single Homeroom** tab.
   a. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   b. In the **Homeroom** dropdown select the homeroom you'd like to assign.
   c. The homerooms in the **Homeroom** drop-down list display based on the selected homeroom terms.
   d. If you'd like to enforce the grade level(s) selected when the homeroom was set up, check the box next to **Enforce Homeroom Grade Level**.
   e. NOTE: If no grade levels were pulled over to the right when you set up the homeroom you will need to uncheck **Enforce Homeroom Grade Level**, otherwise zero students will show when you search for students.
3. The next section shows which students are currently assigned to the homeroom you chose in the dropdown.
   a. If no students are currently assigned to the homeroom the following will display

   [Hide Existing Students]

	Student Number	Student Name	Grade	Status
	There are no records to display			

   b. You can hide this section by clicking the **Hide Existing Students** link.
4. In the final section select how you want to search for the students you want to assign to the homeroom.
   a. To search by students based on criteria choose **Select Students By: Search Criteria**.
   b. Choose the appropriate filters.
   c. If you want the students to be marked by default, put a check in the box next to **Students Selected by Default**.
   d. If the **Students Selected by Default** box is unchecked, students will need to be selected one by one.
   e. Click **Preview Students** button.

f. The students matching your search criteria are listed.

		Student Name	Student Number	Grade	Status	Current Homeroom
1	☐	ACEVEDO, ALVIN	000016124	03	A	1408
2	☐	ALBERT, PHILLIP	000014198	03	A	1408
3	☐	ALEXANDER, GLEN	000014192	03	A	1408
4	☐	ALEXANDER, ROBERTO	000017473	03	A	1408
5	☐	ALFORD, LEO	000015102	03	A	
6	☐	ALLEN, BETTY	000015175	03	A	

g. Students who you want to assign to the homeroom should have a check in the box next to their name. Students you don't want to assign to the homeroom should be unchecked.

h. If a checkmark is placed next to a student who already has a homeroom listed in the Current Homeroom column their current homeroom assignment will be overridden.

i. Click **Assign Students** button.

j. If the number of students chosen to be assigned to the homeroom exceeds the homeroom's capacity the following message will display

Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

This will cause the selected homeroom to be overfilled

You have selected to overfill the selected homeroom. The homeroom's remaining capacity is 20, but you have selected to assign 24 students.

Click 'OK' to continue with the homeroom assignments, overfilling the homeroom
Click 'Cancel' to return and adjust your selections

OK   Cancel

k. Click **OK** to continue or **Cancel** to change the number of students selected.

l. You will be brought to the **Results** tab if there are conflicts.

m. The following message will display: **All selected students were successfully assigned to the homeroom.**

Task #5 – Single Homeroom Bulk Assignment by Student ID.

1. Navigate to ***StudentInformation*** **»** ***Management*** **»** ***Ad-Hoc Updates*** **»** ***Homeroom Bulk Assignment*** .
2. The page defaults to the **Single Homeroom** tab.
   a. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   b. In the **Homeroom** dropdown select the homeroom you'd like to assign.
   c. If you'd like to enforce the grade level(s) selected when the homeroom was set up check the box next to **Enforce Homeroom Grade Level**.
   d. NOTE: If no grade levels were pulled over to the right when you set up the homeroom you will need to uncheck **Enforce Homeroom Grade Level**, otherwise zero students will show when you search for students.
3. The next section shows which students are currently assigned to the homeroom you chose in the dropdown.
   a. If no students are currently assigned to the homeroom the following will display

[Hide Existing Students]			
Student Number	**Student Name**	**Grade**	**Status**
There are no records to display			

   b. You can hide this section by clicking the **Hide Existing Students** link.
4. In the final section select how you want to search for the students you want to assign to the homeroom to.
   a. To search by students based on their student number choose **Select Students By: Student IDs**.
   b. Type in student IDs separated by commas in the box.
   c. If you want the students to be marked to assign to the homeroom by default check the box next to **Studnets Selected by Default**.
   d. If the box is unchecked, students who you want to assign to the homeroom will need to be selected one by one.
   e. Click **Preview Students** button.

f. The students matching your search criteria are listed.

		Student Name	Student Number	Grade	Status	Current Homeroom
1	✔	ALBERT, CLARENCE	000017163	01	A	
2	✔	ACEVEDO, MARJORIE	000016125	02	A	
3	✔	ACOSTA, RICARDO	000013485	02	ESMH	
4	✔	ADKINS, PATSY	000016055	02	A	
5	✔	ALBERT, PHILLIP	000014198	03	A	1408
6	✔	ALBERT, TODD	000015458	KG	HELP	1104

g. Students who you want to assign to the homeroom should have a check in the box next to their name. Students you don't want to assign to the homeroom should be unchecked.

h. If a checkmark is placed next to a student who already has a homeroom listed in the Current Homeroom column their current homeroom assignment will be overridden.

i. Click **Assign Students** button.

j. If the number of student chosen to be assigned to the homeroom exceeds the homeroom's capacity the following message will display

Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

This will cause the selected homeroom to be overfilled

You have selected to overfill the selected homeroom. The homeroom's remaining capacity is 20, but you have selected to assign 24 students.

Click 'OK' to continue with the homeroom assignments, overfilling the homeroom
Click 'Cancel' to return and adjust your selections

[OK] [Cancel]

k. Click **OK** to continue or **Cancel** to change the number of students selected.

l. You will be brought to the **Results** tab if there are conflicts.

m. The following message will display: **All selected students were successfully assigned to the homeroom.**

5. Run the R201 to verify homeroom assignments.

Task #6 – Single Homeroom Bulk Assignment by Homeroom.

1. Navigate to *__StudentInformation__* *__» Management__* *__» Ad-Hoc Updates__* *__» Homeroom Bulk Assignment__* .
2. The page defaults to the **Single Homeroom** tab.
   a. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   b. In the **Homeroom** dropdown select the homeroom you'd like to assign students into.
   c. If you'd like to enforce the grade level(s) selected when the homeroom was set up check the box next to **Enforce Homeroom Grade Level**.
   d. NOTE: If no grade levels were pulled over to the right when you set up the homeroom you will need to uncheck **Enforce Homeroom Grade Level**, otherwise zero students will show when you search for students.
3. The next section shows which students are currently assigned to the homeroom you chose in the dropdown.
   a. If no students are currently assigned to the homeroom the following will display

[Hide Existing Students]			
Student Number	Student Name	Grade	Status
There are no records to display			

   b. You can hide this section by clicking the **Hide Existing Students** link.
4. In the final section select how you want to search for the students you want to assign to the homeroom to.
   a. To search by students based on their homeroom assignment choose **Select Students By: Homeroom**.
   b. This assignment method allows you to override the student's current homeroom assignment and place them in another homeroom.
   c. If the school has multiple homeroom terms you can move students from a 1st semester homeroom into an all year homeroom using this assignment method.
   d. In the **Homeroom Assignment** dropdown select the homeroom you'd like to move students out of.
   e. If you want the students to be marked to assign to the homeroom by default check the box next to **Students Selected by Default**.
   f. If the box is unchecked, students who you want to assign to the homeroom will need to be selected one by one.
   g. Click **Preview Students** button.

h. The students matching your search criteria are listed.

		Student Name	Student Number	Grade	Status	Current Homeroom
1	☐	ACEVEDO, ALVIN	000016124	03	A	1408
2	☐	ALBERT, PHILLIP	000014198	03	A	1408
3	☐	ALEXANDER, GLEN	000014192	03	A	1408
4	☐	ALEXANDER, ROBERTO	000017473	03	A	1408
5	☐	ALFORD, LEO	000015102	03	A	
6	☐	ALLEN, BETTY	000015175	03	A	

i. Students who you want to assign to the homeroom should have a check in the box next to their name. Students you don't want to assign to the homeroom should be unchecked.

j. If a checkmark is placed next to a student who already has a homeroom listed in the Current Homeroom column their current homeroom assignment will be overridden.

k. Click **Assign Students** button.

l. If the number of student chosen to be assigned to the homeroom exceeds the homeroom's capacity the following message will display

Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

This will cause the selected homeroom to be overfilled

You have selected to overfill the selected homeroom. The homeroom's remaining capacity is 20, but you have selected to assign 24 students.

Click 'OK' to continue with the homeroom assignments, overfilling the homeroom
Click 'Cancel' to return and adjust your selections

OK   Cancel

m. Click **OK** to continue or **Cancel** to change the number of students selected.

n. You will be brought to the **Results** tab if there are conflicts.

o. The following message will display: **All selected students were successfully assigned to the homeroom.**

6. Run the R201 to verify homeroom assignments.

Task #7 – Multiple Homerooms Bulk Assignment by Search Criteria.

1. Navigate to *__StudentInformation__* » *__Management__* » *__Ad-Hoc Updates__* » *__Homeroom Bulk Assignment__* .
2. Click on the **Multiple Homerooms** tab.
   a. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   b. The homeroom term chosen in the **Homeroom Term** dropdown determines which homerooms show in the next box named **Available Homerooms.**
   c. Example: If you chose 1sem – 1st semester then only 1st semester homerooms would show in the **Available Homerooms** filter.
   d. In the **Available Homerooms** section pull over the desired homerooms you want to schedule to the right.
   e. You can choose one homeroom or any combination homerooms.
3. In the next section select how you want to search for the students you are going to assign homerooms to.
4. To search by students based on criteria choose **Select Students by Search Criteria**.
5. Choose the appropriate filters.
6. Click the **Assign Students** button.
7. You will be brought to the **Results** tab if there are conflicts.

Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

231 students matched your search criteria; 170 students were assigned to homerooms, but 61 students were not assigned to a homeroom because there was no availability in the selected homerooms or there was a data conflict with the assignment ✕

Single Homeroom	Multiple Homerooms	Results

Student Name	Student Number	Prior Homeroom	New Homeroom	Assigned
LEON, LEO	000016463		1408	☑
MCMAHON, RANDALL	000016185		1408	☑
DEJESUS, BERNICE	000016573		1408	☑
FLYNN, MAXINE	000015287		1408	☑
WADE, ROY	000014093		1408	☑

8. The page displays each student and the homeroom they were assigned to. If the student wasn't assigned to a homeroom their name still appears but the Prior Homeroom and New Homeroom columns are blank for the student and the box in the Assigned column is unchecked for the student.
9. Two main reasons students didn't receive a homeroom assignment is because the homeroom was at a capacity or they already have a homeroom assignment.
10. Run the R201 to verify homeroom assignments.

Task #8 – Multiple Homerooms Bulk Assignment by Students IDs.

1. Navigate to ***StudentInformation*** *» **Management** » **Ad-Hoc Updates** » **Homeroom Bulk Assignment** .*
   a. Click on the **Multiple Homerooms** tab.
   b. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   c. The homeroom term chosen in the **Homeroom Term** dropdown determines which homerooms show in the next section named **Available Homerooms**.
   d. Example: If you chose **1sem – 1st semester** then 1st semester only homerooms would show in the **Available Homerooms** filter.
   e. In the **Available Homerooms** section pull over the desired homerooms you want to schedule to the right.
   f. You can choose one homeroom or any combination of multiple homerooms.
2. In the next section select how you want to search for the students you are assigning the homerooms to.
   a. To assign multiple homerooms by typing in student IDs choose **Select Students By: Student IDs**.
   b. Type in student IDs, separated by commas, in the box.
   c. Click the **Assign Students** button.
3. You will be brought to the **Results** tab if there are conflicts.
4. The page displays each student and the homeroom they were assigned to. If the student wasn't assigned to a homeroom their name still appears but the Prior Homeroom and New Homeroom columns are blank for the student and the box in the Assigned column is unchecked for the student.
5. Two main reasons students didn't receive a homeroom assignment is because the homeroom was at a capacity or they already have a homeroom assignment.
6. Run the R201 to verify homeroom assignments.

Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

231 students matched your search criteria; 170 students were assigned to homerooms, but 61 students were not assigned to a homeroom because there was no availability in the selected homerooms or there was a data conflict with the assignment

Single Homeroom	Multiple Homerooms	Results			
Student Name	**Student Number**	**Prior Homeroom**	**New Homeroom**	**Assigned**	
LEON, LEO	000016463		1408	☑	
MCMAHON, RANDALL	000016185		1408	☑	
DEJESUS, BERNICE	000016573		1408	☑	
FLYNN, MAXINE	000015287		1408	☑	
WADE, ROY	000014093		1408	☑	

Task #9 – Multiple Homerooms Bulk Assignment by Class Period.

The most important thing to remember when assigning homerooms by class period is that the homeroom and the course section need to have the same location. Example: If you want students taking Spanish1 1st period to assigned to Homeroom 101, Spanish1 and Homeroom 101 must both meet in the same location.

The schedule must be finalized in order to assign homerooms by class period.

1. Navigate to ***StudentInformation*** *» **Management*** *» **Ad-Hoc Updates*** *» **Homeroom Bulk Assignment*** .
   a. Click on the **Multiple Homerooms** tab.
   b. In the **Homeroom Term** dropdown select the appropriate homeroom term.
   c. The homeroom term chosen the **Homeroom Term** dropdown determines which homerooms show in the next section named **Available Homerooms**.
   d. Example: If you chose **1sem – 1st semester** then 1st semester only homeroom would show in the **Available Homerooms** filter.
   e. In the **Available Homerooms** section pull over the desired homerooms you want to schedule to the right.
   f. You can choose one homeroom or any combination of multiple homerooms.
2. In the next section select how you want to search for the students you are assigning the homerooms to.
   a. To assign multiple homerooms based on class period, choose Select Students By: Class Period.
   b. Now choose the corresponding course term of the course sections.
   c. If you are assigning homerooms for the 1st semester only homeroom term, select the 1st semester only course term in the **Course Term** dropdown.
   d. Next in the **Rotation Day** dropdown select the day of week you would like to base the homeroom assignments on. 99% of schools will choose Monday.
   e. In the **Period** dropdown select the period of the day you are basing the homeroom assignments on. Typically schools will choose 1st period.
   f. Click the **Assign Students** button.
3. You will be brought to the **Results** tab if there are conflicts.
4. The page displays each student and the homeroom they were assigned to. If the student wasn't assigned to a homeroom their name still appears but

the Prior Homeroom and New Homeroom columns are blank for the student and the box in the Assigned column is unchecked for the student.
5. Two main reasons students didn't receive a homeroom assignment is because the homeroom was at a capacity or they already have a homeroom assignment.
6. Run the R201 to verify homeroom assignments.

14 students matched your search criteria and they were all assigned to homerooms ✖

| Single Homeroom | Multiple Homerooms | **Results** |

Student Name	Student Number	Prior Homeroom	New Homeroom
GAMBLE, MAX	000016103	107A	A107
STEVENSON, MARLENE	000014146	107A	A107
STONE, HOWARD	701002884	107A	A107
NELSON, KIMBERLY	000010309	107A	A107
WILKINS, VICTORIA	000016095	107A	A107
GILBERT, SYLVIA	701022468	107A	A107

Appendix A – Clearing all from a homeroom term

 Performing the steps below will delete all students from the selected homeroom term. Please proceed with caution.

1. Navigate to : ***StudentInformation*** » ***Management*** » ***School Administration*** » ***Scheduling Administration*** » ***Initialization*** » ***Homeroom Terms***.
2. Click on the **Person with x** icon of the homeroom term you want to clear.
   a. The following message will display

   ## Homeroom Terms Maintenance

   From this screen, you can display and change data pertaining to homeroom terms.

   Are you sure you want to remove all student homeroom assignments for the following homeroom term:

   FullYear - Full Year Term

   [OK] [Cancel]

   b. Click **OK** to confirm the delete.
   c. The following confirmation message is displayed **All students were removed from all homerooms for the selected Homeroom Term.**

Appendix B – Clearing one homeroom at a time

1. Navigate to ***StudentInformation*** *» **Management** » **School Administration** » **School Building Administration** » **Homerooms***.
2. Choose the homeroom you'd like to clear all students from.
3. Click the **Person with x** icon.
   a. The following message will display

   ### Homeroom Maintenance

   From this screen, you can Edit, Delete or Add a Homeroom.

   Are you sure you want to remove all students from the following Homeroom:

   107A - 107A

   [OK]   [Cancel]

   Click **OK** to confirm the delete.
   b. The following message is displayed **All students were successfully removed from the homeroom.**

Appendix C – Troubleshooting Homeroom Assignments

Issue	Cause	Solution
Student homeroom assignments don't show in context area.	Homeroom terms weren't properly linked to schedule terms at the time the homerooms were assigned. OR First/last day of school is not an actual School Day.	Clear all homeroom assignments for the homeroom term by using the steps in Appendix A of this document. Edit the homeroom term and link the schedule terms to the homeroom term and then reassign homerooms. OR Update first/last day of school to actual school day.
When adding a new homeroom the room doesn't show in the Location dropdown so I can choose it.	When the room was created the Is Homeroom box wasn't checked.	Edit the location on the Room/Location Maintenance page and mark the Is Homeroom checkbox.
I'm attempting to assign homerooms by class period but it's not working. No one is being assigned a homeroom.	The location of the course and the location of the homeroom must match.	Edit either the course section or homeroom and change the location.

Honor Roll Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
5/8/19	Entire document	Update screenshots and typos
6/8/18	Task #1	Remove obsolete note.

Table of Contents

Alpha School:

GPA Formula	Alpha Exclusions Work	Numeric Exclusions Work
Standard Alpha	Yes	n/a
GPA by Course Count	Yes	n/a

Numeric School:

GPA Formula	Alpha Exclusions Work	Numeric Exclusions Work
Standard Alpha	Yes	No
GPA by Course Count	No	Yes
Standard Numeric	No	Yes
Raw Numeric GPA	No	Yes

Task #1 – Configure Honor Roll

1. Change the context to the building level and the current year.
2. Navigate to: ***StudentInformation » Management » School Administration » Marks Administration Menu » Honor Rolls***.
3. Click **Add Honor Roll**.
4. Enter up to 4 characters in the **Code** field.
5. Enter up to 30 characters in the **Name** field.
6. The **Type** drop-down list defaults to **GPA**. You will receive the same honor roll results regardless of what you choose in the drop-down list. State Support recommends leaving GPA in the drop-down list.
7. Enter an optional **Description:**.
8. If a student is required to have a minimum number of courses, enter that number in the **Min Number of Courses** field.
9. If a student is required to have a minimum number of marks in order to qualify for the honor roll, enter that amount in the **Min Number of Marks** field.
10. If a student is required to achieve a minimum GPA in order to qualify for the honor roll, enter the GPA in the **Minimum GPA** field.
11. In the **GPA Set** drop-down list, select the GPA that will be used to calculate the honor roll. ***Note:*** *Honor rolls are based off of GPAs. You cannot get an honor roll without first having a GPA.*
12. The **Precedence** field signifies how restrictive the honor roll is. A Precedence of 1 is the most restrictive. Example: A school has three honor rolls: All A, AB, and ABC honor roll. Students who qualify for the All A honor roll also qualify for the AB and ABC honor rolls. The All A honor roll is the most restrictive honor roll and should have a Precedence = 1, the AB honor roll is the 2nd most restrictive and should have a Precedence = 2, and the ABC honor roll is the least restrictive and should have a Precedence = 3.
13. If a student makes the All A honor roll, they also qualify for the AB and ABC honor roll and their name will print on all three honor roll lists if **Ignore Precedence** is checked. If you only want the student's name to appear on the most restrictive honor roll, the All A for example, then leave the **Ignore Precedence** unchecked.
14. If students missing over a certain number of marks are excluded from the honor roll, enter the number in the **Max Number of Missing Marks** field. Example: If a student is missing two marks from the 4th quarter, they would not be eligible for the 4th quarter honor roll if the Max Number of Missing Marks field was set to 1.
15. If students are required to earn a certain number of credits in order to qualify for the honor roll, enter the number in the **Min Number of Credits** field.
16. If the **Include Primary Building Students Only** checkbox is checked then only students with the school building filled in on their **Edit Student**

Profile screen **Additional** tab **Primary Building** field drop-down list will be included on the honor roll listing.

17. If you would like an honor roll message to print on the report card if the student qualifies for the selected honor roll, type the message in the **Honor Message** field.

18. Click **Save**.

Task #2 – Configure Alpha Exclusion Marks

F.Y.I. Exclusion marks are optional.

F.Y.I. Selecting to include zero Cs is the same as saying exclude zero Cs.

F.Y.I. Alpha Exclusion marks only work with honor rolls tied to alpha GPA formulas. Please see the chart at the beginning of the document for more information.

1. Click on the **Exclusion Marks** link of the honor roll you created in Task 1.
2. The page refreshes and automatically defaults to the **Alpha Honor Roll Rules** tab.
3. In the following example, we will set up exclusions for an All A honor roll. To qualify for the All A honor roll, the student can only have marks of A and S. Choose a mark from the **Mark** drop-down list. Next, in the **Number Allowed** field, enter the number of marks allowed. Next, click either **Include** or **Exclude**. Finally, click **Add Mark**.
4. If we were setting up a rule to exclude B marks, the screen would look as follows:

5. An exclusion needs to be set up for the B+ and B- also, if the school uses pluses and minuses.
6. As stated above, choosing zero include or zero exclude does the same thing. It makes more sense to use include zero Bs then to say exclude zero Bs.
7. If you make a mistake, click on the **trash can** icon next to the mark. When you delete an exclusion, it is permanently deleted.

8. If your school has combined mark groups set up, you could set up exclusions based on combined mark groups versus setting up an exclusion for each individual mark. Example: Set up a Combined Mark Group for all B marks. Then on the honor roll exclusions page, set up an exclusion for the B mark group. This saves a little time because you do not have to set up a separate exclusion for each B mark if you use the Combined Mark Group.
9. Now set up exclusions for the AB and ABC honor roll.
10. Once you have finished setting up exclusions, click **Cancel** to return to the Honor Roll Maintenance page.

Example of All A honor roll exclusions:

	Mark ▲	Combined Mark Group	Number Allowed	Rule Type
🗑	B		0	Include
🗑	B-		0	Include
🗑	B+		0	Include
🗑	C		0	Include
🗑	C-		0	Include
🗑	C+		0	Include
🗑	D		0	Include
🗑	D-		0	Include
🗑	D+		0	Include
🗑	F		0	Include
🗑	I		0	Include
🗑	W		0	Include

Alpha Honor Roll Rules | Numeric Honor Roll Rules

Mark: [▾] Mark Group: [▾] Number Allowed:* [ ] ● Include ○ Exclude Add Mark Cancel

Task #3 – Set up Numeric Honor Roll Exclusions – optional.

F.Y.I. Numeric Exclusion marks only work with honor rolls tied to numeric GPA formulas. Please see the chart at the beginning of the document for more information.

1. Click on the **Exclusion Marks** link of the honor roll that is tied to a numeric GPA.
2. The page refreshes and automatically defaults to the Alpha Honor Roll Rules tab. Click on the **Numeric Honor Roll Rules** tab.
3. In the following example, we are going to set up numeric honor roll exclusion so that any student with a mark lower than 92.50 does not get included in the highest honor roll. In the **Numeric Mark** field, enter the value of the numeric mark. In this example, enter 92.49. In the **Number Allowed** field, enter zero because we do not want to include anything lower than a 92.50. Next, click **Include**. *Note: Saying to Include zero or Exclude zero means the same thing.* Finally, click **Add Mark**.

Alpha Honor Roll Rules	Numeric Honor Roll Rules		

Numeric Mark:* [   ]   Number Allowed:* [   ]   ⦿ Include ◯ Exclude   **Add Mark**   Cancel

	Numeric Mark ▲	Number Allowed	Rule Type
🗑	92.490000	0	Include

4. Once you have finished setting up exclusions, click **Cancel** to return to the Honor Roll Maintenance page.

Task #4 – Recalculate the GPA associated with the Honor Roll then run the R303.

1. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Course History Administration*** *»* ***GPA Sets***.
2. Click the **circle arrows** of the GPA linked to the Honor Roll you are trying to print.
3. Wait for the GPA recalculation job to complete on your Batch/Report Management screen.
4. Next, navigate to. ***StudentInformation*** *»* ***SIS*** *»* ***Marks*** *»* ***Marks Reports*** *»* ***Honor Roll (R303)***
5. On the R303 submission screen, in the **GPA Set** filter, select the GPA associated with the Honor Roll you are printing.
6. Enter a day that school is in session in the **Homeroom Date** filter. This is especially important for seniors that were withdrawn prior to end of the school year.
7. In the **Sorting Options** filter, move **Grade (DESC)** and **GPA (DESC)** over to the right.
8. Put a check in the box next to **Page Break on First Sort Item:**.
9. Running the R303 in this manner will print each grade level on a separate sheet.
10. Click **Submit**.
11. Wait for the report to complete on your Batch/Report Management screen.

Appendix A - Troubleshooting steps for R303

Question:	Diagnosis:	Possible Solution:	Outcome:
1. Are you using a Homeroom Date on the R303 submission screen that is not a day of school?	The R303 will return zero results if the Homeroom Date used is a day after school is out.	Change the Homeroom Date field to a valid school day on the R303 submission screen.	Rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
2. Have you verified students are getting GPAs? You can not get an Honor Roll listing if the students are not getting GPAs, since the Honor Roll is based off the GPA.	Go to the *StudentInformation » SIS » Course History » Student GPA/Rank* page. Choose the GPA linked to the Honor Roll in question and then choose a grade level. Verify students are actually getting GPAs.	Honor Rolls and GPAs are directly connected. If students are not receiving GPAs then they cannot get on the Honor Roll. Consult the GPA Step by Step document Appendix A and B for GPA troubleshooting steps.	If the R303 still does not list the desired students, continue onto the next question.
3. Is the Min Number of Courses field on the Honor Roll set too high?	If the Min Number of Courses is set to 7 and most students only take 6 courses, the student(s) will not be on the R303.	Edit the Honor Roll and change the Min Number of Courses field to a more attainable number.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
4. Is the Min Number of Marks field on the Honor Roll set too high?	If the Min Number of Marks is set to 10 and students only have 8 marks, the student(s) will not be on the R303.	Edit the Honor Roll and change the Min Number of Marks field to a more attainable number.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
5. Is the Max Number of Missing Marks on the Honor Roll set too low?	If the Max Number of Missing Marks is set to 1 and students have 2 grades missing, the student(s) will not be on the R303.	Edit the Honor Roll and change the Max Number of Missing Marks field to a more attainable number.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.

6. Is the Min Number of Credits field on the Honor Roll set too high?	If the Min Number of Credits is set to 9 and no one attempts over 6 credits, the student(s) will not be on the R303.	Edit the Honor Roll and change the Min Number of Credits field to a more attainable number.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
7. Is Include Primary Building Students Only checked?	If the Include Primary Building Students Only is checked, seniors who have been power withdrawn at the end of the school year or anyone else whose Primary Building field say the school district will not be listed on the R303.	Edit the Honor Roll and uncheck Include Primary Building Students Only checkbox.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
8. Is the Include in Honor Roll box unchecked on the Additional tab of the student's profile?	In order for a student to appear on the R303, they must have the Include in Honor Roll box checked on their profile.	Edit the student's profile and check the Include in Honor Roll checkbox.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
9. Are the correct type of exclusions being used?	If the school is using an alpha GPA formula then alpha exclusion marks must be used. Numeric exclusions will not work with alpha GPA formulas. If the school is using a numeric GPA formula then numeric exclusions marks must be used.	Edit the exclusions and make the needed corrections.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.

10. Are the exclusions set up correctly on the Honor Roll?	If you have an exclusion set up for an S mark and a student has an S mark, they will not get on the Honor Roll. Exclusions must be set up for each individual mark that excludes the students from the Honor Roll. For example: B, B+, and B- must all have an exclusion if you are trying to calculate the All A Honor Roll.	Edit the exclusions and make the needed corrections.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
11. Is the Precedence field correct?	The most restrictive Honor Roll should have the Precedence = 1, the 2nd most restrictive Honor Roll should have the Precedence =2.	Edit the Honor Roll and correct the Precedence.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
12. Is the Honor Roll set to ignore precedence?	If Ignore Precedence is checked on the Honor Roll and a student qualifies for the All A Honor Roll, they also qualify for the AB Honor Roll and will list on both Honor Rolls unless Ignore Precedence is unchecked.	Edit the Honor Roll and uncheck the Ignore Precedence checkbox.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.
13. Is the Minimum GPA field set too high or too low on the Honor Roll?	If the Minimum GPA field is set to 3.0 for the All A honor roll and no exclusions are set up, students who got 5 As and 1 B and got a GPA of 3.2 will still qualify for the All A Honor Roll.	Either increase or decrease the Minimum GPA value or set up exclusions.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, continue onto the next question.

14. Are you using the wrong Homeroom Date?	The R303 is one of the few reports in StudentInformation that honors the homeroom date on the submission screen. Ensure the homeroom date is a day school is in session. If attempting to generate an Honor Roll for Seniors that have already been power withdrawn make sure you use their withdrawal date as the homeroom date on the R303 submission screen.	Change the Homeroom Date on the R303 submission screen.	Rerun the R303.
15. Did you make changes to the Honor Roll and not refresh the GPA?	Any change made to the Honor Roll, no matter how minor, must be followed by refreshing the GPA before you rerun the R303.	Refresh the GPA.	Refresh the GPA then rerun the R303. If the R303 still does not list the desired students, send a Help Desk ticket.

INFOhio Export Checklist

INFOhio Export

The INFOhio Export is usually performed on a nightly basis to send demographic data from StudentInformation to INFOhio for use in the Patron files in the library software. Most ITCs set up the exports to run automatically at night for each of their buildings. Three separate options are available in StudentInformation Options for the homeroom assignment to include in the record for each building. While this checklist provides instruction on how to create the file, here are some additional tips you should know about this process.

NOTE: If the nightly extracts fail to complete, the file created from StudentInformation does not get loaded into the Library system. When no record comes over from StudentInformation for a student, regardless of the reason, the student automatically gets changed to **Expired** in INFOhio. If a new record is loaded for a student to correct the issue, the student's status will be updated automatically.

NOTE: ITC Staff should check the logs daily to ensure that the extracts and loads completed successfully. If logs are checked first thing in the morning and it is discovered that a load failed, once the issue is identified, and the resolution found, extracts can be reprocessed and the files reloaded to quickly resolve the issue. Log files for the StudentInformation extractions reside in the DASL _Log directory on the alpha.

NOTE: StudentInformation Support staff should notify INFOhio support when a StudentInformation update is applied in case something changes that has an affect on the data extracted nightly. This would be an especially important time to check those nightly logs to make sure there are no problems as a result of the update.

NOTE: For any of the homeroom options used, it is possible that the value of a student's homeroom may change at the end of the semester or quarter. Make sure the files are checked at that time to ensure all necessary homeroom information is there. If a student is missing homeroom information in the record, the student's homeroom will be changed to **unknown** in the Library software. The INFOhio Export will only use the finalized schedule.

NOTE: In order for a student to be included in the file, the student must have an annual record in the current school year as well as a LIVE EMIS time period record. EMIS time period records are created for all students regardless of whether a district reports to EMIS or not. If a student is not included in the file and it is not because of the student's status code, then the user should check the student's admission history detail records to make sure that the student has a record for the current school year. Navigate to **StudentInformation > SIS > Student > Admission History > Edit History Details** and check for a record in the current school year.

NOTE: Student status codes play a big part in which students get included in the file. On the Student Status Code Maintenance page, any status code defined with an internal status of **Inactive** or **Deleted** will not be included in the file. This may include students who are residents attending elsewhere if they use a separate status code for these students and make them **inactive** internally. Navigate to **StudentInformation > Management > School Administration > Student Codes Administration > Student Status Codes** to check to see how status codes are configured. Here is a sample from StudentInformation:

Student Status Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to student status codes.

Add Status Code

		Code	Name ▲	Overall Student Status	Description	Active
🗑	✏	AE	ACTIVE ELSEWHERE	Active	Students NOT in building at all like: Full-time PSEOP,Pioneer Career & Technology Center,College NOW,North Point ESC/Erie County, Northwest Ohio Juvenile Detention Center	🟢
🗑	✏	A	ACTIVE RES	Active	ACTIVE RES	🟢
🗑	✏	ACCA	ASHLAND ACADEMY	Active	Ashland High School Students attending the Ashland County Community Academy sponored by Tri-County ESC.	🟢
🗑	✏	BL	BL	Active	building level code	🟢
🗑	✏	D	DELETED	Deleted	DELETED	🟢
🗑	✏	EG	EARLY GRADUATE	Active	Early Graduates - after 1st semester want to keep active so they are included in ranking	🟢
🗑	✏	HS	HOME SCHOOLED	Active	Home Schooled students attending AHS part-time - Will NOT graduate from AHS	🟢
🗑	✏	I	INACTIVE	Inactive	INACTIVE	🟢
🗑	✏	J	JVS RES	Active	JVS RES - Full-time Career Center students	🟢
🗑	✏	N	NON-RES	Active	NON-RES - Full-time students who are open-enrolled to us from another school district (Most are in our building - a couple are at Career Center)	🟢
🗑	✏	O	OTH NONRES	Inactive	OTH NONRES	🟢
🗑	✏	R	RES A/ELSE	Inactive	RES A/ELSE	🟢
🗑	✏	Q	Resident	Inactive	Resident	🟢
🗑	✏	SO	SPORTS ONLY - NON-AHS ATHLETES	Inactive	THIS STATUS IS FOR STUDENTS WHO LIVE IN THE ACS DISTRICT BUT ATTEND OTHER SCHOOLS, EXAMPLE: HOME SCHOOL, ONLINE SCHOOLS (ECOT, OHIO VIRTUAL ACADEMY..) OR NON-PUBLIC SCHOOLS	🟢
🔒	🔒	T1	T1	Active	desc	🟢

☑ Show Active Only
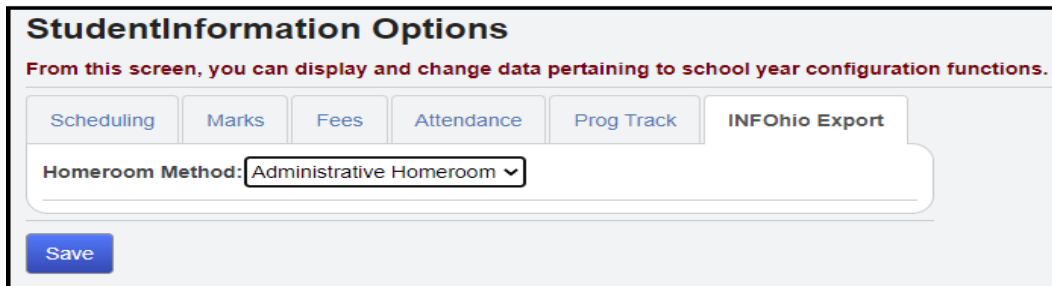
☐ Task #1 - Update StudentInformation Options – INFOhio Export Tab

The StudentInformation Options - INFOhio Export tab allows the district to choose which homeroom they wish to use in the export file.

Homeroom Method – Select from the dropdown box a default method for exporting Homeroom in the INFOhio Export. Valid choices are Administrative Homeroom, Period Homeroom and Department Homeroom. The Default choice is Administrative Homeroom.

Administrative Homeroom

If the Administrative Homeroom is chosen, the student's homeroom as assigned on the Edit Student Profile – Additional tab will be used. If a student has no administrative homeroom, the homeroom information will be empty on the student's record in the export file.
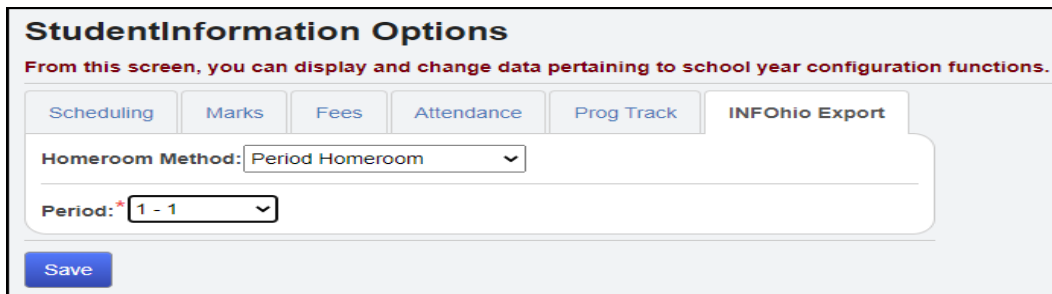
Period Homeroom

If you select Period Homeroom, you must also select the period course sections meet that you wish to use as the homeroom period.

Any course section the student is assigned to that meets the selected period will be used as the homeroom. The teacher and location from the course section will be used as homeroom teacher and room in the export record.

Department Homeroom

If you select Department Homeroom, you must also select the department code of the courses you wish to use as the homeroom period.

Any course section the student is assigned to that meets and has the selected department assigned to the course will be used as the homeroom. The teacher and location from the course matching the selected department will be used as homeroom teacher and room in the export record.

StudentInformation Options

From this screen, you can display and change data pertaining to school year configuration functions.

| Scheduling | Marks | Fees | Attendance | Prog Track | **INFOhio Export** |

Homeroom Method: Department Homeroom

Department:* ENG - ENGLISH

Save

For the department and period methods, if a student has no course section assignments which meet the criteria for department and period, the student will have no homeroom information in the record in the export file.

☐   Task #2 - Run the INFOhio Export

These instructions only apply when running the export manually.

Check with your Librarians to determine which fields they wish to have included in the export file.

1. Change context to the building level.
2. Navigate to: **StudentInformation > Management > Import/Export > INFOHIO Export**
3. The Export page will present the user with a list of fields with a checkbox preceeding each field. Click on each checkbox to include the corresponding data element in the record.
4. Click **Export**.
5. A window will open on the page and the user will be prompted to Save or Cancel. This allows you to save the file to a designated location or cancel the export.
6. Click **Save** and save the file to your hard drive.
7. Send the file to the INFOhio support person for further processing.

Generating Labels with StudentInformation Procedural Checklist

Generating labels thru StudentInformation

You can use the StudentInformation program to generate a listing of students to save to your computer and print labels to a laser printer.

Please refer to the EZQuery End User Guide for the steps on how to create a download file that can be used to generate labels or mail merge documents.

Getting Started

1. Log into **StudentInformation** with your username and password.

2. Click on **EZ Query.**

3. Click on **Reports.**

4. Click on **SIS Student Search**
   - Using the SIS Student Search, select the students and output fields for your spreadsheet and eventual labels. Please see the EZ Query End User Guide for detailed information on the SIS Student Search.
   - Choose to download a file in the Summary tab of the SIS Student Search. Indicate the desired folder location and the desired File Name. The download File option will always default the name to DASL_Data.xls.

- You will want to keep the file type as a Microsoft Excel Worksheet with an .XLS file suffix.

5. Click the **SAVE** button when complete. You have now just copied the contents of that SIS Student Search report in a file, which is located in the Desktop area.
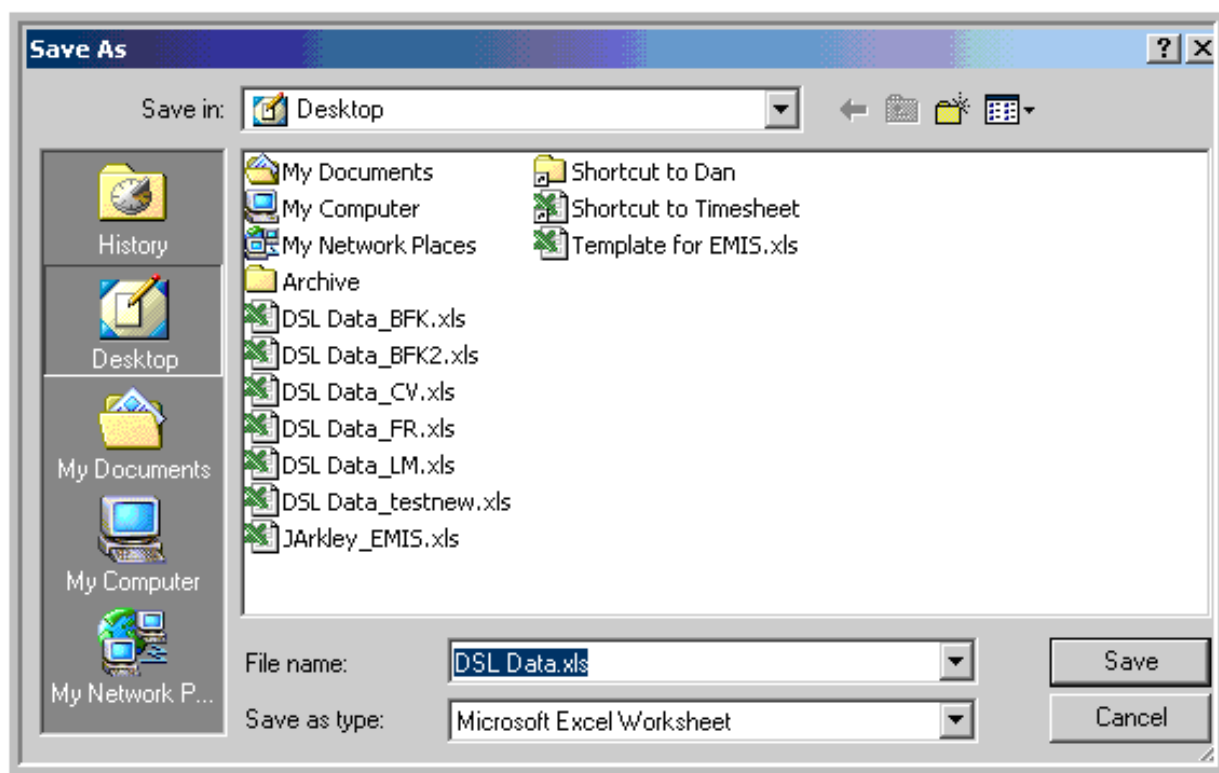
Creating Labels with Microsoft Word

1. Open up **Microsoft Word.**

2. Open a **blank document** if one is not already open.

3. Select the **Tools** menu.

4. Click on **Mail Merge** which will open the Mail Merge Helper Screen.
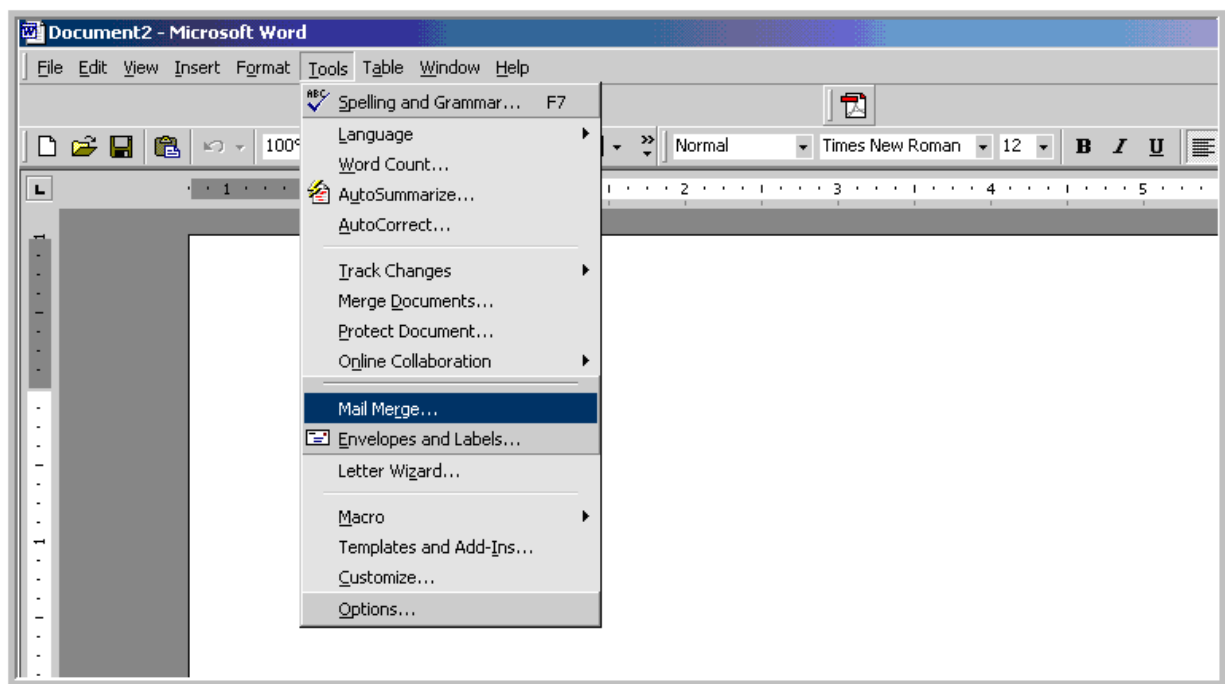
5. In **Step 1**, click on the **Create** button.

6. Select **Mailing Labels.**

7. Select **Active Window** in the prompt that appears.
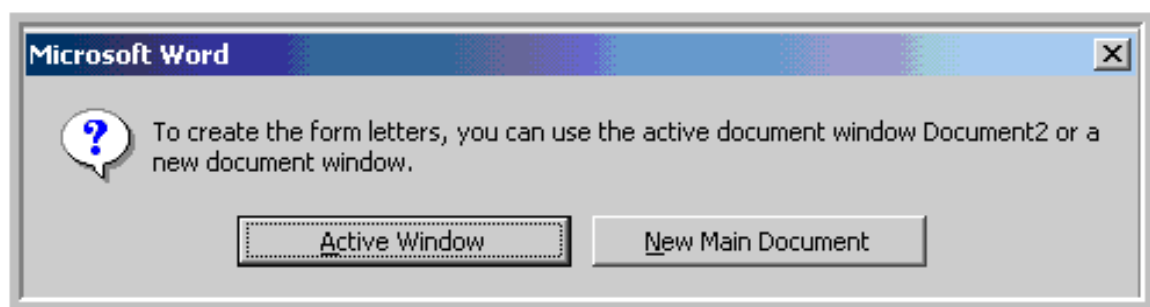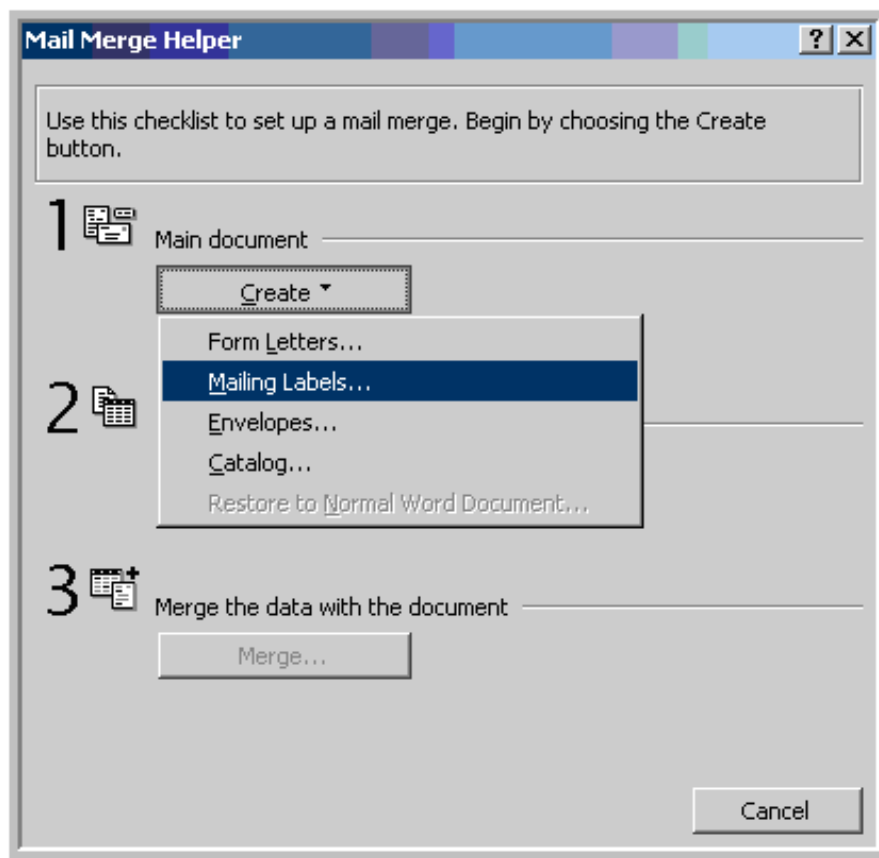
8. In **Step 2**, select your data source by clicking on **Get Data.**

9. Select **Open Data Source.**

10. In the Open Data Source dialog box, change the Files of Type to "**All Files**" from the drop down list.

11. Select the file location of the downloaded **DASL_Data.xls** file in the **Look In: box.**

12. Highlight your **DASL_Data.xls** file and click the **Open** button.
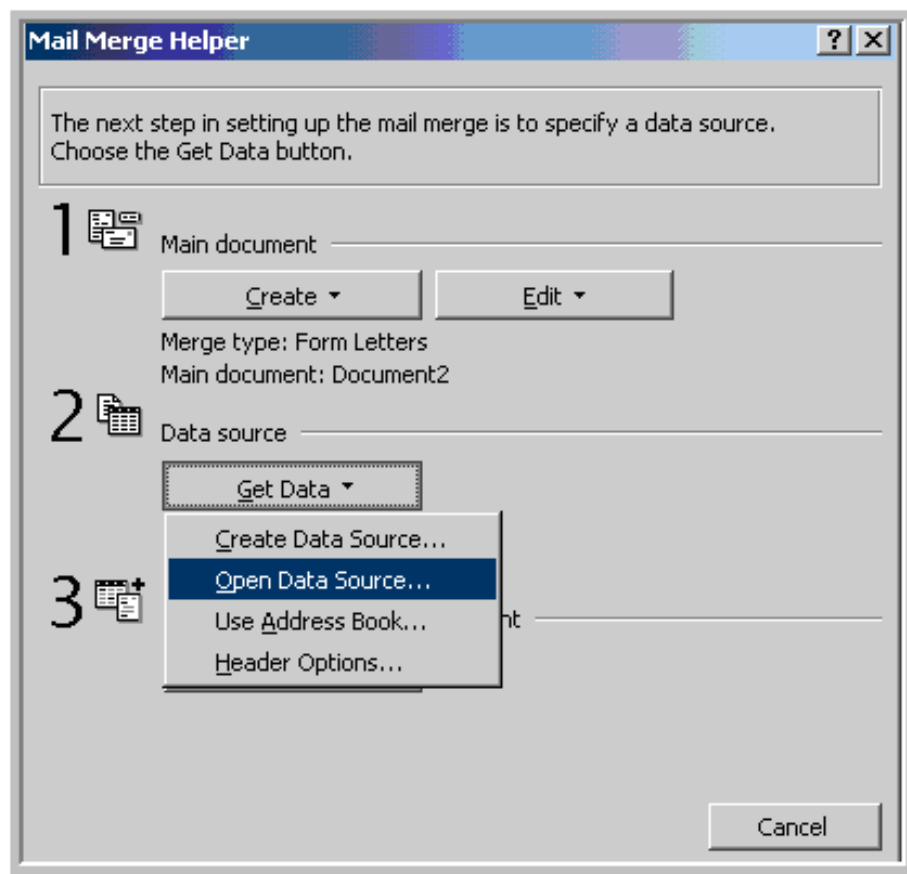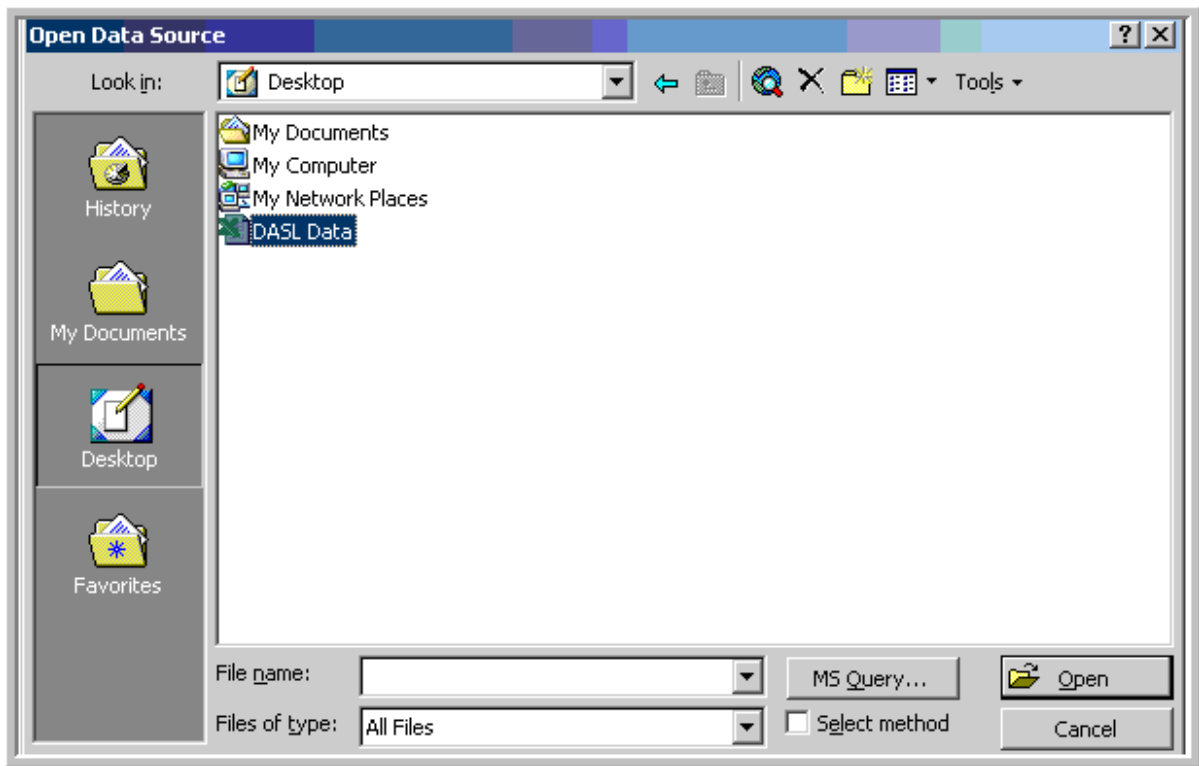
13. In the dialog box that appears, select "**Entire Spreadsheet**".
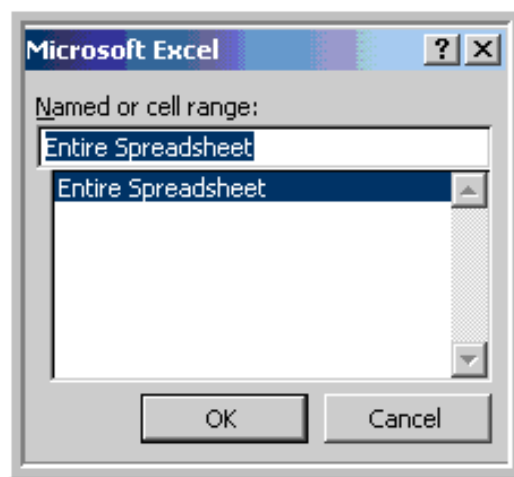
14. Click the **Edit Main Document** button.
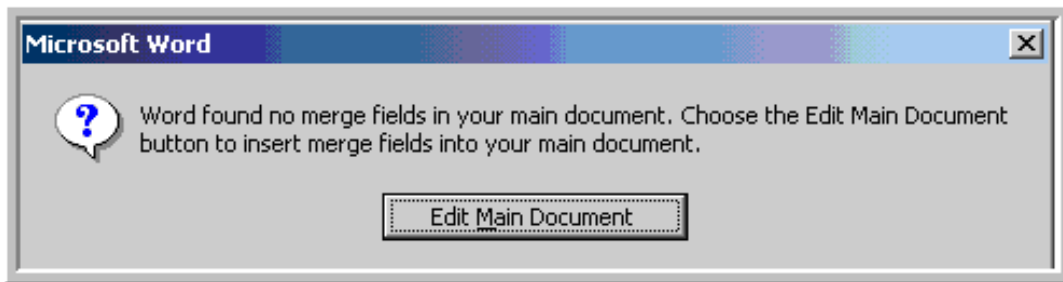
The Label Options dialog box appears and lists the standard Avery label options.

15. Select the correct **Avery Label number** and click the **OK** button.
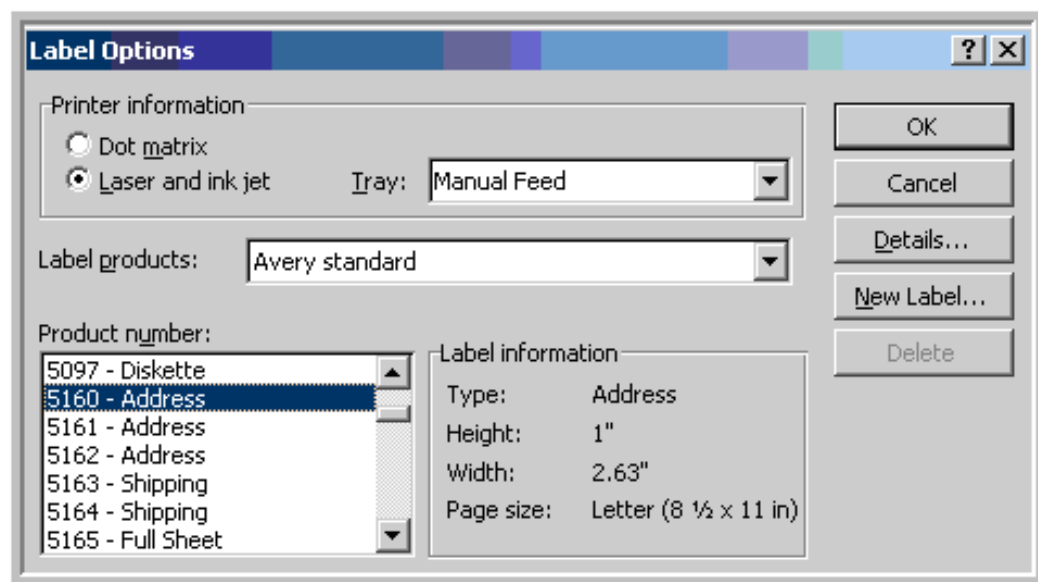
The Create Labels dialog box appears.

16. Click on the **Insert Merge Field** button to view a list of the data fields to be included in your merge.

17. If necessary, place your cursor in the Sample Label box, click on the Insert Merge Field button, and select any **additional fields** that need to be included in the merge.

Create Labels ? ☒

Choose the Insert Merge Field button to insert merge fields into the sample label. You can edit and format the merge fields and text in the Sample Label box.

Insert Merge Field ▾		Insert Postal Bar Code...

Samp

StudentID
LastName
GivenName
CalledName
AddressLine1
AddressLine2
City
State
Zip
AreaCode
Telephone
ParentGuardian
Gender
StudentStatus
Grade

OK   Cancel

Create Labels ? ☒

Choose the Insert Merge Field button to insert merge fields into the sample label. You can edit and format the merge fields and text in the Sample Label box.

Insert Merge Field ▾		Insert Postal Bar Code...

Sample label:

«LastName», «GivenName»
«AddressLine1»
«AddressLine2»
«City», «State» «Zip»

OK   Cancel

18. In Step 3, click on the **Tools** menu and select **Mail Merge.**

19. Click on the **Merge…** button.
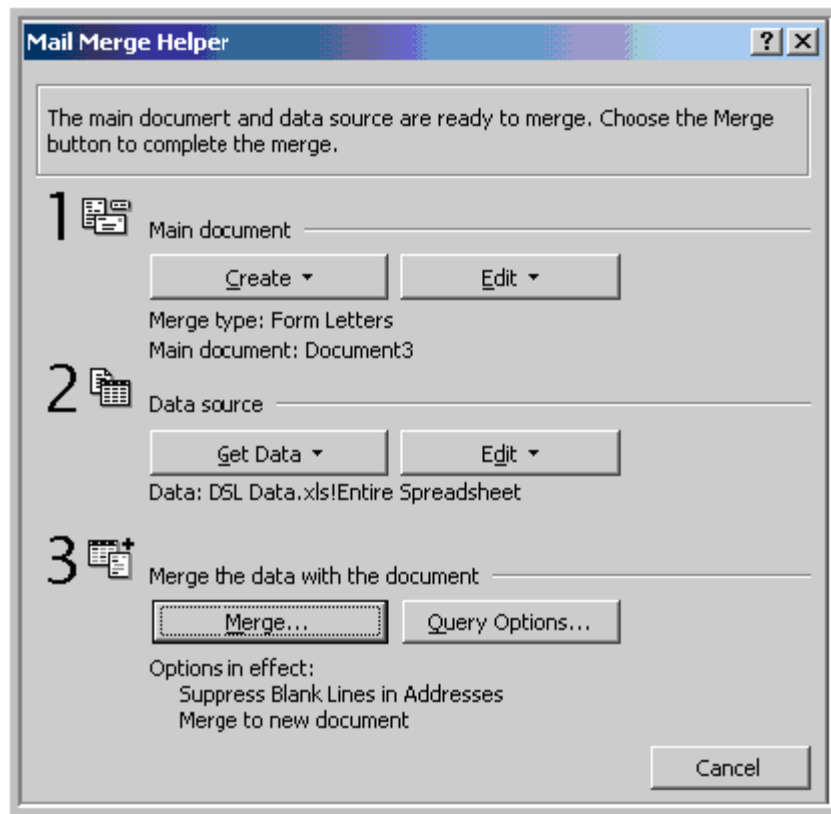
20. Select the **New Document** option from the drop down box.

21. Click on the **Merge button** to process your merge request.
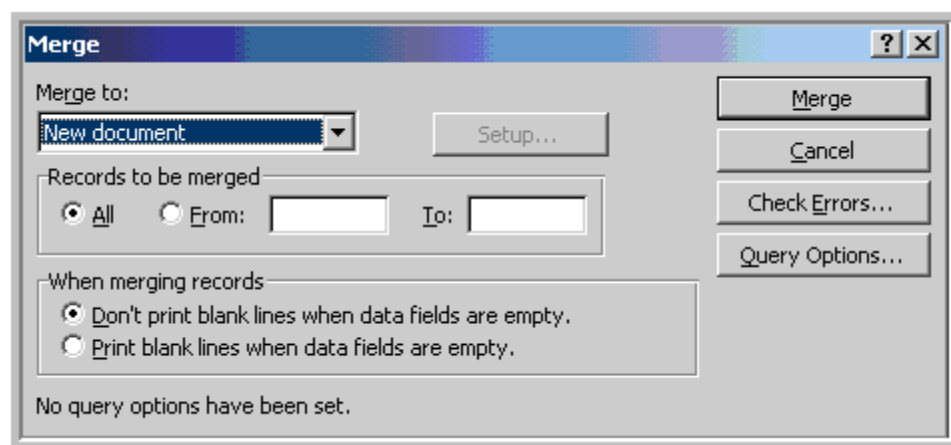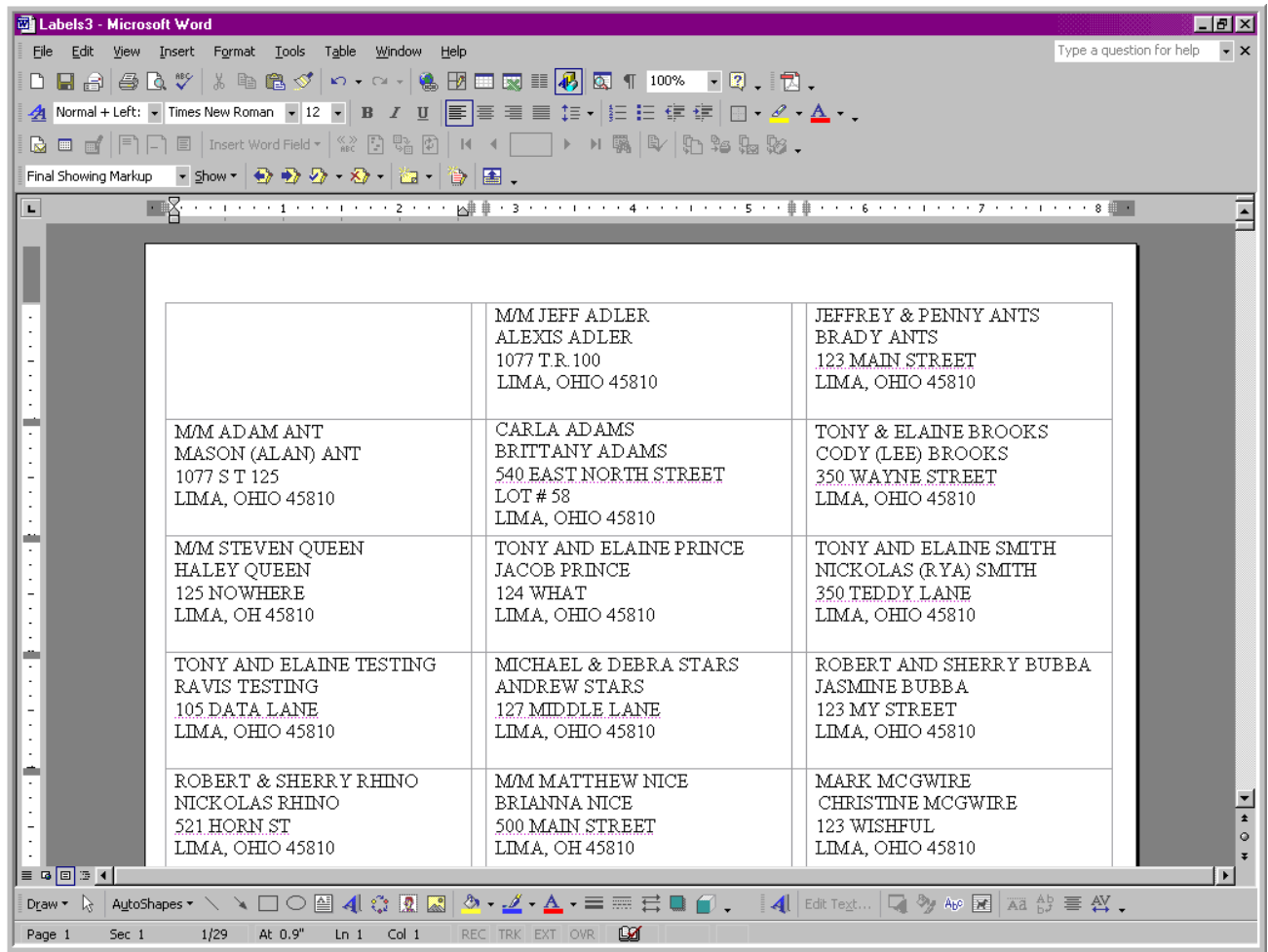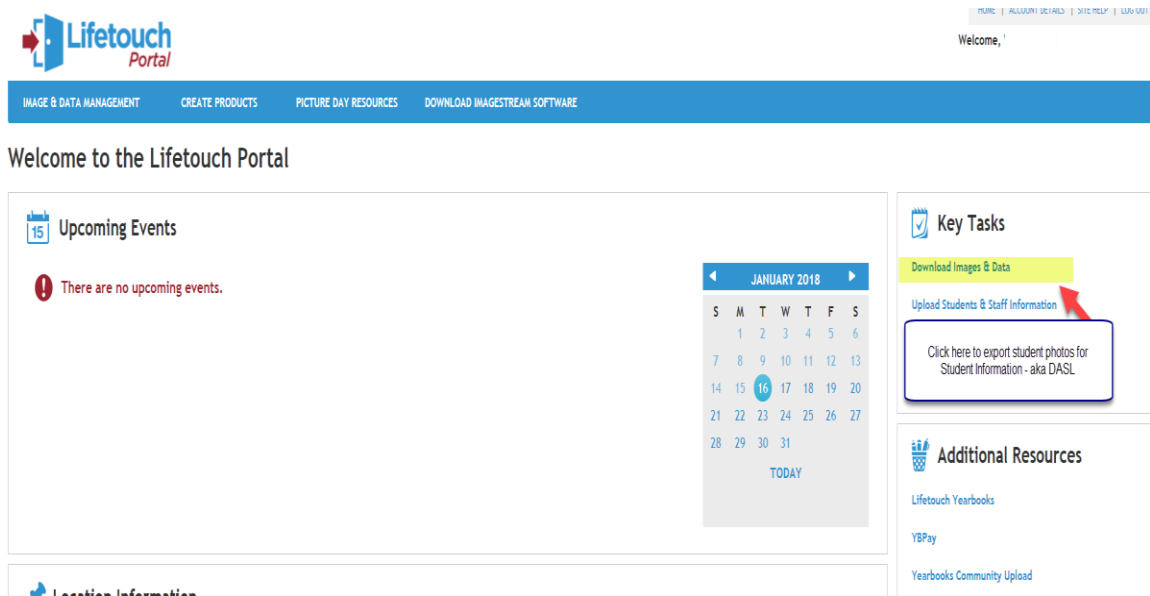
Here is an example of mail merged labels

ProgressBook StudentInformation

LifeTouch Picture Export Procedural Checklist

LifeTouch Picture Export Instructions for use in StudentInformation and GradeBook:

1. Go to the Lifetouch website and login with the credentials sent by the Photo Company.
2. Click on the **Download Images & Data** menu option.

3. Click on the **Students** filter radio button option, then click **All** to select students which will activate the **Available Action** dropdown menu where you will click **Download**.

4. After **Download** is selected, you will receive the Download Options prompt box where you will select the **StudentInformation (ProgressBook)** format which uses the StudentID.jpg datafile naming convention. Click the **Download** button to start the export process.

5. Take the download zipped file and email it to your ITC as instructed.

ProgressBook StudentInformation

Permanent Record Labels

The following steps must be completed in order to print Permanent Record Labels. Labels should be printed after grade card processing is complete for the school year.

Report Card Formatter (R700)

From this screen, you can select parameters to generate a report.

| Selection Criteria | Selection Summary | Load Settings |

⚠ (Warning: the Non-Custom formats can be used, but state support will no longer be provided.)

Formatter Version: ○ Custom   ● Permanent Record Labels

Print Permanent Record Labels from Report Card Formatter R700 – Use your choice of formats to print permanent record labels. The marks information will be pulled from current marks to print on labels for permanent record folders. Formats available are as follows:

Format 22 – 2"x4" or 3-1/3"x4"
Format 23 – 3-1/3"x4"
Format 24 – 3-1/3"x4"
Format 32 – 2"x4" or 3-1/3"x4"; includes previous year credits earned and prints a cumulative credit
Format 33 – 3-1/3"x4"; includes previous year credits earned and prints a cumulative credit
Format 34 – 3-1/3"x4"; includes previous year credits earned and prints a cumulative credit
Format 42 – 2"x4" or 3-1/3"x4"; prints marks on right side and does not print student GPA or student ranking
Format 43 – 3-1/3"x4"; prints marks below student header; prints student GPA but no student ranking
Format 44 – 3-1/3"x4"; prints marks below student header; does not print student GPA or student ranking
Format 62 – same as Format 42 with the addition of the Home School Name field (if Home School IRN field is filled out on the Student Profile – General tab)
Format 63 – same as Format 43 with the addition of the Home School Name field (if Home School IRN field is filled out on the Student Profile – General tab)
Format 64 – same as Format 44 with the addition of the Home School Name field (if Home School IRN field is filled out on the Student Profile – General tab)
Format 82 – 2"x4" or 3-1/3"x4"; includes previous year credits earned and prints a cumulative credit; uses Numeric Marks
Format 83 – 3-1/3"x4"; prints marks below student header; prints student GPA but no student ranking; uses Numeric Marks
Format 84 – 3-1/3"x4" ; uses Numeric Marks

Additional formats may be listed, but they are not active at this time.

All permanent record label formats will show external absences for a student in the attendance subreport section of the permanent record labels. If a student has both daily and external attendance in the selected school year, then two rows will be shown in the attendance subreport. A School Code column will show on all permanent record label formats except 54, due to space limitations, and that column will allow the user to more easily distinguish between the daily and external attendance rows. If the student has more than one record in the attendance subreport on the permanent record label, the Attendance subreport will sort by School Code ascending.

Suggested Settings	Label Font Size	Label Height	Top Margin	Left Margin
For most 2"x4" labels (Avery Label 8163)	5	2	1	.25

Please Note: The bottom right hand label will be blank (the next student prints correctly on the next page) with some margins.

For most 3-1/3"x4" labels (Avery Label 8164)	5	3.33	1	.4
Format 24 - 3-1/3"x4" labels (Avery Label 8164)	5	3.33	.65	.3
Format 44 - 3-1/3"x4" labels (Avery Label 8164)	5	3.33	.8	.4

Please use the following page settings for Adobe 9 and prior versions when printing the labels to ensure that the labels print correctly on the page. These Adobe page settings are most likely the default settings.
- Page Scaling = "None"
- Auto Rotate and Center = unchecked

On some formats, Page Scaling = "Shrink to Printable Area" may need to be set.

Please use the following page settings for Adobe 10 and later versions when printing labels to ensure that the labels print correctly on the page.
- Size Options = "Actual Size"
- Orientation = "Portrait"

Please Note – TO HOME SCHOOLS PRINTING PERMAMENT RECORD LABELS FOR THEIR VOCATIONAL STUDENTS: Since the calendar in each building is for the home school, and the vocational students follow the vocational school calendar, days present would not print correctly on your labels. Days absent and times tardy will print correctly.

See Marks End User Guide documentation for details.

Format 22

NAME	FONT, ELLA JANE		
ID	4002	YEAR	2004-2005
GRD	12	GEND	F

PRESENT	ABSENT	TARDY
175	3	1

CREDITS EARNED:	4

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

GPA SET	GPA	RANK	TTL RNK
Cum	2.875	2	5
Qtr4	4.000	1	5

NAME	PERRY, MICHAEL JAY		
ID	5002	YEAR	2004-2005
GRD	11	GEND	M

PRESENT	ABSENT	TARDY
178	0	0

CREDITS EARNED:	6.5

COURSE NAME	TEAC	GP 4 Qtr	CRED
ALGEBRA II	LAYM	A	0.000
BAS ENGLISH 11	COUS	A	0.000
CHEM I	WEBB	A	0.000
DRAWING	HAND	A	0.000
FRENCH III	BERR	A	0.000
LATIN III	COUS	A	0.000
SPANISH III	HAND	A	0.000

GPA SET	GPA	RANK	TTL RNK
Cum	2.308	1	5
Qtr4	4.000	1	5

Format 23

NAME	EYE, MAGNUM P.		
ID	4001	YEAR	2004-2005
GRD	12	GEND	M

PRESENT	ABSENT	TARDY	CRED: 4.5	GPA SET	GPA	RANK	TTL RNK
175	3	1		Cum	2.444	5	5

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

NAME	CONTRARY, MARY M.		
ID	5001	YEAR	2004-2005
GRD	11	GEND	F

PRESENT	ABSENT	TARDY	CRED: 6.5	GPA SET	GPA	RANK	TTL RNK
174	4	0		Cum	2.308	1	5

COURSE NAME	TEAC	GP 4 Qtr	CRED
ALGEBRA II	LAYM	A	0.000
BAS ENGLISH 11	COUS	A	0.000
CHEM I	WEBB	A	0.000
DRAWING	HAND	A	0.000
FRENCH III	BERR	A	0.000
LATIN III	COUS	A	0.000
SPANISH III	HAND	A	0.000

Format 24

NAME	EYE, MAGNUM P.		
ID	4001	YEAR	2004-2005
GRD	12	GEND	M

PRESENT	ABSENT	TARDY
175	3	1

CREDITS EARNED:	4.5

GPA SET	GPA	RANK	TOTAL RANKED
Cum	2.444	5	5
Qtr4	4.000	1	5

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

NAME	POTTS, JORDAN DANIEL		
ID	4004	YEAR	2004-2005
GRD	12	GEND	M

PRESENT	ABSENT	TARDY
178	0	0

CREDITS EARNED:	4

GPA SET	GPA	RANK	TOTAL RANKED
Cum	2.875	2	5
Qtr4	4.000	1	5

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

Format 32

NAME	EYE, MAGNUM P.		
ID	4001	YEAR	2004-2005
GRD	12	GEND	M

PRESENT	ABSENT	TARDY
175	3	1

CURRENT CREDITS:	4.5
TOTAL CREDITS:	21

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

GPA SET	GPA	RANK	TTL RNK
Cum	2.444	5	5
Qtr4	4.000	1	5

NAME	CONTRARY, MARY M.		
ID	5001	YEAR	2004-2005
GRD	11	GEND	F

PRESENT	ABSENT	TARDY
174	4	0

CURRENT CREDITS:	6.5
TOTAL CREDITS:	19.5

COURSE NAME	TEAC	GP 4 Qtr	CRED
ALGEBRA II	LAYM	A	0.000
BAS ENGLISH 11	COUS	A	0.000
CHEM I	WEBB	A	0.000
DRAWING	HAND	A	0.000
FRENCH III	BERR	A	0.000
LATIN III	COUS	A	0.000
SPANISH III	HAND	A	0.000

GPA SET	GPA	RANK	TTL RNK
Cum	2.308	1	5
Qtr4	4.000	1	5

Format 33

NAME	EYE, MAGNUM P.		ID	4001	YEAR	2004-2005
			GRD	12	GEND	M

PRESENT	ABSENT	TARDY		GPA SET	GPA	RANK	TTL RNK
175	3	1		Cum	2.444	5	5
CURRENT CREDITS:	4.5			TOTAL CREDITS:	21		

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

NAME	CONTRARY, MARY M.		ID	5001	YEAR	2004-2005
			GRD	11	GEND	F

PRESENT	ABSENT	TARDY		GPA SET	GPA	RANK	TTL RNK
174	4	0		Cum	2.308	1	5
CURRENT CREDITS:	6.5			TOTAL CREDITS:	15.5		

COURSE NAME	TEAC	GP 4 Qtr	CRED
ALGEBRA II	LAYM	A	0.000
BAS ENGLISH 11	COUS	A	0.000
CHEM I	WEBB	A	0.000
DRAWING	HAND	A	0.000
FRENCH III	BERR	A	0.000
LATIN III	COUS	A	0.000
SPANISH III	HAND	A	0.000

Format 34

NAME	EYE, MAGNUM P.		ID	4001	YEAR	2004-2005
			GRD	12	GEND	M

PRESENT	ABSENT	TARDY
175	3	1

CURRENT CREDITS:	4.5		GPA SET	GPA	RANK	TOTAL RANKED
TOTAL CREDITS:	21		Cum	2.444	5	5
			Qtr4	4.000	1	5

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

NAME	POTTS, JORDAN DANIEL		ID	4004	YEAR	2004-2005
			GRD	12	GEND	M

PRESENT	ABSENT	TARDY
178	0	0

CURRENT CREDITS:	4		GPA SET	GPA	RANK	TOTAL RANKED
TOTAL CREDITS:	23		Cum	2.875	2	5
			Qtr4	4.000	1	5

COURSE NAME	TEAC	GP 4 Qtr	CRED
AN GEOM	LAYM	A	0.000
BAS ENGLISH 12	COUS	A	0.000
GERMAN IV	LAYM	A	0.000
LATIN IV	COUS	A	0.000
PAINTING	HAND	A	0.000
PHYSICS	BERR	A	0.000
WLD HIS GEN	CLAR	A	0.000

Format 42

NAME	CONTRARY, JASON WILLIAM

ID	7001	YEAR	2004-2005
GRD	09	GEND	M

PRESENT	ABSENT	TARDY
172	6	0

CURRENT CREDITS:	8
TOTAL CREDITS:	8

COURSE NAME	TEAC	GP 2 Qtr	CRED
BIOLOGY I	WEBB	B	0.000
FRENCH I	CLAR	A	0.000
GERMAN I	LAYM	B	0.000
LANGUAGE ARTS	AUST	D	0.000
LATIN I	COUS	A	0.000
MATH 9	LAYM	C	0.000
SOC STUD 9	AUST	D	0.000
SPANISH I	BERR	A	0.000

Format 43

NAME	CONTRARY, JASON WILLIAM		ID	7001	YEAR	2004-2005
			GRD	09	GEND	M

PRESENT	ABSENT	TARDY		GPA SET		GPA	
172	6	0		Avg1		3.250	
CURRENT CREDITS:	8			TOTAL CREDITS:		8	

COURSE NAME	TEAC	GP 2 Qtr	CRED
BIOLOGY I	WEBB	B	0.000
FRENCH I	CLAR	A	0.000
GERMAN I	LAYM	B	0.000
LANGUAGE ARTS	AUST	D	0.000
LATIN I	COUS	A	0.000
MATH 9	LAYM	C	0.000
SOC STUD 9	AUST	D	0.000
SPANISH I	BERR	A	0.000

NAME	RING, NICOLE SUZANNE		ID	7003	YEAR	2004-2005
			GRD	09	GEND	F

Format 44

NAME	CONTRARY, JASON WILLIAM			ID	7001	YEAR	2004-2005
				GRD	09	GEND	M

PRESENT	ABSENT	TARDY
172	6	0

CURRENT CREDITS:	8
TOTAL CREDITS:	8

COURSE NAME	TEAC	GP 2 Qtr	CRED
BIOLOGY I	WEBB	B	0.000
FRENCH I	CLAR	A	0.000
GERMAN I	LAYM	B	0.000
LANGUAGE ARTS	AUST	D	0.000
LATIN I	COUS	A	0.000
MATH 9	LAYM	C	0.000
SOC STUD 9	AUST	D	0.000
SPANISH I	BERR	A	0.000

Format 62

NAME	Student11176, DEBRA	
ID	8667	YEAR 2007-2008
GR	12	GEND F
HOME	Findlay City SD	

PRESENT	ABSENT	TARDY
0	0	0

CURRENT CREDITS:	0
TOTAL CREDITS:	0

COURSE NAME	TEAC	Sem1 Avg	CRED
INT ENG IV		C+	0.000
INT MATH III		C+	0.000
MET 2 LAB		B	0.000
OGT/EMPLOY		B-	0.000
PHYSICS		I	0.000

Format 63

NAME	Student11176, DEBRA	HM SC	Findlay City SD	ID	8667	YEAR	2007-2008
				GR	12	GEND	F

PRESENT	ABSENT	TARDY
0	0	0

CURRENT CREDITS:	0		TOTAL CREDITS:	0

COURSE NAME	TEAC	Sem1 Avg	CRED
INT ENG IV		C+	0.000
INT MATH III		C+	0.000
MET 2 LAB		B	0.000
OGT/EMPLOY		B-	0.000
PHYSICS		I	0.000

Format 64

NAME	Student11176, DEBRA

ID	8667	YEAR	2007-2008
GRD	12	GEND	F
HOME	Findlay City SD		

PRESENT	ABSENT	TARDY
0	0	0

CURRENT CREDITS:	0
TOTAL CREDITS:	0

COURSE NAME	TEAC	Sem1 Avg	CRED
INT ENG IV		C+	0.000
INT MATH III		C+	0.000
MET 2 LAB		B	0.000
OGT/EMPLOY		B-	0.000
PHYSICS		I	0.000

ACT Pre-Identification Export

Change Log

Date	Section Number/Name	Change Description
10/17/19	Overall Document	Updated for FY20
11/12/18	Overall Document	Updated for changes to the FY19 Layout
1/18/18	Traditional Districts & Community Schools	Updated to include Analytics Hub
12/12/17	Overall Document	Updated for changes to the FY18 Layout

Table of Contents

Traditional Districts & Community Schools
Creating the Pre-ID file for ACT using Ad Hoc Reports

Beginning in the 17/18 school year, 11th grade students are required to take the ACT or SAT assessment. An Ad Hoc report was created to produce the ACT Pre-ID file in .csv format. Unlike other pre-ID files, this file will require additional information to be updated to the file prior to uploading it to the ACT assessment company. There are elements required that are not contained in StudentInformation. Because the format of the file is CSV, you may open it in Excel, update any necessary fields for optional and required information and submit the file. This report may be run at the district or building level. If your district only has one building containing 11th grade students, you can run it at the building level.

There are two methods to navigate to the report. The first method is:

1. At the district or building level, click on the 'paper' icon located at the top right of the masthead . Then click the Analytics Hub selection
.
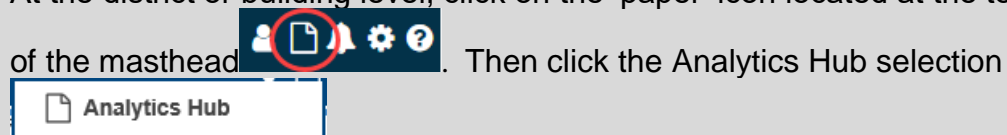
2. Select the ACT Pre-ID by clicking the blue link under the Assessment section.
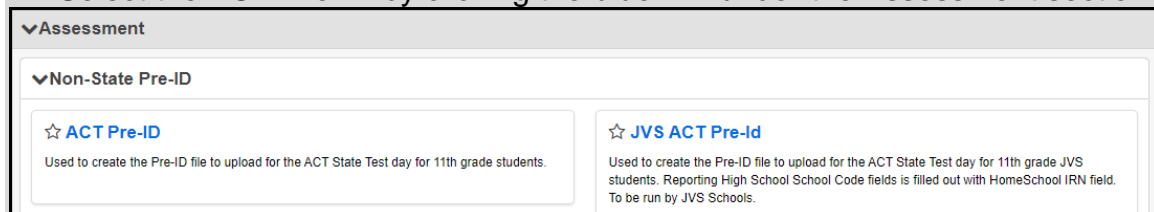
3. Once selected, the following page will display:
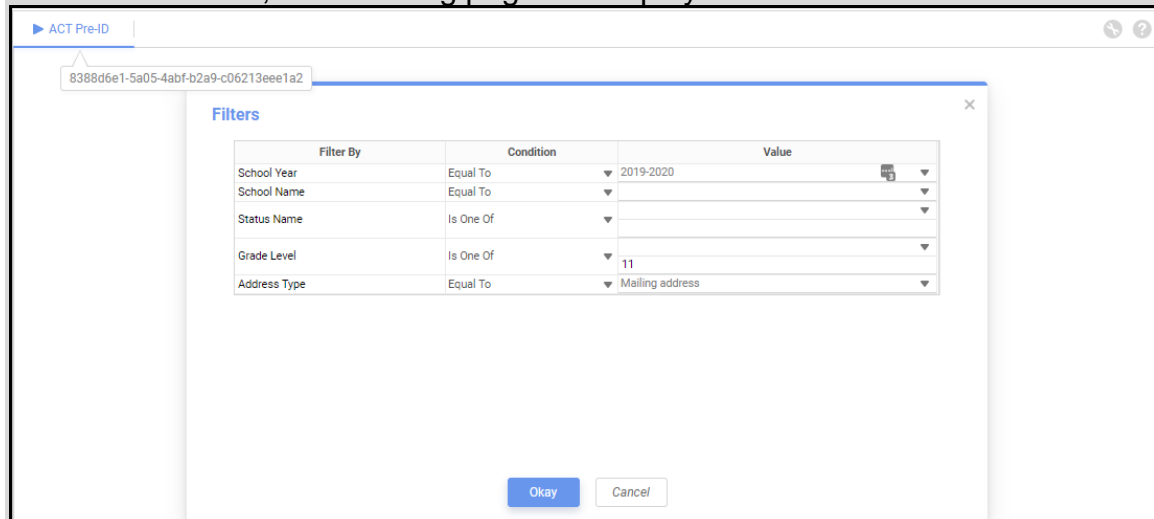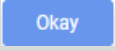
4. Close-up view of the Filters on this page:

Filters

Filter By	Condition		Value	
School Year	Equal To	▼	2019-2020	▼
School Name	Equal To	▼		▼
Status Name	Is One Of	▼		▼
Grade Level	Is One Of	▼	11	▼
Address Type	Equal To	▼	Mailing address	▼

5. A value must be provided for each filter in order for data to be returned. The filter School year has already been defaulted. To select a value for each filter, click on the gray down arrow to the right of each filter name and make your selection. Multiple selections may be made if necessary. Complete the filters as follows:

   a. **School year** – 2019-2020 preselected, no action needed
   b. **SchoolName** – select the building where 11th grade students are enrolled in your district. If you have multiple buildings containing 11th grade students, select both buildings (and update the Condition value)
   c. **StatusName** – select the student status codes that would be used for students who are actively enrolled 11th graders who will be tested by your district
   d. **GradeLevel** - Select 11th Grade only
   e. **StudentContactAddressType** - Select Mailing Address

Once you've selected your filters, click [Okay]. Your report will be generated and you have the options to open the report or save it.

The second method to navigate to the reports is:
1. At the District or Building level, navigate to
   StudentInformation » Local » Analytics Hub.
This will bring you to the same location as Option 1. Follow the same steps as listed above.

Note

In the event you are unable to access either the report icon or the Analytics Hub link does not display any reports, you will need to contact your administrator to get the proper permissions set up.

Updates required to your file prior to submission

Before uploading your file to the ACT vendor, you will need to edit your file in Excel and make the following updates. All fields listed in this table are required:

Column	Column Header	Description	Update Needed
B	Organization Code	ACT High school code where the student is enrolled to take the test	*see the link below this table to access the ACT High school code lookup.
I	Test Code	Indicates the test the students are taking	Values are: mc – The ACT mw – The ACT with Writing w – The ACT writing only wk - WorkKeys **Value is set to 'mc' by default. If you are giving a different test, please update the value for all students.**
J	Delivery Format	Indicates if the student will be paper tested or tested online	Values are: P or p – paper O or o – online **Column defaults to P - Paper**

*To Access the ACT High school code lookup, go to

http://www.act.org/content/act/en/products-and-services/the-act/taking-the-test/high-school-codes-lookup.html

Do not alter or remove any other columns.
Once you have finished with your updates, save the file as a .csv file to your hard drive and prepare for uploading to the ACT vendor.

Follow the instructions from ACT to upload your SDU file.

JVSDs & ESCs
Creating the Pre-ID file for ACT using Ad Hoc Reports

If you're a JVS or an ESC and you have students in StudentInformation to include in the file, follow the directions for Traditional districts using either method through step 3 to create your report.

Once the file has been created, edit the file and make the following updates:
Updates required to your file prior to submission
Before uploading your file to the ACT vendor, you will need to edit your file in Excel and make the following updates. All fields listed in this table are required:

Column	Column Header	Description	Update Needed
B	Organization Code	Enter your ACT School code for your JVS or ESC	*see the link below this table to access the ACT High school code lookup.
I	Test Code	Indicates the test the students are taking	Values are: mc – The ACT mw – The ACT with Writing w – The ACT writing only wk - WorkKeys **Value is set to 'mc' by default. If you are giving a different test, please update the value for all students.**
J	Delivery Format	Indicates if the student will be paper tested or tested online	Values are: P or p – paper O or o – online **Column defaults to P - Paper**
AK	Reporting High School Code	The ACT Code representing the school the results are to be returned to (student's home school)	The file includes the student's home school IRN from the General tab of the student profile. You will need to find the corresponding ACT HS code for each home school and do a find and replace changing the IRN to the ACT HS School code. **DO NOT UPLOAD THE FILE WITHOUT CHANGING THESE VALUES.**

*To Access the ACT High school code lookup, go to

http://www.act.org/content/act/en/products-and-services/the-act/taking-the-test/high-school-codes-lookup.html

Do not alter or remove any other columns.
Once you have finished with your updates, save the file as a CSV file to your hard drive and prepare for uploading to the ACT vendor.

Follow the instructions from ACT to upload your SDU file.

Creating Preident Files for Ohio Graduation Test

Change Log

Date	Section Number/Name	Change Description
1/4/17	Entire document	Update screenshots
10/30/14	Entire document	Update screenshots and breadcrumb trail
8/3/12	Overview	13.0.0 Updates – Added to the Course Section information since the Course Section – EMIS Override tab was added
9/29/11	Overview	Added clarification as to which students are included
6/14/11	Task #3	11.4.4 Updates – Added notes about course codes being truncated to 10 characters for this export file.

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The OGT Pre-identification export process is performed whenever there is a need to create Pre-identification labels to submit to the testing company prior to a test administration.

The OGT Pre-Ident will include the following students in the file:
- Any 10th grade student who is actively enrolled and has not yet taken the OGT test
- Any student in grades 10, 11, 12, and 13 who have taken the test but have not passed all parts of the test
- JVS, Contract Vocational and ESC students with zero percent of time who are attending elsewhere but need to take the test (should the district choose the options to include these students.

As of 10.3.0.16150, JVS students are determined by saying that only students who had JVS as their Sent To or Alt Sent To reason AND had 0 for their attendance percentage were considered JVS for purposes of this selection. The same kind of logic was used for Contract Vocational Out students (with CT as the Sent To or Alt Sent To reason).

A student's admission history records are checked to determine whether he is actively enrolled in the district or not.

Course Section information for the courses a student is enrolled in which are related to the test subject areas are also included in the record. As of 13.0.0, the records are based on the value in the EMIS Subject Code field on the Course Section – EMIS Override tab, if defined; otherwise, the records are based on the value in the EMIS Subject Code field on the Course – EMIS tab.

The following checklist will provide you with instructions on how to complete the process of creating the Pre-Identification file for the OGT test .

The Pre-id will include the following students:

1. Percent of time greater than zero
2. Percent of time equal to zero and Sent to Reason 1 = ES, JV, MR, PS, OS, PI, CI, NI)

Task #1 - Run the report 'Students With no SSID' to verify that all students have an SSID

- Navigation: StudentInformation – SIS – School – Student Reports – Students with no SSID (SSID)

All students to be included on the Preident file must have an SSID.

As of 10.3.0.16150, students without SSIDs will display in a list at the bottom of the Pre-Identification Export page and give the user the option to continue (excluded the students in this list from the export) or cancel. The user can also click on the student information and have a window pop-up with the Student Profile Edit screen.

Task #2 - Make sure Home school field is filled in for students at the JVS or for Contract Vocational students coming into your district.

- Navigation: StudentInformation – SIS – Student – Edit Student Profile – General tab

For students attending the JVS or non-resident students attending another district as contract vocational school, make sure the home school field is filled on the General tab of the student profile. This value will be used to populate the home school IRN and school name for the student's home district and home school field values on the Pre-identification record for vocational students only. Please note that this is the building IRN and not the district IRN. In some cases (i.e. community schools), the district and building IRN are the same.

Task #3 - Run the Pre-ident Export

- Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export

Please note that you must have a district in context.

As of 10.3.0.16150, students without SSIDs will display in a list at the bottom of the Pre-Identification Export page and give the user the option to continue (excluded the students in this list from the export) or cancel. The user can also click on the student information and have a window pop-up with the Student Profile Edit screen.

Available Schools in District (required) – Select the district or school(s) that are to be included in the export file. One export file will be created that will contain data for all selected schools.

Include the following grades – Select which grade levels should be included in the Pre-ID file.

Include the following types of students – Check those options that apply, indicates whether you wish to include students attending elsewhere as Contract Vocational - In, Contract Vocational – Out, JVS, CVI home school or JVS home school students in your file.

Contract Vocational students – In are students that are non-residents of your district attending as a contract vocational student.

Contract Vocational students – Out are students that are residents of your district attending another district as a contract vocational student.

If the district is testing these students and wishes to have the results returned to their district, then include these students in your file.

Include CVI home school information - Hint for non-Home Schools: If you are not the resident district and you want the information sent back to the home school AND you have checked to include "Contract Vocational – In" students, then you will need to check "Include CVI home school Information".

Hint for Home Schools: If you are the Home School, do not check the "Include CVI home school Information".   If you do, any Contract Vocational – In students in your file will generate an error and you will not be able to upload the file.

If the district that is creating the file is a JVS, make sure to check the "Include JVS home school information" checkbox so that all home school IRN's and names will be included in the records.

Include JVS home school information - Hint for non-Home Schools: If you are not the resident district and you want the information sent back to the home school AND you have checked to include "JVS" students, then you will need to check "Include JVS home School information".

Hint for Home Schools: If you are the Home School, do not check the "Include JVS home school Information".   If you do, any JVS students in your file will generate an error and you will not be able to upload the file.

Include only Required students: when this checkbox is checked, this will include only those students in the file that still need to take the test or have yet to pass all parts of the OGT.

Return only these students: Use this box to enter the student ID's in a comma separated list in the text box for any student taking a summer test administration or Alternate Assessment. You must also check the checkbox for the corresponding grade level or appropriate JVS or Contract Vocational checkboxes for any student that you are including in the file using this method.

File Options (required): Select the appropriate file option; Download or Email.

Click on **Export** to create the file. Save the file to your harddrive named as it is named by the export.

Note: If any students are encountered without SSID's, a grid will display below the Export button listing the students with errors. If the students listed do not need to be included in the file you are creating, then click the **Continue** button to create the file.

Please Note: In this export file, course codes longer than 10 characters are truncated to 10 characters by removing the necessary number of characters from the right side of the course code.

Click on **Reset** to clear selected options.

Task #4 - Transfer/upload the file to the appropriate vendor per their instructions

Pre-identification Export for SAT

Change Log

Date	Section Number/Name	Change Description
11/9/2018	Overall Document	Updated for FY19

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Creating the Pre-ID file for SAT using Ad Hoc Reports

Beginning in FY17, 11th grade students are required to take either the ACT or the SAT assessment. Ad Hoc Reports were created to produce the Pre-ID file for both assessments in CSV Format. This document provides the instructions for creating the SAT Pre-ID file. Unlike other pre-ID files, this file will require additional information to be updated to the file prior to uploading it to the SAT assessment company. There are elements required that are not contained in StudentInformation. Because the format of the file is CSV, you may open it in Excel, update any necessary fields for optional and required information and submit the file. This report may be run at the district or building level. If your district only has one building containing 11th grade students, you can run it at the building level.

To create the report:

1. At the District or Building level, click on the [icon] icon at the top of the page or navigate to **StudentInformation » Local » Ad Hoc Reports.**
The following page will be displayed:
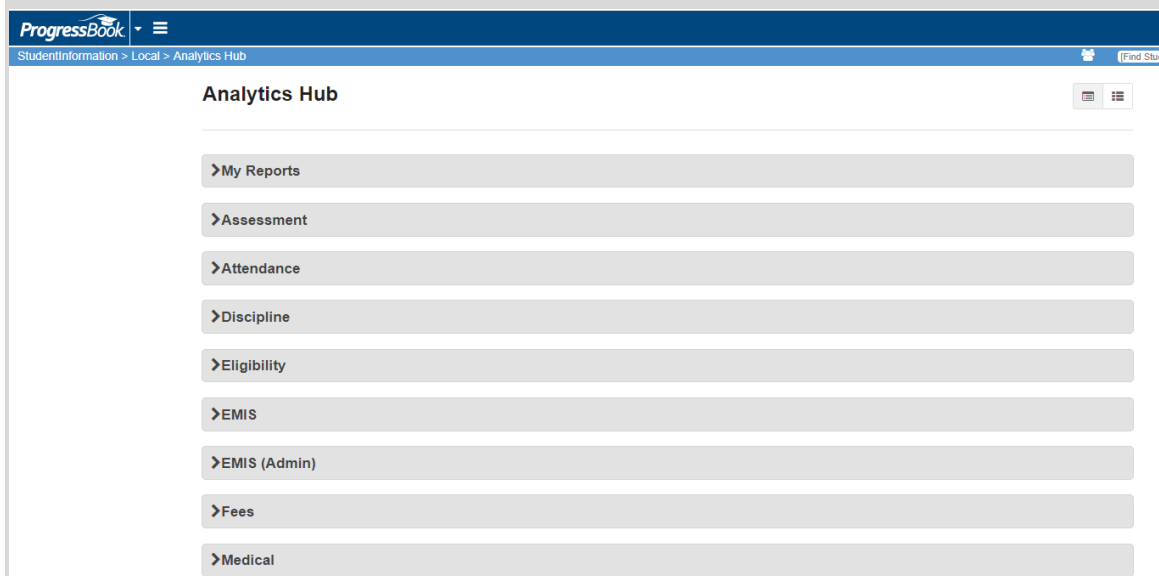
2. Expand the Assessment Folder (you must be on version 16.2 or higher of StudentInformation to see the Assessment folder). **The SAT Export File** will be listed under this folder. Highlight the SAT Export File report. The report is set up to run only in the CSV format option.

Assessment

ACT Pre-ID
Used to create the Pre-ID file to upload for the ACT State Test day for 11th grade students.

FY19 - Preschool ELA Pre-ID Enrollment File
This report creates the Enrollment file as part of the 2018 Preschool ELA Pre-ID process.

FY19 - Preschool ELA Pre-ID Student
This report produces the 2018 Pre-ID student file for students taking the Preschool ELA Assessment. File should be saved as a CSV file

FY19 - Preschool ELA Pre-ID Teacher File
Provides a file of Preschool Teachers needed to complete the 2018 PS ELA PRe-ID process. Run in conjunction with the Student File report and the Enrollment File Report

JVS ACT Pre-Id
Used to create the Pre-ID file to upload for the ACT State Test day for 11th grade JVS students. Reporting High School School Code fields is filled out with HomeSchool IRN field. To be run by JVS Schools.

Preschool ELA Pre-ID Enrollment File
This report creates the Enrollment file as part of the Preschool ELA Pre-ID process.

Preschool ELA Pre-ID Export
This report produces the Pre-ID student file for students taking the Preschool ELA Assessment. File should be saved as a CSV file

Preschool ELA Pre-ID Teacher File
Provides a file of Preschool Teachers needed to complete the PS ELA PRe-ID process. Run in conjunction with the Student File report and the Enrollment File Report

SAT Pre-ID File
Used to create the Pre-ID file to upload for the SAT State Test day for 11th grade students. This report contains any 11th grade student with FTE > 0.

3. Once selected, the report Filters will appear in the larger tabbed section to the right of the folders list. A response must be provided for each filter in order for data to be returned. The filter School year has already been defaulted. To select a value for each filter, click on the blue down arrow to the right of each filter name and make your selection. Multiple selections may be made if necessary. Complete the filters as follows:
   a. **School Year** – 2018-2019 preselected
   b. **SchoolName** – select the building where 11th grade students are enrolled in your district. If you have multiple buildings containing 11th grade students, select both buildings
   c. **GradeLevel** - Select 11th Grade only (Grade Level 11 is preselected)
   d. **StatusName** – select the student status code(s) that would be used for students who are actively enrolled 11th graders who will be tested by your district

Once you've selected your filters, click ✔ OK. Your report will be generated and you have the options to open the report or save it.

Updates required to your file prior to submission

Before uploading your file to the SAT vendor, you will need to edit your file in Excel and make the following updates. All fields listed in this table are required:

Column	Column Header	Description	Update Needed
A	AI CODE	Attending Institution Codes which will be printed on Pre-ID labels. If your school code contains zeroes, include zeroes in the number	*For SAT, go to the link listed below this table to get your attending Institution code using the code search
AI	SAT TEST CENTER	Only required for some students. This field should only be used by schools sending students to test at sites other than their own school. If student is to be tested in another school, enter the Attending Institution Code for the entity where they will be tested	*go to the link listed below this table to get the attending Institution code for the entity that will be testing the student.

If student is being tested in your district, leave the value blank |

Note: Opening this file in Excel may drop the leading zeroes from the birthdate field. Before saving your changes, update the format on the birthdate column to be MMDDYYYY.

*To Access the SAT High school code lookup, go to

https://collegereadiness.collegeboard.org/k-12-school-code-search

Do not alter or remove any other columns or column headings. ALL column headings must be included when you upload the file regardless of whether or not they contain data.

Once you have finished with your updates, save the file as a CSV file to your hard drive and prepare for uploading to the SAT vendor.

Follow the instructions from SAT to upload your file.

A complete file layout explaining all columns for the SAT Pre-ID file can be viewed at
https://collegereadiness.collegeboard.org/pdf/bulk-registration-file-specifications.pdf

ProgressBook StudentInformation

Creating Preident Files for KRA Assessments

Change Log

Date	Section Number/Name	Change Description
10/1/20	Page 2	Added the student must be marked as 'Report to EMIS' to be included
7/17/20		Updated for FY21
8/19/19	Task 6.	Updated the fiscal year to FY20 instead of FY19
7/19/19		Updated for FY20

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The KRA Pre-identification export process for Ready for Kindergarten Online is performed whenever there is a need to create Pre-identification labels to submit to the testing company prior to a test administration.

Before beginning the process of creating the files, KG students must be scheduled into classes. There must also be a finalized Schedule Result set designated on StudentInformation Options.

The KRA Pre-Ident will include the following students in the file:
- Any student in Kindergarten who has Report to EMIS checked, is actively enrolled and is attending the district AND
- Student is enrolled in at least one class with one of the following EMIS Subject Codes:
  - 050102 – Reading K-3
  - 050152 – Integrated Language Arts K-3

A student's admission history records are checked to determine whether he is actively enrolled in the district or not. Ex. If a district has students that are enrolled on the first day of school 8/23/20, but the KRA pre-id is being run on 8/10/20, those students will not be included.

Teacher information identifying the student's teacher for reading/language arts is included. Because of this request, it is necessary to add the Staff Credential IDs and the teacher email addresses into the StudentInformation Staff records for inclusion on the records. It is important that schools make sure that student schedules are up to date when they create the file so the results will be returned to the correct teacher once the vendor sends the test results back to the districts.

For the Teacher export and Enrollment Export, the EMIS Subject Code for the courses a student is enrolled in are based on the value in the EMIS Subject Code field on the Course Section – EMIS Override tab, if defined; otherwise, the records are based on the value in the EMIS Subject Code field on the Course – EMIS tab.

The following checklist will provide you with instructions on how to complete the process of creating the Pre-Identification file for the KRA test.

Task 1. Run the report 'Students With no SSID' to verify that all students have an SSID.

StudentInformation > SIS > School > Student Reports > Student With No SSID (SSID)

All students to be included on the Preident file must have an SSID. Students without an SSID will display in a list at the bottom of the Pre-Identification Export page and give the user the option to continue (excluded the students in this list from the export) or cancel. The user can also click on the student name link and have a window pop-up with the Student Profile Edit screen to update the SSID.

Task 2. Verify all kindergarten teachers have an email address and a Credential ID (State Staff ID) on their staff record

The **Teacher** and **Enrollment** exports include the following fields from the Teacher Staff Record:

- Teacher First Name
- Teacher Last Name
- Teacher Email Address (Teacher export only)
- Credential ID (State Staff ID)

Teacher Email Address: Best practice is for teachers to use their school email address rather than a personal email address.

Task 3. Sync Teacher History Records

The Teacher History Maintenance page allows you to mass update the Teacher History tab for all course sections.

Wipe and New – Deletes all Teacher History tab records and recreates the Teacher History tab information based on the selections in the Meeting Times tab of the course section.

- Run the Wipe and New before running the pre-ident. The pre-ident process is dependent upon the Teacher History records.

- Should be run once the schedule is finalized for all buildings either with the district or building in context
- Can be run multiple times, but manual updates will be overwritten
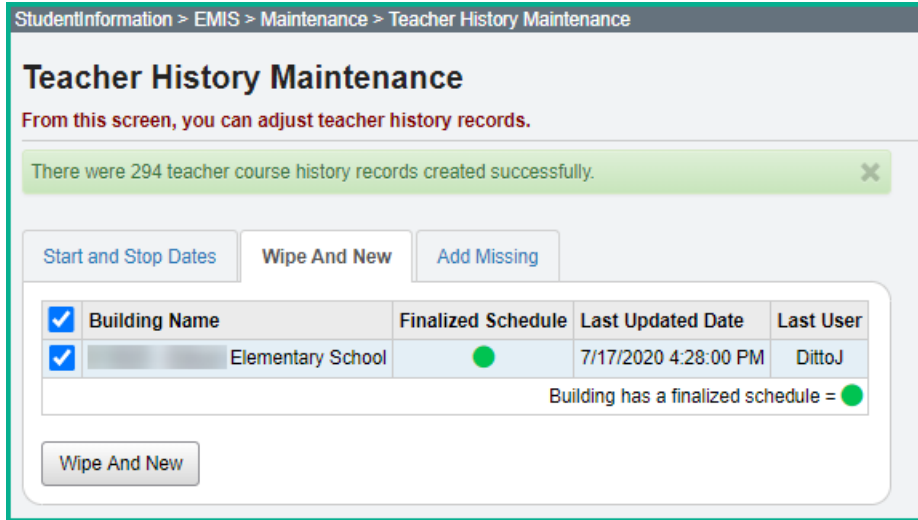
Task 4. Verify the EMIS Subject Code for the Kindergarten Reading and Language Arts courses.

Run the Course Detail report to verify that the kindergarten reading and language arts courses have the correct EMIS subject codes assigned.

StudentInformation > Local > Analytics Hub   Then choose Scheduling and Course Detail Report. The report will contain a lot of information, but Columns A, B, M, AN, AS and BE will provide the information you need to verify the EMIS Subject Code for the these students (You can just hide the other columns when exported as an Excel file.)

	A	B	M	AN	AS	BE
1			Course Detail			
2	Course Code	Course Name	Is Active	Grade Levels	EMIS Subject Code	Report to EMIS
3	BEHV/K	LEARNING BEHAVIORSK	Y	K		N
4	DLETKG	LETTERSK	Y	K	50152	Y
5	LET/KG	LETTERSK	Y	K	50152	Y
6	LETTPS	LETTERSPS	Y	PS		N
7	LAAM	LITTLE ARROWS AM	Y	PS	180108	Y
8	LAPM	LITTLE ARROWS PM	Y	PS	180108	Y
9	PEK	PHYSICAL EDUCATION	Y	K	80300	Y
10	READK	READING/WRITING READINESSK	Y	K	50102	Y
11	DREADK	READING/WRITING REAINESSK	Y	K	50102	Y
12	DREAD1	READING1	Y	1	50102	Y
13	READ1	READING1	Y	1	50102	Y
14	DREAD2	READING2	Y	2	50102	Y
15	READ2	READING2	Y	2	50102	Y
16	DREAD3	READING3	Y	3	50102	Y
17	READ3	READING3	Y	3	50102	Y

The Teacher export will include teachers with students assigned to one of the courses with the following EMIS subject code:

- Reading K-3, EMIS Subject Code 050102
- Integrated English Language Arts K-3, EMIS Subject Code 050152
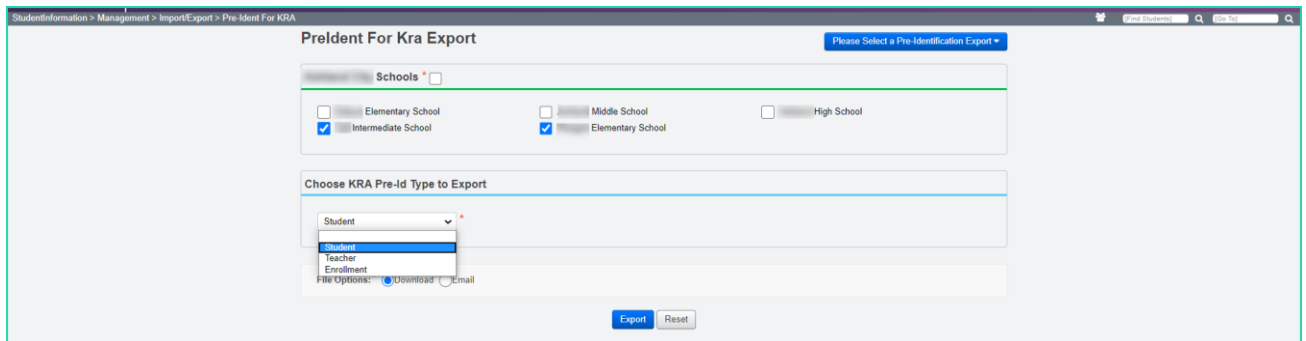
The Enrollment export will include students assigned to one of the courses with the following EMIS subject code:

- Reading K-3, EMIS Subject Code 050102
- Integrated English Language Arts K-3, EMIS Subject Code 050152

Task 5. Run the Pre-ident Export

Please note that you must have the district in context.

Students without an SSID will display in a list at the bottom of the Pre-Identification Export page and give the user the option to continue (excluded the students in this list from the export) or cancel. The user can also click on the student name link and have a window pop-up with the Student Profile Edit screen to update the SSID.

Available Schools in District (required) – Select the school(s) that are to be included in the export file. One export file will be created that will contain data for all selected schools.

Export Format (required) – Select the PreIdent for KRA

Choose KRA Pre-ID Type to Export (required) – Select Student, Teacher or Enrollment

Click on Export to create the file. Save the file to your hard drive named as it is named by the export.

☐ **Task 6. Edit the Enrollment file and update each row with the KRA token. (Optional)**

NOTE: The FY21 KRA Token has already been set for this year. If you see a different KRA token than krar2020, please contact your ITC for assistance.

Every record in the file must have the correct token in the first column of the row. If you are opening the Enrollment file in excel, it may be necessary to format the IRN columns to ensure the leading zeroes remain in the IRN columns.

Replace the value of the token in column A with the current year token. For FY21, the token value is 'krar2020'. Save the file.

	A	B	C	D	E	F	G	H	I	J	K
1	data_collection_token	district_id	district_student_id	state_student_id	school_id	student_first_name	student_last_name	dob	teacher_id	teacher_first_name	teacher_last_name
2	krar2020	245229	13236	XX1234123213368		Johnny	Smith	1/6/2015	OH1231231	Ashley	Johns

Task 7. Transfer/upload the file to the appropriate vendor per their instructions

For additional information, please visit http://dataguidelines.kready.org/HowTo for an FAQ and Step by Step instructions.

Pre-Identification Export for Next Generation and End of Course Exams

Change Log

Date	Section Number/Name	Change Description
11/13/20	Various	Updated for FY21
10/21/19	Various	Updated for FY20

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<u>Pre-Identification Reminders!</u>

- Ability to use an Ad-Hoc Membership for students retaking the EOC exam who are not currently enrolled in a tested course
- The Courses that display in the Selection Window for each End of Course subject are based on the selected **End of Course Assessment value** on the Courses screen EMIS tab.
- Ability to select an End Date (for both EOC and NGA) to include students enrolled through a specific date.
- The output for each export is a .csv format. This means the file may be manually updated prior to uploading to TIDE.
- A Blank option for Test Eligibility & Mode. When the field value contains a blank, no information will be uploaded for that test subject. This will prevent you from overlaying information you've already uploaded for a particular subject.
- The option to choose Paper or Online for the test mode is available by subject so you may choose a different mode for each subject.
- For the Next Generation Assessments, the Course selection pop-ups only include those courses where **the subject codes for the course** is in the table below.
- The Course term popup is now easier to use and contains instructional text at the top of the box.

Pre-id Export Criteria

EOC Pre-ID file - Students will be included in the based on the End of Course Assessment value selected on the Courses screen, EMIS tab. The EMIS Subject Codes listed below are suggested EMIS Subject Codes for the areas to be tested.

NGA Pre-ID file - Students will be included in the based on their enrollment in course sections matching the criteria below:

Tested Subject Area	EMIS Subject Code	IS HS Credit
End of Course Exams		
HS Physical Science	132220	Y
HS American History	150810, 152300	Y
HS American Government	150300,0159950, 150308	Y
HS Biology	132230, 132330	Y
HS ELA1	050160	Y
HS ELA2	050170	
Algebra I	110065, 110301, 110480	Y
Geometry	111200, 110490	Y
Integrated Math I	110065, 110010	Y
Integrated Math II	110020, 110490	Y
Next Generation Assessments		
K-3 ELA	050152	N
3-4 ELA	050153, 050154	N
5-6 ELA	050154	N
7-8 ELA	050156	N
K-3 Math	110003	N
4-6 Math	110150	N
7-8 Math	110175	N
7 Advanced Math	110060	N
8 Advanced Math	110065	N
K-3 Social Studies	151209	N
4-6 Social Studies	151210	N
7-8 Social Studies	151201	N
K-3 Science	132110	N
4-6 Science	132120	N
7-8 Science	132130	N

Students must also have a percent of time greater than zero or a percent of time equal to zero and Sent to Reason 1 = ES, JV, MR, PS, OS, PI, CI, NI.

If a student is in more than one course section for the subject selected, only one record will be submitted for the student.

The Pre-ID also includes the ability to specify an ad-hoc membership for students taking an alternate assessment. When included, there is an additional option to create one file or separate files for OST and AASCD assessments. When both files are created at the same time, students in the AASCD file will be excluded from the OST file.

Add an Acceleration Record for any student that will be taking an Accelerated Test Part for any grade level higher than their current grade

StudentInformation > SIS > Student > Assessment > Accelerated Student

Accelerated Records may be entered for any student taking a Next Generation Assessment test part in a higher grade level than their current grade. To add a record for a student, first search for the student you wish to add a record for. A record will need to be added for each test part the student is accelerated in.

Test – The dropdown will contain any available tests which are for grade levels higher than the student's current grade level. An accelerated test record may only be entered for a grade level test greater than the student's current grade level.

Part – The dropdown will contain those parts which are available for a student to take for the selected test.

Note - It is possible that a student will be reported to EMIS for an accelerated test part for a test that doesn't exist (i.e. 9th grade Math). Since no test materials will be ordered for this student, these records do not need to be on the Pre-Ident file. These types of records should be added directly to the Next Generation Assessment records page for the appropriate grade level test and part.

Create an Ad-Hoc membership group for Alternate Assessment students (optional, only needed when creating the AASCD file)

Students taking an alternate assessment may be submitted in the same file as students taking standard assessments or a separate file may be created. Before running the export, you'll need to create an ad-hoc membership group containing a list of students taking the alternate assessment you wish to include in the Pre-ID file.

1. At the district level, navigate to: ***StudentInformation » My Account » Ad Hoc Memberships.***

2. Click on **Add New Ad-Hoc Membership**.

3. Add a Membership name that identifies the groups you're building.

4. Use the appropriate Search Mode.

Search Mode: ⦿ Search Criteria   ◯ Student IDs   ◯ Use Existing Memberships

General Info	Additional Info	Miscellaneous Info	Course Section Info	Assessment Info

Last Name: [ ] ☐   Middle Name: [ ] ☐

First Name: [ ] ☐   Called Name: [ ] ☐

Social Security: [ ]   Birthdate: [ ] 📅

Ethnicity: [▾]   Gender: [▾]

Street: [ ] ☐   City: [ ] ☐

State: [▾]   Zip Code: [ ]

☐ Students Selected by Default   **Search**

5. From the list of students generated by the search criteria, check the box beside each student you wish to include in the Ad-Hoc Membership group.

6. At the bottom of the list, click **Add Selected Students** to add them to the membership group.

7. Repeat steps 4-6 for each additional group of students you wish to add to the list.

8. Click **Save** to save the ad-hoc membership group.

Running the Pre-Ident for Next Generation Assessment Export

The Pre-Ident option must be processed at the district level. Navigate to:
StudentInformation > Management > Import/Export > Pre-Identification Export.
From the dropdown, select the Pre-Ident for Next Generation Assessment Export.

1. Select the schools containing students to be included. Selecting the checkbox by the district name will select all schools. If you wish to include only certain schools, check the box by the school name.

Pre-Ident For Next Generation Assessment Export [Please Select a Pre-Identification Export ▾]

Lucas * ☐

☑ Lucas Elementary School ☐ Lucas High School ☑ Lucas Middle School

2. In the next section, select the grade level subjects to include in the file. Select the Paper or Online option for each grade level/testing area combination being submitted. If a subject is not chosen for a grade level, the test eligibility indicator in the Pre-ID file for that subject will be blank. This will prevent any subsequent file uploads from wiping out options already in the TIDE system for a student in that particular assessment area. For example, for 3rd grade, if you chose to create a file for the English Language Arts Assessment but not Mathematics, the indicator for Mathematics would be blank. Then if you ran a second file for Mathematics and didn't select English Language Arts, the indicator for English Language Arts would be blank. To TIDE, a blank means no update for that subject.

Pre-Ident For Next Generation Assessment Export [Please Select a Pre-Identification Export ▾]

Lucas * ☐

☑ Lucas Elementary School ☐ Lucas High School ☑ Lucas Middle School

Include the Following Assessments

Select Paper or Online for each subject

☑ **3rd Grade**

☑ English Language Arts   ☑ Mathematics
○ Paper ● Online *   ○ Paper ● Online

☐ **4th Grade**

☐ English Language Arts   ☐ Mathematics

3. For students who are taking an alternate assessment, the option of Supplemental has been added to Paper and Online, and can be selected in the AASCD Test Mode area.

AASCD Test Mode* ○ Online ○ Paper ● Supplemental
(Test mode required for students taking an Alternate Assessment)

4. For students who are taking an alternate assessment, use an ad-hoc membership group to indicate the students who should be flagged in the file for AASCD. All other subject indicators will be blank. The AASCD Column will be marked with a Y, and the Primary Disability column will be completed.

Select an Ad-Hoc Membership for AASCD

| 3rd Grade AASCD ▾ |

☐ *Private and Public*

5. If you wish to run a file only containing specific students rather than all students in a grade level, use the 'Only these students' option to enter a comma separated list of students you wish to include in the file.

Only these students:

Comma separated Student Numbers

6. Select the File Option you wish to use, download will create a file you can save and upload. The Email option will mail the completed file as an attachment to you.

File Options:* ◯ Download ◯ Email

7. Separate File for AASCD: Check if you wish to create separate files for the Next Generation file and AASCD.

☐ Create Separate File for AASCD

8. There is a Run Date field at the bottom of the page next to the Export option. If you wish to include students that enrolled after the selected date, this field can be updated to a later date to include those students.

Students who are not enrolled as of the run date will be excluded from the Pre-Id file.

ℹ 10/30/2020 📅 * Export Reset

9. Click Export. You will be presented with the option to open the file or save it. If you choose open, the file will open in Excel by default.

10. Save the file.

If you choose to open the file in Excel, formatting changes may occur on fields such as the leading zeroes for IRNs and Grade Levels and the YYYY-MM-DD format for birthdates. Make sure before saving those fields, the columns are formatted as Text and the values have leading zeroes, and that the birthdate is in the correct format. If the file isn't opened and only saved, the leading zero values and the birthdate formatting will remain intact.

Note: The file will exclude students who do not have an SSID or a Non-Public SSID. If a non-public district is in context, and some students have not been assigned a Non-Public SSID, a message displays to click on the Student Name to go to the Edit Student Profile screen to add/edit the Non-Public SSID field on the Additional tab.

Create an Ad-Hoc membership group for students retaking the EOC who are not currently enrolled in a tested course (optional, only needed when including students to be retested)

Students retaking an EOC exam should be submitted in the same file as students taking standard assessments. Before running the export, you'll need to create an ad-hoc membership group for each subject area that students are retaking the EOC that you wish to include in the Pre-ID file.

1. At the district level, navigate to: ***StudentInformation » My Account » Ad Hoc Memberships.***

2. Click on **Add New Ad-Hoc Membership** .

3. Add a Membership name that identifies the group you are building.

4. Using the Assessment Info tab, you can identify students to be retested by the Performance Levels in a specific Assessment Area.

| Search Mode: ● Search Criteria ○ Student IDs ○ Use Existing Memberships |
| General Info | Additional Info | Miscellaneous Info | Course Section Info | **Assessment Info** |

ⓘ Use this tab to search for students by assessment result.

Assessments in the following Date Range: 07/01/2016   To: 05/01/2020

Assessment Area: End of Course - ELA2 - English Language Arts 2 ▼

Performance Level: 3, 2, 1 ▼

☐ **Students Selected by Default**   **Search**

5. When using the Assessment Info tab, you can enter a date range to search for students who have specific Performance Level(s) on a particular assessment area as displayed in the screenshot above. Using the date range you can search for the current year only, or you can enter the earliest possible date students may have tested through the current date to select students that may have tested in previous years as well as the current year. You can select one Performance Level or multiple Performance Levels.

6. From the list of students generated by the search criteria, check the box beside each student you wish to include in the ad-hoc membership group.

7. At the bottom of the list, click the **Add Selected Students** button to add them to the membership group.

8. Click **Save** to save the ad-hoc membership group.

9. Repeat steps 2-7 for each assessment area ad-hoc membership you wish to create for students retaking the EOC.

Running the Pre-Ident for End of Course Exams Export

The End of Course Exam Export creates the Pre-Ident files for students taking the End of Course Exams. For this option, you will have the opportunity to choose the subjects you wish to test for each building. Within each subject selected, you will select course sections by course term to include in the export. Course Sections are included based on the selected End of Course Assessment Value on the Courses screen EMIS tab.

The Pre-Ident option must be processed at the district level. Navigate to: StudentInformation > Management > Import/Export > Pre-Identification Export . From the dropdown, select the Pre-Ident for End of Course Exam Export.

If separate files are created for each subject at different times of the year, the test eligibility mode for subjects not selected will be set to blank in the file to prevent

overlaying previous data uploaded to TIDE.

To create a file:

1. With the district in context, select the schools containing students to be included. Selecting the checkbox by the district name will select all schools. If you wish to include only certain schools, check the box by the school name.

2. Once a school has been selected, this enables the subject areas within the school to be selected. Click on the subject area you wish to begin making selections.

3. Once selected, an option to include an ad-hoc membership of students retaking the EOC but not currently in the course can be selected to include in the export, and a list of course terms and course sections for the subject area within the term will display in a pop-up. If you wish to include all course sections within the term, check the box beside the course term.

4. Once your selections have been made, click the Add Button to save your selections.

5. If you wish to only select specific courses within a term, leave the course term box unchecked and then check the box beside each course section to include:

Clear Fork High School ⊛

This page provides the option to Pre-Identify students for this subject exam. You may include students enrolled in the course sections below and/or by Ad-Hoc Membership.

Include Students in the following Ad-Hoc Membership ⓘ

[No Membership Selected ▾]   ☐ *Private and Public*

Include Students in the following Course Sections ⓘ

⌄ Semester 1 ☑

☑ 103 - 1 - ENGLISH 10   ☑ 103 - 2 - ENGLISH 10   ☑ 104 - 1 - CLGE PREP EN…
☑ 910 - 10 - ENGLISH 10

⌄ Semester 2 ☐

☐ 103 - 3 - ENGLISH 10   ☑ 103 - 4 - ENGLISH 10   ☑ 103 - 5 - ENGLISH 10
☐ 104 - 2 - CLGE PREP EN…   ☐ 104 - 3 - CLGE PREP EN…

ⓘ Test Taken: ◯ Paper ⦿ Online   [Add]   [Cancel]

6. Once your selections have been added, choose another subject area to add or proceed to the next section. You can tell which areas were selected by the color change and the Test Mode displayed below the subject name.

☑ Clear Fork High School

| English Language Arts 1 ⊕ | Mathematics 1 ⊕ | Algebra 1 ⊕ | American History ⊕ | Physical Science ⊕ |
| English Language Arts 2 ✎ *Online* | Mathematics 2 ⊕ | Geometry 1 ⊕ | American Government ⊕ | Biology ⊕ |

7. The next section provides the ability to include certain types of students in your file that may be attending from another district or are your residents attending elsewhere but you wish to include them in your file. Check those options that apply to include students attending elsewhere as Contract Vocational - In, Contract Vocational – Out, JVS or ESC Students in your file:

Include the Following Types of Students

☐ Contract Vocational - In   ☐ Contract Vocational - Out   ☐ JVS
☐ Include CVI home school information ☐ Include JVS home school information

Contract Vocational Students - IN – Students who are non-residents of your district attending as a contract vocational student.

Contract Vocational Students – OUT – Students who are residents of your district attending another district as a contract vocational student.

If the district is testing these students and wishes to have the results returned to their district, then include these students in your file.

If the district that is creating the file is a JVS, make sure to check the 'Include home school information' checkbox so that all home school IRNs and names will be included in the records.

Include CVI home school Information (optional)
Hint for non-home schools: If you're not the resident district and you want the information sent back to the home school AND you've checked to include 'Contract Vocational – In' students, you will need to check the 'Include CVI Home School Information' checkbox.

Hint for Home Schools: If you are the Home School, do not check the 'Include CVI Home School Information'.

Include JVS Home School Information (optional)
Hint for non-home schools: If you're not the resident district and you want the information sent back to the home school AND you've checked to include 'JVS' students, you will need to check 'Include JVS Home School Information'.

Hint for Home Schools: If you are the home school, do not check the 'Include JVS Home School information'

8. For students who are taking an alternate assessment, use an ad-hoc membership group of the students you wish to include. If you're using the ad-hoc membership option, select the ad-hoc membership group you created in the first section.

Select an Ad-Hoc Membership for AASCD

-- No AASCD Membership Selected -- ⌄
☐ *Private and Public*

9. For students who are taking an alternate assessment, there are four assessment areas for the pre-id: ELA, Math, Social Studies and Science. Ad-hoc memberships can be set up for a group of students taking multiple areas, or a group of students just being assessed in one area. Selections are contained in the AASCD Test Mode Selection. The AASCD also has three selections for the Mode: Online, Paper or Supplemental. Only one can be

AASCD Test Mode Selection ⓘ

ELA Test Mode: ○Online ○Paper ○Supplemental   Social Studies Test Mode: ○Online ○Paper ○Supplemental
Math Test Mode: ○Online ○Paper ○Supplemental   Science Test Mode: ○Online ○Paper ○Supplemental

10. To run a file containing only specific students rather than all students in a grade level, use the 'Only these students' option to enter a comma separated list of students you wish to include in the file.

Only these students:

Comma separated Student Numbers

11. Select the File Option you wish to use, the download will create a file you can save and upload. The Email option will mail the completed file as an attachment to you.

File Options:* ( )Download ( )Email

11. Create Separate File for AASCD: Check only if you wish to create a separate file for the AASCD and the OST file.

☐ Create Separate File for AASCD

12. If you've selected to include JVS students attending the JVS full time, the Overall Test Taken Options will be used for those students to indicate whether they are taking a paper or Online Assessment. The Test mode chosen for individual subjects doesn't apply to these students. If you're not including JVS students in your file, then you don't' need to worry about this option.

Overall Test Taken: ( )Paper (●)Online ⓘ

13. There is a Run Date field at the bottom of the page next to the Export option. If you wish to include students that enrolled after the selected date, this field can be updated to a later date to include those students.

Students who are not enrolled as of the run date will be excluded from the Pre-Id file.

☐ Create Separate File for AASCD

ⓘ 01/21/2021 📅 * Export Reset

14. Click Export. You will be presented with the option to open the file or save it. If you choose open, the file will open in Excel by default.

15. Save the file.

If you choose to open the file in Excel, formatting changes may occur on fields such as the leading zeroes for IRNs and Grade Levels and the YYYY-MM-DD format for birthdates. Make sure before saving those fields, the columns are formatted as Text and the values have leading zeroes, and that

the birthdate is in the correct format. If the file isn't opened and only saved, the leading zero values and the birthdate formatting will remain intact.

Note: The file will exclude students who do not have an SSID or a Non-Public SSID. If a non-public district is in context, and some students have not been assigned a Non-Public SSID, a message displays to click on the Student Name to go to the Edit Student Profile screen to add/edit the Non-Public SSID field on the Additional tab.

Upload files to the Testing Company

Follow the instructions provided by the vendor to upload your completed file.

Pre-ID for PS ELA Assessments

Change Log

Date	Section Number/Name	Change Description
8/14/20		Updates for FY21
8/29/19		Updates for FY20
5/7/19	Entire document	Update document for screenshots and typos
10/22/18	Task 3. Run the Pre-identification Export Reports	Removed the 'Note'; updated screenshots
8/23/17		Initial document creation

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The PS ELA Pre-Identification exports are a series of Ad Hoc reports that create the **three** files necessary to upload data to the Online Assessment Vendor.

Before beginning the process of creating the files, Preschool students must be scheduled in a class. There must also be a finalized Schedule Result set designated on StudentInformation Options.

There are three files required to be uploaded before any results may be entered for students:
- **Student.CSV** – a file containing Preschool students who will be assessed and their demographic information
- **Enrollment.CSV** – a file containing the same preschool students as in Student.CSV, but also containing their class enrollment information
- **Teacher.CSV** – a file containing information on the teachers of the Preschool classes included in the Enrollment.CSV file

The PS ELA Pre-Ident reports will include the following students and teachers in the file based on the following criteria:
- Any student in Preschool with a status code matching the selected code AND
- Student is enrolled in at least one PS class
- Teachers associated with the course sections that PS students are assigned to

The teacher information requires all teachers to have a Staff Credential IDs and teacher email address on their StudentInformation Staff record for inclusion on the reports.   It is important that schools make sure that student schedules are up-to-date before they create the files.

The following checklist will provide you with instructions on how to complete the process of creating the Pre-Identification files for the PS ELA Assessment.

Task 1. Run the report 'Students With no SSID' to verify that all students have an SSID.

StudentInformation > SIS > School > Student Reports > Student With No SSID (SSID)

All students to be included on the Pre-identification files must have an SSID. Students without an SSID will appear on the Student.CSV file, but with a blank for the SSID. The record will be rejected when uploading the file to the testing company.

Task 2. Verify all Preschool teachers have an email address and a Credential ID (State Staff ID) on their staff record.

The **Teacher** and **Enrollment** exports include the following fields from the Teacher Staff Record:

- Teacher First Name
- Teacher Last Name
- Teacher Email Address (Teacher export only)
- Credential ID (State Staff ID)

Task 3. Run the Pre-identification Export reports

The Pre-Identification Export reports may be run with either the district in context, if you have multiple buildings to include, or the building in context if all Preschool students are in the same building.

The person running the reports must also have access to the Assessments folder in Ad Hoc Reports. Click on the paper icon in the upper right corner to pull up the Analytics Hub and expand the Assessment category. Under State Assessment Pre-ID, you will see FY21 - Preschool ELA Pre-ID Enrollment File, FY21 – Preschool ELA Pre-ID Student and FY21 – Preschool ELA Teacher File.

State Assessment Pre-ID

☆ FY21 - Preschool ELA Pre-ID Enrollment File

Creates the list of preschool teachers needed to complete the 2019 PS ELA Pre-ID process. Run this report in conjunction with the FY20 – Preschool ELA Pre-ID Student and Enrollment File reports.

☆ FY21 - Preschool ELA Pre-ID Student

Creates the 2019 Pre-ID student file for students taking the Preschool ELA Assessment. File should be saved as a CSV file.

☆ FY21 - Preschool ELA Pre-ID Teacher File

Creates the list of preschool teachers needed to complete the 2019 PS ELA Pre-ID process. Run this report in conjunction with the FY20 – Preschool ELA Pre-ID Student and Enrollment File reports.

Running the FY21 Preschool ELA Pre-ID Export to create the Student.CSV file

a. Click on the FY21 - Preschool ELA Pre-ID Student export. The following filters will appear. You must select at least one value for each filter:

Filter By	Condition	Value
School Year	Equal To ▼	2020-2021 ▼
School Name	Is One Of ▼	▼
Status Name	Is One Of ▼	▼
State Equivalent Grade Level	Equal To ▼	PS ▼
FD Is Current Record	Equal To ▼	Y ▼

StudentDemographicCore.SchoolYear	Select the school year you wish to include enrolled students
StudentDemographicCore.SchoolName	Select the School or Schools if more than one school in your district has preschool students
StudentDemographicCore.StatusName	Select the student status code descriptions that would be assigned to the PS students. Multiple statuses may be selected
StudentEMISFD.StateEquivalentGradeLevel	Select the building grade level(s) that represent your building's PS students
StudentEMISFD.IsCurrentRecord	**This filter displays but is not selectable. It is already set for you**

b. Once you have the filters filled in, click **Okay**. The report will be generated.
c. To save the file as a CSV file, click the Export Excel dropdown. Two options will be displayed. Choose the Export CSV option to export the report as a CSV file.
d. A prompt will appear at the bottom of the page to Open or Save the file. If you choose Open, the file will be opened in Excel. If you open the file, **please keep in mind that the district_ID field and School_id fields will be formated as numeric and you will need to change the format back to Text format and mass update the column to include the leading zeroes.**
e. Check for students with missing values, especially SSID. If you have the SSID, you can just update the spreadsheet.
f. Save the file as a .CSV file.

Running the FY21 Preschool ELA Pre-ID Export to create the Teacher.CSV file

a. Click on the FY21 - Preschool ELA Pre-ID Teacher File export. The following filters will appear. You must select at least one value for each filter:

Filter By	Condition	Value
School Year	Equal To ▼	2020-2021 ▼
School Name	Is One Of ▼	▼
Grade Level	Equal To ▼	▼
Status Name	Is One Of ▼	▼

StudentCourseInfo_PreID_v2.SchoolYear	Select the school year you wish to include PS teachers
StudentCourseInfo_PreID_v2.SchoolName	Select the school or schools if more than one school in your district has preschool students
StudentCourseInfo_PreID_v2.GradeLevel	Select the building grade level(s) that represent your building's PS students
StudentCourseInfo_PreID_v2.StatusName	Select the student status code descriptions that would be assigned to the PS students. Multiple statuses may be selected

b. Once you have the filters filled in, click **Okay**. The report will be generated.

c. To save the file as a CSV file, click the Export PDF dropdown. Three options will be displayed. Choose the Export CSV option to export the report as a CSV file.

d. A prompt will appear at the bottom of the page to Open or Save the file. If you choose Open, the file will be opened in Excel. If you open the file, **please keep in mind that the district_ID field and School_id fields will be formated as numeric and you will need to change the format back to Text format and mass update the column to include the leading zeroes**.

e. Check for Teachers with missing Credential IDs or email addresses. The email address will be used to create the teacher's account.

f. Save the file as a .CSV file.

Running the FY21 Preschool ELA Pre-ID Export to create the Enrollment.csv file

> ***Note: Students must be assigned to a course section and the master schedule finalized before running this report.***

a. Click on the FY21 - Preschool ELA Pre-ID Enrollment File export. The following filters will appear. You must select at least one value for each filter:

Filter By	Condition	Value
School Year	Equal To ▼	2020-2021 ▼
School Name	Is One Of ▼	▼
Grade Level	Equal To ▼	▼
Status Name	Is One Of ▼	▼

StudentCourseInfo_PreID_v2.SchoolYear	Select the school year you wish to include PS teachers
StudentCourseInfo_PreID_v2.SchoolName	Select the school or schools if more than one school in your district has preschool students
StudentCourseInfo_PreID_v2.GradeLevel	Select the building grade level(s) that represent your building's PS students
StudentCourseInfo_PreID_v2.StatusName	Select the student status code descriptions that would be assigned to the PS students. Multiple statuses may be selected

b. Once you have the filters filled in, click **Okay**. The report will be generated.
c. To save the file as a CSV file, click the Export PDF dropdown. Three options will be displayed. Choose the Export CSV option to export the report as a CSV file.
d. A prompt will appear at the bottom of the page to Open or Save the file. If you choose Open, the file will be opened in Excel. If you open the file, **please keep in mind that the district_ID field and School_id fields will be formated as numeric and you will need to change the format back to Text format and mass update the column to include the leading zeroes.**
e. Save the file as a .CSV file.

Task 4. Transfer/upload the file to the appropriate vendor per their instructions

To upload your files to the vendor, visit https://ohio.kready.org/login to log into the system.

For additional information, please visit http://education.ohio.gov/Topics/Early-Learning/Kindergarten/Early-Learning-Assessment

Public Course Requests Procedural Checklist

The Public Course Requests (PCR) Module in StudentInformation allows students and/or parents to enter course requests on the internet for the 21/22 school year. Requests entered on the public module show immediately in StudentInformation.

The PCR Module is optional.

SYI and Student Promotion/Bulk Enrollment for the 21/22 school year must be completed before any requests can be entered.

Change Log

Date	Section Number/Name	Change Description
4/30/21	Task #2	Add note about Excluded Courses
1/12/21	Entire document	Update to 21/22
7/9/20	Entire document	Review and update
11/18/19	Entire document	Review and update
11/28/18	Entire document	General updates

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Task #1 - Verify Courses and Course Groups are Setup Correctly to Use in the PCR Module

1. Change the context to the building level in 21/22.
2. Navigate to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Courses**.
3. Search for a Course and then click the **Edit Pencil** icon to edit the Course.
   a. The **Display on Public Module** checkbox on the **General** tab determines if the Course appears on the PCR Module for students to request.
   b. If you would like students to be able to request a Course on the PCR Module then check **Display on Public Module.**
   c. The **Display on Public Module** checkbox is only used for the PCR Module and does not prevent office staff from assigning a request for a Course that is not marked as **Display on Public Module**.
4. Next, on the **Marks** tab, verify the **Credit Units** value of the Course is correct.
   a. Since the PCR Module requires a minimum and maximum number of credits be entered when setting up the module, it is important to verify the credit amount on the Course.
5. The PCR Module looks at the **Grade Levels Selected** filter on the **Miscellaneous** tab of the Course. If the grade level selected in the filter matches the student's grade level, the course will display in the PCR Module for the student to select.
   Note: The selected Grade Levels on the Course loads into GradeBook and are used for setting up Standard Based Report Cards.
6. Finally, on the **Pre/Co-requisites** tab, verify the Pre and Co-requisites are setup.
7. Navigate to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Course Groups.**
8. Search for a Course Group then click the **Edit Pencil** icon to edit the Course Group.
   a. The **Display on Public Module** checkbox on the **Group** tab determines if the Course Group appears on the PCR Module for students to request.
   b. If you would like students to be able to request a Course Group on the PCR Module then check **Display on Public Module**.
   c. The **Display on Public Module** checkbox is only used for the PCR Module and does not prevent office staff from assigning a request for a Course Group that is not marked as **Display on Public Module**.
   d. The **Display Courses Individually** checkbox on the **Group** tab determines whether Courses that are members of this Course Group may be searched for and requested by students in the PCR Module. If

Courses that are in this Course Group should not show individually in the PCR Module, then the **Display Courses Individually** checkbox should be unchecked. This overrides the **Display on Public Module** checkbox on the **Courses – General** tab for the Courses within this Course Group.

Task #2 - Setup the Application Configuration

The Application Configuration specifies how the PCR Module will function.

1. At the building level in 21/22, navigate to: **StudentInformation » Management » School Administration » Public Administration » Application Configuration**.
2. In the **Context Options** section, ensure the **School Year** dropdown is set to 2021-2022.
3. The first section is called **Security Options**. In the **Student Validation Method** dropdown, choose **None**. The **Student Validation Method** is not functional at this time so if you chose **Student Social Security Number** or **Student Number,** it would not change how the PCR Module functions.
4. Next, the **Guardian Access** dropdown allows you to tell StudentInformation if student contacts marked as Legal Guardian should have access to the PCR Module.
   a. A majority of schools gather students in a lab during school and the students enter their course requests. The guardians do not have access to the PCR Module since the students enter the requests at school.
   b. If guardians will not be using the PCR Module, choose **None**.
   c. The 2nd option in the dropdown is **View Only.**
   d. Choosing **View Only** allows you the ability to generate logins for guardians and once the guardian is logged into the PCR Module, they can only review requests. Guardians cannot make any changes to requests if **View Only** is selected.
   e. The 3rd choice in the dropdown is **Modify Requests.**
   f. Choosing **Modify Requests** allows guardians to log into the PCR Module and add and delete requests for the student, but the student may always go back and undo the changes the guardian made.
   g. The 4th option is **Modify and lock requests.**
   h. Choosing **Modify and lock requests** allows guardians to add or delete course requests and lock the requests so the student cannot change them.
   i. Of course, the office staff still has the ability to override any request the student or guardian puts in the PCR Module.
5. The **Dates of Application Availability** dropdown allows you to tell StudentInformation what date range the PCR Module will be available to students and guardians.
6. The next section named **Course Request Options** allows you to configure which course types students can request on the PCR Module.
7. You can type in a URL in the **External course catalog address** field.
   a. If entering a URL, you must also check the **Use external course catalog** box.
   b. If a URL is entered and a student clicks on a Course while in the PCR Module to find out more about the course, they will be directed to the URL listed in the **External course catalog address**.

c. If you wish to use the Course information in StudentInformation, leave the URL field blank.

8. The next option is **Guardian approval required**.
   a. State Support strongly recommends choosing **None** in this dropdown.
   b. Choosing **None** will mark all requests as approved after the student submits his requests and does not require any further intervention from the office staff. The requests submitted by the students are immediately ready to be scheduled by the Batch Scheduler.
   c. Choosing **Electronic** or **Signature** requires the office staff to go to each student and approve their requests one by one. Since the Batch Scheduler only schedules approved requests, the student would not receive a schedule until his or her requests were updated to **Approved** status and then the Batch Scheduler run again.

9. The next option is **Request may specify: Alternate Course**.
   a. This option allows students to choose an alternate course request if the original request is unavailable.
   b. **Note:** The Batch Scheduler allows you the option to schedule alternate course requests or not. So, just because a student enters an alternate Course does not mean they will be scheduled into the alternate Course if their first choice is not available. It also depends on how the Batch Scheduler is configured.

10. Next, you specify the **Minimum credits required** and the **Maximum credits allowed** a student can request on the PCR Module.
    a. If a student attempts to submit requests that are lower than or exceed the min or max setup in the Application Configuration, the student will receive a warning message and will be required to add or drop requests until the number of course requests falls into the correct range.
    b. If you wish to use the PCR Module and your school does not use credit values on the Courses, you can configure the application with a minimum of zero credits and a maximum of 10 credits. The min and max credits are required fields.
    c. At this time, there is no way to control the number of Courses a student can request. You can only control the number of credits.

11. If **Enforce Prerequisites and Corequisites** is checked and a student attempts to add a request that they have not met the prerequisites or corequisites, which are setup on the Pre/Co-requisites tab of the Course found by navigating to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Courses**, the student will be warned that they do not meet the pre or co-reqs and will be allowed to continue or prevented from adding the requests depending on what you chose in the **Requisite Action** dropdown.
    a. Choosing **Warn** in the **Requisite Action** dropdown allows the student to add the request even though they have not met the pre or co-reqs.

The student does receive an informational warning, but they are allowed to continue.
   b. If **Prevent** is chosen and a student attempts to request a Course they do not meet the pre or co-reqs for, an error will display and StudentInformation will not allow the student to add the request.
   c. If **Automatic** is chosen (used with co-requisites only) and a student attempts to request a Course they have not met the co-reqs, the application prompts the user. If the user decides to continue, the application adds or removes the additional requests. If the user decides to cancel, no requests will be added or removed.
   d. An example of when you would want to choose **Warn** instead of **Prevent** is a student who is requesting to take Spanish1 and Spanish2 in the 21/22 school year. If Spanish2 has a prerequisite of Spanish1 and the **Application Configuration** is set to Prevent, the student will not be allowed to choose Spanish2 since they have not completed the course. This is a good reason to choose **Warn**.
12. The next option is **Permit Completed Courses**.
   a. State Support recommends clicking this box because if the box was unchecked, a student who took Band their 9th grade year would not be allowed to request Band their 10th, 11th, or 12th grade year since Band was completed their 9th grade year.
13. The next option is **Course Types**.
   a. Choose the type of Courses students will be able to choose in the PCR Module by placing a checkmark next to the course type.
   b. Typically, schools allow students to choose course types of **Class**, **Course Group**, and **College Credit Plus**.
   c. If you have a Course or Course Group which is included in the course type you have selected, but you do not want students to be able to request it, you can either unmark **Display on Public Module** on the Course or Course Group record or type in the Course or Course Group Codes separated by commas in the field next to **Excluded Courses.** **Note:** Do not have any extra spaces in the comma separated list.
14. Finally, the **Request Cut-off Date** field determines the last day students can enter requests.
   a. In the screenshot example following this task, the **Dates of Application Availability** are set to 12/1/2020 to 5/1/2021 and the **Request Cut-off Date** is 4/1/2021. This means the public module is available until 5/1/21, but students can only enter their requests up to and on 4/1/21. If they login on 4/2/21, the student will only be able to view the requests. The student will no longer be allowed to make changes.
15. Click **Save.**

Student Course Request Application Configuration

From this screen, you can edit the configuration settings for the Student Course Request Application.

Context Options

School Year: 2021-2022 ▼

Security Options

Student Validation Method:*   None ▼

Guardian Access:*   None ▼

Dates of Application Availability:*   12/1/2020 🗓 - 5/1/2021 🗓

Course Request Options

External course catalog address: [_____]

☐ Use external course catalog

Guardian approval required:*   None ▼

Request may specify: ☑ Alternate Course

Minimum credits required:*   5.0 ↕

Maximum credits allowed:*   8.0 ↕

Enforce Prerequisites and Corequisites: ☑

Requisite Action:*   Warn ▼

Permit Completed Courses: ☑

Course Types:

☑ C - Class   ☑ SAT - Satellite course
☐ L - Lunch   ☑ CCP - College Credit Plus
☐ Z - Study hall   ☐ Blank - blank - legacy
☐ ESC - ESC course   ☑ VOC - Vocational
☑ G - Course Group   ☐ CaseMgt - Case Management
☐ S - Spare

Excluded Courses: [_____]

Request Cut-off Date:*   4/1/2021 🗓

ⓘ **Guardian approval required:**

None = All requests will be marked as approved status after the student submits the requests.

Electronic or Signature = The requests will be assigned a pending status. Parents or office staff will have to approve each request one by one.

THE BATCH SCHEDULER WILL ONLY SCHEDULE APPROVED REQUESTS.

[Save] [Cancel]

Task #3 - Generate Student and/or Guardian Accounts and Print Username and Password Letters

Step 1: Generate accounts.

1. At the building level in 21/22, navigate to: **StudentInformation** **» Management** **» School Administration** **» Public Administration** **» Account Generation**.
2. The first section is named **Account Generation Details**.
3. The **Account Type** dropdown allows you to tell StudentInformation whose accounts you want to generate usernames and passwords for.
   a. If you only want to generate usernames and passwords for students, choose **Student Only.**
   b. If you only want to generate usernames and passwords for guardians only, choose **Guardian Only.**
   c. If you want to generate usernames and passwords for both students and guardians, choose **Student and Guardian.**
4. The next dropdown is **Account Lifespan**.
   a. State Support recommends choosing **Date Limited** which means the username and password generated by StudentInformation will be good for the date range selected.
   b. If you choose **Permanent,** it means the student will have the same username and password for every year unless you reset the accounts in later years. The likelihood of a student remembering his username and password from year to year is very slim. For that reason, we recommend you use **Date Limited**.
5. In the **Date Range** filters, use the same dates you used for the **Dates of Application Availability** you setup in the previous task.
   a. In the example screenshot following this task, the Date Range is 12/1/20 – 5/1/21.
6. In the **Existing Accounts** dropdown, the options are **Ignore**, **Reset** and **Reinitialize**. Choosing **Ignore** leaves existing accounts as they are and does not change any account properties. Choosing **Reset** will replace any existing accounts with a new username and password. Choosing **Reinitialize** will reinitialize any existing accounts with a new Account Lifespan keeping the same username and password. State support recommends to **Reset** the existing accounts.
7. Use the **Student Selection** section to choose which students to generate accounts for.
   a. Click **Preview Students**.
   b. The students appear on the screen based on your selection criteria.
   c. Uncheck the students you do not want to generate accounts for and click **Create Accounts**.
8. Now, we are ready to print username and passwords.

Step 2: Print account letters.

9. Navigate to: **StudentInformation** » **Management** » **School Administration** » **Public Administration** » **Account Information Letter**.
   a. Using the **Selection Criteria** filters, choose which students you want to print username and password letters for. It is usually the same filters used to generate the accounts.
   b. Usernames and passwords are case-sensitive, and the last four characters of the username and the entire password contain only the numbers 0-9 and the letters A-F. The last four characters of the username and the entire password does not contain the letter O, only the number 0.
   c. You can enter up to 600 characters as **Letter Verbiage** to appear on all Account Information letters.
      Note: If you include the Public Module URL in the Letter Verbiage section, the students would have this for their convenience during the entering Course Requests process.
   d. Click **Submit**.
   e. A job named **Account Information Letter** has been sent to your Management screen.
   f. Wait for the job to finish and print out the username and password letters.

Account Generation

Account Generation Details

Account Type: [Student Only ▼]

Account Lifespan: [Date Limited ▼]

Date Range:* [12/01/2020] 📅 to* [05/01/2021] 📅

Existing Accounts: [Reset ▼]

Student Selection

Search Mode: ● Student Search ○ Specify Username ○ Specify Student Number

Last Name: [　　　　　] ☐ Perform wildcard search

First Name: [　　　　　] ☑ Perform wildcard search

Gender: ☑ Male ☑ Female ☑ Unspecified

Homeroom Date: [1/12/2021] 📅

Student Status

```
A - ACTIVE RES          ▲
GO - Grad Only
H - Homeschool
I - INACTIVE            ▼
```

☐ Exclude students with selected status(es)

Administrative Homeroom

```
C103 -        (Full Year Term)   ▲
C103 -        (Semester 1)
C103 -        (Semester 2)
C105 -        (Semester 1)       ▼
```

☐ Exclude students in selected homeroom(s)

Grade

```
07 - 07                 ▲
08 - 08
09 - 09
10 - 10                 ▼
```

☐ Exclude students in selected grade level(s)

Membership Group

```
11 - Intervention                              ▲
12 - Post-secondary Enrollment Options Program
15 - 15
16 - 16                                        ▼
```

☐ Exclude students in selected group(s)

Membership

```
15 - Extended Learning Time (Each Week)        ▲
15 - Guided Reading (Small Group Instruction)
15 - Increase Reading Time
15 - Interactive Writing                       ▼
```

☐ Exclude students in selected membership(s)

Program

```
** - NOT APPLICABLE          ▲
01 - MULTIPLE DISABLTIES
02 - DEAF-BLINDNESS
03 - HEARING IMPAIRMENTS      ▼
```

☐ Exclude students in selected program(s)

[Preview Students]

Account Information Letter

From this screen, you can select parameters to generate a report.

| Selection Criteria | Selection Summary | Load Settings |

Search Mode: ● Student Search ○ Specify User Name ○ Specify Student Number

Last Name: [_____] ☑ Perform wildcard search

First Name: [_____] ☑ Perform wildcard search

Gender: ☑ Male ☑ Female ☑ Unspecified

Administrative Homeroom

```
C103 -         (Full Year Term)
C103 -         (Semester 1)
C103 -      .  (Semester 2)
C105 -         Semester 1)
```

☐ Exclude students in selected homeroom(s)

Grade

```
07 - 07
08 - 08
10 - 10
11 - 11
```

☐ Exclude students in selected grade level(s)

Membership Group

```
50 - 50
51 - Graduation Seals
52 - Graduation Pathways
60 - World Languages for Seal of Biliteracy
```

☐ Exclude students in selected group(s)

Membership

```
15 - Extended Learning Time (Each Week)
15 - Guided Reading (Small Group Instruction)
15 - Increase Reading Time
15 - Interactive Writing
```

☐ Exclude students in selected membership(s)

Program

```
** - NOT APPLICABLE
01 - MULTIPLE DISABLITIES
02 - DEAF-BLINDNESS
03 - HEARING IMPAIRMENTS
```

☐ Exclude students in selected program(s)

Homeroom Date: * [1/12/2021] 📅

Letter Types To Generate: [Student Accounts Only ▼]

Letter Verbiage: [Test the letter verbiage on the letter]

Sorting Options

```
Grade (ASC)                    Grade (DESC)
Student Number (ASC)           Student Last Name (ASC)
Student Number (DESC)
Student Last Name (DESC)
```

Delivery Method: [Pickup ▼] [Set As Default]

Email Address: recker@managementcouncil.org

Report Format: [Adobe PDF ▼]

Description: [_____]

[Submit]

Task #4 - Students and/or Guardians Enter Requests on the PCR Module

1. With their username and password letter in hand, have the students login to your Public Module URL.
   a. It is helpful to have the Public Module URL printed on the student's username and password letters.
2. They will be prompted for their **Username** and **Password**.
3. Click **Log In**.
4. Any request already entered in StudentInformation by the office staff will display at the top with locks and students will not be allowed to edit the request.
5. Students can use the **Course Search** or **Specify Course Code** to enter requests. Requests can be entered for Courses and Course Groups.
   a. You can add a request by clicking on the plus sign next to the Course Code or checking the box next to the plus sign.
   b. If the student decides to use the checkbox, the requests are not added until the student clicks **Request Selected Courses**.
   c. If you use the plus button, the request will be added immediately.
   d. Remember only those Courses marked as **Display on Public Module**, are the correct **Course Type**, and match the students **Grade Level** will show when the student searches for courses in the PCR Module. Also, if **Permit Completed Courses** was checked on the **Application Configuration**, check the **Include Completed Courses** during the **Course Search**. They will show in the list of available courses with a red background to distinguish them.
   e. Notice a request added by a student has a Status of **Student Pending**.
   f. Again, any request entered in StudentInformation by the office staff will be locked and have a Status of **Approved**.
6. Once a student has entered their requests, they need to click **Review Requests**.
7. If the student's requests do not meet **Minimum credits required** or **Maximum credits allowed** that was setup on **Application Configuration,** the student will not be allowed to submit his requests. The student will receive an error message letting them know they have not met the min or max credit requirements.
   a. They will need to click **Cancel** and enter more requests or delete requests.
8. If the student has met the min and max credit requirements, a **Submit Requests** button will appear on the screen.
   a. The **Submit Requests** button is very important. Until the student clicks **Submit Requests,** their requests entered on the PCR Module are **Pending Status** and will not be scheduled by the Batch Scheduler in

StudentInformation. Once a student clicks **Submit Requests**, the **Status** of the requests is changed to **Approved**.

b. Once a student has clicked **Submit Requests,** they can no longer add or edit requests. They can only login and view their selections.

c. A student also has the option of clicking on **My Account** where they can **Change My Password**.

Task #5 - Verify Each Student Who Has Entered Requests on the PCR Module Has Approved Their Requests

1. Requests entered on the PCR Module have a **Status** of **Pending** until the student clicks **Submit Requests** at which time the **Status** changes to **Approved**. The Batch Scheduler in StudentInformation will not schedule pending requests. This is why it is very important for students to approve their requests by clicking **Submit Requests** before exiting the PCR Module.
2. To find out which students have zero requests, go to the following page: **StudentInformation** » **Management** » **School Administration** » **Public Administration** » **Uncommitted Requests**.
   a. Click the **Show Students without Requests** radio button which is located near the bottom of the screen and click **Search**.
   b. Each student who has zero requests will display.
   c. You can click on the blue link and you will be brought to their **Student Requests** page.
   d. Another option on the **Uncommitted Requests** page is to see which students have Unapproved requests by Parent/Guardian. You would only need to use this option if you chose **Guardian Approval** = **Electronic** or **Signature** when you setup the **Application Configuration**.
   e. The final option on the **Uncommitted Requests** page is **Uncommitted by Student**.
   f. This option allows you to find students who entered requests on the PCR Module, but have not clicked **Submit Requests** yet.
3. Another way to find students who have entered requests on the PCR Module, but have not clicked **Submit Requests** yet is to run the R701 with the following parameters chosen:

Suppress Requests That Have No Matching Assignment:	⦿ Yes ◯ No
Position For Requests That Have No Matching Assignment:	Before ⌄
Suppress Results That Have No Assignment:	◯ Yes ⦿ No
Position Of Results That Have No Assignment:	Before ⌄
Print Only Schedules With Results That Have No Assignment:	◯ Yes ⦿ No
Print Schedules Changed After Date:	🗓

4. If you find students who have forgotten to click **Submit Requests,** the student can log back in and click **Submit Requests** or the office staff can login and click **Submit Requests** for the student or the office staff can edit each request in StudentInformation and check the **Approved** box and **Save**.

5. The Account Usage page found by navigating to: **StudentInformation » Management » School Administration » Public Administration » Account Usage** displays the usage statistics for a selected group of Public Course Request application users based on the filter criteria, or if a student is in context, it will display usage statistics for all users associated with that student.

ProgressBook StudentInformation

Report Card Processing Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
9/18/20	Setting Up Report Card Processing	Add Use Student Marks and Use Teacher Menu – add note to Honor Roll Update reports list
	Publish Report Cards to ParentAccess	Add Note regarding GB/PA Admin and Page Level Security
7/8/20	Publish Report Cards to ParentAccess	Fix typo
10/28/19	Entire document	Review and Update

Table of Contents

Setting Up Report Card Processing

Important: Prior to processing report cards, verify the following screens and tables are setup correctly.

- ☐ **Verify StudentInformation Options** by navigating to StudentInformation > Management > School Administration > StudentInformation Options - Marks tab. Confirm the type of mark your district will use. Alpha marks are the most commonly reported marks. Numeric marks must be associated with valid standard alpha marks for the purpose of determining GPA calculations.
- ☐ **Verify Courses** by navigating to StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Courses. Search for the applicable course and click the edit pencil. For details on the fields on a course record, refer to the Course and Course Section Setup, Course Group and Course Group Section Setup Procedural Checklist.
- ☐ **Verify Student Profile** by navigating to StudentInformation > SIS > Student > Edit Profile - Additional tab. Confirm the applicable checkboxes are marked if the student is to be included in the Honor Roll, Ranking and GPA and if the student requires a paper copy of the report card. For details on other fields on the profile, refer to the Student and Registration End User Guide.
- ☐ **Verify Mark Types** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Mark Types. Confirm all needed mark types are displayed. You must define a mark type if you wish to give that type of mark during the school year. Mark types also specify a default weight for the mark type for mark averaging and GPA calculations
- ☐ **Verify Marks** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Marks. Marks are also referred to as grades and can be alpha or numeric values (as set on StudentInformation Options above). Schools using numeric marks should have no gaps between min and max numeric marks.
- ☐ **Verify Mark Groups** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Combined Mark Groups. Combined

mark groups are used to group like grades together for honor roll purposes or to define difficulty point scales or add-on point scales.

- ☐ **Verify Difficulty Levels** by navigating to StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Course Difficulty. Course difficulty levels are used to specify courses of elevated or possibly remedial stature. Schools may also elect to award alternate points for marks earned in specific courses based on the level of difficulty assigned for the course.

- ☐ **Verify Difficulty Point Scale** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Difficulty Point Scale. Only one difficulty level may be assigned to a course section.

- ☐ **Verify Add-On Level Codes** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Add-On Level Codes. Add-on level along with GPA add-on points will determine if a student may be awarded additional points to his/her final GPA for a specific course based on the mark received for the course.

- ☐ **Verify Add-On GPA** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Add-On GPA. GPA add-on points are awarded for specified marks and are then added to the resulting GPA.

- ☐ **Verify Exception Credit** for a specific course section by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Course Section Exception or for a specific student by navigating to StudentInformation > SIS > Student > Marks > Student Exception Credit.

- ☐ **Verify Reporting Terms** by navigating to StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Reporting Terms Maintenance. There are two types of reporting terms, standard and virtual. Standard reporting terms represent a collection of days on which information concerning students will be reported and are made up of scheduling terms. Virtual reporting terms are used to create a placehold for marks (Interims, Exams, Averages, etc) and are not associated with any dates.

If the school will be printing GPA Sets, Honor Rolls or Comments on the Report cards, ensure the following are setup in StudentInformation.

- ☐ **Define GPA Sets** by navigating to StudentInformation > Management > School Administration > Course History Administration > GPA Sets. Refer to the GPA Procedural Checklist for detailed instructions.

- ☐ **Define Honor Rolls** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Honor Rolls. Refer to the Honor Roll Procedural Checklist for further instructions. Note: If changes are made to a Honor Roll, refresh the corresponding GPA Set.

- ☐ **Define Standard Comment Maintenance** by navigating to StudentInformation > Management > School Administration > Marks Administration Menu > Standard Comment Maintenance.

Prior to running Report Cards, there are several reports that can be run for verification of marks and attendance.

- ☐ **Class List Formatter (R703)** – Run the R703 to verify marks for each course section.

- ☐ **Students with Specified Marks by Student (R302A)** – Run the R302A to view students with specific or missing marks.

- ☐ **Students with Specified Marks by Teacher (R302B)** – Run the R302B to view students with specific or missing marks, report will group by teacher, then course, then student.

- ☐ **Marks Analysis (R301)** – Run the R301 to view the mark distribution by teacher and/or course section.

- ☐ **Student Composite (R112)** – Run R112 to generate a condensed composite report card printout for student(s). This report will provide GPA results which standard report cards may not.

- ☐ **Student Absence Search Detail (R309-A)** – Run the R309-A to generate a list of selected students and show the detail of their daily absences for the date range selected.

- **Student Absence Search Summary (R309-B)** – Run the R309-B to generate a list of selected students and show the total of their daily absences for the date range selected.
- **Student Absence Analysis by Date Range (Analytics Hub)** – Run this report to list the students days and hours absent for the selected date range. In the post-filter pane, you can filter the results by a range of absence dates and/or hours.

If adjustments are needed to the marks, it can be done in several screens.

- **Use Student Marks** by navigating to StudentInformation > SIS > Student > Marks > Student Marks. Click on any of the blue links for a Course Section to see the appropriate Student Marks Entry page.

Ex. Click on course 1710 Section 1 and then filter on Final (AY) marks.

☐ **Use Teacher Menu** by navigating to StudentInformation > Teacher Menu > Course Section Mark Entry. Filter on Teacher and Section.

Ex. Filter on Final marks.

Running Report Cards (R700)

The Report Card Formatter is used to create report cards, interim reports and permanent record labels for the building.

Note: If you use custom Report Card Formats, they will have different format options, including formatting options (margins, assessment and marks subreport inclusions, and so on) on the Report Card Formatter itself.

Navigate to the R700 submission screen by going to StudentInformation > SIS > Marks > Marks Reports > Report Card Formatter (R700).

Report Card Formatter (R700)

From this screen, you can select parameters to generate a report.

| Selection Criteria | Selection Summary | Load Settings |

⚠ (Warning: the Non-Custom formats can be used, but state support will no longer be provided.)

Formatter Version: ⦿ Custom ◯ Permanent Record Labels

Report Layout: `AllYear2` ▾

Watermark Image: `None ▾` **Watermark Alignment:** `Top Left ▾`

Footer Location: ◯ Directly Beneath the Detail Section ⦿ At The Bottom of the Last Report Page

Report Orientation: ◯ Portrait ⦿ Landscape

Paper Kind: `Letter ▾`

Paper Width: `8.5` **Paper Height:** `11`

Left Margin: `0.5` **Top Margin:** `0.5`

Right Margin: `0.5` **Bottom Margin:** `0.5` **Gutter:** `0.0`

School Years For Credits

| 2018-2019
2017-2018
2016-2017
2015-2016 | | 2019-2020 | |

Interim Report Card: ◯ Yes ⦿ No

Reporting Term For Which To Show Comments / Latest Physical Term Is Used For The Current Reporting Term

| Quarter 2
Exam 1
Semester 1
Quarter 3 | | Quarter 1 | |

Mark Type For Which To Show Comments

| Avg
Exam
Final | | Mark | |

Reporting Term For Which To Show Marks

| Quarter 2
Exam 1
Semester 1
Quarter 3 | | Quarter 1 | |

Mark Type For Which To Show Marks

| Avg
Exam
Final | | Mark | |

Course Types

```
C - Class
L - Lunch
Z - Study hall
ESC - ESC course
```

Mark Credit Type: All ▼

Show Required Marks Only:	● Yes	○ No
Print Report Card If Student Has No Marks Or Comments:	● Yes	○ No
Print Regular Course From Prior Course Term That Has No Marks Or Comments:	○ Yes	● No
Print Regular Course From Current Course Term That Has No Marks Or Comments:	○ Yes	● No
Print Regular Course From Future Course Term That Has No Marks Or Comments:	○ Yes	● No
Print Course History That Has No Marks:	○ Yes	● No
Include Dropped Courses In Past Or Current Course Terms In Current Year:	○ Yes	● No
Include Dropped Courses In Future Course Terms In Current Year:	○ Yes	● No
Include Dropped Courses in Prior Years (for Credits totals):	○ Yes	● No
Show Separate Marks Subreports For Each Marking Pattern:	○ Yes	● No
Show Separate Rows in Credits Subreport for Credits from Different Schools in the Same Year:	● Yes	○ No
Require 'Update History' Flag to be True for Course to be on Report Card:	○ Yes	● No
Require 'Is High School Credit' Flag to be True for Course to be on Report Card:	○ Yes	● No

Marks Alignment in Marks Subreports:
- ● Align Equivalent Marks Columns in Marks Subreports for All Marking Patterns
- ○ Stretch Marks Columns to Fill Width of Marks Shape Within the Marks Subreport for Each Marking Pattern

GPA Sets

```
Cum Weighted              Quarter 1 GPA
Cumulative GPA
New Semester GPA
NEWGPA
```

Honor Roll GPA Sets

```
Cum Weighted
Cumulative GPA
New Semester GPA
NEWGPA
```

Refresh GPA Set and Honor Roll Results: ○ Yes ● No

Reporting Term For Which To Show Attendance

```
                          Quarter 1
                          Quarter 2
                          Quarter 3
                          Quarter 4
```

Absence Type

```
A - ABS/EX
C - Court Ordered Absence
CLI - CLINIC
FT - Field Trip
```

Show Days Present and Days Absent Totals based on Total Days or Occurrences: ● Total Days ○ Occurrences

Absence Cutoff Date: 10/14/2019 📅

Use Period Attendance: ○ Yes ● No

Period

```
1
2
3
4
```

Student Status

```
A - ACTIVE RES
GO - Grad Only
I - INACTIVE
J - JVS FULL T
```

Administrative Homeroom

```
C105 - KIRK (Full Year Term)
C105 - KIRK (Semester 1)
C107 - GORDON (Semester 1)
C107 - GORDON (Full Year Term)
```

Program

```
** - NOT APPLICABLE
01 - MULTIPLE DISABLTIES
02 - DEAF-BLINDNESS
03 - HEARING IMPAIRMENTS
```

Home School

```
012773 - Galion High School (Sch)
```

Counselor

```
BALL, SHARON
SIMS, BRENT
COOPER, RALPH
HAMPTON, MARILYN
```

Membership

```
15 - Extended Learning Time (Each Week)
15 - Guided Reading (Small Group Instruction)
15 - Increase Reading Time
15 - Interactive Writing
```

Special Education Services

```
215001 - Adapted Physical Education Services
215002 - Aide Services
215003 - Attendant Services
215004 - Audiological Services
```

Membership Group

```
11 - Intervention
12 - Post-secondary Enrollment Options Program
15 - 15
16 - 16
```

Ad-Hoc Membership: -- Select an Ad-Hoc Membership -- ▼

    Public And Private ☐

Student ID(s): [   ]

Homeroom Date:* 10/22/2019 📅

Common Text For Report Cards: [   ]

Grading Scale: [   ]

Print Blank Report Card For Student With Unpaid Fees: ○ Yes ● No

Print for Students Requesting Hard Copies: ☐

Omit Unlisted Phone Numbers: ☐

Student Graduation Eligibility Rule: ☐ Primary

        ☐ Secondary   🛈 Select to view the student(s) primary and secondary Graduation Eligibility rule(s) in the report.

Choose Graduation Eligibility Rule: [▼] 🛈 Choose a Graduation Eligibility rule from the list to include in the report.

Mark Type:* Mark - Mark ▼   🛈 Choose the mark type to use in current year's total credits calculation. The mark type is only required if Primary, Secondary, or a specific Rule are chosen.

Recalculate Graduation Eligibility: ☐   🛈 Check recalculate to refresh the student's Graduation Eligibility data (slower) or Uncheck recalculate to view the student's cached Graduation Eligibility data (faster).

🛈 Choose this option for shorter execution time and lower memory usage when running the report for multiple grade levels. A separate interim report will be generated for each selected
Improve Performance by Separating Report Processing by Grade: ☐ grade, and then the interim reports for all selected grades will be combined into one final report. When choosing this option, 'Grade' will be the first sort order for the final report, in order of
the grades selected in the 'Grade' dual select below.

Grade*

```
PS - PS
KG - KG
01 - 01
02 - 02
```
🛈 The 'Grade' dual select is only Required if the 'Improve Performance by Separating Report Processing by Grade' option is chosen above.

Sorting Options

```
Grade (ASC)            Grade (DESC)
Student Number (ASC)   Student Name (ASC)
Student Number (DESC)
Student Name (DESC)
```
🛈 If the 'Improve Performance by Separating Report Processing by Grade' option is chosen above, then the sort order of grades is determined by the order of the grades in the 'Grade' dual select above. In that case the 'Grade' option does not have to be selected in the Sorting Options dual select, since the grade will automatically be the first sort criteria.

Output: ● Report ○ Labels ○ Both Report and Labels

Label Type: Avery Label 5160 - 1" X 2 5/8" 3-columns ▼

Address: ● Use Student Address ○ Use Parent Address

    ☐ Use custom address text [   ]

Include Copied On Correspondence: ○ Yes ● No

Delivery Method: Pickup ▼ [Set As Default]

Email Address: devin.launder@managementcouncil.org

Description: [   ]

[Submit]

Formatter Version

- Custom – report cards generated with the custom report card formatter
- Permanent Record Labels – permanent record labels using fixed formats
- Non-Custom – non-custom report cards are no longer supported; if you are seeing these on your submission screen, contact your ITC.

Report Layout (required) – select the appropriate format from the dropdown menu. These formats are created with the custom formatter application. However, StudentInformation does come with pre-loaded custom formats. For details on all of the fixed custom formats, refer to the table in the StudentInformation Marks End User Guide.

Watermark Image (optional) – select an image to be printed on all pages from the dropdown list. This is configured by ITCs.

Watermark Alignment (optional) – select the position for the watermark image from the drop-down menu. Choices are top left, bottom left, top right, bottom right or center.

Footer Location (required) – select whether the footer should be directly beneath the detail section or at the bottom of the last report page.

Report Orientation (required) – select whether the report card prints in portrait or landscape orientation.

Paper Kind (required) – select the type of paper used for the report card. Choices are letter, legal or custom.

Paper Width (optional) – only available if using custom for paper kind. Enter the width of the paper used, in inches. If using letter or legal, this value is 8.5.

Paper Height (optional) – only available if using custom for paper kind. Enter the height of the paper used, in inches. If using letter, this value is 11. If using legal, this value is 14.

Left Margin (optional) – enter the left-side print margin for the report card, in inches.

Right Margin (optional) – enter the right-side print margin for the report card, in inches.

Top Margin (optional) – enter the top margin for the report card, in inches.

Bottom Margin (optional) – enter the bottom margin for the report card, in inches.

Gutter (optional) – enter the width of space between columns, in inches.

School Years for Credits (optional) – if no school years are selected, the report will use all school years to calculate credits on the report card. You can also filter by selecting specific school years to calculated credits on your report card.

Interim Report Card (optional) – Yes or No; check this box if this is an interim report card.

Reporting Term For Which To Show Comments (optional) – If no reporting terms are selected, the report will use all reporting terms for listing comments on the report card. You can also filter comments by selecting specific reporting terms for your report card.

Mark Type For Which To Show Comments (optional) – If no mark types are selected, the report will use comments of all mark types in creation of the report card. You can also filter by selecting specific mark types for your report card.

Reporting Term For Which To Show Marks (optional) – If no reporting terms are selected, the report will use all reporting terms for listing marks on the report card. You can also filter marks by selecting specific reporting terms for your report card.

Mark Type For Which To Show Marks (optional) – If no mark types are selected, the report will use marks of all mark types in creation of the report card. You can also filter by selecting specific mark types for your report card.

Course Types (optional) – If no course types are selected, the report will use all course types in the creation of the report card. You can also filter by selecting specific course types for your report card.

Mark Credit Type (optional) – select the desired mark credit types for this report card. Valid options are All, Progress 1 or greater, Progress 2 or greater, Progress 3 or greater, Progress 4 or greater, Not Used only, Progress 1 only, Progress 2 only, Progress 3 only, Progress 4 only or Earned only.

Show Required Marks Only (optional) – Yes or No; If a student has manual course history and is also taking classes that appear on the student mark screen, would you like only courses listed on the student marks screen to print on the report card? If you do, answer Yes. If you want manual course history to show also, answer No.

Print Report Card If Student Has No Marks Or Comments (optional) – Yes or No; If a student does not have any marks or comments entered, would you like a blank report card to print for this student? If you do, answer Yes.

Print Regular Course From Prior Course Term That Has No Marks Or Comments (optional) – Yes or No; Allows the user to determine whether a regular course from a prior course term appears on the report card when a student has no marks or comments for the course in the reporting terms chosen on the report submission screen for marks and comments.

Print Regular Course From Current Course Term That Has No Marks Or Comments (optional) – Yes or No; Allows the user to determine whether a regular course from the current course term appears on the report card when a student has no marks or comments for the course in the reporting terms chosen on the report submission screen for marks and comments.

Print Regular Course From Future Course Term That Has No Marks Or Comments (optional) – Yes or No; Allows the user to determine whether a regular course from a future course term appears on the report card when a student has no marks or comments for the

course in the reporting terms chosen on the report submission screen for marks and comments.

Print Course History That Has No Marks – This option is non-functional. While you can enter course history without a mark, it won't print on the report card because there is no reporting term associated if no mark is entered.

Include Dropped Courses in Past Or Current Course Terms In Current Year (optional) – Yes or No; If a student has dropped courses in a completed course term or the current course term, do you want the courses to print on the report card? If you do want the dropped courses to print, select Yes.

Include Dropped Courses in Future Course Terms In Current Year (optional) – Yes or No; If a student drops a 2nd semester only class and you are running her report card in the middle of 1st semester, do you want the dropped 2nd semester only class printing on her report card? If you do want future drops to print, select Yes.

Included Dropped Courses in Prior Years (for Credit totals) (optional) – Yes or No; If a student has dropped classes in prior years, do you want the dropped courses being included in the credit amounts that print on selected report card formats? If you do want the drops included, select Yes.

Show Separate Marks Subreports For Each Marking Pattern (optional) – Yes or No; If you would like the report to be broken down into separate sections for 1st semester only classes, 2nd semester only classes and all year classes, select Yes.

Show Separate Rows in Credits Subreport for Credits from Different Schools in the Same Year (optional) – Yes or No; If the student was in two different buildings and has course history from each building, do you want each school broken out into its' own section? If so, select Yes.

Require "Update History" Flag to be True for Course to be on Report Cards (optional) – The update history flag on the course determines if a course displays on the student's course history screen. Occasionally, a school will unmark a course as update history and does not want this course to print on the report card. In 99% of the cases, you will want to mark Yes for this prompt. NOTE: You can also uncheck the flag on the course titled Print on Report Card.

Require "Is High School Credit" Flag to be True for Course to be on Report Card (optional) – if Yes is selected, courses will be excluded from the report card if they are not checked as "Is High School Credit". This would mainly be used when high school courses are taken at a middle school or junior high.

Marks Alignment in Marks Subreports (optional) - Select how you want Marks to display in Marks subreports. Choices are "Align Equivalent Marks Columns in Marks Subreports for All Marking Patterns", which will keep all equivalent Marks columns aligned (such as Semester 1 Final on a full-page-width All Year Marking Pattern lining up with Semester 1 Final on a half-page-width 1st Semester Marking Pattern), or "Stretch Marks Columns to Fill Width of Marks Shape Within the Marks Subreport for Each Marking Pattern", which will use the full width available in the Marks subreport, regardless of how many Marks are in the Marking Pattern (the

All Year and 1ˢᵗ Semester Marking Patterns in the example above would instead each take up the full page width, without their columns being aligned together).

GPA Sets (optional) – Select desired GPA Set(s) from the dual-select box. If no GPA Sets are selected, GPA information will not print on the report card.

Honor Roll GPA Sets (optional) – Select specific Honor Roll GPA sets to display on the report card. If no Honor Roll GPA sets are selected, no Honor Rolls will print on the report card.

Refresh GPA Set and Honor Roll Results (optional) – Yes or No; Select whether GPA Set and Honor Roll Results will be refreshed. Selecting Yes could slow down the processing of report cards.

Reporting Term For Which To Show Attendance (optional) – Select specific reporting terms to display attendance for on the report card. If no reporting terms are selected, the report will use all reporting terms for listing attendance on the report card.

Absence Type (optional) – If no absence types are selected, the report card will use all absence types in creation of the report card except those with a qualifier of non-absence or partial (these are not included in report card day totals). NOTE: Absence type filters are ignored on the attendance hours subreport.

Show Days Present and Days Absent Totals based on Total Days or Occurrences (required) - If "Total Days" is chosen, then the Days Present will be calculated as the sum of the Actual Days value for each calendar day for the student. Note: If the Actual Days value on any calendar day exceeds the Max Absence Level for the student's calendar, then the Max Absence Level is used for that day in the Days Present sum. The Days Absent will be calculated as the sum of the following: the Absence Level for each daily absence record, multiplied by the Actual Days (or Max Absence Level) for the calendar day on which the absence occurred.

If "Occurrences" is chosen, then the Days Present will be calculated as the sum of the Days Counted value for each calendar day for the student. The Days Absent will be calculated as the sum of the following: the Absence Level for each daily absence record, multiplied by the Days Counted for the calendar day on which the absence occurred. The Days Counted for a calendar day is determined from the Calendar Day Type of the calendar day. For a Calendar Day Type of "School Day", the Days Counted is 1, for "Calamity Make-up Day", the Days Counted is 1, and for "School Half-Day" the Days Counted is 0.5.

Absence Cutoff Date (optional) – Specify the date after which absences are not counted towards the attendance information listed on the report card.

Use Period Attendance (optional) – Yes or No; to use the period attendance values, select Yes.

Period (optional) – If no periods are selected, the report will use all periods in creation of the report card. You can also filter by selecting specific periods for your report card.

Student Status (optional) - If no student statuses are selected, the report will use all student statuses in creation of the report card. You can also filter by selecting specific student statuses for your report card.

Administrative Homeroom (optional) – If no administrative homerooms are selected, the report will use all administrative homerooms in creation of the report card.

Program (optional) – If no programs are selected, the report will use all programs in creation of the report card. You can also filter by selecting specific programs for your report card.

Home School (optional) – This field is populated based on the values entered in the Home School field on the Student Profile – General tab. If no home schools are selected, the report will use all home schools in the creation of the report card. You can also filter by selecting specific home schools for your report card.

Counselor (optional) – If no counselors are selected, the report will use all counselors in creation of the report card. You can also filter by selecting specific counselors for your report card.

Membership (optional) – If no memberships are selected, the report will select all memberships. You can also filter by selecting specific memberships for your report card.

Special Education Services (optional) – Select the special education services to return report cards for students who are assigned those services. If no special education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab of the Special Education screen.

Membership Group (optional) – If no memberships groups are selected, the report will use all membership groups for creation of the report cards. You can also filter by selecting specific membership groups for your report card.

Ad-Hoc Membership (optional) – You can select an ad-hoc membership from the drop-down list. If you select an ad-hoc memberhip, only students in that ad-hoc memberhip will have a report card generated.

Student ID(s) (optional) – If report cards are needed for individual students, the student ID(s) may be input here separated by a comma. Report cards will only be produced for those individuals.

Homeroom Date (required) – Specify the date to use to retrieve the students' homeroom; defaults to today's date.

Common Text For Report Cards (optional) – Type in a common text message that is to appear on report cards.

Grading Scale (optional) – Type in a common grading scale text message that is to appear on all report cards.

Print Blank Report Card for Students with Unpaid Fees (optional) – Yes or No; choose if you wish to print blank report cards (no course information or marks) for students still owing fees. A message will appear stating the amount of fees they owe.
Note: This option is dependent on the scripting being included in the format selected.

Print for Students Requesting Hard Copies (optional) – Select this checkbox to print a paper copy of the report card for students whose profile indicates this preference.

Omit Unlisted Phone Numbers (optional) – Select this box if you wish to omit unlisted phone numbers on the report card.

Student Graduation Eligibility Rule (optional) – Check the appropriate boxes if you want to view the students' primary and/or secondary graduation eligibility rule status on the report card.

Choose Graduation Eligibility Rule (optional) – Select a graduation eligibility rule from the drop-down list if you want to view the students' status for that rule on the report card.

Mark Type (required if selecting rule) – Choose the mark type to use in the current year's total. The mark type is only required if primary, secondary, and/or a specific graduation eligibility rule are chosen.

Recalculate Graduation Eligibility (optional) – Check this box if you want to recalculate the students' status for the selected graduation eligibility rule(s). Selecting this option will result in slower processing of the report cards. Otherwise, the report cards will use cached (faster) values, if they exist.

Improve Performance by Separating Report Processing by Grade (optional) – Choose this option for shorter execution time and lower memory usage when running the report for multiple grade levels. A separate interim report will be generated for each selected grade and then the interim reports for all selected grades will be combined into one final report. When choosing this option, 'Grade' will be the first sort order for the final report, in order of the grades selected in the 'Grade' dual select.

Grade (optional) – If no grades are selected, the report will use all grades in creation of the report card. You can also filter by selecting specific grades for your report cards. The grade dual select box is only required if the 'Improve Performance by Separating Report Processing by Grade' option is chosen above.

Sorting Options (optional) – Choose one or more sort options for your report cards. If the 'Improve Performance by Separating Report Processing by Grade' option is chosen above, then the sort order of Grade is determined by the order of the grades in the Grade dual select. In that case, the Grade option does not have to be selected in the sorting options dual select since the grade will automatically be the first sort criteria.
> *Note: If the Zip Code is selected as the primary sort and 'Include Copied on Correspondence' is set to Yes, then a student may have multiple report card copies, and each of those copies may have a different zip code, since the student's zip code may differ from one or more of the contact zip codes. In this case, the report card will group all of a student's report card copies together in the final set of report cards. This is accomplished by using one zip code per student as the zip code by which all of the*

copies are sorted. The following rules determine which zip code is used for each student when sorting the report cards:
• If "Use Student Address" is chosen, the zip code used for each student will be the student's mailing zip code.
• If "Use Parent Address" is chosen, the zip code used for each student will be the primary contact's zip code.

Output – Select report, labels or both report and labels.
If labels are chosen, use the following adobe page settings to ensure that the labels print correctly on the page.
For Adobe 9:
- Page Scaling = None
- Auto Rotate and Center = unchecked
For Adobe 10:
- Size Options = Actual Size
- Orientation = Portrait

Label Type – If choosing labels, specify the size of the labels by selecting the appropriate label format from the dropdown list.

Address – select the address to use for labels. If you check 'use custom address text', the text you enter in the field will be added at the top of each label and address field.

Include Copied On Correspondence – Yes or No; select whether to include copies of the report card listing addresses for contacts marked 'Copied on Correspondence'.

Delivery Method (optional) – Select from the dropdown – Pickup will return the report cards to the Batch/Report Management screen.

Email Address – auto populated from your StudentInformation profile.

Description (optional) – Data entered here will show on the Batch/Report Management screen.

Publish Report Cards to ParentAccess

StudentInformation – SIS – Marks – Marks Reports – Report Card Formatter (R700) – Load Settings Tab

When you finalize report cards, you can schedule an electronic copy to be saved in the system and published to ParentAccess for parents and students to view.
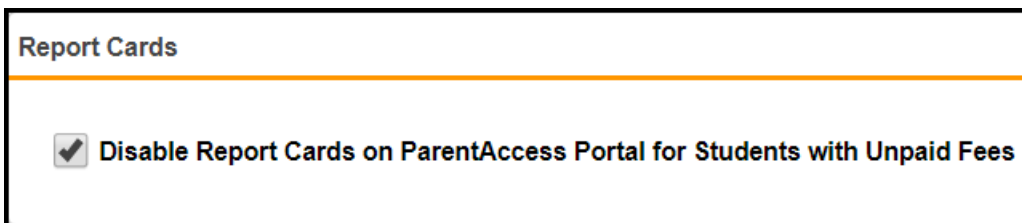
Note: Publication of report cards to ParentAccess depends on a JAMS job scheduled by your technology center. If you encounter any issues with report card publication, please contact the technology center to troubleshoot the issue.

Note: When a student is in context, and you click on the arrow to see the I want to dropdown list, there is an option View Latest Report Card which will show you the electronic copy of the report card that was published to ParentAccess. No electronic copy of the report cards will display until the report card has been published to ParentAccess. A message will display stating "No report cards available for this student."

Note: Report Cards published to ParentAccess do not have the student address displays as a security precaution.

Note: In GradeBook/PA Admin, you will need to go to the Page Level Security to check viewing access for the report cards to PA.

1. Optional: If you do not want report cards to display in ParentAccess for students with unpaid fees, navigate to StudentInformation > Management > District Administration > District Options and ensure the **Disable Report Cards on ParentAccess Portal for Students with Unpaid Fees** option is selected.

2. On the **Report Card Formatter (R700)** screen **Load Settings** tab, in the row of the report card you want to schedule for publishing, click on the pencil.

Report Card Formatter (R700)

From this screen, you can select parameters to generate a report.

Selection Criteria	Selection Summary	**Load Settings**

		Name	Term	Archive Date	Private	Creator	Date Created	Status
🗑	✏	Qtr1 19/20			☐	Launder, Devin (devin)	Oct 25, 2019	

Default Settings On Startup: Load Last Parameters ▾

Current Settings

Name:* [   ] 🔳

Private: ✔

[**Save**]

---

3. On the add/edit version of the screen, ensure the **Name** field displays the name of the report card as you want it to display in ParentAccess. (For example, you may not want a name like "2nd run," "3rd run," etc.)
4. Select the **Schedule Report Card** checkbox.
5. Select the **Term** for which you want to publish the report card.
6. Optional: If the date that defaults in the **Archive Date** field is not the date you want the report card to be viewable by parents and students, enter or select a different date on which to publish the report card to ParentAccess.
7. Click **Save**.

Report Card Formatter (R700)

From this screen, you can select parameters to generate a report.

Selection Criteria	Selection Summary	**Load Settings**

Creator	Date Created	Scheduled By	Date Scheduled	Status
Launder, Devin (devin)	Oct 25, 2019			

Name:* [Qtr1 19/20   ] 🔳 ⓘ

Private: ☐

Schedule Report Card: ✔

Term:* [Qtr1 ▾]

Archive Date:* [10/18/2019   ] 📅

[Cancel] [Run Ready Jobs] [**Save**]

The report card now shows a status of "Pending."

The first time the scheduled JAMS job runs on or after the selected **Archive Date**, parents and students can view the report cards in ParentAccess, and the status changes to "Complete."

If you do not want to wait for the next scheduled JAMS job to process pending report card jobs, you can click the Run Ready Jobs button to immediately run any pending report card jobs.

The job also displays a description of "Report Cards Published to ParentAccess" on the **Batch/Report Management** window.

View Archived Report Cards

Navigate to StudentInformation > Management > School Administration > Archived Report Card Maintenance. From here you can view archived R700 report cards that were published to ParentAccess, edit the name of an archived report card or delete an archived report card.
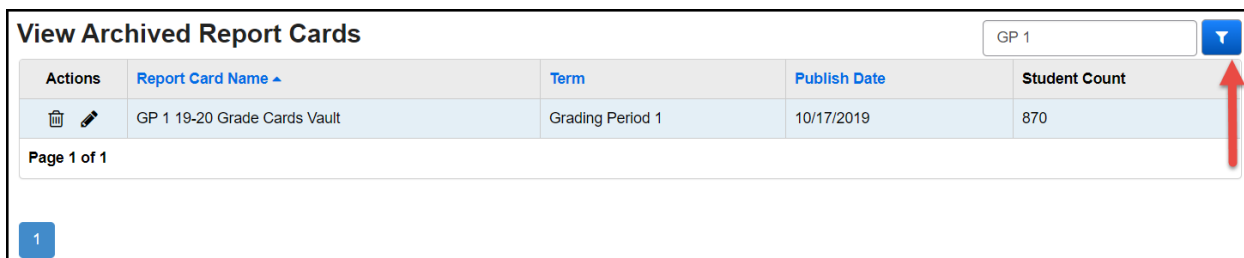
Actions	Report Card Name ▲	Term	Publish Date	Student Count
🗑 ✏	GP 1 19-20 Grade Cards Vault	Grading Period 1	10/17/2019	870
🗑 ✏	Interim #1 Vault	Grading Period 1	9/24/2019	875

View Archived Report Cards — Filter by name...

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1

To locate a specific report card, in the Filter by name…text box in the top right, enter the name of the report card and click the icon to search. The results will be displayed.

Actions	Report Card Name ▲	Term	Publish Date	Student Count
🗑 ✏	GP 1 19-20 Grade Cards Vault	Grading Period 1	10/17/2019	870

View Archived Report Cards — GP 1

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1

Edit Archived Report Card Name

If you need to change the name of a report card, you can change it on the view Archived Report Cards screen. Once you save the updated name, the change is automatically reflected in ParentAccess.
> *Note: You can only edit the name of an archived report card if you do not have a student in context.*

1. Click the edit pencil to edit the name of an archived report card. The Rename Report Card window will open.
2. Enter the New Report Card Name and select Save. The new report card name will be displayed.
   Note: If the name you are trying to save is already the name of another report card (not case sensitive), you cannot save the name change. You can change the name of the original report card with the name you wish to use or you can delete it.

Delete Archived Report Card

If needed, you can delete an archive report card if it was incorrect and should not be accessible.

1. Click the **trash can** icon to delete an archived report card.
2. A delete confirmation window will open. Select Yes to confirm deletion of the selected report card.
   Note: *If you delete the wrong report card, you can re-run the report card formatter.*
3. You are returned to the View Archived Report Cards screen and the deleted report card no longer displays.

Schedule Changes Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
04/28/20	Entire doc	Removed screenshots, updated formatting

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If you are working in a future school year and the schedule is not finalized, you will be required to select a schedule and schedule result when performing the following scenarios.

The remove function will be the only option enabled when dropping a course if school has not started. Once the first day of school arrives, the drop, remove, and transfer functions will all be enabled for course sections that are in progress. If the course term has not started yet, the transfer function will be disabled on the course section.

Scenario 1: Add a class to a student's schedule using the Course Section Assignments page

1. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Course Section Assignments*** in the current school year.
2. Put a student in context.
3. Click ***Add Course Assignment.***
4. The page refreshes.
5. In the ***Course/Section*** fields, enter the course and section number.
6. If you do not know the course and or section number, use the **Ellipse** icon.
7. If you clicked on the **Ellipse** icon, a new window pops up that shows each section of the course and the capacity and filling count.
8. Click on the blue link for the section number and the section number will be automatically filled in for you.
9. The ***Assignment Start Date*** field defaults to the first day of the course term if the course term has not started. If the term is already in session, the date will default to today's date.
10. In the following screenshot the ***Assignment Start Date*** defaulted to the first day of school. 116-22 is actually a 2nd Semester only course. When the assignment is saved, StudentInformation automatically corrects the start date to be the 1st day of 2nd Semester.
11. Leave the ***Assignment Stop Date*** field empty.
12. Click ***Save***.
13. The page refreshes and the following message is displayed, ***The Course Section Assignments was marked to be saved. Click the save changes button to commit to the database.***
14. Click ***Save Changes*** again to commit the changes to the database.
15. If click ***Save Changes*** is not clicked, the course section will not be assigned.
16. The page refreshes.
17. Notice the ***Start Date*** says the correct date which is the 1st day of the 2nd semester even though today's date or the first day of school was used.
18. Another item to note is the ***Type*** says ***Manual***. This means the course section assignment was added by hand by the office staff versus being scheduled by the Batch Scheduler. (Assignments made by the Batch Scheduler have a ***Type*** of ***Batch***.)
19. The manual assignment will not show on the ***Requests*** page because the assignment did not originate from a request. The ***Requests*** page only shows requests.

Scenario 2: Add a class to a student's schedule using the Request Assignments page

1. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Student*** *»* ***Student Schedule*** *»* ***Request Assignments***.
2. Click ***Add Assignment***.
3. The right side of the screen refreshes.
4. In the ***Choose Course/Group (required) and Section (optional)*** field, enter the course section number or use the ***Ellipse*** icon to select the course section.
5. Click ***Next*** or hit the ***Tab*** key on the keyboard.
6. All sections of the course will appear.
7. Click the ***Assign*** button of the section you would like to assign to the student.
8. The right side of the screen refreshes again.
9. The ***Course/Section*** fields are grayed out – which is correct since we selected which section we wanted by clicking Assign in the previous step.
10. If you selected the wrong course section, click ***Cancel***.
11. The ***Assignment Start Date*** field always defaults to the first day of the course term.
12. Click ***Save Assignment***.
13. Notice there is no corresponding request on the same line for this course section assignment. This means the course was entered manually and did not originate from a request.

NOTE: The Student Requests & Assignments page also has the Run Scheduler and Schedule Study Halls options. These options enable student scheduling from this screen.

Scenario 3: Run the Single Student Scheduler for a student

Running the Single Student Scheduler (SSS) requires a Job Parameter be set up. Please see the Batch Scheduler Step by Step for instructions on setting up the SSS.

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Requests*** or ***StudentInformation > SIS > Student > Student Schedule > Request Assignments***
   a. Select a ***Working Schedule*** and ***Result*** from the dropdowns if the schedule hasn't been finalized. Click ***Reload Screen***.
3. Next, click ***Run Scheduler***.
4. Depending on the parameters defined on the SSS Job Parameter, previously scheduled course section assignments, that originated from a request will be undone and rescheduled, sometimes into a different section or no section at all. Please see the Batch Scheduler Step by Step for detailed explanations of the SSS's features.
5. The following message will display, ***The Single Student scheduler has completed successfully.***
6. Click ***Save Changes***.

Scenario 4: Run the Single Student Study Hall Wizard for a student

F.Y.I. Running the Study Hall Wizard for a single student requires the Study Hall Wizard parameter page be filled out. Regardless, if you are running the Study Hall Wizard for a single student or for the entire school, the Wizard uses the same parameters. Please see the Batch Scheduler Step by Step for instructions on setting up the Study Hall Wizard.

F.Y.I. The Study Hall Wizard will only schedule students into study halls if they have an Overall Student Status of Active and they must have at least one course request.

F.Y.I. Student must have at least one course request or course section assignment to be scheduled into study halls by the Study Hall Wizard.

1. Put a student in context at the building level and the school year you are working with.
2. Navigate to **_StudentInformation_ » _SIS_ » _Scheduling_ » _Course Section Assignments_**.
    a. Select a **_Working Schedule_** and **_Result_** from the dropdowns if the schedule hasn't been finalized. Click **_Reload Screen_**.
3. Next, click **_Schedule Study Halls_**.
4. The Study Hall Wizard will fill in the student's schedule with available study halls.
5. The following message will display, **_The single student scheduler for Study Halls has completed successfully_**.
6. Click **_Save Changes_**.

Scenario 5: Bulk add a class to 20 students

1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation*** *» **SIS** » **Scheduling** » **Bulk Assign***.
3. Select a ***Working Schedule*** and ***Result*** from the dropdowns if the schedule hasn't been finalized.
   a. Click ***Reload Screen***.
   b. In the ***Create a list of students*** section filter on which students you'd like to bulk assign the course section to.
   c. Click ***Create New List***.
   d. Click ***Next*** to advance to the 2nd tab.
   e. Enter the course section or course group section or use the ***Ellipse*** to select the course group or section. Click ***Add Section***.
   f. Note: You can add more than one course section or group section.
   g. Click ***Next*** to move to the third tab.
   h. The ***Assignment date*** field will default to today's date if the course term has already started and the first day of the term if it hasn't started yet.
   i. Click ***Assign***.
   j. The page will refresh and if any conflicts exist they will display in the grid.
   k. Put a check in the box next to the students you wish to create a scheduling conflict for or click ***Return*** to go back to the Assignment Start Date tab.
   l. Click ***OK***
   m. The following message will appear: ***Assignments were successfully saved.***
   n. If you don't have the Extra Systems Security to create conflicts for students you will only have the ***Return*** option and you will be forced to remove the students from your list of students or pick different classes that don't conflict with the student(s).

Scenario 6: Drop a class from a student's schedule using the Course Section Assignments page

1. With a student in context, navigate to ***StudentInformation*** *» **SIS** » **Scheduling** » **Course Section Assignments***.
2. Click on the ***trash can*** next to the assignment needing removed.
3. Choose the ***Drop*** option.
4. Enter the last day that the student attended the class.
5. Click ***Save***.
6. The following message will display: ***Assignment Saved***
7. NOTE: If performing the drop using the Course Section Assignments (CSA) page don't forget to click ***Save*** twice.
8. The course should display on the CSA page when ***Status: Dropped*** is marked.
9. The marks associated with the course should display on the Student Marks page with a yellow background.
10. Any period attendance entered for the course section will remain.

Scenario 7: Drop a class from a student's schedule using the Request Assignments page

1. Navigate to *__StudentInformation__ » __SIS__ » __Student__ » __Student Schedule__ » __Request Assignments__*.
2. Click on the *trash can* icon of the section.
3. The right side of the screen refreshes.
4. Enter the student's last day in the course section in the *Stop* field.
5. The **Drop** function is selected by default.
6. Click **Save**.
7. The following message is displayed: Assignment Saved.
8. Uncheck **Show Active Only** checkbox.
9. The dropped course now displays.

Scenario 8: Remove a class from a student's schedule using the Course Section Assignments page

1. With a student in context navigate to *__StudentInformation__ » __SIS__ » __Scheduling__ » __Course Section Assignments__*.
2. Click on the *trash can* next to the assignment needing removed.
3. Choose the *Remove/Delete* option.
4. Click *Save*.
5. The following message will display: *Assignment Saved.*
6. NOTE: If performing the remove using the Course Section Assignments page don't forget to click *Save* twice.
7. The course should display with two locks on the CSA page when *Status: Removed* is marked.
8. Any marks or period attendance associated with removed class have been hard deleted.

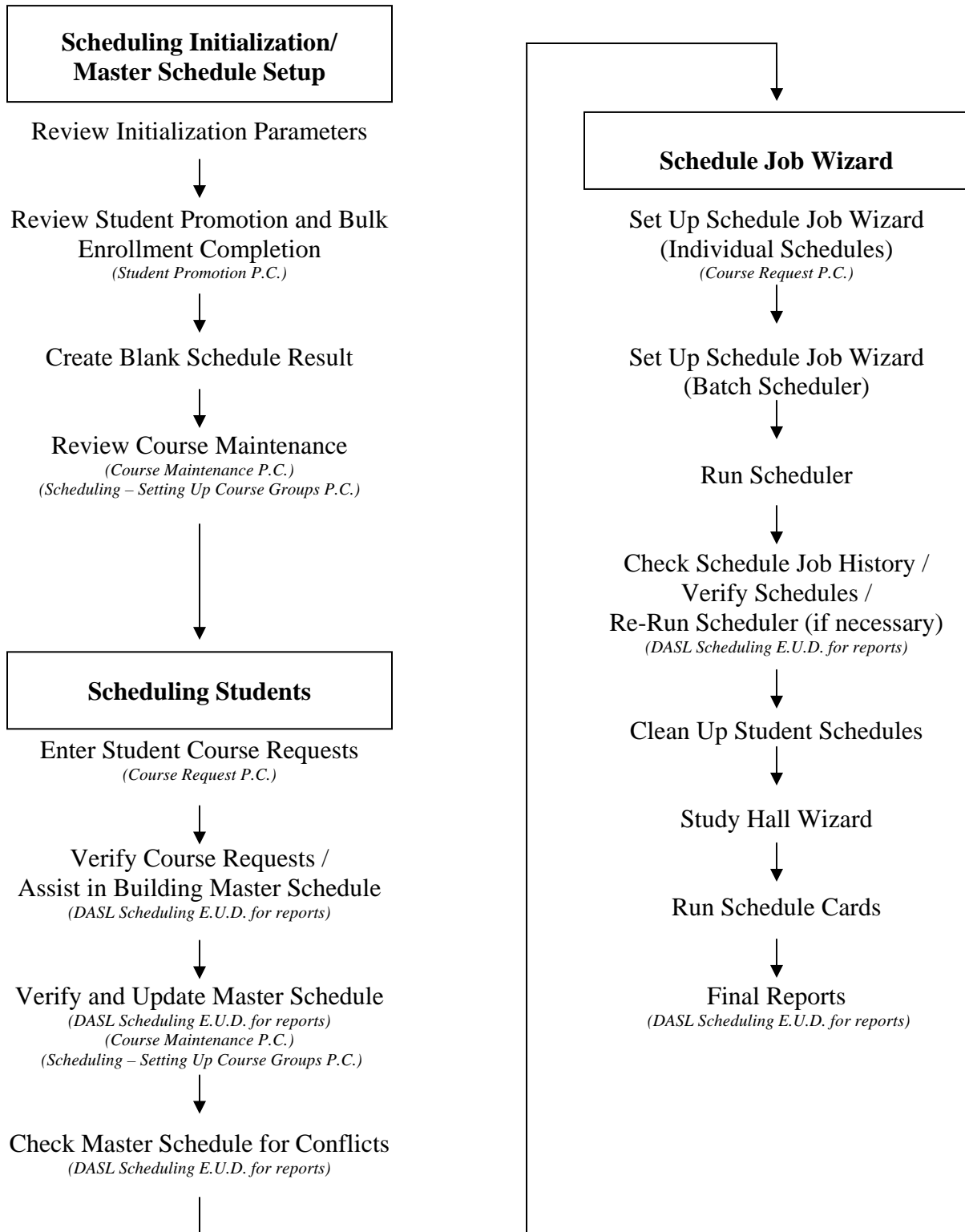## Scenario 9: Remove a class from a student's schedule using the Request Assignments page

1. Navigate to *__StudentInformation__ » __SIS__ » __Student__ » __Student Schedule__ » __Request Assignments__*.
2. Click on the **Trash Can** icon of the section.
3. The right side of the screen refreshes.
4. Select the **Remove / Delete** option.
5. Click **Save**.
6. The following message appears: **Assignment Saved**
7. NOTE: Removed courses are not visible on the Request Assignments page.

Scenario 10: Transfer a student from one class to another using Transfer – Drop option on the Course Section Assignments page or Request Assignments page

1. With a student in context navigate to ***StudentInformation*** *» **SIS** » **Student** » **Student Schedule** » **Request Assignments*** or ***StudentInformation*** *» **SIS** » **Scheduling** » **Course Section Assignments***.
2. Click on the **Trash Can** icon next to the assignment the student will transfer out of.
3. Choose the **Transer** option and enter the course section the student will transfer into.
4. The new section must be the same course term and course type as the course section the student is transferring out of.
5. Next, select the **Drop** option.
6. The **Stop** date field is enabled, enter the last day the student was physically in the class.
7. The new section the student is moving to will have a start date of the next school day.
8. Click **Save**.
9. NOTE: If performing the remove using the Course Section Assignments (CSA) page, don't forget to click **Save** twice.
10. The new class will display on the CSA or Request Assignments (RA) page and the class the student transferred out of will display as a drop.
11. Any marks or period attendance associated with the original course have been transferred to the new class.

Scenario 11: Transfer a student from one class to another using Transfer – Remove option on the Course Section Assignments page or Request Assignments page

1. With a student in context navigate to ***StudentInformation*** *» **SIS** » **Student** » **Student Schedule** » **Request Assignments*** or ***StudentInformation*** *» **SIS** » **Scheduling** » **Course Section Assignments***.
2. Click on the ***Trash Can*** icon next to the assignment the student will transfer out of.
3. Choose the ***Transfer*** option and enter the course section the student will transfer into.
4. The new section must be the same course term and course type as the course section the student is transferring out of.
5. Next, select the ***Remove*** option.
6. The new section the student is moving to will have a start date equivalent to the start date of the section the student transferred out of.
7. Click ***Save***.
8. NOTE: If performing the remove using the Course Section Assignments (CSA) page, don't forget to click ***Save*** twice.
9. The new class will display on the CSA or Request Assignments (RA) page and the class the student transferred out of will display as a remove with locks.
10. Any marks or period attendance associated with the original course have been transferred to the new class.

Scenario 12: Bulk drop 10 students from the same class

1. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Bulk Course Section Management*** .
2. On the ***Choose Section*** tab, enter the course section and click ***View***.
3. Click the ***trash can*** next to any student whom shouldn't be removed from the course section.
4. Click ***Next*** to move to the 2nd tab named ***Choose Action***.
5. Select ***Drop*** and enter a ***Stop*** date, which would be the last day the students attended the class.
6. Click ***Next***.
7. Now, finish the transaction by clicking ***Submit***.
8. The following message will display: ***Drop was successful.***
9. The course should display on the CSA page when ***Status: Dropped*** is marked.
10. The marks associated with the course should display on the Student Marks page with a yellow background.
11. Any period attendance entered for the course section will remain.

Scenario 13: Bulk remove 5 students from the same class

1. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Bulk Course Section Management*** .
2. On the ***Choose Section*** tab, enter the course section and click ***View***.
3. Click the ***trash can*** next to any student whom shouldn't be removed from the course section.
4. Click ***Next*** to move to the 2nd tab named ***Choose Action***.
5. Choose the ***Remove/Delete*** option.
6. Click ***Next***.
7. Now, finish the transaction by clicking ***Submit***.
8. The following message will display: ***Remove was successful.***
9. The course should display with two locks on the CSA page when ***Status: Removed*** is marked.
10. Any marks or period attendance associated with removed class have been permanently deleted.

Scenario 14: Bulk transfer 9 students from one class to another using the Transfer – Drop option

1. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Bulk Course Section Management*** .
2. On the ***Choose Section*** tab, enter the course section and click ***View***.
3. Click the ***Trash Can*** next to any student whom shouldn't be transferred from the course section.
4. Click ***Next***to move to the 2nd tab named ***Choose Action***.
5. Choose the ***Transfer*** option.
6. The new section must be the same course term & course type as the course section the student is transferring out of.
7. Next, select the ***Drop*** option.
8. The ***Stop date*** field is enabled, enter the last day the students were physically in the class.
9. The new section the students are moving to will have a start date of the next school day.
10. Click ***Next*** to move to the 3rd tab named ***View conflicts***.
11. Students who will have a scheduling conflict as a result of being transferred into the new course will display in the grid.
12. Click the ***Trash Can*** next to any student whom shouldn't be transferred into the new course section.
13. Click ***Next***to move to the final tab named ***Summary***.
14. Now finish the transaction by clicking ***Submit***.
15. The following message will display: ***Transfer was successful.***
16. The course the students transferred out of will display with a pencil on the CSA or RA page.
17. Any marks or period attendance associated with old class have been transferred to the new course.

Scenario 15: Bulk transfer 9 students from one class to another using the Transfer – Remove option

1. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Bulk Course Section Management*** .
2. On the ***Choose Section*** tab, enter the course section and click ***View***.
3. Click the ***Trash Can*** next to any student whom shouldn't be transferred from the course section.
4. Click ***Next*** to move to the 2nd tab named ***Choose Action***.
5. Choose the ***Transfer*** option.
6. The new section must be the same course term & course type as the course section the student is transferring out of.
7. Next, select the ***Remove*** option.
8. The new section the student is moving to will have a start date equivalent to the start date of the section the student transferred out of.
9. Click ***Next*** to move to the 3rd tab named ***View Conflicts***.
10. Students who will have a scheduling conflict as a result of being transferred into the new course will display in the grid.
11. Click the ***Trash Can*** next to any student whom shouldn't be transferred into the new course section.
12. Click ***Next*** to move to the final tab named ***Summary***.
13. Now finish the transaction by clicking ***Submit***.
14. The following message will display: ***Transfer was successful.***
15. The course the students transferred out of will display with two locks on the CSA page when ***Removed*** is marked. The transferred out of course will not display on the Request Assignments page.
16. Any marks or period attendance associated with old class have been transferred to the new course.

SCHEDULING PROCEDURE FLOW

Scheduling Initialization/ Master Schedule Setup

Review Initialization Parameters

↓

Review Student Promotion and Bulk
Enrollment Completion
(Student Promotion P.C.)

↓

Create Blank Schedule Result

↓

Review Course Maintenance
(Course Maintenance P.C.)
(Scheduling – Setting Up Course Groups P.C.)

↓

Scheduling Students

Enter Student Course Requests
(Course Request P.C.)

↓

Verify Course Requests /
Assist in Building Master Schedule
(DASL Scheduling E.U.D. for reports)

↓

Verify and Update Master Schedule
(DASL Scheduling E.U.D. for reports)
(Course Maintenance P.C.)
(Scheduling – Setting Up Course Groups P.C.)

↓

Check Master Schedule for Conflicts
(DASL Scheduling E.U.D. for reports)

Schedule Job Wizard

Set Up Schedule Job Wizard
(Individual Schedules)
(Course Request P.C.)

↓

Set Up Schedule Job Wizard
(Batch Scheduler)

↓

Run Scheduler

↓

Check Schedule Job History /
Verify Schedules /
Re-Run Scheduler (if necessary)
(DASL Scheduling E.U.D. for reports)

↓

Clean Up Student Schedules

↓

Study Hall Wizard

↓

Run Schedule Cards

↓

Final Reports
(DASL Scheduling E.U.D. for reports)

Student Profile Bulk Update Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
3/30/21	FS-Standing & FD-Attributes-Effective Date tab	Updated screenshot
4/27/20	Entire document	Review and update
7/1/19	Entire document	Updates

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Before an update can be performed, navigate to the StudentInformation »

My Account »Ad Hoc Memberships page to create an ad hoc membership

group of students you wish to update.
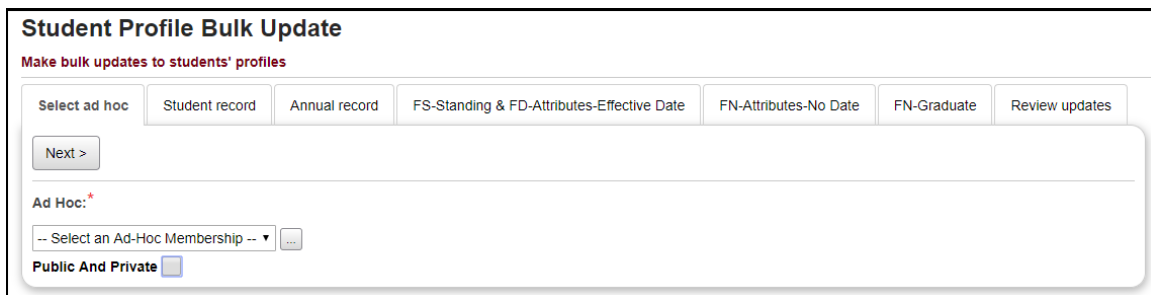
> If this option is not displayed on your Ad Hoc Updates menu, please contact your ITC support staff. Access may be restricted to this module. The update process takes you through a series of tabs for selecting the data elements to be updated.

Please see the *Student and Registration Guide* for detailed explanations on each student profile element.

☐ **Select Ad Hoc tab**
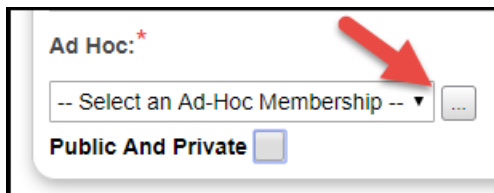
1. Select the ad hoc membership group for which you plan to make bulk updates.
2. Click on the **Public and Private** checkbox to expand the ad hoc membership groups available for updating to include both public and private ad hoc membership groups.
3. Click **Next.**

If you have not created an ad hoc membership group to use for your update, click on the ellipses to navigate to Ad Hoc Memberships page to select students for updating.

☐ Student Record tab

1. Make necessary changes to the Student Record fields.
2. Click **Next.**

Clearing Fields - If you wish to clear any field(s) for the selected ad hoc membership group, you will need to check the checkbox next to that field(s). A checkbox with no values in the dropdown will clear values for that field for the selected students.

For example: [image of Citizenship field with checked checkbox] will clear out the Citizenship field for the selected ad hoc membership group.

☐ Annual Record tab

1. Make necessary changes to the Annual Record fields.
2. Click **Next.**

Student Profile Bulk Update
Make bulk updates to students' profiles

Selected ad hoc membership: test
Number of students in selected ad hoc membership: **1**

| Select ad hoc | Student record | Annual record | FS-Standing & FD-Attributes-Effective Date | FN-Attributes-No Date | FN-Graduate | Review updates |

ⓘ Select the checkbox next to the field(s) you wish to edit.
If a checkbox is selected and the value left blank, any existing value(s) in the field(s) are cleared from student profiles unless they are otherwise noted as required.

[< Back] [Next >]

Graduation Year:
☐ [   ]

Grade Next Year:
☐ [▼]

Special Ed:
☐ [   ]

Scheduling Priority:
☐ [▼]

Include in Honor Roll:
☐ [▼]

Include in Ranking:
☐ [▼]

Include in GPA:
☐ [▼]

Team:
☐ [▼]

Student Status:
☐ [▼]

Program:
☐ [▼]

Primary Building:
☐ [▼]

New School:
☐ [▼]

Counselor:
☐ [▼]

Home School IRN:
☐ [🔍]

Flags:
1:      2:   3:   4:   5:
☐ [ ] ☐ [ ] ☐ [ ] ☐ [ ] ☐ [ ]

Distance student was transported from residence to school building:
☐ [▼]

Countweek Transportation Days:
☐ ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Clearing Fields - If you wish to clear any field(s) for the selected ad hoc membership group, you will need to check the checkbox next to that field(s). A checkbox with no values in the dropdown will clear values for that field for the selected students.

☐ **FS-Standing & FD-Attributes-Effective Date tab**

1. Make necessary changes to the FS-Standing & FD-Attributes-Effective Date fields.

These fields are only available during the current school term and only to those administrators with access.

2. Click **Next.**

FD - Attributes - Effective Date

EMIS Grade Level:
☐ [▼]

State Equivalent Grade:
☐ [▼]

Disability Condition:
☐ [▼]

Section 504 Plan:
☐ [▼]

Disadvantagement:
☐ [▼]

Free/Reduced Lunch Status:
☐ [▼]

English Learner:
☐ [▼]

Immigrant Status:
☐ [▼]

Attendance Pattern:
☐ [▼]

Preschool Poverty Level:
☐ [▼]

Reporting Calendar:
☐ [▼]

Clearing Fields - If you wish to clear any field(s) for the selected ad hoc membership group, you will need to check the checkbox next to that field(s). A checkbox with no values in the dropdown will clear values for that field for the selected students.

☐ FN-Attributes-No Date tab

1. Make necessary changes to the FN-Attributes-No Date fields.

These fields are only available during the current school term and only to those administrators with access.

2. Click **Next.**

Clearing Fields - If you wish to clear any field(s) for the selected ad hoc membership group, you will need to check the checkbox next to that field(s). A checkbox with no values in the dropdown will clear values for that field for the selected students.

☐ FN-Graduate tab

1. Make necessary changes to the FN-Graduate fields.

These fields are only available during the current school term and only to those administrators with access.

2. Click **Next.**

Student Profile Bulk Update

Make bulk updates to students' profiles

Selected ad hoc membership: test
Number of students in selected ad hoc membership: **1**

| Select ad hoc | Student record | Annual record | FS-Standing & FD-Attributes-Effective Date | FN-Attributes-No Date | FN-Graduate | Review updates |

ℹ Select the checkbox next to the field(s) you wish to edit.
If a checkbox is selected and the value left blank, any existing value(s) in the field(s) are cleared from student profiles unless they are otherwise noted as required.

< Back   Next >

CORE Economics and Financial Literacy Requirement Met:
☐ ▼

CORE Fine Arts Requirement Met:
☐ ▼

CORE Graduation Requirement Exemption:
☐ ▼

CORE Graduation Requirement Exemption Date: ☐ [ ] 📅
CORE Graduation Requirement Met:
☐ - ☐ (Check the box to update and indicate that the CORE Graduation Requirement has been met)
Exempted from Physical Education Graduation Requirement:
☐ ▼

Expected Graduation Date:
☐ [ ] 📅

Graduation Date:
☐ [ ] 📅

Diploma Type:
☐ ▼

OGT Graduation Alternative:
☐ ▼

Military Compact Graduation Alternative:
☐ ▼

Clearing Fields - If you wish to clear any field(s) for the selected ad hoc membership group, you will need to check the checkbox next to that field(s). A checkbox with no values in the dropdown will clear values for that field for the selected students.

☐ **Review Updates tab**

1. Review the updates screen and do one of the following:
   a. Save the changes via the **Submit** button. OR
   b. Edit your selections by selecting **Back** to return to any of the previous tab screens.

Student Profile Bulk Update
Make bulk updates to students' profiles
Selected ad hoc membership: test
Number of students in selected ad hoc membership: 1

| Select ad hoc | Student record | Annual record | FS-Standing & FD-Attributes-Effective Date | FN-Attributes-No Date | FN-Graduate | Review updates |

< Back

ⓘ Please review all of the profile selections before finalizing.

Profile Item	New Values
Citizenship:	Clear Values
Graduation Year:	2022

Submit

Once the profile changes are saved successfully, you will receive the following message.

Student Profile Bulk Update was completed successfully.

Student Registration Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
7/22/21	Entire document	Review and update
6/14/21	Set District Options	Updated screenshot
3/30/21	Student Profile – FD-Attributes tab	Updated screenshot
4/14/20	Define Withdraw Codes	Update screenshot
4/3/20	Entire document	Review and update
9/30/19	Entire document	Review and update
5/20/19	Entire document	Review and update
9/25/18	Entire document	Review and update

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Before Registering Students

Verify that all necessary codes and parameters are defined properly before registering a new student. If you are confident that these steps have been properly completed previously, then you may continue to the "Registering or Re-enrolling Students." *See Student and Registration End User Documentation for details.*

☐ **Define Grade Level Codes** – With the district in context, verify that appropriate Grade Level Codes have been defined and mapped to the applicable EMIS code. You do not have to use identical Grade Level Codes and EMIS Codes; you can map any Grade Level Code to any EMIS Code, or even multiple Grade Level Codes to a single EMIS Code.

Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Grade Level Codes

Grade level Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to grade level codes.

[Add Grade Level Code]

		Code	Name	EMIS Code	Description	Sort Order ▲	Active
🗑	✏	01	01	01	01	1	🟢
🗑	✏	02	02	02	02	2	🟢
🗑	✏	03	03	03	03	3	🟢
🗑	✏	04	04	04	04	4	🟢
🗑	✏	05	05	05	05	5	🟢
🗑	✏	06	06	06	06	6	🟢
🗑	✏	07	07	07	07	7	🟢
🗑	✏	08	08	08	08	8	🟢
🗑	✏	09	09	09	09	9	🟢
🗑	✏	10	10	10	10	10	🟢
🗑	✏	11	11	11	11	11	🟢
🗑	✏	12	12	12	12	12	🟢
🗑	✏	13	13	13	13	13	🟢
🗑	✏	23	23	23	23	23	🟢
🗑	✏	30	30	30	30	30	🟢
🗑	✏	DR	DR	DR	DR	68	🟢
🗑	✏	IN	IN	IN	IN	70	🟢
🗑	✏	PS	PS	PS	PS	79	🟢
🗑	✏	KG	KG	KG	KG	86	🟢
🗑	✏	GR	GR	GR	GR	95	🟢
🗑	✏	**	**	**		96	🟢

☑ Show Active Only

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☐ **Define Building Grade Levels** – With the building in context, verify that appropriate Building Grade Level Codes have been defined and mapped to the appropriate district Grade Level Codes. When editing Building Grade Levels, you can also set default Registration information for each Building Grade Level (Counselor, Included in Honor Roll, Included in Ranking, Included in GPA) for use with the Registration Wizard (see below).

Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Building Grade Levels

Building Grade Levels Maintenance

From this screen, you can display, add, change and delete data pertaining to building grade levels.

Add Grade Level

		Code	Name	EMIS	Description	Sort Order ▲	Active
🗑	✏	09	09	09	Grade 9	11	🟢
🗑	✏	10	10	10	Grade 10	12	🟢
🗑	✏	11	11	11	Grade 11	13	🟢
🗑	✏	12	12	12	Grade 12	14	🟢
🗑	✏	13	13	13	Grade 13	15	🟢
🗑	✏	23	23	23	Grade 23	16	🟢
🗑	✏	GR	GR	GR	Graduate	17	🟢

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Building Grade Levels Maintenance

From this screen, you can display, add, change and delete data pertaining to building grade levels.

Grade Level:* `10 - 10 ▾`

Grade Specific Registration Default Data

Counselor: `-- Select Counselor -- ▾`

Scheduling Priority: `1 ▾`

Include in Honor Roll: `▾`

Include in Ranking: `▾`

Include in GPA: `▾`

Pri. Graduation Rule: `▾`

Alt. Graduation Rule: `▾`

Expected Graduation Date: `[        ] 📅`

Save **Cancel**

☐ **Define Student Status Codes –** Verify that appropriate Status Codes have been defined.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Student Status Codes

Student Status Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to student status codes.

[Add Status Code]

		Code	Name ▲	Overall Student Status	Description	Active
🗑	✏	A	Active HS	Active	Active	🟢
🗑	✏	GO	Grad Only	Inactive	Grad Only	🟢
🗑	✏	I	Inactive	Inactive	Inactive	🟢
🗑	✏	N	Non-res HS	Active	Non-resident attending	🟢
🗑	✏	R	Resident attending elsewhere	Inactive	Resident attending elsewhere	🟢

✔ **Show Active Only**

☐ **Define Admission Codes** (optional) – Verify that appropriate Admission Codes have been defined.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Admission Codes

Admission Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to admission codes.

[Add Admission Code]

		Code	Name ▲	Description	Active
🗑	✏	11	Court Referral	Court Referral	●
🗑	✏	2	Enter From A Non-Public School	Enter From A Non-Public School	●
🗑	✏	3	Entered From Same County	Entered From Same County	●
🗑	✏	4	Entered From Same State	Entered From Same State	●
🗑	✏	15	Entering From A Jvs Preschool	Entering From A Jvs Preschool	●
🗑	✏	13	Entering From A Licensed Kinde	Entering From A Licensed Kinde	●
🗑	✏	12	Entering From A Licensed Presc	Entering From A Licensed Presc	●
🗑	✏	8	Entering From An Institution	Entering From An Institution	●
🗑	✏	6	Entering From Another State/Country	Entering From Another State/Country	●
🗑	✏	14	Entering From Head Start	Entering From Head Start	●
🗑	✏	7	Entering From Home Schooling	Entering From Home Schooling	●
🗑	✏	9	Entering From Mr/Dd	Entering From Mr/Dd	●
🗑	✏	ID	Moved between buildings	Moved between buildings	●
🗑	✏	5	Not enrolled in an Ohio Public School since 2003	Not enrolled in an Ohio Public School since 2003	●
🗑	✏	10	Previously Dropped Out	Previously Dropped Out	●
🗑	✏	1	Student enrolling for first time (PS/KG)	Student enrolling for first time in Ohio public school/Community School because of age (Preschool/KG)	●

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☐ **Define Withdraw Codes** (optional) – Verify that appropriate Withdraw Codes have been defined.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Withdraw Codes

Withdraw Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to withdraw codes.

Add Withdraw Code

		Code	EMIS Code	Name ▲	Description	Active
🗑	✏	99	99	Completed HS Grad require./course requir. & passed	Completed crse requ; passed assessments	●
🗑	✏	52	52	Death	Death	●
🗑	✏	48	48	Expelled	Expelled	●
🗑	✏	74	74	Moved: not known to be continuing	Moved;not known to be continuing	●
🗑	✏	79	79	No longer eligible to be enrolled in district	Reason for Enrollment (received reason) no longer valid	●
🗑	✏	76	76	Non-Attendance Accor. to 72 hour Rule	Non-attending according 72 hour rule (Community Schools only)	●
🗑	✏	39	39	Non-enrolled student no longer receiving services	Non-enrolled student no longer receiving services	●
🗑	✏	**	**	Not Applicable, Did not withdraw/was not truant	N/A - WITHIN THE DISTRICT TRANSFER	●
🗑	✏	44	44	Not valid pub. community schl	Not valid pub. community schl	●
🗑	✏	73	73	Over 18 years of age	Over 18 years of age	●
🗑	✏	72	72	Pursued employment/work permit - Supt. approval on	Pursued employment/work permit	●
🗑	✏	35	35	Res. District no longer Responsible for Student	Resident Student Withdrew from Educating Entity with a Reason Code that indicates the Resident District no longer has a Responsibility for the Student	●
🗑	✏	75	75	Student compl. course require./did NOT pass requ.	Student completed crse;didn't pass assessments	●
🗑	✏	38	38	Student promoted beyond max grade/entity	Student promoted beyond max grade/entity	●
🗑	✏	81	81	Student reported in error - never should have been	Student reported in error - never should have been reported	●
🗑	✏	45	45	Tr. by Court Order/Adj/if court ordered other pub	Transf. Court Order/Adjud	●
🗑	✏	41	41	Tr. to another Ohio SD, local/exem vill/city, tr.	Transf. local,exempt,city	●
🗑	✏	42	42	Tr. to prive school, transcript req on file, Ed Ch	Transf. private schl	●
🗑	✏	46	46	Transferred out of the United States	Transf. out of U.S.	●
🗑	✏	40	40	Transferred to another School District outside of	Transf schl out of OH	●
🗑	✏	43	43	Transferred to home schooling, superint. approval	Transf to home schooling	●
🗑	✏	51	51	Verified Medical Reasons - Dr. authorization on fi	Verified Medical Reasons	●
🗑	✏	77	77	Withdrew due to 3314.26(non-tested 2 yr e-School (	Withdrew due to 3314.26(non-tested 2 yr e-School (Comm. Sch only)	●
🗑	✏	71	71	Withdrew due to truancy/non-attendance	Wd Truancy/non att	●
🗑	✏	37	37	Withdrew from Kindergarten	KG Student has withdrawn because it has been deemed to be in the best interest of the student if he/she waits one more year until starting his/her KG experience	●
🗑	✏	36	36	Withdrew from Preschool/PS student WD from PS prog	Withdrew from PS for any reason	●
🗑	✏	47	47	Withdrew pursuant to Yoder vs. Wisconsin	Wd Yoder vs. Wisconsin	●

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☐ **Define Ethnicity Codes** (optional) – Verify that appropriate Ethnicity Codes have been defined.

Note: Codes that show with a lock signifies that the code was setup at the district level.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Ethnicity Codes

Ethnicity Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to ethnicity codes.

Add Ethnicity Code

		Code ▲	Name	Description	Active
🔒	🔒	A	Asian	Asian	🟢
🔒	🔒	B	Black	Black	🟢
🔒	🔒	H	Hispanic	Hispanic	🟢
🔒	🔒	I	American Indian or Alaskan Native	American Indian or Alaskan Native	🟢
🔒	🔒	M	Multiracial	Multiracial	🟢
🔒	🔒	P	Pacific Islander	Pacific Islander	🟢
🔒	🔒	W	White	White	🟢

☑ Show Active Only

☐ **Define Birthdate Verification Codes** (optional) – Verify that appropriate

Birthdate Verification Codes have been defined.

**Navigation: StudentInformation – Management – School Administration
– Student Codes Administration – Birthdate Verification Codes**

Birthdate Verification Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to birthdate verification codes.

Add Verification Code

		Code	Name ▲	Description	Active
🔒	🔒	BPC	Baptismal Certificate	Baptismal Certificate	🟢
🔒	🔒	BC	Birth Certificate	Birth Certificate	🟢
🔒	🔒	PP	Passport	Passport	🟢
🔒	🔒	UN	Unknown	Unknown	🟢

☑ Show Active Only

☐ **Define Program Codes** (optional) **–** Verify that appropriate Program Codes have been defined, if desired.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Program Codes

☐ **Define Counselors** (optional) **–** Verify that appropriate Counselors have
been defined, if desired. Security clearance is required to assign groups and
roles to staff. On the Staff Member's View/Edit Staff Member Schools tab, if
you need to add a Counselor Job Function, click **Add**.

**Navigation: StudentInformation – Management – Security – View Staff
Members – Search – select staff member – Add/Edit Staff Member
Schools tab**

Once a staff member is defined as being a counselor, navigate to the Counselor Maintenance page, and set the grade levels for that Counselor, if you want to define Counselors for specific grade levels.

Navigation: StudentInformation – Management – School Administration – School Building Administration – Counselors

Counselor Maintenance

From this screen, you can display and change data pertaining to school guidance counselors.

	First Name	Last Name ▲	Grade	Active
✎	ETHEL	ALVARADO	09, 10	🟢
✎	DARREN	BURKE	09, 10	🟢
✎	JUANITA	CHRISTENSEN	09, 10	🟢
✎	NEIL	FULLER	09, 10	🟢
✎	JULIAN	GRAVES	09, 10	🟢
✎	ELLEN	GREER	11, 12	🟢
✎	TIFFANY	GUERRERO	11, 12	🟢
✎	KATHY	INGRAM	11, 12	🟢
✎	EDNA	MCCARTHY	11, 12	🟢
✎	CHARLOTTE	NUNEZ	11, 12	🟢
✎	TOMMY	PERKINS	11, 12	🟢
✎	TERRI	RICHARD	11, 12	🟢
✎	JOSEPHINE	SAUNDERS	11, 12	🟢
✎	MARJORIE	SIMON	11, 12	🟢
✎	TED	WELCH	11, 12	🟢
✎	THELMA	WISE	11, 12	🟢

☑ Show Active Only

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☐ **Define Team Codes** (optional) **–** Verify that appropriate Team Codes have been defined, if desired. These will be used in the Course Request Mass Update Groups process.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Team Codes

☐ **Define Custody Type Codes** (optional) **–** With the district in context, verify that appropriate Custody Type Codes have been defined, if desired. These will be used on the Student Contacts page.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Custody Type Codes

Custody Type Code Maintenance

From this screen, you can display, add, change and delete data pertaining to custody type codes.

		Code	Name ▲	Description	Custody	Active
🗑	✏	BP	Birth Parents		☐	🟢
🗑	✏	CP	Court Placed		☐	🟢
🗑	✏	FO	Father Only		☐	🟢
🗑	✏	G	Guardian		☐	🟢
🗑	✏	HF	Host Family		☐	🟢
🗑	✏	MO	Mother Only		☐	🟢
🗑	✏	S	Shared		☐	🟢

Add Custody Type

☑ Show Active Only

☐ **Define Contact Type Codes** (optional) **–** With the district in context, verify that appropriate Contact Type Codes have been defined, if desired. These will be used on the Student Contact Summary page.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Contact Type Codes

Contact Type Codes Maintenance
From this screen, you can display, add, change and delete contact type codes.

[Add Contact Type Code] [Map Professional Contact Codes]

		Code	Name ▲	Description	Count	District Codes	Professional Contact	NCES Contact Type	Active
🗑	✏	SOCI	Case Worker	Case Worker	176	-- Select a Professional Code -- ▼	👤		●
🗑	✏	DENT	Dentist	Dentist	1245	-- Select a Professional Code -- ▼	👤		●
🗑	✏	DOCT	Doctor	Doctor	1812	-- Select a Professional Code -- ▼	👤		●
🗑	✏	EMR	Emergency	Emergency	6930	-- Select a Professional Code -- ▼			●
🗑	✏	EMR2	Emergency (2)	Emergency (2)	5674	-- Select a Professional Code -- ▼			●
🗑	✏	EMR3	Emergency (3)	Emergency (3)	2527	-- Select a Professional Code -- ▼			●
🗑	✏	EMR4	Emergency (4)	Emergency (4)	249	-- Select a Professional Code -- ▼			●
🗑	✏	FRND	Family Friend	Family Friend	2955	-- Select a Professional Code -- ▼			●
🗑	✏	WKF	Father's Employer	Father's Employer	7215	-- Select a Professional Code -- ▼			●
🗑	✏	FOS	Foster Parent	Foster Parent	124	-- Select a Professional Code -- ▼			●
🗑	✏	GRPA	Grandparent	Grandparent	12427	-- Select a Professional Code -- ▼			●
🗑	✏	GUAR	Guardian/Custodian	Guardian/Custodian	489	-- Select a Professional Code -- ▼			●
🗑	✏	WKG	Guardian's Employer	Guardian's Employer	65	-- Select a Professional Code -- ▼			●
🗑	✏	HOSP	Hospital	Hospital	333	-- Select a Professional Code -- ▼	👤		●
🗑	✏	WKM	Mother's Employer	Mother's Employer	7615	-- Select a Professional Code -- ▼			●
🗑	✏	NBR	Neighbor	Neighbor	1102	-- Select a Professional Code -- ▼			●
🗑	✏	PAR	Parent (1)	Parent(1)	15188	-- Select a Professional Code -- ▼		1759 - Family member	●
🗑	✏	PAR2	Parent (2)	Parent (2)	6335	-- Select a Professional Code -- ▼			●
🗑	✏	REL	Relative	Relative	6911	-- Select a Professional Code -- ▼			●
🗑	✏	WKSF	Stepfather	Stepfather	1190	-- Select a Professional Code -- ▼			●
🗑	✏	WKSM	Stepmother	Stepmother	421	-- Select a Professional Code -- ▼			●

☑ Show Active Only

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☐ **Define Membership Group Codes** (optional) **–** Verify that appropriate Membership Group Codes have been defined, if desired.

Navigation: StudentInformation – Management – School Administration – Membership Groups

Membership Group Maintenance

From this screen, you can display, add, change and delete data pertaining to membership groups.

Add Membership Group

		Code ▲	Name	Description	Active
🗑	✏	11	Intervention	Intervention	🟢
🗑	✏	12	Post-secondary Enrollment Options Program	Post-secondary Enrollment Options Program	🟢
🗑	✏	15	15	15	🟢
🗑	✏	16	16	16	🟢
🗑	✏	20	Specialized Instructions	Specialized Instructions	🟢
🗑	✏	21	Placement Options	Placement Options	🟢
🗑	✏	22	Disadvantaged Pupil Programs (DPPF)	Disadvantaged Pupil Programs (DPPF)	🟢
🗑	✏	23	Title I	Title I	🟢
🗑	✏	24	Emergency Immigrant Education Program	Emergency Immigrant Education Program	🟢
🗑	✏	30	Vocational Programs	Vocational Programs	🟢
🗑	✏	40	Extracurricular/Intracurricular Programs and Servi	Extracurricular/Intracurricular Programs and Services	🟢
🗑	✏	41	Academic Intracurricular Descriptions (Vocational	Academic Intracurricular Descriptions (Vocational Student Organizat	🟢
🗑	✏	42	Interscholastic Athletics	Interscholastic Athletics	🟢
🗑	✏	49	Other	Other	🟢
🗑	✏	50	50	50	🟢
🗑	✏	51	Ohio Means Jobs	Ohio Means Jobs	🟢
🗑	✏	52	Graduation Pathways	Graduation Pathways	🟢
🗑	✏	60	World Languages for Seal of Biliteracy	World Languages for Seal of Biliteracy	🟢

☑ Show Active Only

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☐ **Add Membership Group Codes** (optional) **–** Add Membership Group Codes, if desired.

Navigation: StudentInformation – Management – School Administration – Membership Groups – Add Membership Group button

☐ **Miscellaneous Data Groups Maintenance** – To select miscellaneous groups from the Edit Student Profile - Custom tab, click on the **View Definitions** for the desired group and check the **On Profile** box by editing the Field Title.

Navigation: StudentInformation – Management – School Administration – Miscellaneous Data Groups – View Definitions

Navigation: StudentInformation – Management – School Administration – Miscellaneous Data Groups – View Definitions – Edit icon

Navigation: StudentInformation – Management – School Administration – Miscellaneous Data Groups – View Definitions – Edit icon – On Student Profile box

Miscellaneous Data Definitions Maintenance - SpEd - Special Education

From this screen, you can display, add, change and delete data pertaining to miscellaneous data field definitions.

Field Title:* Teacher Name

Field Type: ● Textbox ○ Pre-Defined List ○ Checkbox

Data Type:* Alpha Numeric ∨

Field Length:* 50

Regular Expression:

Sort Order:* 1

On Student Profile: ✔

Is Active: ✔

Is Read-Only: ☐

[Save] [Cancel]

Set Registration Defaults

When registering students, you can set default information for many registration fields. There are three "levels" of registration defaults: District Defaults, Building Defaults, and Grade Level Defaults. Building Defaults override District Defaults for their building. Grade Level Defaults are building-specific, but are different fields than the Building Defaults. All values inserted by the registration defaults settings can be changed for a student while registering that student.

☐ **Set District Defaults** – First, set the District as the school in context. Navigate to the Registration Defaults screen, and enter any information you want defaulted for every building in the district. (Any building defaults set later can override these values, so you can set district defaults for most schools in a district, and set different default values for the school or schools which do not match these defaults.)

Note: The Family Group registration defaults can only be set at the district level.

Navigation: StudentInformation – Management – School Administration – School Building Administration – Registration Defaults (District in context)

☐ **Set Building Defaults** – Set the school building for which you want to set defaults in context, navigate to the Registration Defaults screen, and enter any information you want defaulted for this building. Any District Defaults display to the right of the screen, and you can copy those to the building by clicking the **Use District Defaults** button.

Navigation: StudentInformation – Management – School Administration – School Building Administration – Registration Defaults (Building in context)

☐ **Set Grade Level Defaults** – On this screen, click the edit pencil icon for the Grade Level for which you want to set defaults.

Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Building Grade Levels

Building Grade Levels Maintenance

From this screen, you can display, add, change and delete data pertaining to building grade levels.

Add Grade Level

		Code	Name	EMIS	Description	Sort Order ▲	Active
🗑	✏	09	09	09	09	9	🟢
🗑	✏	10	10	10	10	10	🟢
🗑	✏	11	11	11	11	11	🟢
🗑	✏	12	12	12	12	12	🟢
🗑	✏	13	13	13	13	13	🟢
🗑	✏	23	23	23	23	23	🟢
🗑	✏	30	30	30	30	30	🟢
🗑	✏	DR	DR	DR	DR	68	🟢
🗑	✏	IN	IN	IN	IN	70	🟢
🗑	✏	GR	GR	GR	GR	95	🟢

☑ Show Active Only

Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Building Grade Levels – Edit pencil icon

Building Grade Levels Maintenance

From this screen, you can display, add, change and delete data pertaining to building grade levels.

Grade Level:*   [12 - 12 ▾]

Grade Specific Registration Default Data

Counselor:	[GREER, ELLEN ▾]
Scheduling Priority:	[1 ▾]
Include in Honor Roll:	[Yes ▾]
Include in Ranking:	[Yes ▾]
Include in GPA:	[Yes ▾]
Pri. Graduation Rule:	[▾]
Alt. Graduation Rule:	[▾]
Expected Graduation Date:	[　　　　　　] 📅

[Save] [Cancel]

Set the defaults for this grade level, and click **Save**.
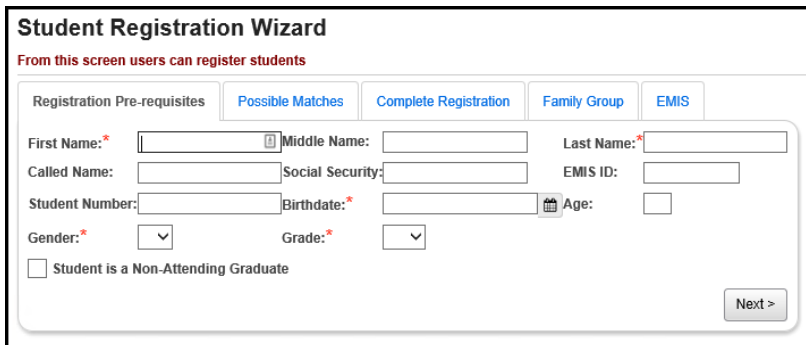
Registering or Re-enrolling Students – Registration Wizard

Follow these steps to create a new student record or enroll a new or previously attending student to the school. **See Student and Registration End User Documentation for details.**

☐ **Student Registration Wizard – Registration Pre-requisites tab –** Fill out all required fields, and any additional fields desired, and click **Next**. This will check to see if a record already exists for this student after entering only the minimum required information for that verification process. If no student record exists that is a possible match, the Wizard will proceed to the **Complete Registration** tab, and you can skip the next several steps in this checklist.

There is also an option **Student is a Non-Attending Graduate**. This allows you to indicate that the student is a non-attending graduate (Grad-Only). Upon checking this option and clicking **Next**, the Registration Wizard enters the Grad-Only Registration Mode (Non-Attending Graduate Registration).

Navigation: StudentInformation – SIS – Registration Wizard

☐ **Student Registration Wizard – Possible Matches tab –** If a student's required information on the Registration Pre-requisites tab matches any existing student's, this tab will display. There are two types of Possible Matches, each of which will be described below. You can have more than one type of Possible Match on this tab.

StudentInformation will find a Strict Match if the Social Security Number or EMIS ID match an existing student in the district or the school building. StudentInformation will find a Non-Strict Match if the first initial of the student's First Name, as well as the student's Last Name, Birthdate and Gender all match an existing student in the district or the school building. Depending on the Possible Match category, follow the steps below to continue to the Complete Registration tab of the Student Registration Wizard.

Navigation: StudentInformation – SIS – Registration Wizard – Possible Matches tab

Strict Match – If the social security number or EMIS ID number for a student being registered matches an existing student in the school, StudentInformation will not permit registration of a new student. This is an effort to prevent duplication of students. Select a matching student and click **Next** to edit that student's profile instead of registering a new student. Click **Back** to return to the Registration Pre-requisites tab to edit the entered information.

Please Note: StudentInformation does not automatically update the student's Progression Track when a Strict Match is found and used for Student Registration. The student's Progression Track will need to be manually updated.

Non-Strict Match – If the first initial of the First Name for a student being registered, as well as that student's Last Name, Gender and Birthdate all match an existing student, StudentInformation will warn you of a Non-Strict possible match. You may either continue registering the new student as a brand new student (not using any information from any matching student's record), edit a matching student's profile (if a student is found in the current building and year) or enroll a matching student to the current building and year (if a student is found, but not in the current building and year). A Non-Strict match may contain multiple students, from the same or different schools. Select a matching student and click **Next** to edit that student's profile instead of registering a new student. Select the **Register New Student** option and click **Next** to register the new student (not using any information from the matching record or records. Select a matching student and click **Next** to register this matching student by continuing onto the Complete Registration tab. Click **Back** to return to the Registration Pre-requisites tab and edit the entered information.

If a strict or non-strict match is found for the student in another building, the user will be asked to indicate whether this is or is not a change of the student's primary building/EMIS attending building. If Yes is chosen, the primary/EMIS attending building will be changed to the new building. If No is chosen, the primary/EMIS attending building will remain as it is and will not change.

Student Registration Wizard

From this screen users can register students

| Registration Pre-requisites | Possible Matches | Complete Registration | Family Group | EMIS |

Change primary / EMIS attending building?

◉ Yes

◯ No

Next >

☐ **Student Registration Wizard – Complete Registration tab –** Fill out all required fields and any optional fields you may desire on the Registration page. A student must have a master record before any additional elements can be defined for the student.

Navigation: StudentInformation – SIS – Registration Wizard – Complete Registration tab

From this point you may either click the **Next** button to continue onto the Family Group tab for this student if Family Groups is turned on (see next step), or press the **Edit Profile** button to continue adding information for this particular student (see the **Student Profile** section below) or click **Back** to return to the Registation Pre-requisites tab.

Address Standardization – Address fields in StudentInformation will standardize an entered address to fit USPS standards (removing punctuation, checking to see if the address is within the valid range of house numbers for the street, and changing zip code to the correct zip+4 code). In addition to the mailing benefits, this behavior provides more consistent and correctly-spelled address entries, allowing easier searching by address. Please see the **StudentInformation Getting Started** End User Guide for more information on Address Standardization. Any screen which uses Address Standardization has a checkbox at the bottom of the screen titled **Bypass Address Standardization**. Checking this box will prevent the standardization process for this screen only.

Address Verification – StudentInformation can also verify that the student's address is within the district where the student is enrolled. This feature must be enabled at both the District and Building levels. More information about Address Verification can be found in the **Address Verification** Procedural Checklist and in the **StudentInformation Getting Started** End User Guide.

If you are attempting to register a student with the same Student Number as another student, the screen will display the following error message.

Student Registration Wizard
From this screen users can register students

Message: Cannot Register Student. Student number already in use.
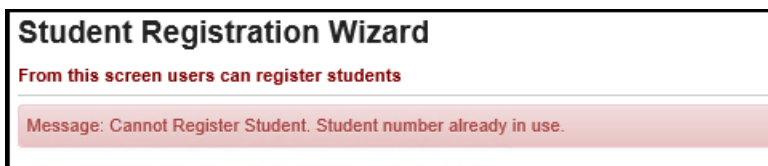
☐ **Student Registration Wizard – Family Group tab** (optional) – This tab will display if the Uses Family Groups option is checked on the District Options page. Select a Family Group Search option and/or enter a Family Group Name or confirm Matching Criteria and then click **Search**. If an existing Family Group is listed that is the correct one for the student being registered, check the existing Family Group and click **Next**. If no results display or none of the existing Family Groups listed work for the student being registered, do not check any of the Family Groups listed and just click **Next**. A new Family Group will be created for the student.

Navigation: StudentInformation – SIS – Registration Wizard – Family Group tab

☐ **Student Registration Wizard – EMIS tab** (optional) – Fill out all required fields and any optional fields you may desire on the Registration page. A student must have a master record before any additional elements can be defined for the student. Click **Finish** when you are done.

Navigation: StudentInformation – SIS – Registration Wizard – EMIS tab

☐ **Student Registration Wizard – Non-Attending Graduate Registration -** Fill out all required fields and any optional fields you may desire on the Non-Attending Graduate Registration page.

Notes:

1. Non-Attending Graduates (Grad-Only) students can only be registered at community schools and traditional schools.

2. Transfer students cannot be registered as Non-Attending Graduates.

3. If a previously withdrawn student is registered as a Non-Attending Graduate student, their Diploma Type, Graduation Date, Expected Graduation Date, Courses Completed IRN, and Courses Completed Date must be updated according to set Grad-Only parameters.

4. For Non-Attending Graduate students only, the FN-Graduate tab includes the Courses Completed IRN and Courses Completed Date fields.

5. For Non-Attending Graduate students only, the General tab and FN-Graduate tabs display the notification, **This student is a Non-Attending Graduate**.

6. On the FS-Standing tab, the EMIS Situation dropdown list now includes EMIS Situations 600 – Grad Only Student, Not Enrolled for traditional districts, 601 – Grad Only Student, Not Enrolled for community schools.

Navigation: StudentInformation – SIS – Registration Wizard – Non-Attending Graduate Registration tab

Student Profile, Additional Information and Verification

☐ **Student Profile – General tab** – Verify that the registration information you entered is correct, and enter other pertinent information.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are <u>valid</u>, the user will be given the option to **Save** the changes and proceed to the chosen tab, or **Cancel** changes and proceed to the chosen tab. If the changes on the previous tab are <u>not valid</u>, the user will be given the option to **Return** to the previous tab to re-enter the changes or **Cancel** changes and proceed to the chosen tab.

Navigation: StudentInformation – SIS – Student – Edit Profile – General tab

If you change the Attendance Calendar on this screen, a confirmation screen will be displayed, where you need to enter the date this calendar change becomes effective.

☐ **Student Profile – Additional tab** – Verify information on this tab, and enter any additional information.

Navigation: StudentInformation – SIS – Student – Edit Profile – Additional tab

Note: For Non-Public schools with a student in context, you can also add or edit a Non-Public SSID. The district SSID prefix displays in the District's Non-Public SSID Prefix field.

☐ **Student Profile – Custom tab –** Click the Custom tab on the Edit Profile page. Fill out the requested information, if desired. The Custom tab will list all of the miscellaneous data definitions that have been specified to be included on the student profile. These fields will be separated by Data Group, then sorted by sort order of the Data Definition within each group. Only active data definitions will be included on the screen.

Users must have proper security access in order to view and/or update the data on the Custom profile tab. A new security node has been added under the **Extra System Permissions** area, specifically for **Custom Profile Data**. If the user does not have access to this node, the Custom tab will be disabled. If the user has read access to this node, the Custom tab will be enabled, but if the user does not have update access to this node, all fields will be disabled.

Navigation: StudentInformation – SIS – Student – Edit Profile – Custom tab

☐ **Student Profile – Private tab** – Verify information on this tab, and enter any additional information. It is only necessary to list names if they are different from names listed on General tab. Not all staff will have security clearance to view this information. The Social Security Number is hidden by default. You can click **View Social Security** to view or edit the content.

Navigation: StudentInformation – SIS – Student – Edit Profile – Private tab

☐ **Student Profile – FS-Standing tab** – Verify information on this tab, and edit existing FS-Standing records or add new FS-Standing records.

NOTE: StudentInformation does not require each field in the FS-Standing tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

NOTE: When enrolling a Match, the Report to EMIS checkbox should be reviewed to make sure it is correctly checked or unchecked.

Navigation: StudentInformation – SIS – Student – Edit Profile – FS-Standing tab

To create a new FS record:

- Click on **New Student Standing** button.
- The detail area will be filled with the values from the most recent record with the exception of Effective Start Date.
- Enter an Effective Start Date and modify the fields as necessary.
- Click **Save.**

Delete and edit FS records by clicking on the icons in the history list.

Users can insert a record with an Effective Start Date that falls between the Effective Start Dates of two existing records if the information in the record meets the following criteria:

- At least one value in the inserted record is different than the values in the existing records.
- The inserted record does not have the same Effective Start Date as another record.
- The Effective Start Date in the inserted record is greater than the earliest Effective Start Date for this school year.
- If the record is an FS record, the District Admission Date is greater than or equal to the current District Admission Date.

☐ **Student Profile – FS-Attendance tab** – Verify information on this tab, and edit existing FS-Attendance records or add new FS-Attendance records. **NOTE:** StudentInformation does not require each field in the FS-Attendance tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

Navigation: StudentInformation – SIS – Student – Edit Profile – FS-Attendance tab

Edit FS-Attendance records by clicking on the icons in the history list.

☐ **Student Profile – FD-Attributes tab** – Verify information on this tab, and edit existing or add new FD-Attributes records.

NOTE: StudentInformation does not require each field in the FD-Attributes tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

Navigation: StudentInformation – SIS – Student – Edit Profile – FD-Attributes tab

To create a new FD record:

- Click on **New Student Attributes** button.
- The detail area will be filled with the values from the most record record with the exception of Effective Start Date.
- Enter an Effective Start Date and modify the fields as necessary.
- Click **Save.**

Delete and edit FD records by clicking on the icons in the history list.

Users can insert a record with an Effective Start Date that falls between the Effective Start Dates of two existing records if the information in the record meets the following criteria:

- At least one value in the inserted record is different than the values in the existing records.
- The inserted record does not have the same Effective Start Date as another record.
- The Effective Start Date in the inserted record is greater than the earliest Effective Start Date for this school year.
- If the record is an FS record, the District Admission Date is greater than or equal to the current District Admission Date.

☐ **Student Profile – FN-Attributes tab** – Verify information on this tab, and enter any additional information.

NOTE: StudentInformation does not require each field in the FN-Attributes tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

Navigation: StudentInformation – SIS – Student – Edit Profile – FN-Attributes tab

☐ **Student Profile – FN-Graduate tab** – Enter FN-Graduate record information that is reported in EMIS Reporting Period G.

Navigation: StudentInformation – SIS – Student – Edit Profile – FN-Graduate tab

Edit Student Profile

From this screen, you can display and change information regarding a students profile.

| General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | FN-Graduate | Transportation |

Save   Cancel

Last Modified: 08/18/2010 9:53 AM by User:

Student is a Non-Attending Graduate: ☐

CORE Economics and Financial Literacy Requirement Met: N - District has not determined this student met requirement ▼

CORE Fine Arts Requirement Met: N - District has not determined this student met requirement ▼

CORE Graduation Requirement Exemption: * - Student has not opted out of Ohio Core requirements (default) ▼

CORE Graduation Requirement Exemption Date: [📅]

CORE Graduation Requirement Met: ☐

Exempted from Physical Education Graduation Requirement: N - District not adopted policy or student has not met all of policy re ▼

Expected Graduation Date: [📅] (Leave blank to use Grade Level default value: NOT SET)

Graduation Date: [📅]

Diploma Type: * - Not Applicable ▼

OGT Graduation Alternative: 0 - Not Used ▼

Military Compact Graduation Alternative: 0 - Student is not using the military compact alternative ▼

Non-Attending Graduates

Courses Completed IRN: ⓘ [ ] - [ ] 🔍

Courses Completed Date: [📅]

Proficient Foreign Languages:
(European) Portuguese
Afrikaans
Akan-Twi
Albanian

☐ **Student Profile – Transportation tab** – Enter any additional transportation information.

Navigation: StudentInformation – SIS – Student – Edit Profile – Transportation tab

☐ **Add, Edit, Delete Student Memberships –** Add, edit, or delete memberships for the student in context.

Navigation: StudentInformation – SIS – Student – Edit Memberships

Edit Student Memberships

From this screen, you can edit and delete student memberships for the working school and school year.

ⓘ Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

		Membership Code	Membership Name	Start Date	Stop Date	Staff Member	Prog Prov IRN
🗑	✏	420003	Basketball	Nov 01, 2018			******

Add Membership   **Back to Student Profile**

☐ **Membership Members –** Memberships can be added through the School Membership Members page.

Navigation: StudentInformation – SIS – School – Membership Members

Membership Members

From this screen, you can maintain the students associated with the selected membership.

Membership Group: [-- Select a Membership Group -- ▾]   Membership: [-- Select a Membership -- ▾]

◉ Show Active Members ◯ Show Members From: [9/24/2018] 📅 To: [9/24/2018] 📅 **Go**

☐ **Enter Student Notes** (optional) **–** Student Notes screen will be used to add, modify or delete notes pertaining to an individual student.

Navigation: StudentInformation – SIS – Student – Notes

☐ **Enter Student Miscellaneous Data** – Select a Miscellaneous Group from the Filter By Groups dropdown menu, to add/view student Miscellaneous Data.

Navigation: StudentInformation – SIS – Student – Misc. Data

☐ **Enter Student Community Service Hours** (optional) **–** Community Service Hours may be entered for individual students as needed. This functionality can be used in conjunction with Graduation Eligibility.

Navigation: StudentInformation – SIS – Student – Community Service

Clicking on the **trash can** icon will delete the Community Service record, and clicking on the **pencil** will edit the Community Service record.

☐ **Enter Student Contact Info –** Each contact record displays the data entered for Student Contact. The primary contact can be selected by clicking on a **gray star**. A **gold star** indicates the primary contact. The primary contact's name will appear on reports.

- o Those contacts marked as **Copied on Correspondence** will prompt the creation of an additional copy of report cards for the designated contact. It will include the name and address of the designated contact.
- o Those contacts marked as **Legal Guardian** will display on the Student's Home Page (View Profile). Multiple contacts can be checked as Legal Guardian and all will display.

Navigation: StudentInformation – SIS – Student – Contacts Summary
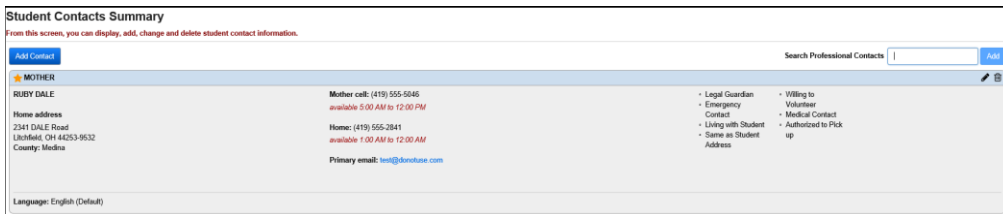
Clicking on the **trash can** icon will delete that contact, and clicking on the **pencil** will edit that contact's details.

Contacts marked as Medical Contacts can also be viewed (but not edited) on the Medical Contacts page.

Navigation: StudentInformation – SIS – Student – Medical – Medical Contacts

Medical Contacts

From this screen, you can view student contact information.

MOTHER	FATHER	EMERGENCY CONT.
RUBY DALE	CRAIG DALE	WANDA STRICKLAND

test@donotuse.com

Mobile: (419) 555-0003

Home: (419) 555-2841

EMERGENCY CONT.	FRIEND	Dentist
JESSE GOODWIN	TODD TOWNSEND	BONNIE POTTER

Mobile: (419) 555-6674 Work: (419) 555-8062 Ext:

Doctor
ERNEST INGRAM

Work: (419) 555-8662 Ext:

☐ **Enter Custody Alert** (optional) **–** Enter custody alert information, as needed.

Navigation: StudentInformation – SIS – Student – Custody Alert

Custody Alert

From this screen, you can display, add, change and delete custody alerts for a student.

Add Custody Alert

		Date	Alert Description	Priority	Starting Date	Ending Date	Author	Critical	Active
🗑	✏	Sep 24, 2018	Student should only be released to his mother,	5	Aug 01, 2018		amy		🟢

☑ Show Active Only

☐ **Enter Disability Alert** (optional) – Enter disability alert information, as needed.

Navigation: StudentInformation – SIS – Student – Disability Alert

☐ **Enter Medical Alert** (optional) – Enter any medical alert information, as needed.

Navigation: StudentInformation – SIS – Student – Medical - Medical Alert

See StudentInformation Student Medical documentation for details on setting up a medical alert.

☐ **Enter Miscellaneous Alert** (optional) – Enter miscellaneous alert information, as needed.

Navigation: StudentInformation – SIS – Student – Miscellaneous Alerts

☐ **Enter or Update Family Groups** (optional) – If the district is going to be using family groups, start off by turning on this functionality on the District Options page and then go onto the Family Groups page.

Set District Options (optional) – The District Options screen allows you to specify if you wish to use Family Groups and if so, set the courier policy at the district level. The Student Registration Wizard uses this policy to assign family couriers. If you withdraw a student who is assigned to be a family courier, StudentInformation assigns a new courier to the family group based on the district policy. There is also an option to exclude students in certain grade levels (for example, preschool) from being selected as the courier. The District Options screen also allows you to control page level security on the Family Groups Contacts tab.

Navigation: StudentInformation – Management – District Administration – District Options

District Options

From this screen, you can display and change District Options.

Family Groups

☑ Uses Family Groups

Select a method to assign a Family Courier

○ No Family Courier assignment
◉ Assign Family Courier to youngest family member
○ Assign Family Courier to oldest family member

Select grade levels that will be excluded from being a family group courier

Grade

```
AG - AG
IN - Infant/Toddler (Ages 0-2)
PS - PS
K - K
```

Select a method to edit Family Group Contacts

◉ Allow edits per school
○ Allow edits per district

Report Cards

☐ Disable Report Cards on ParentAccess Portal for Students with Unpaid Fees

Graduation Points Service

☑ Recalculate Student Graduation Points daily

Unattended Email Address

Email Address: no-reply@YourDomain.com

Special Education Program

[SpS Refresh ▾]

[Save]

Navigation: StudentInformation – Management – District Administration – Family Groups

Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: DALE

| Group | Students | Contacts |

Students' contacts can only be modified if the student is in the building in context.

⊕ DALE Family Group

Search Professional Contacts

[|]   Add To Group

[Collapse All]   **MARVIN DALE**

Grade: 09
BUHS

| CON1 | ❖ |

JULIA WALTON   ☑ ☆ ✎

| DENTIST | ❖ |

BONNIE POTTER   ☑ ☆ ✎

| DOCTOR | ❖ |

ERNEST INGRAM   ☑ ☆ ✎

| EMERGENCY CONT. | ❖ |

JESSE GOODWIN   ☑ ☆ ✎

WANDA
STRICKLAND   ☑ ☆ ✎

| FATHER | ❖ |

CRAIG DALE   ☑ ☆ ✎

| FRIEND | ❖ |

TODD TOWNSEND   ☑ ☆ ✎

| MOTHER | ❖ |

RUBY DALE   ☑ ⭐ ✎

Back

☐ **Create or Update Family Groups Wizard** (optional) – The Family Groups Wizard has been added to step users through the process of creating all of the family groups for a school or district at once. You can create family groups by matching on address, city, state, zip code, contact last name, contact first name and/or phone number.

Note: In order for the Family Groups Wizard to recognize new students, the default school year must be the year in which the new students will start. (For example, if you are registering new Kindergarten students with an admission date of 8/1/21, the default school year must be 2021-2022 when you run the Family Groups Wizard.)

Navigation: StudentInformation – Management – District Administration – Family Groups Wizard

☐ **Run Reports for Verification** (optional) **–** Run any or all of the following reports, as needed. More information on each of these reports can be found in the **StudentInformation Student & Registration** End User documentation.

Navigation: StudentInformation – SIS – School – Student Reports
- Student Lunch Free/Reduced (LUNCH)

- Student Alerts (STD_ALRT)

- Student with No SSID (SSID)

- Student with No SSNO (SSNO)

- Student Contact List (CONT)

- Student Status/Attendance Code (STAT)

- Ethnicity Summary Report

- Student Roster Detail (R101-A)

- Student Roster Summary (R101-B)

- Student Roster Summary by Home School

- Student Roster Summary by Homeroom

- Student Roster Summary by Program

- Student Roster by Membership (R102)

- Admission/Withdrawals (AWEX)

- Withdrawal List (WITH)

- Administrative Homeroom Detail (R201-A)

- Administrative Homeroom Summary (R201-B)

- Student Locker Allocation (LOCK)

Navigation: StudentInformation – SIS – School – Civil Rights Reporting (CRDC)
- Civil Rights Report (CRR)

Student Transfer Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
1/26/21	Entire document	Review and update
5/5/20	Entire document	Review and update
3/23/20	Receiving District – Enroll a Single Student transferred from another district and import course history and/or attendance and/or assessments	FYI – Course History Logic for Location value FYI – Attendance Includes hours
3/23/20	Receiving District – Bulk Enroll Transfer from another district	7 – Transfer Attendance includes hours 9 – Transfer Course History logic for Location value
1/21/20	Entire document	Review and update
8/14/19	All areas referencing 'whacks'	Updated to include that the pending student will be removed from the new district if summer withdrawn before transferred into new district
8/1/19	Intro	Add note regarding match on EMIS IDs
2/3/19	Entire document	Update screenshots

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If the application finds a match when registering students, a prompt asking if the Primary Attending Building should be changed – always say YES unless you are trying to dual enroll a student in two buildings within the same district in the same year.

If course history or attendance are selected to transfer, then an annual record/partial record will be created in the corresponding year. The annual/partial record is needed for the prior year course history or attendance to display correctly.

The annual/partial records in the prior year will show with no student status and the student's calendar will show as **Withdrawn** – this is as designed. If you need to change the student's grade level on the course history that was manually entered or imported, you can edit the student's profile and change their grade level. Please note that you will have to select a student status in order to save successfully.

If the sending student has an EMIS ID that matches a student in the receiving district, the student will transfer using the Bulk Enroll Detail option and the student will be enrolled with a unique EMIS ID. If you attempt to enroll a student using the Bulk Enroll option on the Pending Students screen, a message will display identifying that the **Student matched on EMIS Id**. You would need to transfer this student using the **Detail** option and a new unique EMIS ID will be assigned to the student.

Bulk Enroll Pending Students
From this screen, you can register or reject a student that has been sent to you from another school.

ⓘ The following are matches for students you are registering in the current school with open admission records.
Please review the students listed below for possible duplicate records. The matching transferred students were not enrolled.

Transferred Student	Matching Student	M Student ID	M Gender	M Birthdate	M Address	M City	M State	M Zip	M SSID	M EMIS Id	Matched On
High School	Andrew	36	M	/2004	RD		OH				Student matched on EMIS Id.

Scenario 1: Sending District – Transfer a Single Student

The student transfer process does not withdraw the student from the sending school. If the student needs withdrawn from the sending school, use the Withdraw Student page.

If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

1. With a student in context at the building level, navigate to **StudentInformation** » **SIS** » **Student** » **Student Transfer**.
2. In the **Make students available in:** dropdown, select the year you would like to transfer the student to.
3. In the **Search For District:** field, begin typing the district name. Select the district from the results. Note: You can transfer the student to your own district when doing a building to building transfer.
4. Select an optional building within the district from the **Building:** dropdown. If left blank, the student you are transferring will be available to enroll into any building in the district.
5. Click **Transfer**.
6. The transfer will be added to the grid and show with a Pending status.

Student Transfer

From this screen, you can transfer the selected student to a building or a district and view the status of the transfers that have taken place.

To Building	To District	JVS	Transfer Date	Status
Lucas High School	Lucas	no	05/04/2020 09:02 AM	Pending
Galion High School	Galion	no		

Make students available in: * 2019-2020 ▾

Search For District: * [Search For District to Transfer Student]

Building: -- Select a Building (optional) -- ▾

[Transfer] [Cancel]

Scenario 2: Sending District – Bulk Transfer Multiple Students

The student transfer process does not withdraw the student from the sending school. If the student needs withdrawn from the sending school, use the Withdraw Student page.

If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

1. With the building in context, navigate to **StudentInformation » Management » School Administration » Student Transfer » Bulk Student Transfer**.
2. Select an Ad-hoc from the **Ad Hoc Membership:** dropdown or click the **elipse** icon to create one.
3. In the **Make students available in:** dropdown, select the year you would like to transfer the student to.
4. In the **District:** dropdown, select the district within your ITC you would like to transfer the student to. Note: You can transfer the student to your own district when doing a building to building transfer.
5. Select an optional building within the district from the **Building:** dropdown. If left blank, the student you are transferring will be available to enroll into any building in the district.
6. Click **Bulk Transfer**. The following message will display:

   2 students were transferred successfully and now have pending status.

Each student in the ad-hoc membership will have a record added to their Student Transfer page denoting the transfer.

Student Transfer

From this screen, you can transfer the selected student to a building or a district and view the status of the transfers that have taken place.

To Building	To District	JVS	Transfer Date	Status
Lucas High School	Lucas	no	05/04/2020 09:09 AM	Pending
Galion High School	Galion	no		

Make students available in: * 2019-2020

Search For District: * Search For District to Transfer Student

Building: -- Select a Building (optional) --

Transfer   Cancel

Each student transferred in or out of the building will be listed on either the Transfer In History page or Transfer Out History page.

Transfer In History

From this screen, you can view students that have recently transferred to your building from another building or district.

Transfer Date Range: [_____] to [_____] [Search] ☐ This School Year Only

	Student	Grade	From District	From School	Transfer Date ▼	User Id	From Year
Detail	RICHARDS, HOLLY	09	Galion	Galion High School	05/04/2020 09:09 AM	Recker, Amy	2019-2020
Detail	PATTON, GARY	09	Galion	Galion High School	05/04/2020 09:09 AM	Recker, Amy	2019-2020

Transfer Out History

From this screen, you can view students that have been previously transferred from your building to another building or district.

Transfer Date Range: [_____] to [_____] [Search]

	Student	Grade	To School	To District	To Year	Job ID	Transfer Date
Detail	RICHARDS, HOLLY	09	Lucas High School	Lucas	2019-2020	53409	05/04/2020 09:09 AM
Detail	PATTON, GARY	09	Lucas High School	Lucas	2019-2020	53409	05/04/2020 09:09 AM

Scenario 3: Receiving District – View Pending Transfers and/or Delete Unwanted Students

F.Y.I. Use the filters to narrow down your search, if needed, and click **Search**.

F.Y.I. The page is divided into two sections:

    Students transferring within the district in context (Building Transfers).
    Students transferring from another StudentInformation district within your ITC (District Transfers).

F.Y.I. If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

To delete any unwanted transfers, put in check in the box next to their name and click **Delete Selected Transfers**.

Scenario 4: Receiving District – Bulk Enroll Building to Building Transfers

If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

1. On the **StudentInformation» Management » School Administration » Student Transfer » Pending Students** page with a building in context, select the students you wish to enroll and click the **Bulk Enroll Building Transfers** option in the Building Transfers section.
2. The **Bulk Enroll Pending Students** page now displays.
3. Most fields on the page are pulled from the Registration Defaults page, change the values, if needed, and fill in any other required fields.
4. The students will be listed in the grid below.
5. The **To Grade** column will be populated with a corresponding grade level in the receiving building.
   a. If the student is being transferred from the previous year, the student transfer will look at the receiving schools Grade Level Progressions table to determine what the student's new grade level should be.
   b. If the receiving school does not have a corresponding grade level on the Building Grade Levels table, the **To Grade** dropdown for the student will be blank and you will need to select a grade level from the dropdown before the student can be bulk enrolled.

Student ▲	From District	From Building	From Grade	To Grade	Job ID	Transfer Date
ALEXANDER, ROGER	Galion	Galion Middle School	08	08 ▾	53411	05/04/2020 11:32 AM

Building Register Selected Students   **View Pending Students**

6. Click **Building Register Selected Students**.
7. A summary of the values will display. Click **Continue with Registration**.
8. Since the students are already active in the district, they will display as matches. Check any students who should be registered into the building in context.
9. Click **Overwrite Selected Students**.
10. The following message is displayed:

   Students were successfully enrolled.

Scenario 5: Receiving District – Bulk Enroll Transfers from another District

 Intra-district transfers and outside your district transfers need to be bulk enrolled separately.

 If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

1. On the **StudentInformation » Management » School Administration » Student Transfer » Pending Students** page with a building in context, select the students you wish to enroll and click the **Bulk Enroll District Transfers** option in the District Transfers section.
2. The **Bulk Enroll Pending Students** page now displays.
3. Most fields on the page are pulled from the Registration Defaults page, change the values, if needed, and fill in any other required fields.
4. The students will be listed in the grid below.
5. The **To Grade** column will be populated with a corresponding grade level in the receiving building.
   a. If the student is being transferred from the previous year, the student transfer will look at the receiving schools Grade Level Progressions table to determine what the student's new grade level should be.
   b. If the receiving school does not have a corresponding grade level on the Building Grade Levels table, the **To Grade** dropdown for the student will be blank and you will need to select a grade level from the dropdown before the student can be bulk enrolled.

Status	Student ▲	From District	From Building	From Grade	To Grade	Job ID	Transfer Date
⚠	Harper, Connor	Lucas	Lucas High School	10	10 ▼	53410	05/04/2020 11:30 AM

6. Select which information from the sending school you would like to import for the group of selected students.

Transfer Attendance:	☐
Transfer Assessments:	☐
Transfer Course History:	☐ (Currently not available for ITC to ITC transfer)

7. Any years of attendance at the sending school will be summarized and brought over in the transfer if Transfer Attendance is selected. Also, if Transfer Attendance is selected, the transfer now includes attendance

hour totals for the student from the sending school, and the hours display on the student's External Absences screen.

8. If Transfer Assessments is selected, the transfer will bring over all attempts of the following five assessment tests: OGT, SAT, ACT, PLAN, PSAT

9. If Transfer Course History is selected, the transfer will bring over course history marked as Is High School credit from the sending school according to the Default Marks Mappings previously set up.

   Also, the transfer now includes the location based on the following logic:

   On the course sections EMIS Override tab, check for Location IRN and Location values; if blank then
   On the course's Marks tab, check for CCP Location IRN and College Location field values; if blank then
   Send the course's EMIS tab, EMIS Location IRN and EMIS Location Description field values as the location for the course; if blank then
   Send the school IRN of the school that is sending the student.

10. Click **District Register Selected Students**.
11. A summary of the values will display. Click **Continue with Registration**.
12. The following message is displayed:

    Students were successfully enrolled.

Scenario 6: Receiving District – Enroll a Single Student Transferred from another Building within your District

The student transfer process does not withdraw the student from the sending school. If the student needs withdrawn from the sending school, use the Withdraw Student page.

If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

1. On the **StudentInformation » Management » School Administration » Student Transfer » Pending Students** page with a building in context, select the student you wish to enroll and click the **Detail** button next to the student in the **Building Transfers** section.
2. The **Pending Student Detail** page is displayed.
3. Click the **black arrow** icon to register the student.
4. The page refreshes and the **Student Registration Wizard** page is displayed.
5. The **Registration Pre-requisites** tab is populated with values from the transfer. Click **Next**.
6. On the **Possible Matches** tab, the student will show as a Strict Match since he was transferred from another building in the district.
7. Select a matching student and click **Next** to edit that student's profile instead of registering a new student.

8. On the **Complete Registration** tab, a majority of the values are populated off the student's record at the other building in the district.
9. Fill in any required fields and click **Next** to move to the **EMIS** tab or **Finish** to complete registration.
10. An entry will be added to the Student Transfer page to show the student was registered via the Student Transfer process.

Student Transfer

From this screen, you can transfer the selected student to a building or a district and view the status of the transfers that have taken place.

To Building	To District	JVS	Transfer Date	Status
Galion High School	Galion	no	05/04/2020 01:09 PM	Accepted
Galion Middle School	Galion	no		

Make students available in: * 2019-2020 ▼

Search For District: * [Search For District to Transfer Student]

Building: [-- Select a Building (optional) -- ▼]

[Transfer] [Cancel]

Scenario 7: Receiving District – Enroll a Single Student Transferred from another District without Importing Course History, Assessments, or Attendance

The student transfer process does not withdraw the student from the sending school. If the student needs withdrawn from the sending school, use the Withdraw Student page.

If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

1. On the **StudentInformation** » **Management** » **School Administration** » **Student Transfer** » **Pending Students** page with a building in context, select the student you wish to enroll and click the **Detail** button next to a student in the **District Transfers** section.
2. The **Pending Student Detail** page is displayed.
3. Click the **black arrow** icon to register the student.
4. The page refreshes and the **Student Registration Wizard** page is displayed.
5. The **Registration Pre-requisites** tab is populated with values from the transfer.
6. Choose a grade level from the **Grade** dropdown. Click **Next**.
7. On the **Complete Registration** tab, a majority of the values are populated off the student's record at the sending school and the registration defaults at the receiving school.
8. Fill in the required fields.
9. In the **Transfer Options** section select:
   I don't want to transfer course history, attendance records and assessments.
10. Click **Finish**.
11. The following message will display at the top of the screen: **Are you sure you want to complete registration for this student?** Click **OK**.
12. The following message will display:

   The student saved successfully.

Scenario 8: Receiving District – Enroll a Single Student Transferred from another District and Import Course History and/or Attendance and/or Assessments

The student transfer process does not withdraw the student from the sending school. If the student needs withdrawn from the sending school use, the Withdraw Student page.

Course History: For students transferred from within your ITC, only courses marked as Is High School Credit taken within the last six years will transfer. Currently, course history does not transfer with students sent from sending schools outside your ITC.

The transfer includes the location based on the following logic:

On the course sections EMIS Override tab, check for Location IRN and Location values; if blank then
On the course's Marks tab, check CCP Location IRN and College Location field values; if blank then
Send the course's EMIS tab, EMIS Location IRN and EMIS Location Description field values as the location for the course; if blank then
Send the school IRN of the school that is sending the student

Attendance: Any years of attendance at the sending school will be summarized and brought over in the transfer. The transfer also now includes attendance hour totals for the student from the sending school and the hours display on the student's External Absences screen.

Assessment: High School Assessment information (ACT, PSAT, SAT, PLAN, and OGT) will transfer.

If you whack or summer withdraw a student after you transferred them, but before the new school enrolls them, the transfer will be deleted at the new school. A whack removes all records of the student, including the transfer records.

1. On the **StudentInformation » Management » School Administration » Student Transfer » Pending Students** page with a building in context, select the student you wish to enroll and click the **Detail** button next to a student in the **District Transfer** section.
2. The **Pending Student Detail** page is displayed.

Pending Student Detail

From this screen, you can register or reject a student that has been sent to you from another school.

Student Name: GALLAGHER, JEAN
Gender: F
From District: Galion
From Building: Galion High School
From Grade: 09
Transfer Job ID:53413

⚠ Warning: The Marking Patterns of the schools and school years need to be mapped in order to transfer course history.

Click Here to map the marking patterns.

		To Building	To District	JVS	Transfer Date	Status
⏵	🗑	Lucas High School	Lucas	no	05/04/2020 01:56 PM	Pending
		Galion High School	Galion	no		

[View Pending Students]

3. If Marking Pattern Mappings have not been saved, a warning will display.
4. Use the blue **Click Here** link to take you to the **Marking Pattern Summary** page where you can see the Marking Pattern Mappings that have been saved. To define mappings, at the district level, go to the **StudentInformation » Management » School Administration » Marks Administration Menu » Marking Pattern Mapping** page to setup default marking pattern mappings.

Marking Pattern Mapping

From this screen, you can display, add, change and delete data pertaining to marking pattern mapping.

Search Options

Sending District: [-- Search for District (optional) --]
Sending School: [-- Select a Building (optional) --]
Receiving School: [-- Select a Building (optional) --]
School Year: [-- Select a School Year (optional) --]
Show Active Only: ☑   [Search]

[Add Marking Pattern Mapping]

	Sending District ▲	Sending School	Receiving District	Receiving School	School Year	Last Update By	Active
			There are no records to display				

5. Enter search criteria in the **Search Options** section and click **Search**. If any existing marking pattern mappings were previously entered that match the search criteria, they will display. If additional mappings are needed, click **Add Marking Pattern Mapping**.
6. On the **Marking Pattern Mapping Detail** page, map the appropriate marks. Click **Save**.
7. Continue this process until all the necessary years are mapped.
8. At the building level, back on the **View Pending Students** page, select the student you wish to enroll and click the **Detail** button next to a student in the **District Transfer** section.
9. The **Pending Student Detail** page is displayed.
10. Click the **black arrow** icon to register the student.

11. The page refreshes and the **Student Registration Wizard** page is displayed.
12. The **Registration Pre-requisites** tab is populated with values from the transfer.
13. Choose a grade level from the **Grade** dropdown. Click **Next**.
14. On the **Complete Registration** tab, a majority of the values are populated off the student's record at the sending school and the registration defaults at the receiving school.
15. Fill in the required fields.
16. In the **Transfer Options** section, select: **I want to…**
    Transfer Course History, Transer Attendance, Transfer Assessment. Click **Next**.

	⭕ I don't want to transfer course history, attendance records and assessments.
	🔘 I want to ...
Transfer Options:*	☑ Transfer Course History (Currently not available for ITC to ITC transfer)
	☑ Transfer Attendance
	☑ Transfer Assessment

17. On the **Family Group** tab, select the appropriate Search and Matching Criteria. Click **Next**.
18. On the **EMIS** tab, make any needed changes. Click **Next.**
19. On the **Course History** tab, select the school years you wish to transfer marks for. Click **Next**.
20. On the **Attendance** tab, select the school years you wish to transfer attendance for. Click **Next**.
21. On the **Assessment** tab, select the assessments you wish to transfer. Click **Finish**.
22. If you do not transfer all course history or attendance, the only way to retransfer the information is to whack the student and have the sending school resend the transfer.
23. A message displays stating the student was successfully registered and any errors concerning Subject Areas or Area of Study.

Student Registration Wizard
From this screen users can register students

The Student saved successfully.

Student Number	Student Name	Warning/Error Message
SQ4898960	GALLAGHER,JEAN	Warning: Rank Weight '11' in the Course '0H0030 CP ENGLISH 9' was not found in the receiving school
SQ4898960	GALLAGHER,JEAN	Warning: AreaOfStudy 'FIN' in the Course '0H0090 CONCERT CHOIR' was not found in the receiving school
SQ4898960	GALLAGHER,JEAN	Warning: AreaOfStudy 'FOR' in the Course '0H0151 FRENCH II' was not found in the receiving school

Appendix A: Fields Transferred when a Student Moves within the District

- **Profile:**
  - General tab: All fields but Program & Home School IRN
  - Additional tab: Special Ed, County of Origin, Citizenship
  - Custom tab:
  - Private tab: All fields
  - FS Standing tab: All fields
  - FS Attendance tab: All fields
  - FD Attributes tab: All fields
  - FN Attributes tab: All fields
  - FN Graduate tab: All fields
  - Transportation tab: Vehicle Description, License Plate, Driver's License Number, State
- **All Course History**
- **All Contacts**
- **All Alerts**
- **All Assessments**
- **Community Service Hours**
- **All Medical Information**
- **Special Education Records**
- **Fees**

Memberships, Schedules, Attendance, and Discipline will not transfer to the new building.

Appendix B: Fields Transferred in a District to District Transfer within your ITC

- First Name
- Middle Name
- Last Name
- Called Name
- Social Security
- Gender
- Hispanic/Latino
- Local Ethnic Category
- Racial Group(s)
- Summative Race
- Citizenship
- Native Language
- Birthplace City
- Birthdate
- Home Language
- Mother's Maiden Name
- Country of Origin
- Graduation Year (Additional tab)
- Address of Residence
- Mailing Address
- Phone Number
- Email
- State Student ID (SSID)
- Legal First Name
- Legal Middle Name
- Legal Last Name
- Disability Condition
- Course History (optional)
- Attendance (optional)
- Assessments (optional)

Currently, the following items are not included in a district to district transfer:
Contacts, Free & Reduced Lunch Status, Alerts, Memberships, Medical,
Discipline, Special Education, Community Service, Misc Data,
Zero fields on FS, FD, FN records except Disability Condition

Appendix C: Fields Transferred in a District to District Transfer from Outside your ITC

- First Name
- Middle Name
- Last Name
- Called Name
- Social Security
- Gender
- Hispanic/Latino
- Local Ethnic Category
- Racial Group(s)
- Summative Race
- Citizenship
- Native Language
- Birthplace City
- Birthdate
- Home Language
- Mother's Maiden Name
- Country of Origin
- Graduation Year (Additional tab)
- Address of Residence
- Mailing Address
- Phone Number
- Email
- State Student ID (SSID)
- Legal First Name
- Legal Middle Name
- Legal Last Name
- Disability Condition
- Attendance (optional)

Currently, the following items are not included in a district to district transfer: Contacts, Assessments, Free & Reduced Lunch Status, Alerts, Memberships, Medical, Discipline, Special Education, Community Service, Misc Data, Zero fields on FS, FD, FN records except Disability Condition

Appendix D: Setting up COHI Mapping Defaults at the District Level

State Support recommends districts begin configuring Marking Pattern Mappings now. Once the Student Transfer page is linked to the Marking Pattern Mapping pages, districts will be able to begin using the saved mappings immediately.

Marking Pattern Mapping is currently only available for districts within your ITC.

Helpful Hint: The Student Transfer process will only transfer course history that is marked as Is High School credit. Marking Pattern Mapping only needs to set up for buildings with high school credit courses.

Searching for existing mappings:

1. With the district in context, navigate to **StudentInformation » Management » School Administration » Marks Administration Menu » Marking Pattern Mapping**.
2. To search for existing mappings, select the desired filters and click **Search**.

Marking Pattern Mapping

From this screen, you can display, add, change and delete data pertaining to marking pattern mapping.

Search Options

Sending District:	044024 - Galion
Sending School:	-- Select a Building (optional) -- ▼
Receiving School:	-- Select a Building (optional) -- ▼
School Year:	-- Select a School Year (optional) -- ▼
Show Active Only:	✔

Search

Add Marking Pattern Mapping

		Sending District ▲	Sending School	Receiving District	Receiving School	School Year	Last Update By	Active
🗑	✎	Galion	Galion High School	Lucas	Lucas High School	2019-2020	amy	🟢

Creating new mappings:

1. With the district in context, navigate to **StudentInformation » Management » School Administration » Marks Administration Menu » Marking Pattern Mapping**.
2. Click **Add Marking Pattern Mapping**.
3. In the **Sending District**: begin typing another district within your ITC.
4. Select the desired district.

Marking Pattern Mapping Detail
From this screen, you can display, add, change and delete data pertaining to marking pattern mapping detail.

Sending District:*	044024 - Galion
Sending School:	
Receiving School:*	
Marks Available to Transfer From School Year:*	
Active:	✔

[Save] [Save and New] [Cancel]

5. In the **Sending School**: select the appropriate building that awards courses for high school credit.
6. In the **Receiving School**: select the building in your district that awards high school credit, a high school for example. If your district has multiple high schools, the mapping will need done for each building.
7. Select the appropriate year from the **Marks Available to Transfer From School Year**.
8. The page will refresh and the course history mapping and marks mapping will display.
9. Choose the marking pattern rules/marks from the sending school that you would like to map into your building.
10. Next, verify the marks/grades mapping.
11. Click **Save**.

Marking Pattern Mapping Detail
From this screen, you can display, add, change and delete data pertaining to marking pattern mapping detail.

Sending District:*	044024 - Galion
Sending School:	GAHS - Galion High School
Receiving School:*	LUHS - Lucas High School
Marks Available to Transfer From School Year:*	2018-2019
Active:	✔

Sending Marking Pattern	Sending Marking Pattern Rule	Receiving Marking Pattern	Receiving Reporting Term	Receiving Mark Type	Receiving Significance Level
FULL	QTR2	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
FULL	FIN	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
FULL	AVG2	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
FULL	AVG1	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
FULL	QTR3	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
FULL	QTR1	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
FULL	QTR4	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
Qtr1	Qtr1	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
Qtr2	Qtr2	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
Qtr3	Qtr3	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
Qtr4	Qtr4	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM1	AVG1	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM1	Fin	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM1	QTR2	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM1	QTR1	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM2	QTR4	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM2	SEM2	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM2	QTR3	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --
SEM2	Fin	-- Not Loaded -- ✔*	-- Not Loaded -- ✔*	-- Not Loaded --	-- Not Loaded --

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○ Use Alpha Marks

○ Use Numeric Marks (Both Sending and Receiving School must be Numeric Marks)

Sending School Alpha Marks	Sending School Numeric Marks	Receiving School Alpha Marks	Receiving School Numeric Marks
A+	98.50 - 100.00	A+ ⌄	97.00 - 100.00
A	92.50 - 98.49	A ⌄	95.00 - 98.99
A-	89.50 - 92.49	A- ⌄	93.00 - 94.99
B+	86.50 - 89.49	B+ ⌄	91.00 - 92.99
B	82.50 - 86.49	B ⌄	85.00 - 90.99
B-	79.50 - 82.49	B- ⌄	83.00 - 84.99
C+	76.50 - 79.49	C+ ⌄	81.00 - 82.99
C	72.50 - 76.49	C ⌄	73.00 - 80.99
C-	69.50 - 72.49	C- ⌄	71.00 - 72.99
D+	66.50 - 69.49	D+ ⌄	69.00 - 70.99
D	62.50 - 66.49	D ⌄	63.00 - 68.99
D-	59.50 - 62.49	D- ⌄	61.00 - 62.99
F	0.00 - 59.49	F ⌄	0.00 - 60.99
I		I ⌄	
O		-- Not Loaded -- ⌄	
P		P ⌄	
S+		S+ ⌄	
S		S ⌄	
S-		S ⌄	
U		U ⌄	
WD		WD ⌄	
WF		WF ⌄	
WP		WP ⌄	

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[Save] [Save and New] [Cancel]

Appendix E: Webservices

F.Y.I.

F.Y.I.

A green dot designates the ITC is connected to the webservice and can send and receive student transfers.

A red dot denotes the ITC's webservice is down and cannot perform or accept any student transfers. Please try again later.

NOTE: It is recommended to **Refresh** the service prior to doing the ITC to ITC transfers.

Appendix F: Transfer Out History

Lists each student transferred out the building in context. Click on the **Detail** link next to the student's name to view more details about the student.

Transfer Out History

From this screen, you can view students that have been previously transferred from your building to another building or district.

Transfer Date Range: [_____] to [_____] [Search]

	Student	Grade	To School	To District	To Year	Job ID	Transfer Date
Detail	RICHARDS, HOLLY	09	Lucas High School	Lucas	2019-2020	53409	05/04/2020 09:09 AM
Detail	PATTON, GARY	09	Lucas High School	Lucas	2019-2020	53409	05/04/2020 09:09 AM

Student Transfer

From this screen, you can transfer the selected student to a building or a district and view the status of the transfers that have taken place.

To Building	To District	JVS	Transfer Date	Status
Lucas High School	Lucas	no	05/04/2020 09:09 AM	Accepted
Galion High School	Galion	no		

Make students available in: * [2019-2020 ▼]

Search For District: * [_____]

Building: [-- Select a Building (optional) -- ▼]

[Transfer] [Cancel]

Appendix G: Transfer In History

A list of students transferred into the building in context. Click on the **Detail** link next to the student to view what attendance, course history, and assessments were imported by the user.

Withdrawing Students Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
4/29/20	Entire document	Review and Update
10/8/19	Entire document	Review and Update

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Withdrawing a Student: Follow these steps to withdraw a student from a building or district. Withdrawal Codes are used to describe the reason a student is leaving school such as moving, dropout, etc. Withdrawal codes are also reported to EMIS so EMIS Codes are required when adding or editing a Withdrawal Code. Unless otherwise noted, see *Student and Registration Guide* for details**.**

☐ **Define Withdraw Codes –** Before withdrawing a student, verify that appropriate Withdraw Codes have been defined. You can view inactive codes by un-checking the **Show Active Only** checkbox.

Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Withdraw Codes

Withdraw Codes Maintenance
From this screen, you can display, add, change and delete data pertaining to withdraw codes.

Add Withdraw Code

		Code	EMIS Code	Name ▲	Description	Active
🗑	✏	99	99	Completed HS Grad require./course requir. & passed	Completed crse requ; passed assessments	●
🗑	✏	52	52	Death	Death	●
🗑	✏	48	48	Expelled	Expelled	●
🗑	✏	74	74	Moved: not known to be continuing	Moved;not known to be continuing	●
🗑	✏	79	79	No longer eligible to be enrolled in district	Reason for Enrollment (received reason) no longer valid	●
🗑	✏	76	76	Non-Attendance Accor. to 72 hour Rule	Non-attending according to 72 hour rule (Community Schools only)	●
🗑	✏	39	39	Non-enrolled student no longer receiving services	Non-enrolled student no longer receiving services	●
🗑	✏	**	**	Not Applicable, Did not withdraw/was not truant	N/A - WITHIN THE DISTRICT TRANSFER	●
🗑	✏	44	44	Not valid pub. community schl	Not valid pub. community schl	●
🗑	✏	73	73	Over 18 years of age	Over 18 years of age	●
🗑	✏	72	72	Pursued employment/work permit - Supt. approval on	Pursued employment/work permit	●
🗑	✏	35	35	Res. District no longer Responsible for Student	Resident Student Withdrew from Educating Entity with a Reason Code that indicates the Resident District no longer has a Responsibility for the Student	●
🗑	✏	75	75	Student compl. course require./did NOT pass requ.	Student completed crse;didn't pass assessments	●
🗑	✏	38	38	Student promoted beyond max grade/entity	Student promoted beyond max grade/entity	●
🗑	✏	81	81	Student reported in error - never should have been	Student reported in error - never should have been reported	●
🗑	✏	45	45	Tr. by Court Order/Adj/if court ordered other pub	Transf. Court Order/Adjud	●
🗑	✏	41	41	Tr. to another Ohio SD, local/exem vill/city, tr.	Transf. local,exempt,city	●
🗑	✏	42	42	Tr. to prive school, transcript req on file, Ed Ch	Transf. private schl	●
🗑	✏	46	46	Transferred out of the United States	Transf. out of U.S.	●
🗑	✏	40	40	Transferred to another School District outside of	Transf schl out of OH	●
🗑	✏	43	43	Transferred to home schooling, superint. approval	Transf to home schooling	●
🗑	✏	51	51	Verified Medical Reasons - Dr. authorization on fi	Verified Medical Reasons	●
🗑	✏	77	77	Withdrew due to 3314.26(non-tested 2 yr e-School (	Withdrew due to 3314.26(non-tested 2 yr e-School (Comm. Sch only)	●
🗑	✏	71	71	Withdrew due to truancy/non-attendance	Wd Truancy/non att	●
🗑	✏	37	37	Withdrew from Kindergarten	KG Student has withdrawn because it has been deemed to be in the best interest of the student if he/she waits one more year until starting his/her KG experience	●
🗑	✏	36	36	Withdrew from Preschool/PS student WD from PS prog	Withdrew from PS for any reason	●
🗑	✏	47	47	Withdrew pursuant to Yoder vs. Wisconsin	Wd Yoder vs. Wisconsin	●

☑ Show Active Only

☐ **Enter Final Mark** (optional) **–** Navigate to the Student Marks page for the final attending reporting period.

Navigation: StudentInformaion – SIS – Student – Marks – Student Marks

See Marks Guide for details.

Student Marks
From this screen, you can view a student's marks for each completed or present course.

☐ Show Completed Courses Only ~~Dropped~~ Withdrawn
Marking Pattern: Full Year

Course Section		Qtr1 Mark	Qtr2 Mark	Ex1 Exam	Sem1 Avg	Qtr3 Mark	Qtr4 Mark	Ex2 Exam	Sem2 Avg	Fin Fin
0H0051 - ALGEBRA I (Section 5)	•	A	B		A					
0H0068 - ZOOLOGY (Section 1)	•	A	A		A					
0H0071 - AMERICAN HISTORY (Section 6)	•	A	A		A					
0H0151 - FRENCH II (Section 2)	•	A	A		A					
0H0SHF - Academic Assistance/Study Hall (Section 11)	•									
0H1030 - *ACCELERATED ENGLISH 9 (Section 1)	•	B	B		B					
23 - Class of 2023 (Section 1)	•									

- Click the **course section** to add marks.
- Add the **student marks** as needed.

Student Mark Entry - DONOVAN, MARCUS
This screen is used to perform mark entry for a student

Show Marks List   Show Display Options   Show Comments List

[Save Changes]

Course Section	Mark	Value	General	
0H0051 - ALGEBRA I: Section 5	Mrk1	A		
	Mrk2	B		
	Ex1			
	Sem1	A		
	Mrk3			
	Mrk4			
	Ex2			
	Sem2			
	Fin			

☐ **Enter Withdraw Student Info –** Determine whether this is a building or district withdrawal and fill out other required withdrawal information. Be sure to set the student's new Student Status to **Inactive** (or another appropriate withdrawn Student Status code), and check the boxes to clear the student's Locker and Homeroom Assignments, if desired.

Navigation: StudentInformation – SIS – Student – Withdraw Student

District Withdraw

Building Withdraw

☐ **Verify Admission History Page** (optional) **–** View the Admission History Summary page to ensure that student withdrawal information has been properly updated.

Navigation: StudentInformation – SIS – Student – Admission History – View Admission History

Admission History Summary
This page displays admission and withdrawal history for the selected student

Galion
• Galion Middle School
   8/21/2017 - 5/24/2018
   8/20/2018 - 5/23/2019
• Galion High School
   8/21/2019 - 10/7/2019 Withdraw Code: 74 Moved: not known to be continuing

☐ **Edit Admission History Details** (optional) – You can edit Admission History details, to change admission dates, admission codes and student calendars, if needed.

Navigation: StudentInformation – SIS – Student – Admission History – Edit History Details

Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

School Year Type: Regular ▼

	Year	Date	Event	School	Calendar	Code
	2017 - 2018	Aug 14, 2017	District Admission	Galion		
	2017 - 2018	Aug 14, 2017	Building Admission	Galion Middle School	DFLT	
	2018 - 2019		Intrabuilding Progression	Galion Middle School	DFLT	
🖊	2019 - 2020	Jul 01, 2019	Building Admission	Galion High School	DFLT	
🗑 🖊	2019 - 2020	Oct 07, 2019	Building Withdraw	Galion High School	DFLT	Moved: not known to be continuing
	2019 - 2020	Oct 07, 2019	District Withdraw	Galion		

Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

School Year: 2019 - 2020
Event: Building Admission
School: Galion High School
Admission Date: *7/1/2019 📅
Admission Code: ▼
Calendar:* HS Default (Default) ▼

[Save] [Cancel]

☐ **Remove Next Year Admission** (optional) – If the student has been enrolled into the next school year already, this withdrawal will not have affected that admission. Click the **trash can** icon on the future admission record on the student's Edit History Details page to remove that admission as well.

Navigation: StudentInformation – SIS – Student – Admission History – Edit History Details

☐ **Re-Enroll Accidentally Withdrawn Students** (optional) – If you accidentally withdraw a student you did not intend to withdraw, you can re-enroll the student from the Edit History Details page. Simply delete the withdrawal event using the **trash can** icon. **Note:** This only applies during the school year. If you accidentally withdraw a student with a Summer Withdrawal, you will have to re-enroll them completely.

Navigation: StudentInformation – SIS – Student – Admission History – Edit History Details

Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

School Year Type: Regular ▾

		Year	Date	Event	School	Calendar	Code
		2018 - 2019	Aug 06, 2018	District Admission	Galion		
		2018 - 2019	Aug 06, 2018	Building Admission	Galion Middle School	DFLT	
	✏	2019 - 2020	Jul 01, 2019	Building Admission	Galion High School	DFLT	
🗑	✏	2019 - 2020	Oct 07, 2019	Building Withdraw	Galion High School	DFLT	Moved: not known to be continuing
		2019 - 2020	Oct 07, 2019	District Withdraw	Galion		

Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

Are you sure you want to delete the following admission event?

Building Withdraw on 10/7/2019

OK   Cancel

Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

The admission event was successfully deleted

School Year Type: Regular ▾

		Year	Date	Event	School	Calendar	Code
		2018 - 2019	Aug 06, 2018	District Admission	Galion		
		2018 - 2019	Aug 06, 2018	Building Admission	Galion Middle School	DFLT	
🗑	✏	2019 - 2020	Jul 01, 2019	Building Admission	Galion High School	DFLT	

You will need to go to the student's profile, and change the student's Status to the correct enrolled status (for example, from Inactive to Active or Non-Resident), and change the student's Grade Next Year to the appropriate grade.

Navigation: StudentInformation – SIS – Student – Edit Profile – General tab

You will also need to go to the **FS-Standing** tab on the student's profile, and correct the **District Withdraw Date** and **Withdraw Reason**, if the accidental withdrawal was a district withdrawal.

Note: Also, check the **Report to EMIS** checkbox on the **FN-Attributes** tab if it has been unchecked and the student should be reported to EMIS.

Review the student's schedule using the Request Assignments page. Un-check the **Show Active Only** checkbox. For each course section assignment with a stop date in the past (or on the current date), add a new assignment for the same course section starting the day after the stop date. For course section assignments with a stop date in the future (and the same as the start date), instead Remove those course section assignments (with the trash can icon and the Remove/Delete option) and re-assign the student to those course sections (linked to the student's request, if any) with the original start date.

Navigation: StudentInformation – SIS – Student – Student Schedule – Request Assignments

You can also re-enter the student's schedule on the Course Section Assignments page. Make sure to check Dropped and click Search to view Dropped course section assignments.

Navigation: StudentInformation – SIS – Scheduling – Course Section Assignments

Note that on this page, you will be unable to see the dropped assignments while adding each new assignment (assignments will no longer be linked to requests). Don't forget to click Save Changes when you are finished on this screen.

Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule:*	Default Schedule ▾	Schedule Result:*	Default Schedule Result ▾		Status:* ☑ Assigned ☐ Dropped
Course:			...	Course Term:	▾	☐ Removed
Date:	📅		Teacher:	▾	
Period:	▾				Search

| Add Course Assignment | Drop All Assignments | Schedule Study Halls | | | Save Changes | Cancel Changes |

		Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date	End Date
🗑	✏	0H0030	CP ENGLISH 9	1	1 (C205)	JEAN DELGADO	Full Year	Manual	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H0071	AMERICAN HISTORY	2	2 (C123)	DEBORAH WALSH	Full Year	Manual	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H0063	BIOLOGY	3	3 (C223)	MELINDA MONROE	Full Year	Manual	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H0285	CULINARY FUNDAMENTALS	3	4 (C113)	SHERRY DOYLE	Semester 1	Manual	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H0269	ROBOTICS	2	5A,5B (C103)	SARA JOSEPH	Semester 1	Manual	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H0171	Lunch	2	5C (CAFE)	ANDREA ORTEGA	Semester 1	Manual	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H0051	ALGEBRA I	3	6 (C212)	NICHOLAS COX	Full Year	Batch	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H3038	READING FUNDAMENTALS	1	7 (C105)	MAUREEN KIRK	Semester 1	Batch	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	0H3160	RR Academic Assist/Study Hall	5	8 (C213)	DUANE BANKS	Full Year	Manual	Dropped	Aug 21, 2019	Oct 07, 2019
🗑	✏	23	Class of 2023	1	11 (LIBR)	RUBY ERICKSON	Full Year	Manual	Dropped	Aug 21, 2019	Oct 07, 2019

When Removing assignments with the same start date and stop date in the future from the Course Section Assignments page, you should re-assign those courses on either the Request Assignments page (linked to the request), or on the Student Requests page.

Navigation: StudentInformation – SIS – Scheduling – Requests

Also, if you selected to clear locker or homeroom assignments when withdrawing the student, you will need to re-assign the student's locker and homeroom. See the *Assigning Lockers to Students Procedural Checklist* and the *Assigning Homerooms to Students Procedural Checklist* for more details.

If the student actually withdrew, and then came back at a later date, you would need to re-register the student, but only fill out the required fields on the Registration Pre-requisites tab of the Registration Wizard. When StudentInformation informs you of a Strict Match on the Possible Matches tab, you could re-activate that student's information.

Navigation: StudentInformation – SIS – Registration Wizard – Registration Pre-requisites tab

Navigation: StudentInformation – SIS – Registration Wizard – Possible Matches tab

NOTE ON EXPELLING STUDENTS: If a student is expelled and is not receiving instructional services, then the student should be withdrawn with code '48'. If the student returns, re-admit the student through the Student Registration Wizard screen. If the student does not return after the expulsion period is over, then the withdrawal reason would stay as code '48'. If a student is expelled, but is receiving instructional services, do not withdraw the student, simply report the discipline.

☐ **Withdrawing Students Between School Years** (optional) – If you withdraw a student as a summer withdrawal (after the end of one school year, and before the start of the next school year), you should change context to the new school year, then withdraw using a date before the start of the school year, but after the student's enrollment date (such as 8/1/19). You will see a warning message that requires you to confirm the summer withdrawal.

Navigation: StudentInformation – SIS – Student – Withdraw Student

Withdraw Student

From this screen, you can withdraw a student from the working school.

The withdraw date (08/01/2019) indicates a summer withdraw. A summer withdraw will delete all student records for the current school year except those required for EMIS reporting. Choose OK to proceed with a summer withdraw. Choose Cancel to select a date within the school year (8/21/2019 - 5/26/2020).

Records that will be removed:

Student Course Section Assignments

Student Course Requests

Student Absences

Student Marks

Student Fees

Student Alerts

Student Transportation

Student Homeroom

Student Locker

Student Transfers

Student Memberships

Student Discipline

[OK] [Cancel]

☐ **WITH Report** (optional) **–** Prints a list of students withdrawn between specific dates.

Navigation: StudentInformation – SIS – School – Student Reports – Withdrawal List

☐ **AWEX Report** (optional) **–** Prints a list of students admitted and or withdrawn between specific dates.

Navigation: StudentInformation – SIS – School – Student Reports – Admission/Withdrawal

ProgressBook
Student *Information*

Adding course terms for Satellite or ESC courses taught at another location with different course term start and end dates (EMIS Course Terms)

Change Log

Date	Section Number/Name	Change Description
11/29/18		Updated for FY19
9/1/2015	Task 5	Added clarification on students dropped from the class
8/26/15	All sections	Corrected some steps, added overall guidance on each step
04/08/15		Doc created

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Purpose

The purpose of this document is to guide you through the steps to create new course terms to cover the start and end dates for courses taken in a building outside the district. These courses may have start and end dates that fall outside the master calendar date ranges. By setting up a new course term and then using the EMIS Terms parameter to specify the dates of the course section, this enables CTRMEMIS to report the actual days the course meets.

With the new EMIS terms defined, CTRMEMIS will report the start and end dates for the course according to the EMIS term start and end dates. Course section assignment start and end dates will still reflect the building's term dates, however, CTRMEMIS will accommodate for that and report the student in the class full time if their course section assignment start date is equal to either the EMIS term start date or the course term start date from the building course terms. For the end date, no date will be reported on the GN record unless the student left the course before the end of the course section. The EMIS term end date will be used to determine the end of the course.

Limitations

This checklist was originally written from the perspective of school already in session and the original classes already existing on the master schedule. Once school starts and students are assigned to a course section, you cannot change the course term on a course section. These instructions guide you through moving the students from one course section with the local course term to a new section with the new course term and EMIS term dates defined specifically for the course term dates from another district.

At this time, we are not recommending districts extend the master calendar to accommodate these types of calendars. Dates outside the master calendar will be handled with new functionality in sub-calendar maintenance that is currently under development. Because this functionality hasn't been released yet, buildings would not be able to enter attendance for any days outside the master schedule this course term may meet.

Also, once students are assigned to the new course section, the course section assignment dates will still reflect the building course term dates and not the EMIS term dates at this time. CTRMEMIS processing will handle the differences in dates and will use the EMIS term dates for reporting of staff and student class record.

Task #1 – Add new course terms

A new course term will need to be added so that different EMIS term dates may be specified. This will allow the existing course term to remain for local use while the new course term will be used specifically for those courses taken outside the district but are required to be reported by the district reporting the student. To add a new course term:

1. Navigate to : ***StudentInformation* » *Management* » *School Administration* » *Scheduling Administration* » *Initialization* » *Course Terms*** .
2. Click Add Course Term and enter the required information.

Task #2 – Add a Marking Pattern for each new course term

The new course term will also require a marking pattern. For this term, only those reporting periods where the district will be collecting marks needs to be defined for this marking pattern. For example, if the district will only be collecting a final mark for the course, then only a final mark needs to be specified in the marking pattern associated with the new course term.

1. Navigate to : ***StudentInformation* » *Management* » *School Administration* » *Marks Administration Menu* » *Marking Patterns***.
2. Click Add Marking Pattern
3. Enter the required information and check only one Course Term name. *Do not mark* Set as Default.
4. Next enter Marking Pattern Rules. Only enter marking pattern rules for marks you are recording.

StudentInformation > Management > School Administration > Marks Administration Menu > Marking Pattern Rules Maintenance

Marking Pattern Rules - Satellite Courses

From this screen, you can display, add, change and delete data pertaining to marking pattern rules.

Add Pattern Rule   Cancel and Return

		Name	Mark Type	Sequence Number	Reporting Term ^	Significance	Credit Percentage	Marks Start Date	Marks Cutoff Date
✕	✎	Final	Final Mark	1	Final	Earned	100		

Task #3 – Update EMIS term dates

For the new course term, update the EMIS Term dates at the district level. Use the start and end date the course actually meets even if those dates are outside the boundary of the current building's master calendar start and end dates. To update EMIS Term Dates:

1. Change context to the district level
2. Navigate to: ***StudentInformation » EMIS » Maintenance » EMIS Term Dates***.
3. Edit applicable course terms and adjust the start and stop dates. The dates should indicate the term start and end dates of the location where the course is actually taught.

Task #4 – Create new course sections for satellite courses & assign to new course term(s)

In this step, you will update the course section with the new course term. If the course section exists and no students have been assigned yet, you can just change the course term associated with the section. If students have been assigned, create a new course section using the new course term.

1. Navigate to: ***StudentInformation » Management » School Administration » Scheduling Administration. » Course Maintenance » Course Sections*** . Create a new course section and assign the newly created course term.
   - **If a course section exists and no students have been scheduled into the course section** yet, edit the existing course section and update the course term changing it to the newly created course term.
   - **If a course section exists and students have already been scheduled into the course section**, then you'll need to add a new course section making the course term the newly created course term and then follow the directions in **Task 5** to transfer the students from the old course section to the new section.
2. Add Teacher History records manually or run Add Missing on the Teacher History Maintenance page.

Task #5 – Create ad hoc memberships consisting of the students assigned to the "old" section

If students had already been scheduled into the course section, you'll need to move the students from the old course section to the new course section. This step details how to accomplish this using ad-hoc membership groups to move the students from one course section to another. If students haven't been scheduled into the course section yet, add course section assignments for the newly created course section.

1. Navigate to **_StudentInformation » My Account » Ad hoc Memberships_**.
2. Use the Course Section Info tab to create a separate ad hoc membership for each "old" satellite section.

NOTE: Ensure your ad hoc membership includes students who previously dropped the "old" section. (If you're switching course sections after school has started, dropped students must be included. For EMIS reporting, ODE wants to see all students in the course section, even if the student only attended the class one day. Once a dropped student is added, you must update the course section assignment with the original stop date of the date the student dropped the class.

Task #6 – Bulk Remove students from "old" section

In this step, students are removed from the old course section in preparation for assigning to the new course section. If no students have been assigned yet to the course section, then you can skip this step and go on to adding students to the course section.

1. Navigate to: **_StudentInformation » SIS » Scheduling » Bulk Course Section Management_**.
2. Bulk remove all students from the section
3. Repeat for all "old" satellite sections

Task #7 – Bulk Assign students into "newly created" Satellite sections using ad hoc memberships

If students were removed from a prior section, use the instructions in this step to add them back to the newly created course section.

1. Navigate to: ***StudentInformation*** *»* ***SIS*** *»* ***Scheduling*** *»* ***Bulk Assign***.
2. Select Search by Ad Hoc Membership
3. Bulk assign students that were in "old" satellite sections into new satellite sections
4. Use the first day of the term for satellite course as the assignment start date. Later you can manually adjust any students that may have come into the section after the start of class.

NOTE: If the start date is before the master calendar start date, use the first day of the master calendar as the start date. When CTRMEMIS is processed, it will report the EMIS term start date instead of the master calendar start date.

Task #8 – Run CTRMEMIS in update mode before resubmitting data

Assigning Attendance Patterns to Students

Change Log

Date	Section Number/Name	Change Description
10/31/14	Entire document	Fix spacing - cosmetic

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Step 1 - Create Attendance Patterns

Beginning with the 14.5 release, the Attendance Pattern Codes used for EMIS no longer reflect predefined codes from ODE. Each district will be required to define a set of attendance patterns to be used across the district. Prior to each district

defining their own attendance patterns, the previous attendance patterns used are still valid codes should you choose to use them instead of defining your own codes. There are several factors to keep in mind when defining attendance pattern code values:

- Only one attendance pattern may be designed as the Default value for all grade levels (**) on the building's default calendar
- Each attendance pattern may be assigned to multiple calendars as long as the grade levels assigned to each of those calendars is different. There can be no duplication of grade levels between the two calendars. (ex: AM Cal: Att Patt: HD, Grade Level KG, /PM Cal: Att Patt: HD, Grade Level: PS)
- If there is a chance a group of students may have different attending days than other students, a separate pattern is needed
- Each attendance pattern may represent students in multiple grade levels

Adding Attendance Patterns

With the district in context, navigate to *__StudentInformation__* >> *__Management__* >> *__School Administration__* >> *__EMIS__* >> *__Attendance Pattern Maintenance__*.
Initially, all previously used Attendance Pattern codes from last year will display. Add and/or Inactivate codes as needed to define the set of codes to be used for all buildings.

The following example provides a separate pattern for Seniors, AM or PM only calendars, Kindergarten Late/Staggered Start and an Alternative Schedule.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

Attendance Pattern Maintenance
From this screen, you can display, add, change and delete Attendance Patterns.

The Attendance Pattern was successfully saved

Add Attendance Pattern

	Attendance Pattern ^	Attendance Pattern Description	Is Active
🔒	**	Not Applicable	💡
✏	AM	AM Only Calendar	💡
✏	AS	Alternative Schedule	💡
✏	KL	KG Late Start	💡
✏	PM	PM Only Calendar	💡
✏	PS	PS Alternate Days	💡
✏	SR	Seniors	💡
☑ Show Active Only			

1. With the district in context, navigate to: *__StudentInformation__* » *__Management__* » *__School Administration__* » *__EMIS__* » *__Attendance Pattern Maintenance__*.

a. Add an attendance pattern by clicking **Add Attendance Pattern**.
b. Type in a **Code** that makes sense to you and your district.
c. AM is used as the code in the example following this step by step for the pattern assigned to students who attend mornings only.
d. Next, give the attendance pattern a **Name** that represents the group.
e. Make sure the **Is Active** checkbox is checked. Attendance patterns that do not have this box checked will not be available on Sub-Calendar Maintenance.
f. Click **Save**.
g. See the example screenshot below this step by step.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance   [Find Students] Q

Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

Attendance Pattern Code:	AM
Attendance Pattern Description:	AM Only Students
Is Active:	✓

Save   Cancel

Inactivate any attendance patterns that will not be used. If you don't want any building to use an existing attendance pattern code, make it inactive so there is no chance it may be used. If an Attendance pattern is already assigned to a sub-calendar, do not inactivate it until you have assigned another attendance pattern to the calendar.

Step 2 - Assigning Attendance Patterns to Sub-Calendars

Each calendar that is to be reported to EMIS must have an attendance pattern assigned.

1. With the building in context, navigate to: ***StudentInformation » Management » School Administration » Scheduling Administration » Sub-Calendars.***

   a. Click the [✏] next to the sub-calendar you wish to assign an attendance pattern to.

   b. Under the EMIS section, select the appropriate Attendance Pattern Value from the dropdown.

   c. If the sub-calendar is not the default calendar, uncheck the checkbox for the **All Grade Levels - **:** prompt. Once unchecked the Grade Levels dual select box will become available. Select all grade levels that apply to this calendar/attendance pattern combination.

   d. For the **To Be Reported:** value, check the appropriate radio button to indicate whether the calendar is to be reported in Days or Hours.

   e. Enter a date in the **Date of Spring Administration - Math Test:** date box if applicable to students assigned to this calendar. Save a blank date to report the **Date of Spring Administration** as "00000000".

2. ***Not Expected to be in Attendance between the first and last day of school on every:***

   a. The checkboxes in this section indicate whether students assigned to this calendar may not attend a specific day of the week consistently (ex: students may only attend MWF and never T or TH).

   b. Check the box beside each day where students are ***NOT*** expected to attend each week.

Not expected to be in attendance between the first and last day of school on every:

Monday: ☐

Tuesday: ☐

Wednesday: ☐

Thursday: ☐

Friday: ☐

3. ***Expected to be in attendance between the first and last day of school on every:***

    a. The checkboxes in this section indicate the days outside of a normal school week where students are expected to be in attendance every week.

    b. Check the box beside each day where students ***ARE*** expected to attend each week.

Expected to be in attendance between the first and last day of school on every:

Saturday: ☐

Sunday: ☐

    c. Check the **Report to EMIS:** ☑ Checkbox.

    d. Click ***Save*** to Save the record.

    e. The following prompt will appear, Click on Continue. This will update the attendance pattern on the FD record for any student who is assigned to this sub-calendar.

StudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendars [Find Students]

Sub-Calendar Maintenance
From this screen, you can display, add, change and delete data pertaining to Sub-Calendars.

By saving your changes the attendance pattern on the FD records of Students associated with this calendar will be updated.

Continue   Cancel

Any student assigned to this sub-calendar will now show the Attendance pattern associated with this calendar on their current FD record.

Repeat the steps listed above for each sub-calendar in each building that is to be reported to EMIS.

Step 3 - Assigning Attendance Patterns to Students Individually

When a student has a calendar change, it will most likely mean an attendance pattern change as well. There is a new element on the student's FD record indicating which Calendar they are assigned to. This is in addition to the Calendar field on the General Tab. The calendar on the FD tab controls the attendance pattern assignment. Follow these steps to make a calendar change for a student.

1. With the building in context, navigate to: ***StudentInformation*** **»** ***SIS*** **»** ***Student*** **»** ***Edit Profile***.
2. Find the student you wish to perform a calendar change for.
3. On the General Tab, select the appropriate calendar from the **Attendance Calendar:** dropdown.
4. Click Save.
5. A new screen will appear indicating the student's previous calendar assignment, their new calendar assignment and a Calendar Change Effective Date field.
6. Enter the Effective Date of the calendar Change. The date selected must be a day within the school year.
7. Click Save.
8. Next, select the FD – Attributes Tab
9. You will need to add a new Attributes record with the updated attendance calendar if this is a true calendar change and not a correction to existing calendar assignment.
10. Enter the Effective Start Date. Use the same date that was used on the General Tab for the Calendar Change Date.
11. Select the appropriate Calendar from the Reporting Calendar Dropdown. When a calendar is selected, the Attendance Pattern value will change to show the attendance pattern associated with that calendar.
12. Click Save to save the record.

Attendance Pattern: AS - Alternative Schedule

Reporting Calendar: GR - Graduates/Early release

☐ Exclude FD Records from Fall Initialization Updates

Step 4 - Assigning Attendance Patterns to Students Using Student Profile Bulk Update

FD Calendar assignments may be made in bulk using the Student Profile Bulk Update process. Before updates can be made, an Ad-Hoc Membership group must first be created for the students you wish to update. Once the group has been created, follow these steps:

1. With the building in context, navigate to: ***StudentInformation » Management » Ad-Hoc Updates » Student Profile Bulk Update***
2. Select the Ad Hoc Membership group you wish to perform the update for.
3. Click Next until you get to the FS-Standing & FD-Attributes Effective Date Tab.
4. If you're updating records as of the beginning of the school year, enter the effective date of 07/01/2014. This will update an existing FD record if it already exists. If you're making a calendar change mid year, enter the effective date of the change and a new FD record will be created to reflect the calendar change.
5. Scroll down the page to the FD Attributes Box.
6. Check the Box beside Reporting Calendar.
7. Select the appropriate Reporting Calendar from the Dropdown.
8. The Attendance Pattern checkbox will automatically be checked as well as the Attendance pattern value associated with the calendar will be displayed.
9. Click Next until you get to the Review Updates Tab. Examine your selections to ensure they are correct. There is no back-out once the updates are made.
10. Click Submit.

NOTE: If you use the 7/1/2014 Date to perform the update, this will update the student's initial record for the beginning of the school year. If you choose to use the first day of school, the update will ADD a new FD record with the new calendar value and attendance pattern. The prior record will be reported with whatever calendar and pattern it had been assigned when the release was first installed.

How to Mass Update Core Subject Area or Dual Credit field in Course Maintenance

Change Log

Date	Section Number/Name	Change Description
11/5/14	Entire document	Update screenshot and breadcrumb trails
09/29/14	Entire document	Added Dual Credit option
11/1/11	Entire document	Updated sch yr
9/29/11	Objective	12.0.0 Updates - Updated Screenshot

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F.Y.I. One year or "unit" of instruction is defined as a minimum of 120 hours of course instruction, except that for a laboratory course, "one unit" means a minimum of one hundred fifty hours of course instruction.

F.Y.I. "One-half unit" means a minimum for 60 hours of course instruction, except for physical education courses, "one-half unit" means a minimum of one hundred twenty hours of course instruction.

F.Y.I. All courses in which high school credit is earned need to have the Core Subject Area updated for the current year, the future year, and prior years, regardless if where the course was taken. (Taken at the JVS, Post Secondary Institution, another district, or the middle school.)

F.Y.I. Ultimately it's the District's decision as to which Core Subject Area they choose for a course. There are no steadfast rules.

F.Y.I. Dual Credit field on General tab of course needs updated for any course in which a student is earning dual credit for HS and college.

Task #1 – Run CRSE report to verify courses are marked appropriately

F.Y.I.

All courses that earn High School Credit need a CORE Subject Area value.

1. Change Context to the building level and 10/11.
2. Navigate to : ***StudentInformation » SIS » Scheduling » Scheduling Reports » Course Curriculum (CRSE)***.
3. In the **Course Type** dual select, choose the course types that count for high school credit. (Course type examples: Class, Satellite, PS, ESC, etc.)
4. Leave the other dual selects empty except for **Fields To Display** dual select.
5. In the **Fields To Display** filter pull the CORE Subject Area and Is Dual Credit fields to the right.
6. Choose the report sorting options in the **Sorting Options** filter.
7. Click **Submit**.
8. Wait for the report to complete on the **Batch/Report Management** screen.
9. The following is a sample of the report output:

REPORT: DASL – REPO CRSE		HIGH SCHOOL						COURSE CURRICULUM			
SCHOOLYEAR: 2014-2015									PAGE 1 OF 1		
									RUN AT 9:58 AM 11/5/2014		

COURSE CODE	COURSE NAME	GR	Incld Crdt	Incld GPA	Hon Roll	High Sch Crd	Rept To EMIS	Credit Units	Dual Crd	CORE Subj Area
137	CORE GEOMETRY	11;12	Y	Y	Y	Y	Y	1.000000	N	MTO
138	PRE-ALGEBRA	09	Y	Y	Y	Y	Y	1.000000	N	MTO
139	CORE ALGEBRA I	10	Y	Y	Y	Y	Y	1.000000	N	MTO
140	ALGEBRA I	09;10;11;12	Y	Y	Y	Y	Y	0.000000	N	MTO
142	CORE ALGEBRA II	10;11	Y	Y	Y	Y	Y	1.000000	N	MTA
143	ALGEBRA II	09;10;11;12	Y	Y	Y	Y	Y	1.000000	N	MTA
144	GEOMETRY	10;11;12	Y	Y	Y	Y	Y	1.000000	N	MTO
150	COLLEGE PREP ALGEBRA	12	Y	Y	Y	Y	Y	1.000000	N	MTO
931	ONU ALGEBRA/TRIGONOMETRY	11;12	Y	Y	Y	Y	Y	1.000000	N	MTO
136-2	CONSUMER MATH OL	12	Y	Y	Y	Y	Y	1.000000	N	MTO
142-2	ALGEBRA II CCSS OL	10;11	Y	Y	Y	Y	Y	1.000000	N	MTA

10. Use the report to:
    a. Make sure courses that marked as Is High School Credit do have a credit amount listed. Course 140, outlined in red in the example report output, is marked as Report to EMIS and Is HS Credit but is worth zero credits.
    b. Make sure the Dual Credit flag is marked for the appropriate courses.
11. Districts can use the EMIS Subject Area and Subject Area for Credit values to determine what the CORE Subject Area value should be but ultimately it is the District's decision.

Task #2 – Mass update CORE Subject Area or Dual Credit fields on Course in Course Maintenance in a prior year

This task needs completed at the High School level and Middle School level (provided your Middle School offers courses for high school credit)

1. Navigate to : *__StudentInformation__* » *__Management__* » *__Ad-Hoc Updates__* » *__Bulk Course Update__*.
2. Use the Filters to select courses that need updating.
   a. Since only courses that are High School credit and reportable to EMIS need updated make sure the ☑ Is High School Credit Only and ☑ Report To EMIS Only boxes are checked.
   b. Click Preview Courses .
3. The screen refreshes and the Course Filters are hidden. Click [Show Course Filters] to view the filters.
   a. Now the Update Directives section displays at the top of the screen and the list of courses is below the Update Directives section.
   b. In the School Years To Update filter pull all years over to the right.
   c. The current school year isn't listed in the filter by design. SI automatically assumes the courses in the year in context need updated.
4. In the I want to update section, either choose CORE Subject Area or Dual Credit radio button.
   a. If Core Subject Area is selected then choose a CORE Subject Area from the dropdown that all courses selected will be updated to.
   b. If Dual Credit is selected then click the Dual Credit checkbox to update that field for the selected courses or unclick the Dual Credit checkbox to uncheck the Dual Credit field for the selected courses.
   c. Click Update Selected Courses .
   d. The following message will display

   All selected courses were successfully updated with the selected CORE Subject Area.

Task #3 – Run Bulk Course Update with each prior year in context

Repeat Task #2 with each prior year in context to catch any courses that were prior year but marked as do not roll course to next year.

Example: Spanish 1 is a course in 13/14. It is not marked to **Roll course to next year:** in Course Maintenance, therefore the Spanish 1 didn't get copied up to 14/15 during SYI.

How to Mass Update Core Subject Area or Dual Credit Fields on Manual Course History Records

Change Log

Date	Section Number/Name	Change Description
11/5/14	Entire document	Update screenshots and breadcrumb trails
09/29/14	Entire document	Added Dual Credit option
12/18/13	Objective	14.2.0 Updates – updated screenshot
09/29/11	Objective	12.0.0 Updates - Updated screenshot

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F.Y.I. One year or "unit" of instruction is defined as a minimum of 120 hours of course instruction, except that for a laboratory course, "one unit" means a minimum of one hundred fifty hours of course instruction.

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F.Y.I. Ultimately it's the District's decision as to which Core Subject Area they choose for a course. There are no steadfast rules.

F.Y.I. Dual Credit field on General tab of course needs updated for any course in which a student is earning dual credit for HS and college.

Task #1 – Mass update CORE Subject Area or Dual Credit fields on Manual Course History Records

F.Y.I.

All manual course history records that are marked as IS High School Credit need a CORE Subject Area value.

1. Change your context to the building level in the current school year.
2. Navigate to : **_StudentInformation_** » **_Management_** » **_Ad-Hoc Updates_** » **_Bulk Manual Course Update_**.
3. In the **Manually Entered Course School Years** filter, select the years to update.
4. Click **Next >** to advance to the **Choose originating schools** tab.
5. Make sure there is a check in the box next to **High School Credit Manually Entered Courses Only** ☑.
6. The district can choose to update the manual course history for all originating schools at one time or by each originating school individually.
7. State Support recommends running the Manual Bulk Update by one Originating School at a time.

Bulk Update Manual Course Core Subject Area
From this screen you can bulk update the Core Subject Area on Manually Entered Courses

| Choose school years | Choose originating schools | Choose filters | View courses and update records | View summary |

[< Prev] [Next >]   [Summary >>]

Choose whether to view and update manually entered courses included in High School Credit only.

High School Credit Manually Entered Courses Only ☑

Choose the originating schools to update.
If no originating schools are chosen, records for all orginating schools will be updated.
The list contains the originating schools on the manually entered courses for the school years chosen.

Manually Entered Course Originating Schools
```
ELIDA HIGH SCHOOL
KALIDA LOCAL SD
POST SECONDARY/OUT OF STATE
SHAWNEE HIGH SCHOOL
```

Chosen
```
APOLLO JVSD
```
← →
⇐ ⇒

8. In the **Manually Entered Course Originating Schools** filter, select the desired schools and move them over to the **Chosen** filter box.
9. Click **Next >** to advance to the **Choose filters** tab.
10. Use the filters to narrow down the list of courses to update.

11. In the screenshot below, the Subject Area of Mth-MATH is used as a filter.

12. Often times manual course history records are entered in a variety of different ways. One user typed in an Algebra course using only the appreviation of ALG, another user used the complete name of Algebra.

13. Users can utilize the **Or like** `alg` filter to search for courses.

14. Click **Next >** to view the courses found that match the search criteria and advance to the **View courses and update records** tab.

15. As you can see from the screenshot below, some Algebra courses were entered into manual course history using the abbreviation ALG and other manual courses history records were typed into using the full word ALGEBRA.

	Code ^	Short Name	Name	Is HS Credit	CORE Subject Area	Records
☐	1015	ALGI	ALGI	☑		1
☐	70047	ADVANCEDALG	ADVANCEDALG	☑		1
☐	70050	TECHNICALGEOM	TECHNICALGEOM	☑		8
☐	70052	ALGEBRA1	ALGEBRA1	☑	SCP	16
☐	70053	ALG2	ALG2	☑		23
☐	70053	ALGII	ALGII	☑		8
☐	ALGII	ALGII	ALGII	☑		28

☐ Show Manually Entered Courses Missing CORE Subject Area Only

16. The **Records** column details how many manual course history records will be affected if the update is completed.
17. In the I want to update section, either choose CORE Subject Area or Dual Credit radio button.
    a. If Core Subject Area is selected then choose a CORE Subject Area from the dropdown that all courses selected will be updated to.
    b. If Dual Credit is selected then click the Dual Credit checkbox to update that field for the selected courses or unclick the Dual Credit checkbox to uncheck the Dual Credit field for the selected courses.
18. Place a check in the box next to the courses that you want to be updated.
19. If a course already had a CORE Subject Area or the Dual Credit field marked that will display in the corresponding column.
20. Click **Update Selected Records** .
21. The screen will flash and the same list of courses will be displayed except now the corresponding column will be filled in for every course you selected to update.
22. Click **Summary >>** to view the number of manual course history records that still need updating from the originating school selected on the second tab named **Choose originating schools** .
    Click **< Prev** twice to return to the **Choose filters** tab.
23. Repeat the process of filtering and updating courses again until all manual course history records from the originating school selected on tab two have been updated.
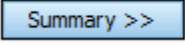
Task #2 – Repeat process in Task 1 for each originating school

All manual course history records that are marked as Is High School Credit need updated with a CORE Subject Area.

Task #3 – Verify the appropriate manual course history records were updated with a CORE Subject Area.

1. Navigate to : ***StudentInformation*** » ***Management*** » ***Ad-Hoc Updates*** » ***Bulk Update Manual Course Core Subj Area***.
2. Click [Summary >>] to view the number of courses missing a CORE Subject Area.

Once the marks are imported from the JVS using the Home School Import, please verify again that all manual course history records have a CORE Subject Area. JVSDs aren't required to report CORE Subject Area so there is a good chance manual course history imported from the JVS will not have the CORE Subject Area filled out.

Appendix A – How to erase the CORE Subject Area field on manual course history entries if they were erroneously updated

1. Navigate to : ***StudentInformation*** *» **Management*** *» **Ad-Hoc Updates*** *» **Bulk Update Manual Course Core Subj Area***.
2. Select the school years of the manual course history and originating school you wish to clear the CORE field on 1st and 2nd tabs.
3. Use the filters on the [Choose filters] tab to select the manual course history records you wish to clear the CORE field on.
4. On the 4th tab named [View courses and update records], choose [View courses and update records] in the **CORE Subject Area:** dropdown.
5. Enter a check in the box next to the courses you wish to clear the CORE field.

Choose school years	Choose originating schools	Choose filters	View courses and update records	View summary

< Prev   Next >   Summary >>

Select the manually entered courses to update. Choose a CORE subject area value and click the 'Update Selected Records' button. Only records matching the school years and originating schools selected in the previous tab will be updated.

CORE Subject Area: [Clear CORE Subject Area]   ▼

☐ Select All   Update Selected Records

	Code ^	Short Name	Name	Is HS Credit	CORE Subject Area	Records
☐	70002	H.S.MATH	H.S.MATH	☑	MTA	11
☑	70002	SENIORMATH	SENIORMATH	☑	MTO	1
☑	BUSMA	BUSINESSMATH	BUSINESSMATH	☑	MTO	7
☑	SSMTH	SSINTMTH3	SSINTMATH3	☑	MTO	2
☑	SSMTH	SSINTMTH3	SSINTMTH3	☑	MTO	1
☐	TRMTH	TRANMATH	TRANMATH	☑	MTO	1
☐	TRMTH	TRANSMATH	TRANSMATH	☑	MTO	2
☐	TRNMT	TRANMATH	TRANMATH	☑	MTO	1

☐ Show Manually Entered Courses Missing CORE Subject Area Only

Total Manual Course Records
26

6. Click [Update Selected Records] .

7. The screen will flicker and the same list of filtered courses will be displayed except the courses you chose to update will no longer the have the CORE Subject Area column filled out.

	Code ^	Short Name	Name	Is HS Credit	CORE Subject Area	Records
☐	70002	H.S.MATH	H.S.MATH	☑		11
☐	70002	SENIORMATH	SENIORMATH	☑		1
☐	BUSMA	BUSINESSMATH	BUSINESSMATH	☑		7
☐	SSMTH	SSINTMTH3	SSINTMATH3	☑		2
☐	SSMTH	SSINTMTH3	SSINTMTH3	☑		1
☐	TRMTH	TRANMATH	TRANMATH	☑	MTO	1
☐	TRMTH	TRANSMATH	TRANSMATH	☑	MTO	2
☐	TRNMT	TRANMATH	TRANMATH	☑	MTO	1

☐ Show Manually Entered Courses Missing CORE Subject Area Only

Direct Certification Input File for Free and Reduced Procedural Checklist

The EZ Query – Reports – SIS Student Search function can be used to produce the Direct Certification input file to be submitted to the State Department for Free and Reduced (CRRS).

Change Log

Date	Section Number/Name	Change Description
5/14/20	Entire document	Review and update

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Task #1 – Generate Output using EZ Query – Reports – SIS Student Search

1. Navigate to: **StudentInformation** » **EZ Query** » **Reports** » **SIS Student Search**.
2. At the district level, on the **Select Schools** tab, select the applicable buildings by moving them to the right-side box. Click **Next**.
3. On the **Filter Criteria** tab, if you want all the students, click **Next**. If you want to limit the selected students, use the different filter tabs to locate the field(s) you want to filter on. Ex. the Free/Reduced Lunch Status field is on the EMIS tab. Click **Next**.
4. On the **Field Selection** tab, use the selection tabs to mark the fields to include in the output.
   a. On the **Students** tab, select **First Name**, **Last Name**, **Student Number**, **Birthdate** and **Gender**.
   b. On the **Enrollment** tab, select **Home School IRN**.
   c. On the **Addresses & Contacts** tab, select **Student Home Phone**, **Mailing Address Street**, **Mailing Address Street2**, **Mailing Address City**, **Mailing Address State**, **Mailing Address Zip**, **Primary Contact First Name**, and **Primary Contact Last Name**.
   d. On the **EMIS – FS-Standing** tab, select **District of Residence**.
   e. Click **Next.**
5. On the **Summary** tab, under **File Download Options**, for the **File Download Type**, select **TAB** and for the **Download Method**, select **Download**. Click **Finish**.
6. A Download File pop-up screen will display. Click **Download File**. Click **Save** to save the file to your desktop. When the download is complete, click **Finish**.

The input file must be tab-delimited and have the fieldnames in the header record. The required fields are **lastname**, **firstname**, and **dateofbirth**. If you supply any other data, the header must contain the fieldname. The fieldname must match their list.

The data in the input file must match the corresponding ODE data for the student to appear in the output file. The IRN is exempt from this rule, this is not needed to be compared. The IRN is there for your information in the output file.

Task #2 – Import the File into Excel to Manipulate the Data

1. Open **Excel**.
2. On the **main menu bar**, click **Data**. Under **Get Data**, click **From Text/CSV**.
3. Locate the EZ Query output file that was saved to your desktop. Select the file and click **Import**. In the **Text Import Wizard**:
   a. Step 1 – Leave the File Origin at 1252: Western European (Windows).
   b. Step 2 – Leave the Delimiter set to Tab.
   c. Step 3 – Leave the Data Type Detection set to Based on first 200 rows.
   d. Click **Load**.

   Now the data is in an excel spreadsheet. Rearrange the columns so they are in the correct order. You will need to add blank columns for the following: middleinitial and parentmiddleinitial. You will also need to change the column headers to match the list. Once you are finished, save the file as type **Text (Tab delimited) (*.txt)**.

Example:

Direct Certification File FieldNames	EZ Query FieldNames
lastname	lastname
firstname	firstname
dateofbirth	birthdate
middleinitial	
parentlastname	primarycontactlastname
parentfirstname	primarycontactfirstname
parentmiddleinitial	
address1	mailingaddressstreet
address2	mailingaddressstreet2
city	mailingaddresscity
state	mailingaddressstate
zip	mailingaddresszip
childgender	gender
phonenumber	student home phone

ProgressBook StudentInformation

FY21 Period A Assessment Checklist

Change Log

Date	Section Number/Name	Change Description
3/12/21	DPR Growth (GD)	Updates for new Renaissance Star replacement for DPR Growth (GD)
2/10/21	NGA – Next Generation Assessment (GN)	Added info regarding the Reading Promotion Score
1/7/21	EOC – End of Course Assessment (GE)	Update to the Fall Window section
1/6/21	EOC – End of Course Assessment (GE)	Removed reference to Appendix A
11/5/20	Alternate Assessment (AASCD), High School (GX)	Updated the Score Not Reported values
10/5/20	EOC Assessments	Updated the date required to be reported for spring FY20 EOC assessments
10/2/20	Run Reports to Verify Assessment Data	Updated Screenshot
10/1/20		Document creation for FY21

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Assessment Imports

The chart below includes all the available assessment imports and pertinent data to each.

Import Name	Assessment Type	Status	File Layout Required
ACT WorkKeys Vendor File	ACT WorkKeys	Current	.csv
ACT WorkKeys Import from Template	ACT WorkKeys	Current	.csv
AP Exam	AP Exams	Current	.csv
Assessment Extract	Assessment Import File (various assessments)	Current	.csv
DPR Growth	Aka DPR Growth, DORP or NWEA Assessment (MAP)	Current	.csv Combo File Format
KRA	KRA	Current	.csv
OAA		Not Used	
OAA & OGT Alternate		Not Used	
OCTCA	WebXam; CTE Student Assessment; OCTCA	Current as of 18.2.0 Release **NOT USED FOR FY20 RESULTS**	.csv
OCTCA FY20 Only	Results for the FY20 OCTCA – updated import required in order to import the Score Not Reported for assessments that were awarded based on the course grade	Current	.csv
ODDEX File	ACT, AP Exam, PS ELA, CTE Technical (OCTCA), DPR Growth, End of Course, Industry Credential, International Baccalaureate, KRA, NGA, OELPA, OGT, PS COS, SAT, Student Achievement (grades 3-8 alt. assessment), WorkKeys	Current	.txt
OELPA	OELPA	Current	.txt
OELPS	OELPS fka ELPA21 Screener (This assessment is not	Current	.csv

	reported to EMIS but can be loaded to StudentInformation)		
OGT	OGT	Not used, assessment must be manually entered	
OST	Next Generation Assessment, End of Course Assessment, Alternate Assessments (AASCD)	Current	.txt
OTELA		Not Used	
PARCC		Not Used	
PLAN	PLAN (pre-ACT) Scores; This import was for the PLAN which is now the Pre-ACT, and has not been updated for the pre-ACT values	Not Used	.txt
PSAT/NMSQT	Preliminary SAT/National Merit Scholarship Qualifying Test	Current	.xlsx
PS COS	Preschool COS	Current	.csv
PS ELA	Preschool ELA	Current	.csv
Redesigned ACT (New Format as of 09/2016)	ACT	Current	.txt
Redesigned SAT (New format as of 10/2015)	SAT	Current – This import needs updated for FY21	.csv
SAT (Old Format)		Not Used	

StudentInformation > SIS > Assessment > Assessment Imports

The assessment import tries to match the students in StudentInformation with the results from the import file. Assessment imports use different matching criteria depending on the assessment type. Refer to the ProgressBook StudentInformation Assessment Guide for details on the matching criteria used for each assessment.

Reminders for Importing:
1. The district must be in context.
2. Navigate to the page and use the drop-down list to select the type of assessment being imported.
3. Test Date – if importing OCTCA, OELPA, PS ELA or KRA results, there will be an additional prompt for the date of the assessment.
4. Browse – browse for the vendor file.
5. Upload – Once you have selected the assessment type and the file, upload the results. This may take a few minutes depending on the number of student records in the import file. Once the upload is complete, a message details how many records were successfully uploaded and indicates student records can be verified by clicking **View Import Management**.
6. If an import file is reloaded, or if a different import file is loaded for the same assessment type, any records for the same student with the same test date and test type will overwrite the existing data in the assessment maintenance page.
7. When importing files obtained from ODDEX, be sure to use the ODDEX File import selection regardless of the test type.

Assessment Import Management

StudentInformation > SIS > Assessment > Assessment Import Management

The assessment import management screen shows the results of each assessment import in three separate tabs:
- Unmatched records – records imported but not yet assigned to a student
- Matched records – records imported and assigned to a student
- Errors – records that were not imported because of stated errors

If the appropriate import file does not display in the import field, click 'Import Another File' to return to the assessment imports screen to import the desired file.

Refer to the ProgressBook StudentInformation Assessment Guide for more details on the Import, and the Unmatched Records, Matched Records and Errors tabs.

ODDEX File Imports

When utilizing files that have been obtained from ODDEX to import using the ODDEX File option, remember the following:

1. ODDEX will permit you to obtain records using either the SSID or the EMIS ID. Be aware, the import into StudentInformation will NOT import files with the EMIS ID. It must be the SSID.
2. Import file contains and matches on the student's SSID (from tblStudentEMISFS)
3. If the record in the import file does not have an SSID that matches in the district, the record will not import.
4. The Test Date on the record in the import file will be the Test Date imported.
5. Records from multiple years will import to the appropriate school year.
6. ACT Record has a 'day date'; day dates of 00 will default day value to 01
7. Records already in the assessment maintenance page will be overwritten if the import contains a record with the same date.
8. ACT WorkKeys – if a district loads the 'Scale Scores' instead of the 'Level Scores' those are the scores in ODDEX. Then when importing those scores into StudentInformation, the Grad Points Summary does not correctly reflect the actual 'Points' in the Workforce Readiness field.

Period A - Assessment Reporting

Collection Window A is used for assessment reporting. At specific points in the school year, ODE will issue a manifest for each assessment they wish to collect. The FA Assessment Record transfer will be used for all assessment types. Some of these assessments will be required to be reported during other reporting periods as well (Period G), but this checklist is referring to all assessment reporting during Period A.

Districts are required to report one record per student for each student assessment type/subject area assessment date combination. Therefore, if a given assessment has multiple areas/subjects, multiple Student Assessment Records will be required to be reported.

FA Student Assessment includes:
- AC – ACT Assessment
- AP – AP Exam
- GB – Preschool ELA Assessment
- GF – OELPA
- GM – Preschool Child Outcome Summary (COS)
- GO – KRA
- GW – CTE Industry Credential
- GX - OGT
- GY – CTE Student Assessment (OCTCA)
- IB – International Baccalaureate
- SA – SAT
- WK – Workkeys
- GD – DPR Growth (fka DORP)
- GE – End of Course Exam
- GN – Next Generation Assessment
- GA – Alternate Assessment, Grades 3-8
- GX – Alternate Assessment, High School

KRA – Kindergarten Readiness Assessment (GO)

The KRA assessment includes ways for teachers to measure a child's school readiness. All students enrolled on the first day of school through November 1st must have an assessment record reported to EMIS, except for students in their second year of kindergarten. This assessment has the following components which are required to be reported:

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
LL	Language Literacy
M	Mathematics
PD	Physical Development
SF	Social Foundation
OISR	Overall Individual Student Report

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, *** (Scaled Score)	*, A, B, C, D, E, F, H, J, K, R, S	**, NO, Y3

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Fall	July – Nov.

ASSESSMENT IMPORT AVAILABLE	Yes – KRA Import	.csv Format

Reminders:
1. Be sure to use the correct test date (not the date the records are being loaded) when loading the import file.
2. When manually adding a KRA record, be sure to select the correct test date as the valid Assessment Area Codes are selected based upon the testing date.
3. Records for students who were required to take the test, but did not test will need to be added manually.
4. Districts required to report: Traditional, STEM, community schools and state organizations. Assessments taken at the ESC or County Board of DD are to be shared with the district of residence who is responsible for reporting.
5. KRA results should not be reported for John Peterson and Autism Scholarship students.
6. Retained kindergarten students are not required to take the KRA and districts are not to submit a KRA record for those retained students. Students reported with a Retained Status Element option '1' are considered retained, and ODE will not be looking for a record for them.
7. The Error Bands (LLSE – Language Literacy Error Band; MSE – Mathematics Error Band; PDSE – Physical Development Error Band; and SFSE – Social Foundation Error Band) are not required for EMIS reporting. Whether importing the assessment results or manually adding them, these scores can continue to

be included on the KRA Assessment Maintenance page, however, they will not be included in the transfer file to the data collector.

8. Kindergarten students that have a LEP designation of other than '*' are required to take the KRA.

KRA			Add Assessment Result ⊕
▼Assessment Date: 10/14/2019			🗑 ✏
Subject	**Score Not Reported**	**Accommodations**	**Score**
Language Literacy	*	NO	275
Language Literacy - Error Band	*	NO	6.48
Mathematics	*	NO	281
Mathematics - Error Band	*	NO	9
Physical Development	*	NO	289
Physical Development - Error Band	*	NO	20.76
Social Foundations	*	NO	283
Social Foundations - Error Band	*	NO	9.12
Overall Individual Student Report	*	NO	280

Preschool ELA Assessment (GB)

Preschool students who need an ELA record reported:
If a child is funded using Early Childhood Education (ECE) Grant funds, the entity receiving the funding from the Ohio Department of Education is required to report the Early Learning Assessment data. This rule supersedes all other PS ELA reporting rules. The entity receiving ECE Grand funding and therefore reporting the ELA may be a traditional district, a JVSD, a community school or an Educational Service Center (ESC).

For children who are not funded using ECE Grant funds and who receive any Preschool Special Education services, the district of residence is required to report the student's Preschool ELA data. Any district educating a preschool special education student may also report.

For children receiving special education services or Early Childhood Education Grant funds (or both), the ELA scores should be reported two times per year, once in the fall and once in the spring.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
AEE	Awareness and Expression of Emotion
COMM	Communication
COOP	Cooperation with Peers
CSM	Coordination – Small Motor
NBSN	Number Sense
PCT	Personal Care Tasks
PLR	Phonological Awareness
RWA	Relationships with Adults
SFIP	Safety and Injury Prevention
VOC	Vocabulary

SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
A, B, C, D, E, 1, 2, 3, 4, 5, ***	*, A, B, D, F, H, J, R, S	**, NO, Y3

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Fall	Aug. – Nov.
Spring	Feb. - May

ASSESSMENT IMPORT AVAILABLE	Yes – PS ELA	.csv Format
(MUST OBTAIN IMPORT FILE FROM ODDEX)	Yes – ODDEX File	.txt Format

Reminders:
1. **Note: A score of 'N' on the results document should be reported as: Score '***'; and Score Not Reported 'S'. A score of 'NE' on the results document should also be reported as: Score '***'; and Score Not Reported 'S'.**
2. When adding or importing Preschool ELA records, be sure to select the date the assessment was given, not the date you are entering the record.
3. Manually enter records for students who did not test using a Score Not Reported reason.
4. When manually entering Preschool ELA records, data must be entered for each area of the Assessment before the record will save. For each manually added record, update the Accommodations value, Score Not Reported value, and test score, if needed.
5. When importing the PS ELA import file, students who have received a scores of 'E – Exempted' will receive an error message on the Assessment Import Management page under the Errors tab. These records are not created and must be created manually as the application cannot determine the appropriate Score Not Reported reason to be used.

Preschool COS (Childhood Outcome Summary) (GM)

All preschool students with a disability are required to be assessed using the Childhood Outcome Summary (COS) assessment instrument. The COS is a record of progress on specific outcomes as required by federal law.

The assessment date can be anytime during the school year; however, not all results are reported to ODE. Over the course of enrollment in preschool, the data reported should include information about when the child entered preschool special education and when the child exited preschool special education. Every preschool special education student must have at least one COS assessment record reported per school year. For any child who enters and exits preschool special education services in the same school year with 6 months or more between entry and exit, two COS assessment records should be reported (once at entry and once at exit).

The resident district is required to report the COS assessment records for students enrolled in these programs.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
E	Social Emotional Skills
EPRG	Social Emotional Skills Progress
K	Acquiring and Using Knowledge and Skills
KPRG	Acquiring and Using Knowledge and Skills Progress
T	Taking Appropriate Action to Meet Needs
TPRG	Taking Appropriate Action to Meet Needs Progress

SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
Social Emotional Skills, Acquiring and Using Knowledge and Skills, Taking Appropriate Action to Meet Needs – Scores of 1-7, ***	*, A, B, D, F, J, R	**
Related Progress Assessment Areas – Scores of F, N or Y, ***	*, A, B, D, F, J, R	**

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Year-Round	Jan. – Dec.

ASSESSMENT IMPORT AVAILABLE	Yes – PS COS	.csv Format

Reminders:
1. Records for students who were required to take the test, but did not test will need an assessment record added manually.
2. Same-aged, typically developing peers enrolled in the same preschool special education program may also be assessed but these scores will not be reported in EMIS.
3. At the present time, there is no vendor results file for this assessment. Districts can access a Preschool COS Template under the Analytics Hub (StudentInformation/Local/Analytics Hub) in the EMIS>EMIS Assessment section, which will populate with the preschool students who have a disability code of '16'. Districts can then enter the student scores onto the template. The completed template can then be imported through the Assessment Import using the PS COS assessment import option.
4. The Student Assessment Extract can be used to create an import file for the home districts. You (typically ESC) can limit the students whose PS COS records should be included in the file, and forward the extract to the home district. The home district can then use the Assessment Imports, Assessment Type: Assessment Extracts, and import the file into their district in order to report the PS COS records that were taken at another district.

StudentInformation > SIS > Student > Assessment > Preschool COS

Preschool COS Assessment Record

From this screen, you can display, add, change and delete data pertaining to a student's Preschool COS assessment results.

Add Preschool COS Record

		Test Date	Test Part	Score Not Reported	Score	Progress
🗑	✏	Sep 15, 2020	Acquiring and Using Knowledge and Skills	*	4	N
🗑	✏	Sep 15, 2020	Positive Social Emotional Skills	*	3	F
🗑	✏	Sep 15, 2020	Taking Appropriate Action to Meet Needs	*	6	Y

NGA – Next Generation Assessment (GN)

The NGA assessment is administered to students in Grades 3-8.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
M	Mathematics
R	Reading (3rd grade only)
S	Science (5th and 8th grades only)
ELA	English Language Arts

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, ***	*, A, B, C, D, E, F, H, I, J, K, N, P, 5	**, NO, Y1, Y2, Y3

VALID OPTIONS FOR THIS ASSESSMENT		
ASSESSMENT WINDOW		ASSESSMENT DATE REPORTED
Fall	3rd Grade ELA only	November
Spring	Test windows vary depending upon grade level, subject area, online or paper testing	April regardless of actual test date
Summer	3rd Grade ELA only	July

ASSESSMENT IMPORT AVAILABLE	Yes – OST Import	.txt Format

Reminders:
1. An assessment record will need to be added manually for students who were required to take the test but did not test.
2. Every third-grade student must also have a Reading Promotion score record reported, even if they did not test. If the student did not test, but was required to test, an assessment record will also need to be added for the Reading Promotion assessment with a Score Not Reported reason. When manually adding records for students who did not assess on the Reading Promotion assessment, the Grade 3 Reading Promotion Status field can be left blank. The result of leaving it blank is that the 'Latest Third Grade Reading Promotion Status' value on the FN Attributes tab will not be updated by this selection.
3. Students who are not enrolled in a grade level 3-8 tested subject area due to being enrolled in a course for high school credit instead, are not required to take the test for this grade level but would take the EOC assessment for that course instead. Example, 8th grade students taking Algebra I for high school credit instead of 8th grade math.

Add Assessment Result

Period of Test:*	Spring
Fiscal Year of Test:*	2021
Building of Test:*	064675 - Hickory Ridge Elementary
Grade at Time of Test:*	03 - Third Grade
Assessment Area:*	03ELA - 03 English Language Arts
Required Test Type:*	STR - Standard
Score Not Reported:*	* - Option Not Applicable, Student took Test
Accommodations:*	NO - Student did not receive accommodations on the STR test or took ALT
Score:*	642
Performance Level:	4 - Accelerated

Create   Cancel

Add Assessment Result

Period of Test:*	Fall Block
Fiscal Year of Test:*	2021
Building of Test:*	064675 - Hickory Ridge Elementary
Grade at Time of Test:*	03 - Third Grade
Assessment Area:*	03REA - Grade 3 Reading Promotion
Required Test Type:*	STR - Standard
Score Not Reported:*	* - Option Not Applicable, Student took Test
Accommodations:*	NO - Student did not receive accommodations on the STR test or took ALT
Score:*	42
Grade 3 Reading Promotion Status:	No - Student does not meet reading promotion score

Create   Cancel

EOC – End of Course Assessment (GE)

Students who began 9th grade on or after July 1, 2014 are required to take End of Course (EOC) exams. Additionally, students who are accelerated and taking courses for which an EOC exam is offered will be required to take the EOC exam in that subject area.

There is no separate alternate assessment for each EOC exam. If a student is eligible to participate in an alternate assessment per the Alternate Assessment for Students with Significant Cognitive Disabilities (AASCD) Participation Guidelines, a proficient score in each of the assessed content areas – English Language Arts, Mathematics, Science and Social Studies, may be used in lieu of attaining the required minimum composite score on the EOC exams for graduation requirement. [See Alternate Assessment (AASCD), High School (GX) in the next section of this documentation.]

The traditional district, STEM district, JVSD, community school or state organization in which the student is enrolled when the test is taken is responsible for reporting the results.

Substitute Tests for Science, American History or American Government
1. Advanced Placement
2. International Baccalaureate
3. College Level Courses

College Credit Plus (CCP) courses or approved AP/IB tests, in the subject area, will satisfy the end-of-course graduation test requirement for **American History, American Government and Biology.** The college course grade earned under College Credit Plus or AP/IB test scores **may earn** graduation points in place of the end-of-course tests.

Once the AP and IB assessments are reported to ODE for these areas, ODE will calculate the number of points earned towards graduation points based on the score received on the assessment.   An EOC record is not entered in StudentInformation to report points earned for AP & IB exams.

It is important to note, while students can earn graduation points for College Credit Plus coursework and AP/IB test scores in biology, **districts must administer the biology end-of-course tests to all students to satisfy federal testing requirements.**

Students completing a College Credit Plus course in American History or American Government will not need to sit for the end-of-course tests in the subject area and may earn graduation points based on the letter grade in the course.

There are **no College Credit Plus/AP/IB substitutions** for mathematics or English Language Arts.

Note: Please refer to the StudentInformation Graduation Points EUG for additional information pertaining to how the assessments are applied toward the required graduation points.

THE FOLLOWING PROVIDES THE DATES WHEN COURSES WERE AVAILABLE FOR THE FIRST TIME		
Fall 2014	**Spring 2015**	**Fall 2015**
Algebra I	Physical Science	Biology
Geometry	American History	
English Language Arts I	American Government	
English Language Arts II	Integrated Math I & II	

There are multiple options for students to meet the requirements for the EOC assessment without taking the EOC assessment. For some students, these 'points' may have been earned in prior years. If your district has not reported EOC Assessment records for students meeting the criteria below, those records need to be created and reported. Please see examples EOC examples of how to report an EOC with Score Not Reported reason of W, X and Y in *examples (1), (2), (3) and (4) below.*

When entering records for the above situations, the records should include one of the following Score Not Reported reasons:

- W – Assessment Score Not Reported because student received graduation credit for assessment area due to course completion prior to end of course assessment availability; Number in score field represents number of graduation points earned
- X – Assessment Score Not Reported because student received graduation credit for assessment area due to completion of a dual credit course; Number in score field represents number of graduation points earned
- Y – Student transferred in from **out of state or from homeschooling** with course already completed; number of required graduation points reduced.
- 2 - Assessment score not reported because student received graduation credit for alternative Non-Public school EOC assessment prior to public district enrollment; Number in score field represents number of graduation points earned

Example (1) Course taken for high school credit prior to Assessment availability:
Student took Biology for high school credit in the 14/15 school year, prior to the assessment being available. The Fiscal Year of the test value should be the fiscal year in which the student completed the course. Student Received an 'A' for the course. (This example would also apply for students who took courses as follows: Junior (11th) grade student took an Algebra I course for High School Credit in 13/14 as an 8th grader.

The EOC was not yet available. The values would simply be the ones that apply to the 8th grader's situation.)   The following values should be entered for this record:

Field	Value
Period of Test	Spring or Spring Block
Fiscal Year of Test	2015
Building of Test	Building student was in
Grade at Time of Test	9th
Required Test Type	STR
Assessment Area	Biology
Score Not Reported	W
Accommodations	**
Score	5
Performance Level	5

Example (2) Graduation credit received for completion of dual credit course (CCP):

Junior (11th) grade student took a CCP American/United States Government Course receiving both college and high school credit in 16/17. The Student received a 'C' in the course. The Score or graduation points for a 'C' in this course equate to a '4' based College Credit Plus Course Grade chart.

Field	Value
Period of Test	Spring
Fiscal Year of Test	2017
Building of Test	Building student was in
Grade at Time of Test	11th
Required Test Type	STR
Assessment Area	American/United States Government
Score Not Reported	X
Accommodations	**
Score	4
Performance Level	4

Example (3) Student transferred in from *out of state or home school*:

Junior (11th) grade student moved to Ohio from another state. The student completed Algebra I in another state and may have or may not have taken some type of end of course assessment. The Score Not Reported Option Y is to be used for these students. The values should be reported for the year the student completed the course in the other state.

Field	Value
Period of Test	Spring
Fiscal Year of Test	2016
Building of Test	****** - IRN not disclosed
Grade at Time of Test	10th
Required Test Type	STR

Assessment Area	Algebra I
Score Not Reported	Y
Accommodations	**
Score	***
Performance Level	Any – This is not reported

Example (4) Student received graduation credit for alternative Non-Public school EOC assessment prior to public district enrollment:
Sophomore (10th) grade student transferred into a public school from a Non-Public school. His freshman year at the Non-public took an Algebra I and the Iowa Test. He scored a 275 which is equal to '3').

Field	Value
Period of Test	Spring
Fiscal Year of Test	2018
Building of Test	******
Grade at Time of Test	9th
Required Test Type	STR
Assessment Area	Algebra I
Score Not Reported	2
Accommodations	**
Score	3
Performance Level	3

FY20 EOC Assessment Reporting
Due to COVID 19 school closures in 19/20, the spring EOC assessments were not able to be administered. See http://education.ohio.gov/Topics/Student-Supports/Coronavirus/Graduation-Flexibility-%E2%80%93-2021-and-Beyond for additional information. **StudentInformation is in the process of creating a report – End of Course Grade Substitution Report - that will produce an extract file to be imported using the Assessment Extract Import format.** This option allows students taking courses with an End of Course exam in the spring of FY20 to use the grade in that course as their exam score.
1. This option is valid for students who attended last year but did not graduate.
2. The test date for these assessments should be 4/1/20 or 5/1/20.
3. The Score Not Reported value should be 'W'.
4. The assessment records should be reported in FY21.
5. Qualifying courses include the following:
    a. ELA I
    b. ELA II
    c. Algebra I or Integrated Math I
    d. Geometry or Integrated Math II
    e. Biology
    f. American History
    g. American Government

6. In cases where a student is given a final course grade using an A through F grading scale, a student's final course grade will be translated to an equivalent skill level or point value according to the following scale:

FINAL COURSE GRADE	SKILL LEVEL / POINT VALUE
A	Advanced and Competent/5
B	Accelerated and Competent/4
C	Proficient and Competent/3
D	Basic and Not Competent/2
F	Limited and Not Competent/1

7. In cases where a student is given a final course grade of pass/fail, complete/incomplete or another similar measure, a "fail" or equivalent designation would earn a student a skill level and point value equivalent to an "F" grade in the table above. In these cases, districts and schools are responsible for determining the equivalent grade or appropriate skill level assigned to a "pass" grade. For the purposes of competency in Ohio's long-term graduation requirements, a "pass" designation will be equivalent to competency and a "fail" designation will not meet the competency requirement.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
ALG1	Algebra I
BIOL	Biology
ELA1	English Language Arts I
ELA2	English Language Arts II
GEOM	Geometry
GOVM	American/United States Government
HIST	American/United States History
MTH1	Mathematics I
MTH2	Mathematics II
PHYS	Physical Science

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, *** Scaled Score or Grad Points where required	*, A, B, C, D, E, F, G, H, I, J, P, W, X, Y, 2, 5	**, NO, Y1, Y2, Y3

VALID OPTIONS FOR THIS ASSESSMENT		
ASSESSMENT WINDOW		ASSESSMENT DATE REPORTED
Fall Block	November – January	December regardless of actual Test Date
Spring Regular	March – May	April regardless of actual Test Date
Spring Block	March – May	May regardless of actual Test Date

		(ODE has indicated they may be accepting April dates for this window also)
Summer	July	July

ASSESSMENT IMPORT AVAILABLE	Yes – OST Import	.txt Format

Reminders:

1. Records for students who were required to take the test, but did not test will need to be added manually. This includes certain students who received credit for the test but did not take the test.
2. All prior year EOC records will be included in the FY21 transfer file to ODE for EMIS reporting. Districts need to make sure they have manually added records for students with a Score Not Reported reason that have also received graduation points, even if those records are for past years, and if those records have not been previously entered.
3. EOC records are not entered for students taking the alternate assessments.

Add Assessment Result

Period of Test:*	Spring
Fiscal Year of Test:*	2021
Building of Test:*	003970 - Brunswick High School
Grade at Time of Test:*	10 - Tenth Grade
Required Test Type:*	STR - Standard
Assessment Area:*	ELA2 - English Language Arts 2
Score Not Reported:*	* - Option Not Applicable, Student took Test
Accommodations:*	NO - Student did not receive accommodations on the STR test or took ALT
Score:*	622
Performance Level:	5 - Advanced

Create   Cancel

Alternate Assessment (AASCD), High School (GX)

Due to COVID 19 school closures in 19/20, the spring alternate assessments were not able to be administered. See http://education.ohio.gov/Topics/Student-Supports/Coronavirus/Graduation-Flexibility-%E2%80%93-2021-and-Beyond for additional information. **StudentInformation is in the process of creating a report – End of Course Grade Substitution Report - that will produce an extract file to be imported using the Assessment Extract Import format.** This option allows students taking courses with an End of Course exam in the spring of FY20 to use the grade in that course as their exam score. Additional data contained in the EOC Section of this document.

The Alternate Assessment results are available to the districts in an OST assessment record format from the testing company.

ODE will calculate the number of graduation points to be awarded for each alternate assessment taken as a '3' when the alternate assessment score is reported as well as a Special Education Grad Requirement (FE) record.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
C	Social Studies
M	Mathematics
R	Reading
S	Science

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, *** Scale Score	*, A, B, C, D, E, F, H, I, J, K, , S, W, 5	NO

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Spring	February - March

ASSESSMENT IMPORT AVAILABLE	Yes – OST Import	.txt Format

Reminders:
1. Records for students who were required to take the test, but did not test will need to be added manually.
2. When using the import to load these records, the Accommodations value should be imported as part of the record.

3. If applicable, be sure to update the Special Education Grad Records (FE) to indicate if the student is exempted from the consequences of not passing a specific assessment.
4. The district where the student was enrolled at the time of testing is responsible for reporting the results.
5. Reading and Writing were combined as an ELA assessment, so we only report the Reading Assessment Score for this assessment, and W is no longer reported.

StudentInformation > SIS > Student > Assessment > OGT

OGT and Alternate Assessment Scores

From this screen, you can display, add, change and delete data pertaining to a student's ohio graduation test results.

Building IRN - Spring Test Administration:	003970 - Brunswick High School
Test Type:*	ALT - Alternate
Part:*	MATH - Math
Test Date:*	03/01/2021
Grade at Time of Test:*	10
Accommodations:	NO - Student did not receive accommodations on the STR test or took ALT
Score Not Reported:	* - Option Not Applicable, Student took Test
Scaled Score:	328
Raw Score:	***
Required for Graduation:	*
Overall Performance Level:	
Re-report Time Period:	
Transferred From IRN:	-

Save   Save and New   Cancel

Alternate Assessment (AASCD), Grades 3-8 (GA)

The Alternate Assessment results are available to the districts in an OST assessment record format from the testing company.

Due to COVID 19 school closures in 19/20, the spring alternate assessments were not able to be administered. See http://education.ohio.gov/Topics/Student-Supports/Coronavirus/Graduation-Flexibility-%E2%80%93-2021-and-Beyond for additional information. **StudentInformation is in the process of creating a report – End of Course Grade Substitution Report - that will produce an extract file to be imported using the Assessment Extract Import format.** This option allows students taking courses with an End of Course exam in the spring of FY20 to use the grade in that course as their exam score. Additional data contained in the EOC Section of this document.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
M	Mathematics
R	Reading
S	Science

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, *** Scaled Score	*, A, B, C, D, E, F, H, I, J, K, S, 5	No

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Spring (Alternate Only)	February – March

ASSESSMENT IMPORT AVAILABLE	Yes – OST Import	.txt Format

Reminders:
1. Records for students who were required to take the test, but did not test will need to be added manually.
2. When using the import to load these records, the Accommodations value should automatically be updated to NO.
3. The district where the student was enrolled at the time of testing is responsible for reporting the results.

Student Achievement

From this screen, you can display, add, change and delete data pertaining to student achievement records.

Building IRN - Spring Test Administration:	000877 - Applewood Elementary Schoo ▾
Test Grade/Type:*	3rd Ach - Alternate ▾
Part:*	MATH - Math ▾
Test Date:*	03/02/2021 📅
Grade at Time of Test:*	03 ▾
Accommodations:	NO - Student did not receive accommodations on the STR test or took ALT ▾
Score Not Reported:	* - Option Not Applicable, Student took Test ▾
Scaled score:	322
Raw score:	***

Save   Save and New   Cancel

ACT Assessments (AC)

A 'day' date value is reported with the ACT in addition to the month and year.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
Reading	R
Mathematics	M
Writing (optional)	W
English	ENG
Science	S

SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, *** Scale Score	*, A, B, C, D, E, F, H, I, J, K, L, 3, 4, 5	**

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Year-Round	Jan. – Dec. (Include day date)

ASSESSMENT IMPORT AVAILABLE		
Redesigned ACT (New Format as of 9/2016)	Yes	.txt Format
(MUST OBTAIN IMPORT FILE FROM ODDEX)	Yes – ODDEX File	.txt Format

Reminders:
1. All prior year ACT records will be included in the transfer file to the Data Collector.
2. ACT (American College Testing Assessment) results are available for download from ACT in an electronic format and the districts must contact ACT for details. The import file for ACT results needs to be in a .txt format.
3. For the ACT Writing score to be included in the Transfer file to the Data Collector, the score must be in the Writing Subject Score field. (Writing is no longer required.)
4. ACT Import now imports multiple ACT assessments within the same month. Ex., if a student took the ACT twice in February, the first record will import with a date of 2/1/XX and the second record will import with a date of 2/2/XX. Both records are then included in the transfer file to the Data Collector.

5. If a student didn't take all the required subjects for the ACT that are needed as an End of Course assessment replacement, the student needs two separate ACT records to be added:
   a. One should contain the scores for the parts the student took. This record should also have a Score Not Reported value of '*'.
   b. The second record should represent the parts they were required to take but did not. The score value should be '***' for the parts not taken. Then the Score Not Reported value should be a value other than '*' that indicates the reason the student didn't take these test parts.
   c. When adding two separate records, they will need to have two different dates, ex. February 2 and February 3, or they will be seen as duplicates by the Data Collector.

ACT (American College Testing Assessment):

StudentInformation > SIS > Student > Assessment > ACT

ACT Scores

From this screen, you can display, add, change and delete data pertaining to the ACT.

Testing Date:* `14/02/2021` 📅

Score Not Reported:* ▼

Test Location: ▼

Accommodations: ▼

Composite Score: [ ]

Mathematics Score: [ ]
Mathematics Pre-Algebra/Elementary Algebra Sub Score: [ ]
Mathematics Intermediate Algebra/Coordinate Geometry Sub Score: [ ]
Mathematics Plane Geometry/Trigonometry Sub Score: [ ]

Science Score: [ ]

STEM Score: [ ]
STEM National Norms: [ ]

English Score: [ ]
English Usage/Mechanics Sub Score: [ ]
English Rhetorical Skills Sub Score: [ ]

Reading Score: [ ]
Reading Social Studies/Sciences Sub Score: [ ]
Reading Arts/Literature Sub Score: [ ]

Combined English/Writing Score: [ ]
Writing Test Sub Score: [ ]

Essay Comments: ▲ ▼ •• •• ▲ ▼

English Language Arts (ELA) Score: [ ]
English Language Arts (ELA) National Norms: [ ]

Writing Subject Score: [ ]
Writing Domain Score: Ideas and Analysis: [ ]
Writing Domain Score: Development and Support: [ ]
Writing Domain Score: Organization: [ ]
Writing Domain Score: Language Use and Conventions: [ ]
Writing National Norms: [ ]

Understanding Complex Text: ▼

Progress Toward Career Readiness: ▼

[Save] [Save and New] [Cancel]

SAT Assessments (SA)

Note

Note: A new results file layout has been received for FY21. We are in the process of making updates for it.

All prior year records will also be included in the transfer file. The SAT Subject Scores are not EMIS reportable, so they are not available in the transfer file.
A 'day' date value is reported with the SAT in addition to the month and year.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
Reading	R
Mathematics	M
Writing	W

SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, *** Scale Score	*, A, B, C, D, E, F, H, I, J, K, L, 3, 4, 5	**

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
000-999, *** Scale Score	Jan. – Dec. (Include day date)

ASSESSMENT IMPORT AVAILABLE		
Redesigned SAT (New format as of 10/2015)	Yes	.csv Format

Reminders:
1. The SAT Reasoning scores are the SAT records reported to ODE. The SAT Subject scores are not reported to ODE.
2. If a student didn't take all the required subjects for the SAT that are needed as an End of Course assessment replacement, the student needs two separate SAT records to be added:
   a. One should contain the scores for the parts the student took. This record should also have a Score Not Reported value of '*'.
   b. The second record should represent the parts they were required to take but did not. The score value should be '***' for the parts not taken. Then the Score Not Reported value should be a value other than '*' that indicates the reason the student didn't take these test parts.
   c. When adding two separate records, they will need to have two different dates, ex. February 2 and February 3, or they will be seen as duplicates by the Data Collector.

SAT (The Scholastic Aptitude Test - Reasoning)

StudentInformation > SIS > Student > Assessment > SAT Reasoning Test

SAT Reasoning Test Scores

From this screen, you can display, add, change and delete data pertaining to the SAT Reasoning Test.

Testing Date:* `04/15/2021` 🗓

Grade at Time of Test:* ▾

Score Not Reported:* `* - Not Applicable, Student took the Test` ▾

Pre - 2016 SAT Reasoning Scores

Critical Reading Score: [   ] ⓘ

Math Score: [   ] ⓘ

Writing Score: [   ] ⓘ

Writing Multiple-Choice Sub Score: [   ]

Essay Sub Score: [   ]

Redesigned SAT Reasoning Scores

Evidence-Based Reading and Writing Section Score: [   ] ⓘ

Math Section Score: [   ] ⓘ

Reading Test Score: [   ]

Writing and Language Test Score: [   ]

Math Test Score: [   ]

Analysis in Science Cross-Test Score: [   ]

Analysis in History/Social Studies Cross-Test Score: [   ]

Words in Context Subscore: [   ]

Command of Evidence Subscore: [   ]

Expression of Ideas Subscore: [   ]

Standard English Conventions Subscore: [   ]

Heart of Algebra Subscore: [   ]

Passport to Advanced Mathematics Subscore: [   ]

Problem Solving and Data Analysis Subscore: [   ]

Essay Reading Subscore: [   ]

Essay Analysis Subscore: [   ]

Essay Writing Subscore: [   ]

Total SAT Score: [   ]

[Save] [Save and New] [Cancel]

SAT (The Scholastic Aptitude Test - Subject)

StudentInformation > SIS > Student > Assessment > SAT Subject Tests

SAT Subject Test Scores

From this screen, you can display, add, change and delete data pertaining to the SAT Subject Tests.

Subject Test:* ▾

Testing Date:* [   ] 🗓

Grade at Time of Test:* ▾

Score:* [   ]

[Save] [Save and New] [Cancel]

International Baccalaureate Assessments (IB)

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
	See Chapter 2.8.1 Assessment Area Codes of the EMIS Manual for a complete list

SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
1-7 Scale Score	*	**

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
IB	Nov. & May

ASSESSMENT IMPORT AVAILABLE		
IB	No	

Reminders:
1. A complete listing of the Assessment Areas for this assessment can be found in the EMIS Manual, Chapter 2.8.1, Student Assessment Record.

International Baccalaureate (IB)
Only IB Program Assessment will be collected. Please refer to the IBO.org website.

StudentInformation > SIS > Student > Assessment > International Baccalaureate (IB)

International Baccalaureate (IB)
From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

Testing Date:* 05/01/2020

Assessment Area Code:* IB00 - Group A Language A - Special Request

Assessment Result:* 4

Save   Save and New   Cancel

Advanced Placement Assessments (AP)

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
	See Chapter 2.8.1 Assessment Area Codes of the EMIS Manual for a complete list

SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
AP 1-5 Scale Score	*	**

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Year-Round	January through December

ASSESSMENT IMPORT AVAILABLE		
AP	Yes	.csv Format
(MUST OBTAIN IMPORT FILE FROM ODDEX)	Yes – ODDEX File	.txt Format

Reminders:
1. The AP Exam will only load assessment records in the year the assessment was taken. If you have assessment results from 19/20 and attempt to load them in the 20/21 school year, the import will advise that all records were imported but that no scores loaded. Check the assessment test dates, and then import into the 19/20 school year, and the records will import successfully.
2. Assessment Area Code AP99 is used for any AP Exam which is not defined under a specific Assessment Area Code.
3. AP Subscores are not reported to ODE, although they can be entered into StudentInformation.

OGT Records (GX)

Beginning with the OGT Assessments taken in the Fall of 2018 forward, the assessment results file layout has changed. Due to this change, the OGT results from tests taken in the fall of 2018 forward will need to be manually entered. Chapter 2.8, version 9.2, of the EMIS Manual is the last version to contain OGT information.

Beginning in the fall of FY21 any students who are still utilizing the OGT assessment to complete graduation can take the same OGT assessment up to and including three (3) times during the fiscal year. Since the OGT can be taken multiple times per month, a 'day date' value can now be reported with the OGT assessment record.
Students grade 10 and above in the 14/15 school year and earlier are still required to take the OGT (GX) assessment.

Assessment Area Code	Assessment Area Code Description
S	Science
M	Math
R	Reading
W	Writing
C	Social Studies/Citizenship

Score	Score Not Reported	Accommodations
000-999, ***	*, A, B, C, D, E, F, H, I, J, K, S	**, NO, Y1, Y2, Y3

Valid Options for This Assessment	
Assessment Window	Assessment Date Reported
September – July	

Assessment Import Available	Yes through the Summer 2018 results - OGT	.txt Format

Reminders:
1. A 'day' date is required to be reported with the OGTs taken in FY19 forward. Be sure to include the actual date of the assessment; this will allow multiple assessments in the same month to be reported accurately.
2. OGT Assessment results from Fall 2018 forward will need to be manually entered into StudentInformation for each student at *StudentInformation > SIS > Student > Assessment > OGT*. The Performance Level will also be available to be completed for assessments with test dates of Fall 2018 forward.
3. StudentInformation will report the latest attempt for each test part regardless of test date.

4. Make sure the **Required for Graduation:** field is marked correctly on the OGT record, especially for those IEP students who do not have to actually pass the test in order to graduate. Although this field isn't reported to EMIS, StudentInformation looks to this value for other processes such as the Who Needs It and Transcripts. When a student took the OGT in a prior year and since that time, has been placed on an IEP and is no longer required to pass the OGT to graduate, a new OGT test record for this year's testing date will need to be added with the value of No in the **Required for Graduation:** field. Students are required to take the test one more time after it is determined the student does not need to pass the test to graduate.
5. A JVS is only to report testing results for students who enroll directly into the JVS without enrolling in the resident district.

StudentInformation > SIS > Student > Assessment > OGT

OGT and Alternate Assessment Scores

From this screen, you can display, add, change and delete data pertaining to a student's ohio graduation test results.

Building IRN - Spring Test Administration:	001545 - Barberton High School
Test Type:*	STR - Standard
Part:*	MATH - Math
Test Date:*	09/01/2020
Grade at Time of Test:*	11
Accommodations:	NO - Student did not receive accommodations on the STR test or took ALT
Score Not Reported:	* - Option Not Applicable, Student took Test
Scaled Score:	352
Raw Score:	***
Required for Graduation:	*
Overall Performance Level:	2 - Basic
Re-report Time Period:	
Transferred From IRN:	-

Save   Save and New   Cancel

OELPA (GF)

Student Assessment (FA) Record(s) are required to be submitted for each student with a "Y", "M", "S", or "L" option reported on the LEP Status Element on the Student Attribute – Effective Date (FD) Record for any day within the testing window. Students who have been identified as English Language Learners must take the OELPA until they receive a score that will allow them to exit the program. While they are taking the OELPA, the students must also take the KRA, Next Generation, OGT, and End of Course exams if the students meet the requirements during the test windows for those assessments.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
LIST	Listening
R	Reading
SPKG	Speaking
W	Writing

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999, *** Scale Score	*, A, B, C, D, E, F, H, I, J, L, 5	**, NO, Y1, Y2

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Spring	Jan – March

ASSESSMENT IMPORT AVAILABLE	Yes - OELPA	.txt Format

Reminders:
1. When manually entering an OELPA record, the areas under Listening, Reading, Speaking and Writing must be completed for the record to save. Users can complete the remaining areas (Ex. Comprehension Score, Proficiency Status, etc.) or leave them blank and the record will save if the required fields have been completed. The import will populate all fields displayed on the OELPA Assessment Maintenance page that have values for them contained in the import record.
2. The traditional district, STEM district, community school, or state organization in which the student is enrolled when the test is taken is responsible for reporting the results.

3. When using the Assessment Import process for the OELPA, in the Test Date field, enter the date the assessment was taken.
4. The following abbreviations may appear on some assessment records: DNA – Did Not Attempt; and INV – Invalidated. A test is 'attempted' once the student has started the test (had the opportunity to view at least one item). A domain test is 'not attempted' if the student never started the domain test (i.e., the student never had the opportunity to view any items.) A test is invalidated when a student is caught cheating, or the test is compromised.

StudentInformation > SIS > Student > Assessment > OELPA

Ohio English Language Proficiency Assessment (OELPA)

Add Assessment Result

∨ Assessment Date: 1/11/2021

Subject	Score Not Reported	Accommodations	Score	Performance Level	Standard Error
Listening	*	NO	542	3	26
Reading	*	NO	530	3	27
Speaking	*	NO	542	3	23
Writing	*	NO	476	1	25

Comprehension Score: 5437
Comprehension Standard Error: 229

Proficiency Status: 2 - Progressing

Overall Score: 5273
Overall Standard Error: 251

CTE Industry Credentials (GW)

CTE Industry Credentials (GW) can be reported to EMIS with the actual year and month the credential was earned. Additionally, a 'day' date may be included when entering the month and year.

An Industry Credential is a credential, certification or license developed and awarded by an industry association or state licensing agency. Students are not required to get an industry credential, but if a student does receive one of the industry credentials, the district should report the credential to EMIS. If a student earns more than one Industry Credential, report all credentials the student receives.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
	See Chapter 2.8.1 Assessment Area Codes of the EMIS Manual for a complete list

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
P, N	*	**

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Year-Round	Year and Month Credential Earned

VALID TEST TYPES FOR THIS ASSESSMENT	
TEST TYPE	TEST DATES
STR	On or before June 30, 2019
IPD - Assessment cost paid by LEA	On or after July 1, 2019
INP - Assessment cost Not paid by LEA	On or after July 1, 2019

ASSESSMENT IMPORT AVAILABLE	No

Reminders:
1. If a student receives an industry credential prior to the close of the Graduate (G) reporting period, the district should report the industry credential during period G reporting. This is in addition to reporting it during Collection Window A – Assessments.
2. If a student attempts an industry credential during the school year, the district in which the student is enrolled should report the attempt during the earliest appropriate Assessment (A) collection. If a graduating student attempts an

industry credential after graduation and prior to the close of the Graduate (G) collection, the graduating district should report the industry credential during G reporting.

3. Traditional districts, STEM districts, JVSDs, community schools and state organizations are able to report Industry Credentials.

4. The Industry Credential Update screen can be used to add assessments for multiple students at one time through the use of various filters.

5. Effective for the FY20 school year and forward, the LEA administering the Industry Credential is required to pay for the assessment; however, if a different district is also loading those scores to their SIS, they will want to be sure to mark the test type as INP if they did not pay for the assessment.

CTE Student Assessment (GY – OCTCA)

Note: Due to the COVID-19 school closures during FY20, updates have been made for reporting this assessment. Refer to the ODE EMIS Manual, Special Section: COVID-19 Related EMIS Reporting Guidance for updated instructions for the WebXam/OCTCA. Be certain to use the **OCTCA FY20 Only** Assessment Type when importing the FY20 OCTCA (WebXam) results. This Assessment Type will import the required Score Not Reported values.

Any student who **is a concentrator** should have some type of a CTE Assessment record reported. This data will be used for the CTE Report Card.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
	See Chapter 2.8.1 Assessment Area Codes of the EMIS Manual for a complete list

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
CTE Subject Code Assessments	*, B, C, D, E, F, H, J, T, X, 5	**
000-100		
CTE Technical - Summative		
000-100, ***, I, N, P, A	*, B, C, D, E, F, H, J, T, X, 5	**
CTE Portfolio - Summative		
000-100, ***, I, N, P, A	*, B, C, D, E, F, H, J, T, X, 5	**

VALID OPTIONS FOR THIS ASSESSMENT		
ASSESSMENT WINDOW		ASSESSMENT DATE REPORTED
Fall **Subject Code Assessments**	Actual assessment dates will vary	Sept. - June

ASSESSMENT IMPORT AVAILABLE	Yes - OCTCA	.txt Format

Reminder:
1. This record should be reported by the district that employs the CTE Workforce development instructor.
2. **Summative Assessments (aka Legacy assessments) –** will have an alpha score and the format for the assessment type is NNAA. Effective in FY20

forward ODE will be calculating the Summative Assessment scores. It is expected that these scores will no longer be EMIS reportable for that reason, and we do not expect to receive results for the Summative Assessments in the assessment results file. However, if students have legacy results from past years that were not reported, they can still be reported at the present time, and also during Period D.

3. **Subject Code Assessments** – will have a numeric score and the format for the assessment type is AAAN.
4. A record with a Score Not Reported reason is required to be reported for any student who is a 'concentrator' that did not test. These will need to be manually entered.
5. Please refer to the Office of Career-Technical and Adult Education (CTE) web site for additional information on rules and legislation, test implementation dates, scoring standards and up-to-date information on CTE Assessments. Information about the CTE Technical Assessments and Career Paths for the Teaching Professions Portfolio Assessment is located on the Ohio Department of Education's web site.

DPR Growth (MAP) (GD) replaced by Renaissance STAR

This replacement is occurring for the 20/21 school year reporting forward. Details have just been received, and we are working on updates. The information below is updated with the most current information we have.

Please note: Do not submit the DPR Growth assessment records for the 20/21 school year – only the Renaissance STAR records will be correct for 20/21 reporting. Updates have been submitted to Development and we will keep you apprised.

This assessment measures student skills in mathematics and reading. Results from the spring administration will be reported in the Renaissance STAR Assessment (A) Collection.

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
M	Mathematics
R	Reading

VALID OPTIONS FOR THIS ASSESSMENT		
UNIFIED SCALE SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
600-1400	*, A, B, C, D, E, F, H, I, J, L, 5	**, NO, Y1, Y2, Y3

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
	February - June

ASSESSMENT IMPORT AVAILABLE		

Reminders:
1. Records for students who were required to take the test, but did not test will need to be added manually.

ACT WorkKeys (WK)

The ACT WorkKeys is a nationally recognized job skills assessment students take to earn a workforce readiness score on the job skills assessment. This assessment is reported in the Non-State Assessments for the Local Report Card (LRC).

ASSESSMENT AREA CODE	ASSESSMENT AREA CODE DESCRIPTION
M	Mathematics – Version 1
R	Reading – Version 1
LCIF	Locating Information – Version 1
AMTH	Applied Math – Version 2
GLIT	Graphic Literacy – Version 2
WDOC	Workplace Documents – Version 2

VALID OPTIONS FOR THIS ASSESSMENT		
SCORE	SCORE NOT REPORTED	ACCOMMODATIONS
000-999 Performance Standard Score	*, H, 5	**

VALID OPTIONS FOR THIS ASSESSMENT	
ASSESSMENT WINDOW	ASSESSMENT DATE REPORTED
Spring	Jan. – Dec.

ASSESSMENT IMPORT AVAILABLE	Yes	ACT WorkKeys Vendor File ACT WorkKeys Import File Template

Reminders:
1. Version 1 or Version 2 will need to be selected after choosing the date when manually entering the assessment. Version 2 can be selected after 6/1/17.
2. Score option '***' is not valid for this assessment and can no longer be entered. Test records with '***' as the Score element will not be included in the transfer file to the data collector.
3. Scores can be entered for one of the assessment areas and the page will save. This accommodates students who take different parts of the assessment on different days.
4. The value for the Test Grade Level is '**' and is defaulted in the WorkKeys transfer file.
5. Scores for Version 1 and Version 2 cannot be mixed with each other. For credit students must complete all of Version 1 or all of Version 2.

6. Class of 2020 forward must earn a **score of 14** on the WorkKeys, with a minimum score of 3 in each test assessment area of the WorkKeys.
7. According to ACT, any district that gives WorkKeys has access to a report called Data Export Report online. This is the vendor file that they can import using the Vendor file option. This report is an Excel file and it will give them the information they need to successfully import the student results.
8. There is also a WorkKeys_Import_Template that can be used to enter your data, and then import the file through the Assessment Imports – ACT WorkKeys Import File Template.

Select the Assessment Version

| Assessment Version ▾ |
| Assessment Version |
| Version 1 |
| Version 2 |

Next Cancel

Version 2

Assessment Date: 9/2/2020

Applied Math - Version 2.0

Score Not Reported: *   * - Option Not Applicable, Student took Test ▾

Score: *   Score

Graphic Literacy - Version 2.0

Score Not Reported: *   * - Option Not Applicable, Student took Test ▾

Score: *   Score

Workplace Documents - Version 2.0

Score Not Reported: *   * - Option Not Applicable, Student took Test ▾

Score: *   Score

Create Cancel

Run reports to verify assessment data

Some assessment reports that have been added to the AdHoc Reports to assist with assessment data can be found at _StudentInformation_ > _Local_ > _Ad Hoc Reports_ and are as follows:

˅ Assessment `New`

⭐ **End of Course Grade Substitution Report** `New`

Used to generate a file for students who took courses that were marked for a particular End Of Course exam in the 2019-2020 school year,and also completed in the second half of the school year.

˅ EMIS Assessment

⭐ **FB Acceleration Detail**

Lists all FB records in a spreadsheet format for students who are reported to EMIS when you run the FB transfer.

⭐ **Industry Credential Detail**

Lists students and the industry credential assessments they have taken in a spreadsheet format, including the Testing Date, Test Part Code, Test Part Name, Score, and Points Earned.

⭐ **PS COS Import Template**

This report should be used as a template for the Preschool COS import. You must still manually enter the test results for the included students.

⭐ **State Assessment Below Reported Score Report**

Provides state assessment data with results that are less than the selected score value.

⭐ **State Assessment Below Scaled Score Report**

⭐ **State Assessment Report**

Lists all parts and scores of the selected assessment type based on the selected student's test year.

⭐ **Third Grade Testing Diagnostic Detail**

Displays third-grade testing diagnostic results in a spreadsheet format for students in grades KG - 3.

Please be sure to check back to this location regularly as additional reports will be added as time and requests permit.

Verify Student Assessment and correct errors

The Assessment Verifications have been updated to be a useful tool when trying to verify your assessment data. Now each of the assessment verifications have a blue interactive link for the student's name which will take you to their assessment page where you can review the issue, add a needed record, or update the values such as entering records with a 'Score Not Reported' fields.

StudentInformation > EMIS > Verify Assessment

Verify Assessment - Barberton

From this screen, you can verify student assessment data.

Include Buildings:*
- ◉ Select All Buildings ◯ Clear All Buildings

☑ BAWO - BARBERTON ELEMENTARY EAST ☑ BAUL - BARBERTON MIDDLE SCHOOL
☑ BAME - BARBERTON ELEMENTARY WEST ☑ BADE - BARBERTON PRESCHOOL
☑ BAHS - BARBERTON HIGH SCHOOL

Test Type:
- ◯ Verify - Preschool COS (GM)
- ◯ Verify - Preschool ELA (GB)
- ◯ Verify - KRA(GO)
- ◯ Verify - Student Achievement OAA (GA)
- ◯ Verify - OGT(GX)
- ◯ Verify - End of Course (GE)

[Verify] [Cancel]

LCE Validation:
0 Records Displayed

Transfer Student Assessment Records to the Data Collector

The assessment transfer process is available on the Assessment Transfer – Collection (A) Menu under EMIS. Each reporting period has its own menu containing options specific to that reporting period.

The transfer process for assessments provides the ability for the user to select only those assessments they wish to include in the transfer. This provides control over the assessments you wish to submit. Once you have completed the reporting for a specific assessment, it is not necessary to retransfer each time you report assessment data. Data should be transferred according to the guidelines of ODE's manifest.

You must have the district in context to transfer Assessment records to the data collector.

StudentInformation > EMIS > Assessment Reporting Collection (A)

EMIS - Create Flat Files - Select Files
From this screen, you can transfer Assessment Collection (A) records.

Request Type	Program Selection

☑ Select all transfers
☑ Transfer - ACT (AC)
☑ Transfer - AP (AP)
☑ Transfer - CTE Industry Credential (GW)
☑ Transfer - CTE Student Assessment - OCTCA (GY)
☑ Transfer - DPR Growth Assessment (GD)
☑ Transfer - End of Course (GE)
☑ Transfer - International Baccalaureate (IB)
☑ Transfer - KRA (GO)
☑ Transfer - Next Generation Assessment Grades 3-8 (GN)
☑ Transfer - OELPA (GF)
☑ Transfer - OGT (GX)
☑ Transfer - Preschool COS (GM)
☑ Transfer - Preschool ELA (GB)
☑ Transfer - SAT (SA)
☑ Transfer - Student Achievement OAA (GA)
☑ Transfer - WorkKeys (WK)

Transfer Type:*
◯ Flat file transfer
◉ Flat file transfer for Data Collector

[< Back] [Submit] [Cancel]

FY21 Period G Checklist

Change Log

Date	Section Number/Name	Change Description
8/11/21	Task 17 – Register Grad-Only Students in 20/21 using the Registration Wizard	Gard Only students with a Graduation Date prior to current school year now included in the Period G transfer file
5/6/21	Task 16 – Withdraw Summer Grads	Clarification added
5/6/21	Task 17 – Register Grad-Only Students in 20/21 using the Registration Wizard	Addition of functionality for prior year graduates
4/1/21	Overall document	Updated for FY21

Table of Contents

Period G (Graduate)

For Period G, all City, Local, Exempted Village school districts are required to report data for Period G.

JVSDs and ESCs are not required to report Period G records.

For Period G, we collect the data on students who graduated anytime during the 20/21 school year as well as students who will graduate over the summer prior to the start of the 21/22 school year.

99% of Period G work will take place in the 20/21 school year. One exception is students who graduated during the summer on or after July 1st.

Once the 20/21 school year ends and you have moved to 21/22 as your default school year, data in 20/21 Period S will still be accessible for corrections and reporting completion. Period G reporting affects the Local Report Card, so it is important to complete reporting in a timely manner.

For students taking courses in the summer of 2021, manual course history records should be entered in 20/21.
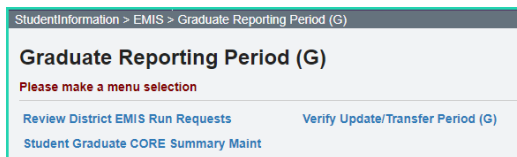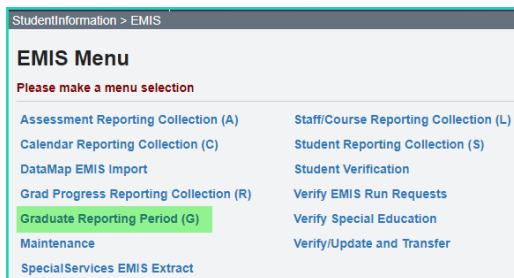
Reminders

- Graduating students MUST be reported as withdrawn with the appropriate Withdrawal Reason code indicating they are withdrawn as a graduating student. Withdrawal Dates and Codes are not reported in Period G.

- In the future school year, School Year Initialization must be run before starting period G processes. In addition, the Default Calendar must be set on StudentInformation Options in the high school building to indicate the default calendar for the building.

Modified Graduation Requirements for FY21 Graduates

Students are eligible for local graduation flexibility, but not necessarily entitled to graduate, if they meet the following requirements:

ODE is currently reviewing House Bill 67 which includes assessment changes for Grades 11 and 12; there may be additional items for graduates in the House Bill. We will be watching EMIS Change 21-164 for updates.

1st Set of Tasks: Tasks that can be completed before school is finished
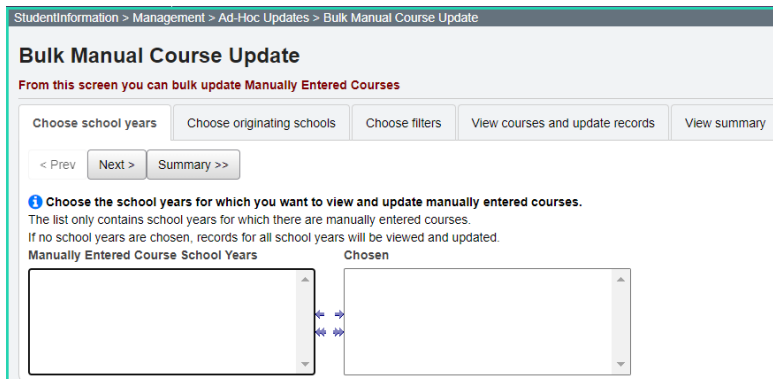
SSST highly recommends the following eight tasks be completed before school is out.

Task 1 – Bulk Update Courses and Manual Course History records for Core Subject Area and Dual Credit

A bulk update process is available to allow you to quickly mass update the Core Subject Area value and/or the Dual Credit Checkbox on course records or manual course history records. Each course to be counted for high school credit must have a Core Subject Area value. In addition, any course that is considered a Dual Credit course must have the Dual Credit flag updated before the college credit amount earned may be updated for students earning dual credit.

Refer to the **Bulk Update Core Subject Area or Dual Credit** Step by Step and the **Bulk Update Manual Course History Core Subject Area or Dual Credit** Step by Step for further instructions.

The process may be run in 20/21 to catch any new courses that may have been added.

Task 2 – Flag Courses and/or Course History with Dual Credit Option

Students who are taking courses that have been approved under the Articulation Agreement through the College Board of Regents for both high school credit and college credit, should have the 'Dual Credit' value reported as part of their Core Summary (GC) Record.

Update this field on the General tab in Courses for the course.

'Course is Dual Credit' is available to view on each student's Course History Summary to see if the student received Dual Credit for a course.

Additionally, when adding Manual Course History for a student, the Dual Credit option is available to be checked for that student's record.

Task 3 - Update <u>Student</u> College Credit values for Dual Credit Courses

For any student who earned transcripted college credit for Dual Credit, update the college credit amount the student earns. The college credit amount must be the transcripted college credit amount that will appear on the student's college transcript. The college credit earned will be reported on the GC Core Summary Records.

The College Credit Hours value selected on the Marks tab for a course will automatically populate the credit field for the Bulk Assign & Save Selected value on the College Credit Management screen.

Use the College Credit Management page to update the values based on the courses and/or manual course history records flagged as dual credit courses. Students must earn a passing mark in the course. **Courses must be marked 'Dual Credit' to be included on the College Credit Management course sections.**

1. Change Context to the building level and 20/21.
2. Navigate to ***StudentInformation » Management » Ad-Hoc Updates » College Credit Management***

EMIS Student Tab Updates
3. On the **EMIS Student tab,** select the dual credit Course whose college credit value you want to update for any student.
4. In the course sections drop-down list, select the appropriate course section for which you want to perform the update.
5. Select the check box in the row of each student whose college credit you want to update for the selected course section. (You can also select **Check All** to select all students).
6. Enter the college credit for the selected students using one of the following methods:
      A. Update selected students individually:
          1. In the row of each student, in the **College Credit** column, enter the college credit the student earned in the course section.
          2. Click **Save Selected**.

B. Bulk update selected students:
1. In the text box above the grid, the Credit value should already be populated with the value on the Courses Marks Tab.
2. Click **Bulk Assign & Save Selected**.

Manually Entered Courses
1. On the **Manually Entered Courses tab,** when the tab is selected, any student who has a manual course history record with the College Credit flag set will appear on a grid on the page.
2. Select the Check box in the row of each student whose college credit you want to update for the selected course section. (You can also select **Check All** to select all students).
3. Enter the college credit for the selected students using one of the following methods:
   A. Update selected students individually:
      1. In the row of each student, in the **College Credit** column, enter the college credit the student earned in the course section.
      2. Click **Save Selected**.
   B. Bulk update selected students:
      1. In the text box above the grid, enter the amount of college credit earned by all the selected students.
      2. Click **Bulk Assign & Save Selected**.

Task 4 – Run Course Detail report to verify courses are marked appropriately

 Scheduling: Course Detail – lists all course information in a spreadsheet format

All courses that earn High School Credit and are EMIS reportable need a CORE Subject Area value. Utilizing this report will provide every field for every course on an Excel spreadsheet which will allow users to hide fields they do not need, sort, filter, etc. to verify the required data.

Task 5 – Verify graduating seniors have been Power Withdrawn from your district

Power Withdraw is a very powerful tool. Verify the list of students to withdraw before executing the bulk withdrawal

Power Withdraw provides the ability to select students by Grade Level, Grade Level Next Year, ad-hoc membership, Home School IRN, Homeroom, Teacher, Course Section assignment, Membership group, EMIS Situation or How Received value. Individual Student ID's may also be used to find students to update.

CRITICAL
Graduating seniors must be withdrawn before the final Period S window closes. Seniors should be withdrawn using the **last day of attendance on the senior calendar, if applicable,** not the last day of school.

CRITICAL
If you fail to withdraw graduating students in 20/21, they will show on the Missing Student Report for FY22 Period S.

The Power Withdraw process does not perform a complete withdrawal. Power Withdraw only enters a withdraw date and code. Power Withdraw does not drop course section assignments, apply fee waivers, or change the student's status. If seniors are Power Withdrawn prior to running their final transcripts, their transcripts will include their withdrawal date.

The Honor Roll Report is one of the few reports in StudentInformation that honors the homeroom date on the submission screen. If attempting to generate an Honor Roll for seniors that have already been power withdrawn, make sure you use their withdrawal date as the homeroom date on the Honor Roll Report submission screen.

1. At the building level navigate to **_StudentInformation_ » _Management_ » _Power Withdraw_**.
2. The School: dropdown will default to the building in context.
3. In the Withdraw Reason: dropdown select 99 - Completed High School Graduation Requirements.
4. The Withdraw Date: will default to the last day of school and should be changed if the senior calendar has an earlier end date.
5. The Withdrawn to IRN: will default to ******.
6. In the Search Mode: section select the Search Criteria radio button.
7. Use the filters to narrow down your search criteria.
8. Ensure ☑ Students Selected by Default is checked.
9. Click Search.

10. Verify the students on the list are correct.
11. Uncheck the students who will not be graduating and do not need withdrawn.
12. Double check the list to make sure it is correct before continuing.
13. Click **Withdraw** .
14. The following message will display when the process is complete.

All selected students were successfully withdrawn

15. If errors occur the following message will be displayed

Errors occurred while withdrawing students. Students with errors were not withdrawn unless otherwise noted.

16. The students will be listed below the Search Mode: section.
17. View the students and correct the errors.
18. Rerun the Power Withdraw if needed.

Task 6 – Add/Update Student Memberships (Programs) for Graduation Pathways & Seal of Biliteracy

Graduation Pathways
Students who qualify to graduate under one of "Graduation Pathways' in 20/21 will need to add one of the 52XXXX Program Codes to be reported during Period G.

Graduation Seals
Students who qualify to graduate with one or more of the Graduation Seals in 20/21 will need to add each 51XXXX Program Codes to be reported during Period G.

Seal of Biliteracy - (60XXXX)
For students graduating with a Seal of Biliteracy, the membership representing the language(s) in which they received the Seal of Biliteracy must be added to the student's memberships for reporting during Period G. A complete listing of the Program Codes for the various languages can be found in Chapter 2.9, Student Program (GQ) Record, of the EMIS Manual.

Additionally, they will need to select the Proficient Foreign Languages on the FN Graduate tab. This will allow the Seal of Biliteracy to be added to the student's transcript.

Task 7 - Update Graduation Date and Diploma Type

Use the EMIS FN Graduate Detail Report under Ad Hoc Reports to verify values to be reported for graduates.

The Graduation Date and Diploma Type fields may be updated during the school year so the information will be available for final transcripts. The actual Graduation Date and Diploma Type *will not* be reported until period G data is submitted.

Grad Only students
Students who are not enrolled in your district, but graduate by completing their graduation requirements at your district, are Grad Only students. They should be entered as a Grad Only student following the steps in the **Registering Grad Only Students** documentation.

Grad Only students with Graduation Date prior to current school year
For the current school year, districts will be able to add Grad Only records for students with prior year graduation dates (out of date range). These students with a student annual record in the current school year will then be included in the FN transfer file during Period G. Additional information will be available for this item once it is implemented.

On-time Graduating Students:
Use Bulk Update to update Diploma Type and Diploma Date. The Power Withdraw option may be used for these students prior to the end of the school year. Best practices would indicate that this option should be applied no more than 10 days prior to the end of the school year.

Manually update the Graduation Date and Diploma Type fields:

1. Navigate to ***StudentInformation » SIS » Student » Edit Profile***
2. On the FN-Graduate tab, fill in the student's graduation date in the Graduation Date: field.
3. Next select the appropriate diploma in the Diploma Type: dropdown.
4. Click Save.

Bulk update Graduation Date:

1. Change your context to the building level and the current school year.
2. Navigate to ***StudentInformation > Management > Ad-Hoc Updates > Update Graduation Date***.
3. By default, only students with an EMIS Grade Level of 12 are updated. All other grade levels will need to be updated manually.

4. Select the applicable status codes in the Select the Student Statuses to be included: dual select.

5. In the ☁ File Download Options section select

CSV ▾	Download ▾

6. Enter the graduation date in the Graduation Date: field.

7. If Override Existing: ☑ is marked, any student who is a 12th grader and matches the status codes selected above will have their graduation date updated.

8. Next select ⦿ Verify in the Run Type: section.

9. Click **Submit** .View the output file and verify the students who will be updated with the correct date.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Building	StudentNu	DisplayName	StudentStatusName	EMISGrade	PreviousGi	GraduationDate	PreviousGi	Graduatio	Address	Address2	City	State	Zip
2	WYHS	202		ACTIVE RES	12		6/2/2021 0:00		2021				OH	
3	WYHS	202		JVS FULL T	12		6/2/2021 0:00		2021				OH	
4	WYHS	202		JVS FULL T	12		6/2/2021 0:00	2021	2021				OH	
5	WYHS	202		JVS FULL T	12		6/2/2021 0:00		2021				OH	
6	WYHS	202		JVS FULL T	12		6/2/2021 0:00	2021	2021				OH	

10. Once you have verified the output, choose Run Type: ⦿ Update .

11. Once the process is complete the following message will be displayed:

   There were 5 EMIS graduation dates and 5 SIS graduation years updated ✕
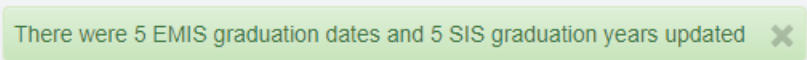
12. Now navigate to a student's profile.

13. Verify the student's Graduation Date: on the FN-Graduate tab has been updated and the Graduation Year field on the Additional tab has also been updated.

CAUTION! **Students included on the output file who are not going to graduate will need to have the Graduation Date and diploma type manually removed from their FN-Graduate tab.**

Bulk update Diploma Type:

1. Navigate to _**StudentInformation**_ » _**Management**_ » _**Ad-Hoc Updates**_ » _**Update Diploma Type**_ .

2. In the Assigned Graduation Dates dual select pull over the graduation date you used in the Bulk Update Graduation Date process above.

All Graduation Dates		Assigned Graduation Dates
	← →	06/02/2021
	≪ ≫	

3. Choose a diploma type from the Set diploma type to: dropdown.

4. If you would like to use Graduation Verification rules to further narrow down students who will be updated with the selected diploma type, fill in the `for students passing rule:` and `Mark Type:` fields.

5. Click **Submit**.

6. The following message will be displayed: `The update student diploma type job has been successfully submitted`

7. Verify the `Diploma Type:` field on the `FN-Graduate` tab has been updated.

Note: When the Bulk Update process for diploma type is used, select the diploma type that reflects the type earned by the majority of students included in the update. Once completed, manually update the diploma type on the FN Graduate tab for any student whose diploma type differs from what was selected in the bulk update.

Task 8 - Set up Ad-Hoc Groups for Student Graduate Fields

If a student has met any of the requirements for the CORE elements on the FN Graduate Tab, it is necessary for the value to be changed to "Y". This can be accomplished quickly by using the mass update process.

These elements are not school year specific. Once changed, the change will be reflected in all years.

To complete the updates, you will need to create an Ad-Hoc Group for each of the following fields to update the values using the Student Profile Bulk Update.
- CORE Economics and Financial Literacy Requirement Met
- CORE Fine Arts Requirement Met
- CORE Graduation Requirement Exemption
- Exempted from Physical Education Graduation Requirement
- CORE Graduation Requirement Met

The default settings for each value are:

To make an Ad-Hoc Membership go to:

1. Navigate to ***StudentInformation*** *»* ***My Account*** *»* ***Ad Hoc Memberships***
2. Click on the [Add New Ad-Hoc Membership] .
3. Name your membership, ex. CORE Economics Requirement Met.
4. Choose your search criteria. Example: Use [Additional Info] Tab and select students by grade level. Click [Search] . (Check [✓] Students Selected by Default to include)
5. Review the list of students and uncheck the box beside any student you do not want to include in the update.
6. Then click the [Add Selected Students] . You will receive a message at the top of the page that says "Added 'XXX' students to membership".
7. Click [Save] .
8. You will want to create an Ad-Hoc Membership for each of the above Requirement fields to be used in the Student Profile Bulk Update.

Task 9 – Run Student Profile Bulk Update to update FN Graduate Fields

F.Y.I. Once the Ad-Hoc Memberships have been created for the CORE Requirement fields listed in Task 7 above, you are ready to process the Student Profile Bulk Update to update each of these fields. You can do each one as you are ready; you do not have to wait until you have all Ad-Hoc Memberships completed.

1. Navigate to ***StudentInformation*** » ***Management*** » ***Ad Hoc Updates*** **»** ***Student Profile Bulk Update***
2. Click on the dropdown to select the Ad-Hoc Membership that you have prepared for the Update. If you have not yet prepared your Ad-Hoc Membership, you can do so at this time by clicking the [...].
3. After selecting your Ad-Hoc membership, click the [Next >] button. Continue clicking the [Next >] button until you reach the [FN-Graduate] tab.
4. Check the CORE Requirement Met field you wish to update.
5. Choose the value you wish to update your Ad-Hoc Membership with and click [Next >].
6. Review the updates you wish to make and click [Submit]. Once the profile changes are saved successfully, you will receive a message that states, "Student Profile Bulk Update was completed successfully."

2nd Set of Tasks: Can be completed after the first set of tasks is complete.

Task 10 – Run Graduate CORE Summary Verify/Update

The CORE Summary Verify/Update will only look at students with a diploma date between the first day of the school and the day before the first day of school for the upcoming year. Run the Graduate CORE Summary Verify/Update process in Verify mode to make sure that no courses or manual course history records have been missed. The verification process may be run for a single building or multiple buildings in the same run. This process creates an interactive list of courses or course history records that do not have a CORE Subject Area specified.

When processed for "Course Verify", only the Course records will be included in the verification. When processed for "Student Verify", manually entered course history records will be verified.

Period G data will include a Graduate CORE Summary record indicating how many credits towards high school graduation a student has earned in each specific CORE Subject Area.   Only courses which are flagged for high school credit will be considered for the Graduate CORE Summary Records.   If college credit was earned for dual credit courses, the amount of dual credit by core subject area is also included.

Calculating the credits earned for CORE will be based on courses the student took where high school credit was earned that counts towards graduation. This may or may not include courses taken in the district. If the student earned credit towards graduation from another entity and the school district accepts it as credit towards their graduation requirements, it needs to be used in the calculation of credits for CORE. This could include courses taken from the following entities:

- Courses taken at the district that will award the diploma
- Courses taken at the JVSD/Contract Vocational School
- Courses taken at a Post Secondary Institution
- Courses taken at another school district
- Correspondence Courses
- Any other experiences for which the district that will award the diploma has awarded credits toward graduation for the student, subject to any relevant local and state policies.

Records for these types of courses would have been created manually on the Course History module. Courses taken in middle school where a student earned credit towards graduation would also count.

The Graduate CORE Summary Verify/Update only needs run in buildings where there are graduating seniors.
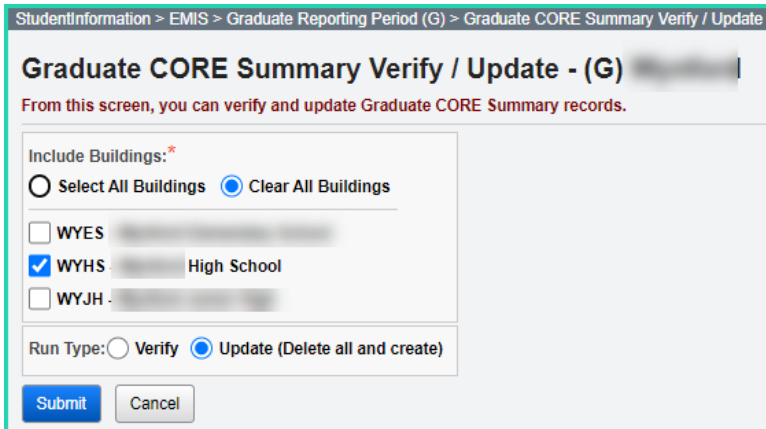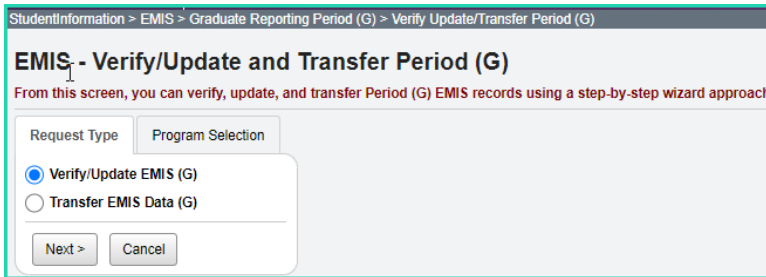
1. Navigate to ***StudentInformation » EMIS » Graduate Reporting Period (G) » Graduate CORE Summary Verify / Update***.
2. Run the Graduate CORE Summary Verify/Update in verify mode first. Choose ⦿ Course Verify . It automatically verifies the school year you are in, and you can select to choose any or all previous school years as well by pulling them over to the School Years To Verify box.
3. Click **Submit** and you will receive an interactive list of courses that require updates. By choosing the blue link under Course Code, you can go to the screen required, make the updates and save. You will then return to this page to continue making updates.
4. Once you have made all the corrections, you can proceed to check ⦿ Student Verify and click **Submit** . This page will list any students with Manually Entered Courses that require CORE Subject Area updates. By choosing the interactive blue link, you will be taken to the Manually Entered Course page to update the CORE Subject Area for each course. Once the updates have been made and saved, you will return to this page to continue making updates.

Task 11 – Create Student Graduate CORE Summary Records

Once you have completed the Graduate CORE Summary Verify/Update verification and verified the students who have met requirements for graduation, you are ready to process the CORE Summary in update mode.

When updating the CORE Summary Record, one record per CORE Subject Area where credit is earned will be created.

1. Go to ***StudentInformation » EMIS » Graduate Reporting Period (G) » Verify Update/Transfer Period (G)*** and select Update and **Submit** .
2. You will receive a message that the Graduate CORE Summary update job has been submitted.

Task 12 – Make corrections to Student Graduate CORE Summary Records

The Student Graduate CORE Summary Maintenance Page will show a summary of records for each student created through the update process. This page has add/edit and delete capabilities.

Records are created for graduates only for Period G. Manual records may need to be added for your summer graduates, so it is important to remember that when you process Update CORE Summary Record in update mode, you want to do this prior to manual entries, or the manual entries will be overwritten during the update**.** Manual records only need to be created if there is no course history record for the credits earned over the summer. If you enter manual course history, you can rerun the update process.

All summer school manual course history should be entered in 20/21.

StudentInformation > EMIS > Graduate Reporting Period (G) > Student Graduate CORE Summary Maint

Student Graduate CORE Summary Maintenance

From this screen, you can display, add, change and delete data pertaining to student Graduate CORE Summary records.

Add CORE Summary Record

		CORE Area Code	CORE Area	CORE Count	Dual Credit
🗑	✏	ELE	Elective Units	2.00	0.000000
🗑	✏	ENG	English Language Arts Units	4.00	3.000000
🗑	✏	FAR	Fine Arts Units	1.50	0.000000
🗑	✏	MTA	Mathematics - Algebra II or Equivalent Units	3.00	3.000000
🗑	✏	FLR	Foreign Language Units	2.00	0.000000
🗑	✏	HTH	Health Education Units	0.50	0.000000
🗑	✏	SOO	Social Studies units Othe than Am. Hist & Government	2.50	0.000000
🗑	✏	SOH	Social Studies - American History units	2.00	0.000000
🗑	✏	SCP	Science - Physical Science Units	1.00	0.000000
🗑	✏	SCL	Science - Life Science Units	2.00	0.000000
🗑	✏	SCA	Science - Advanced Science units	2.00	0.000000
🗑	✏	MTO	Mathematics Units Other than Algebra II or Equivalent	2.00	0.000000
🗑	✏	SOG	Social Studies - American Government Units	1.00	0.000000
			Totals:	25.50	6.000000

Task 13 - Run Graduate Demographic/Attributes Verify

Student Verification should be processed at the district level. With the district in context, the user has the choice of selecting which buildings he wishes to perform the verification process for.

Graduation related errors have been moved to Period G verification process.

District Level Processing

1. Change your context to the district level and the 20/21 school year.
2. Navigate to ***StudentInformation*** *» **EMIS** » **Graduate Reporting Period (G)** » **Graduate Demographic / Attributes Verify**.
3. Choose the buildings in the district you would like to run UNCLEMIS for.
4. Choose how many students you would like to see per page in the Number of Students Per Page: dropdown.
5. Click Verify .
6. Once the process is completed the verification errors will display on the page.

Correcting Verification Errors

1. Verification errors are interactive links which allow you to navigate to the profile of the student with the error and correct the error without leaving the verification page.

2. To correct errors for a student, click on the student's name.
3. The student's profile displays in a new window.
4. Correct the errors and save your changes to the profile.
5. After cleaning up the errors, run the verification again to verify the errors are no longer there.

Task 14 – Verify that all reportable Assessment Records are on file for Graduates

The following assessments should be reported during Period G for graduates:

1. OGT assessments for summer grads
2. American College Testing Assessment (ACT)
3. The Scholastic Aptitude Test (SAT)
4. International Baccalaureate (IB)
5. Advanced Placement (AP)
6. Industry Credential Assessment (GW)
7. End of Course (GE)
8. Workkeys (WK)
9. High School Alternate Assessments (GX)
10. For FY21 forward, the CTE Industry Assessment aka OCTCA, will also be reported (GY)

OGT results for graduating seniors (small subset of students) as of the end of the school year were reported in period A data. Summer results will be reported in Period G.

The ACT, SAT, IB and AP may also have been reported during the Period A window but may also be reported for graduates during the Period G reporting. This may be the only opportunity for some of these graduates to have the ACT, SAT, IB and AP reported and included for the LRC, so it is important to verify the scores have been entered for any graduates.

Once your district has received notification that the summer OGT assessment scores are ready, your district will download the file and import it using Assessment Import Management.

OGT records that were reported incorrectly during Period A may be included in the Period G OGT Transfer. Graduating students whose OGT records were incorrectly reported during Period S will need to have their OGT record flagged to be re-reported in Period G and included in the OGT Transfer when it is run for G.

The GW Industry Credential Assessments should be reported for all students who took an assessment, regardless of whether they passed. Beginning in FY18, all past and current GW assessments are now to be reported with a score of 'P' or 'N'.

Task 15 – Process Graduate/OGT Summer Verify

Task 15 should be run with the 20/21 school year in context.

Once OGT summer test results have been entered (July 2020), run the verify process to check for any errors before transferring the records to the Data Collector. Make any corrections necessary in 21/22 if the students have already been transferred to the next school year. If the student does not exist in the 21/22 school year, then make the corrections in 20/21. Records will be included in the transfer based on the summer testing date.

1. *With the district in context navigate to: **StudentInformation » EMIS » Graduate Reporting Period (G) » Verify Update/Transfer Period (G)**.*
2. Select ⦿ **Verify/Update EMIS (G)** .
3. Click [Next >] .
4. On the Program Selection tab select ⦿ **Verify - Student Ohio Graduation Test** .
5. Next mark the buildings to run the process for.
6. Finally click [**Verify**] .

StudentInformation > EMIS > Graduate Reporting Period (G) > Verify Update/Transfer Period (G)

EMIS - Verify/Update EMIS Period (G)
From this screen, you can verify, update, and transfer Period (G) EMIS records using a step-by-step wizard approach.

Request Type	Program Selection

○ Verify - Graduate Demographic / Attributes
○ Verify - Membership Programs (MEMBEMIS)
⦿ Verify - Student Ohio Graduation Test
○ Verify/Update - Graduate CORE Summary

[< Back] [Next >] [Cancel]

Task 16 – Withdraw Summer Grads

Students who meet their graduation requirements between the last day of school in 20/21 and prior to the first day of school in 21/22, should be reported during Period G as summer graduates.

Students who have passed all tests, do not finish coursework prior to end of school in 20/21, but complete coursework and receive diploma prior to June 30, 2021

1. Withdraw student with '99' on the last day of school (and make sure they are reported during FY21S final window)
2. Update student's withdraw date on the FS Standing tab and also under the Edit History Details to reflect the date the diploma was received
3. Update FN Graduate Tab with the Graduation Date and Diploma Type
4. This student should be reported both in FY21S and FY21G.

Students who have passed all tests, do not finish coursework prior to June 30, but complete coursework and receives diploma prior to the first day of school in 21/22

1. Student is enrolled in 21/22 and taking summer courses to complete his coursework requirement.
2. Student completes the coursework after June 30 but prior to the first day of school in 21/22.
3. Update FN Graduate tab with the Graduation Date and Diploma Type. (FN Graduate data isn't school year specific so it doesn't matter if you update it while in 20/21 or 21/22)
4. If the student has been promoted to the 21/22 school year, withdraw student from the 21/22 school year with a withdrawal reason of '99' on the date his diploma is received (after June 30, but prior to the first day of school in 21/22)
   OR
   A student who withdraws over the summer may be reported in the 21/22 school year with a single FL – Student Summer Withdrawal record. The student would not be promoted to the 21/22 school year and would not be reported in the future school year with the exception of the FL record. Update student's course history with the completed courses in 20/21 (manual course history entries).

Students who finished their coursework prior to the end of 20/21 but did not pass all required tests

For students who were withdrawn with a 7X code at the end of the school year, if they pass the required assessments during the summer PRIOR to the first day of school in 21/22, and receive their diploma

1. Update student's 20/21 FN Graduate Tab with the Graduation Date and Diploma Type

2. Add the assessment records
3. Students will be picked up in the FY21 Period G reporting period
4. Do not change the original withdraw date or the original withdraw reason

Task 17 – Register Grad-Only Students in 20/21 using the Registration Wizard

A Graduate-Only student's graduation information is reported as an FN – Student Time Period Record. The student Registration Wizard has been modified to register students who are Grad-Only similar to regularly registered students. A reduced subset of elements is collected during the registration process for these students to satisfy EMIS reporting requirements.

If a student should have graduated in a prior year but did not take or pass the test requirements and was withdrawn with a 7X withdrawal reason and now meets the graduation requirements, the student should be registered as a Grad Only student.

Prior to registering a Grad-Only student, there are some data elements that you must have to complete the registration process:

1. SSID – the student's SSID must be reported. Because the student is withdrawn at the time of registration, the SSID locator will not be returning SSIDs for these students.
2. District IRN where student completed their course requirements towards graduation.
3. Date the student completed their course requirements.

If you have this information, refer to the 'Registering Grad Only Students' documentation and proceed to Student Registration and begin registering the student.

Grad Only students with Graduation Date prior to current school year
Districts can add Grad Only records for students with prior year graduation dates (out of date range). These students with a student annual record in the current school year will then be included in the FN transfer file during Period G. These students must also have the 'Student is a Non-Attending Graduate checkbox selected on the Edit Student Profile screen'.

Task 18 – Add Student Withdrawal Override (FC) Records

ODE has indicated this record also will be used to update an incorrectly reported withdraw reason and/or withdraw date from prior years. This is to assist in eliminating appeals as well as positioning the student into the correct graduation cohort.

This record is now reportable in Period S or Period G. The Reporting Period defaults to Period S when opening this page; however, if the record is to be reported in Period G, the user will need to select 'G' in the dropdown.

When including an FC record for Period G reporting, the following withdrawal codes are the only accepted withdrawal reasons:

- 40 – Transferred to Another School District Outside of Ohio
- 42 – Transferred to a Private School
- 43 – Transferred to Home Schooling
- 45 – Transferred by Court Order/Adjudication
- 46 – Transferred out of the United States
- 48 – Expelled
- 51 – Verified Medical Reasons
- 52 – Death
- 81 – Student Reported in Error

Student Withdrawal Override (Formerly Student Missing Override) Records (FC) records continue to be reported for SSIDs appearing on the Missing Student Override report where an override is warranted. Once reported, the FC record should continue to be reported for the remainder of the S collections for the fiscal year.

If a student withdrew from school prior to the last day of the prior school year and was not reported as withdrawn in the prior school year or as a summer withdrawal, the SSID would be reported for this record. The SSIDs entered into this record are not checked against prior year data. ds are school year specific.

See Section 2.17 of the ODE EMIS Manual for additional information regarding the Student Missing Override Record.

Task 19 – Run Review District EMIS Run Requests

Run Review District EMIS Run Requests to get an audit trail of what processes have been performed for each building in your district. Review District EMIS Run Requests and check the EMIS Verify and Update processes as well as the transfer processes to make sure that all tasks are completed. It will provide you with a listing of when each process was run, what time, and the user that ran it for each building in the district. At this point in the checklist, it is important to check the following:

- Make sure each of the Period G processes have been run in Verify mode for each building where applicable
- Make sure all updating processes have been run in Update mode at least one time for the district
- Make sure all the necessary transfers were performed after the update processes were run
- If updates were rerun, also make sure that transfers were rerun as well
- Make sure that no process was run too early

Run Review District EMIS Run Requests also provides a history of all processes and transfers run to keep for your own purposes. It can be processed anytime during the reporting period to see where things stand.

Task 20 – Period G Transfers

This task should be run with the 20/21 school year in context.

Once you have completed all data updates, you are ready to transfer your data to the Data Collector. It is important that you transfer all necessary file types before submitting your data to ODE. Make sure you have completed all the transfers for Period G. The transfers for period G are located on the Graduate Reporting Period G menu.

The Period G transfers looks at the Master Calendar in the future year to determine the last date for summer graduates to be included in the Period G transfer files. If your transfer returns no graduate students, make sure SYI has been run in the future year and the Master Calendar set up. This applies even if the school building is going to be closed in the future school year.

Before running the Data, Collector make sure the most recent version of the manifest is downloaded.

1. While logged into the Data Collector, click on the **Collection Requests** tab.
2. Begin the collection.
3. Mark the Data Sources section.

☑ All Files data sources		
Data Sources	**Availability**	**Collection Status**
☑ BA-Files	✅ Ready	Not Started

4. District can choose the Collect Only option and then do the Prepare later, or they can choose the Collect and Prepare so both are completed at the same time.

Data Sources	**Availability**	**Collection Status**
☐ ML-Files	✅ Ready	Not Started
Scope of execution		
Perform: ○ Collect Only ● Collect and Prepare		

5. Once the Prepare has completed, review the Level 1 Validation errors.
6. Return to StudentInformation to make corrections and updates resolving the Level 1 Validation errors.
7. After creating a new transfer file in StudentInformation and submitting it to the Data Collector, begin a new collection.
8. If satisfied with the results, submit the collection to ODE for processing.
9. Once the collection has been processed by ODE, you should receive Level 2 Reports. Review the Level 2 Reports for accuracy and make corrections in StudentInformation.

Remember.... Once you correct errors and rerun any required updates in StudentInformation, a new transfer to the Data Collector must be performed. Once the transfer is complete rerun your collections.

FY21 Period L Staff/Course Reporting Checklist

Change Log

Date	Section Number/Name	Change Description
6/10/21	Task 18 – Period L Transfer	Updated Screenshot
6/10/21	Task 16 – Updates for the Student Grade Records	Added a new task
9/23/20	Entire Document	Update dates for 20/21

Table of Contents

Period L Staff/Course Checklist

Reporting Windows (tentative) –

	First Window	Second Window
Data Dates Included	7/1/XX – 6/30/XX	7/1/XX – 6/30/XX
Reporting Window	Oct. – Jan.	Feb. – Aug.
		This window replaces data from first window for funding but not for Licensure
Record Types to Include	CN	CN
	CU	CU
	CM	CM
	CV	CV
	GN	GN
	FR	FR

Record Types to Include for Period L – (All record types listed above) Refer to the ODE EMIS Manual for further clarification on records reported in each 'L' window.

Each reporting window will include transactions from July 1 through the end of the reporting window. Reporting is on-going meaning there is no cut-off date. As students are enrolled in your district, their data will be included in the next transfer regardless of enrollment date. As changes are made to the staff and course information and CTRMEMIS is run in update mode, that current data will be reflected in the transfers.

Task 1 – Run INVSUBJ to Verify Subject Codes Assigned to Courses

Navigate to *StudentInformation > EMIS > Staff/Course Reporting Collection (L)* and run the Verify Subject Codes (INVSUBJ). Courses will be listed if the Report to EMIS checkbox on the course record is marked but the EMIS Subject Code field is blank or invalid. Additionally, the process will check the EMIS Subject Codes on the Course Section Override tabs. **See the EMIS Manual, Chapter 4.7, for an updated list of valid subject codes.**

The INVSUBJ also displays whether there are students enrolled in the course or course section.

12 Records Displayed

Course Subjects

Building IRN	Building	Course Code	Course Name	EMIS Course Subject Code	Students Enrolled
001545	BAHS	SO8	SPECIAL OPTION 8		☑
001545	BAHS	SO8.	SPECIAL OPTION 8.		☑
001545	BAHS	GC2021	GOOGLE CLASSROOM2021		☑
001545	BAHS	GC2024	GOOGLE CLASSROOM2024		☐
001545	BAHS	GC2022	GOOGLE CLASSROOM2022		☑
001545	BAHS	GC2023	GOOGLE CLASSROOM2023		☑
001545	BAHS	SO2	SPECIAL OPTION 2		☑
001545	BAHS	SO2.	SPECIAL OPTION 2.		☑
001545	BAHS	SO3	SPECIAL OPTION 3		☑
001545	BAHS	SO3.	SPECIAL OPTION 3.		☑
018457	BAME	ASPEC	CENTER BASED	196095	☐
030528	BAWO	PSPEC	Center Based	196095	☐

0 Records Displayed

Course Section Override Subjects

Building IRN	Building	Course Code	Course Name	EMIS Course Subject Code	Section Number	Students Enrolled
There are no records to display						

Edit the EMIS tab of the course in Course Maintenance to correct the Subject Code.

StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Courses

Updates to EMIS Subject Codes for FY21:

- 178019 – Plan Reading and Estimating
- 170801 – Maritime Occupations
- 176002 – Flux Cored Arc Welding

EMIS Subject Codes removed in FY21
- 178015 – Telecommunications/Low Voltage Systems
- 178025 – Custodial Services
- 990371 – Vocational Job Training Coordinating

Task 2 – Run the Wipe and New process

 The Wipe and New process should only be run at the beginning of the school year. When it is processed, it overwrites any manual changes that have been made to teacher history records during the school year.

Running the Wipe and New is not a required process but is beneficial for districts beginning the school year to update their teacher history records with the most current information from any changes made to course sections. When School Year Initialization was processed to create the new school year, last year's teacher history records were copied up to this school year. The Wipe and New process will ensure you are reporting the most up-to-date records. Running the Wipe and New process at the beginning of the school year also assists other processes that depend on Teacher History records from the Teacher History Tab.

Wipe and New will update Teacher History records to match the data on the Meeting Times tab of the course section. It overwrites any existing data.

1. On the Wipe and New tab on the Teacher History Maintenance screen, select the school(s) for which you want to create new teacher history records. ***Note:*** *If a building is in context, the building is already selected.*
2. Click **Wipe and New**.
3. When the Wipe and New process is completed, StudentInformation displays a message at the top of the page that indicates the number of teacher history records that were created.

Note: Wipe and New cannot be run for a building that has not yet finalized its schedule.

Task 3 – Run the Add Missing process to update any Teacher History Records for newly added courses

Add Missing will add a new teacher history record if there is no teacher history record matching the teacher designated on the meeting times tab or if no Teacher History record exists. It does not overwrite any existing data. Add Missing can be run throughout the year.

1. On the Add Missing tab on the Teacher History Maintenance screen, select the school(s) for which you want to add missing teacher history records. *Note: If a building is in context, the building is already selected.*
2. Click **Add Missing**.
3. When the Add Missing process is complete, StudentInformation displays a message at the top of the page that indicates the number of teacher history records created, or if none, the message indicates that no teacher history records were created.

StudentInformation > EMIS > Maintenance > Teacher History Maintenance

Teacher History Maintenance
From this screen, you can adjust teacher history records.

There were 3 teacher course history records created successfully.   ✕

| Start and Stop Dates | Wipe And New | **Add Missing** |

☑	Building Name	Finalized Schedule	Last Updated Date	Last User
☑	001545 - BARBERTON HIGH SCHOOL	🟢	9/22/2020 1:17:00 PM	janice
		Building has a finalized schedule = 🟢		

Add Missing

Task 4 – Run the Start and Stop Dates option to update Teacher History Records (Optional)

If your semester start/stop dates change during the school year, ex. due to calamity days, use the Start and Stop Dates tab option to update existing Teacher History Records.

NOTE: If the change in the start and stop dates affects the stop and start dates for the Course Section Assignments for students, you will want to use the Course Section Assignment Dates page to make any updates that are needed. These updates should be made at the building level.

Task 5 – Verify Courses and Course Sections

Courses - General Tab

CCP Courses – Be certain to check the 'dual credit' checkbox on the Courses General Tab when adding College Credit Plus courses. When setting up courses, districts should set up separate courses for CCP and non-CCP courses. A course should not have some course sections that are CCP and some that are non-CCP.

NCAA Core Course

The **NCAA Core Course** located on the General Courses tab must be checked in order for a course to count as a NCAA Core Course. This field is used to designate which courses meet the eligibility requirements for Division I and Division II colleges. Additional information pertaining to the eligibility requirements can be found at https://www.ncsasports.org › ncaa-eligibility-center › eligibility-requirements.

Once your district has determined which courses should have this box checked, they may want to go back 3-4 years and update the NCAA Core Course box for those previous years as well. This will allow districts to be able to verify that students who are currently in the higher grades and considering athletics in college, will meet the requirements needed.

Courses - Marks Tab

According to the EMIS Manual, the EMIS Location IRN (on the Courses – EMIS tab) generally is the IRN of the physical location where the course is being held. Exceptions are as follows:

CCP Courses – Report the IRN of the post-secondary institution that is giving credit for the course.

CCP Courses with a CP Delivery Method (Career Tech CCP Course) – Report the IRN of the actual location of the course, not the IRN of the Post-Secondary Institution.

- **College Credit Hours -** should be filled in with the number of possible college credits the student can earn for the course.
- **CCP Location IRN** – When a CCP Course has a Delivery Method of CP, this field should be filled in with the college IRN. Transcripts have been updated to include this information and will look at the following fields in the order below using the first IRN it locates:
  - Course Section EMIS Override Location IRN
  - CCP Location IRN (Course>Marks tab)
  - EMIS Location IRN (Course>EMIS tab)
  - School Name
- **College Location –** This field is populated when a value is entered in the CCP Location IRN field. If the college is an out-of-state college, the **CCP Location IRN** should be completed with '999999' and you can type in the name of the college in the **College Location** field. This is particularly important for any CTE Courses.

Courses – EMIS Tab
Curriculum Code – VM Career Technical Education Middle Grade Course
Establishes a class as a middle grade Career-Technical Education class. Middle grade CTE courses are 30-120 hour introductory level courses linked to business, industry, and labor that ensure a seamless pathway from middle school to college careers. CTE middle grade courses may be offered for any pathway with an approved CTE-26 on file. VM courses do not count towards a student's CTE concentrator status and students in VM courses are not subject to CTE technical testing. See the CTE Program Matrix for a

complete list of subject codes that may be used in conjunction with the VM curriculum code.

Delivery Method – CI Computer as Instructor
A certificated staff member must be the Teacher of Record for courses with Delivery Method of CI. The staff member can be a superintendent, principal, or teacher. The Staff ID cannot be '9999999999'.

Credit Flex element on EMIS tab of Course record:
- N – Course is not a credit flexibility course (default)
- R – Yes, the course is a credit flex course used for credit recovery work
- Y – Yes, the course is a credit flex course not used for credit recovery

If either of the following values is different on the EMIS tab of the course, you will need to set up separate courses. Simply adding a separate course section will not work.
- Educational Option
- Credit Flex

The EMIS Override tab on the course section allows different values in the following fields:

Start Date and Stop Date - If a course section has a different start and/or end date than the rest of the course sections for a particular course, those values can be updated on the EMIS Override tab.

Update EMIS values in Course Section Maintenance
Teacher IRN Override – Located on the Teacher History tab, this field can be used to enter a co-teacher's Staff Provider IRN if they are not from the district, i.e., from an

ESC. This will allow the Staff Course records to correctly report co-teachers and their Staff Provider IRN.

Transfer file:

Team Teaching – If a course section is taught by more than one teacher, both teachers should be marked as the Teacher of Record on the course section Meeting Times tab and as CT - Co-Teacher on the Teacher History tab since both teachers are required to have a Staff Class Master Record reported.

Reminders:
1. All Courses K-12 must be broken out into courses by subject.
2. Each of the courses that have been broken out, except for homerooms and other special classes created for the grade book package, needs to be reported in EMIS.
3. Homerooms should not be marked as reportable to EMIS on the Course record.
4. You must report all year long courses and any other courses offered during the school year, such as courses offered second semester only or courses that span five or six week periods.
   a. *Preschool courses* - Are to be reported as self-contained courses. Only one course is reported for each preschool student. **EMIS Subject Code 180108** is required to be reported for all Preschool courses. Special Ed courses will be differentiated by the value selected in the Student Population field on the

EMIS tab of Courses. The valid values for Student Population for this EMIS Subject Code are DP, D8 and PR.

b. *Students receiving preschool itinerant services* – Do not report course records and subject records for itinerant services.

c. *Gifted courses* – Students taught by the Gifted Intervention Specialist (GIS) who is considered the "Teacher of Record" should be reported but Supplemental Gifted services/programs provided by the GIS or other staff members are not considered courses and do not need student subject records.

d. *If the ESC is a contracted agency* - The resident district needs to report the courses and class lists taught by ESC contracted staff. The ESC instructor should be set up using their credential ID. The ESC will report the staff demographic, employment, and contractor staff records. Be sure to mark these ESC courses as EMIS reportable, the ESC's IRN is used for the Program Provider IRN, and the proper building IRN is used for the location IRN.

e. *Home Instruction*: School age students with disabilities who are receiving home instruction are to have one course record per course, reported for each teacher. The course should be reported with the appropriate EMIS Subject Code, Delivery Method, Curriculum, Educational Option, and Student Population in Course Maintenance.

f. *College Credit Plus* courses (fka Post-Secondary) must be set up as a class on the student's schedule. State Staff ID of the staff member should be reported for Employee ID if the staff is employed by the district. Employee ID of all 9s is reported if the staff is employed by the college. A generic CCP teacher should be set up in your district with a State Staff ID of all 9s.

g. *ESP Classes* – A staff class master record is required to be reported with the appropriate art, music or PE subject code for courses taught in grades K-8 for each ESP teacher. ODE does not require student subject records to be reported for each student in an ESP class, however StudentInformation will not include the course without at least one student assigned. You must assign students to ESP classes.

h. *Credit Flex Courses* – A course master record is required to be reported for any course which is a credit recovery course. To qualify, a course must meet the district's board approved credit flexibility policy that provides opportunities for students to earn credits in non-traditional ways. A new field has been added to the course record as well as manual course history to indicate a course is credit flex course. Report the course with the appropriate delivery method. If the delivery method is 'TO', the staff member may have an ID of all 9s.

StudentInformation allows course codes up to 15 characters and the first 10 characters must be unique. However, for EMIS reporting no more than 10 character course codes should be used.

Task 6 – Verify Reportable Courses

Navigate to *StudentInformation > EMIS > Staff/Course Reporting Collection (L)* and choose Verify - Reportable Courses to confirm courses being reported to EMIS. Manually update any courses as needed.

Task 7 – Verify course information and make any necessary changes

📄 Course Detail Report – provides all course information in an excel friendly format.

- The Course Detail Report provides a complete listing of all courses at a specific building that the user wishes to validate.
- All possible Course related fields are displayed on the Excel report. The options begin in Column A and continue through Column BO. Users can hide the columns they don't wish to see.
- As an Excel report, users can then sort the data how they want to see it displayed.
- A second report called Course Curriculum (CRSE) is available within the application at StudentInformation>SIS>Scheduling>Scheduling Reports>Course Curriculum (CRSE). For this report, you can choose up to ten fields you wish to display.

Course Detail Report

Course Code	Course Name	Course Description	Abbreviation	Course Short Name	Hours of Instruction	Scheduling Priority	Display on Public Module	Is High School Credit	Roll Course to Next Year	College Prep	Display on Parent Access	Is Active	Is in Update History	Core Course
216	216		216	9th H 216	0	5	Y	Y	Y	N	Y	N	Y	Y
4CCNT	4 CITY COMPACT NORTON		4CCNT	4CCNT	75	5	Y	N	Y	N	Y	Y	N	N
4CCWA	4 CITY COMPACT WADSWORTH		4CCWA	4CCWA	75	5	Y	N	Y	N	Y	Y	N	N
9HG	9th Grade Honors		9GH	9th H 216	0	5	Y	Y	Y	N	Y	Y	Y	Y
5041	ACCOUNTING 1		ACCT 1	ACCOUNTING 1	75	6	Y	Y	Y	N	Y	Y	Y	Y
9090	ACT Prep (Eng/Reading)		ACTPE&R	ACTPENG/READ	76	5	Y	Y	Y	N	Y	Y	Y	Y
9091	ACT PREP (Math/Sci)		ACTPM&S	ACTPMATH&SCI	76	5	Y	Y	Y	N	Y	Y	Y	Y
ACTP10	ACTPREP 10		ACTP10	ACTPREP10	75	5	Y	Y	Y	N	Y	Y	Y	Y
ACT10	ACTPREP10		ACTP10	ACT10	0	5	Y	Y	Y	N	Y	Y	Y	Y
ACTP10.	ACTPREP10.		ACTTP10.	ACTPREP10.	75	5	Y	Y	Y	N	Y	Y	Y	Y
8878	ADV ENGINEERING & PROGRAMMIN.		ADVE&P.	ADV ENG & PROG.	152	9	Y	Y	Y	N	Y	Y	Y	Y

Task 8 – Verify All Staff Members have a Credential ID

The Credential ID is used by Pre-Identification exports as well as on Staff Class Master records and Program records for contracted staff.

For CCP teachers employed by the college, enter all 9s in the State Staff ID field. For CCP teachers employed by the district, enter their Credential ID in the State Staff ID field. Credit flex teachers may have all 9s in the State Staff ID field if the Delivery Method is 'TO'. Credit flex teachers will have a credential ID in the State Staff ID field if the Delivery Method is not 'TO'.

More than one staff member can have all 9s for the State Staff ID field.

Task 9 – Verify and Update the HQT Field Value as needed for Civil Rights Reporting

Note

Although HQT values are no longer reported to EMIS, the Civil Rights Report **does use** HQT values for certain areas. The current areas in the CRDC reporting that utilize HQT values are as follows:

- COUR-9 *Classes in Mathematics Courses in High School Taught by Teachers with a Mathematics Certification*
- COUR-14 *Classes in Science Courses in High School Taught by Teachers with a Science Certification*
- COUR-16 *Classes in Computer Science Courses in High School Taught by Teachers with a Computer Science Certification*
- COUR-1b *Grade 7/8 Algebra I Classes Taught by Certified Teachers*

Additional documentation on these areas can be found in the EUG StudentInformation Student and Registration Guide.

A course section **must** have a record on the Teacher History tab to create an HQT record. HQT records are not dependent upon CTRMEMIS/CLISEMIS having been run. The courses available to have an HQT value for a teacher are based upon the teacher being marked as teacher of record on the teacher history tab, the subject code, curriculum element, delivery method and student population fields on the course record and on the EMIS overrides tab of the section.

A. Updating the Highly Qualified Definition for existing HQT records:

1. Navigate to *StudentInformation* » *Management* » *School Administration* » *Scheduling Administration* » *Highly Qualified Teacher Update*.
2. Select a teacher from the Filter By Teacher: dropdown.
3. Courses the teacher instructs will be displayed based on the combination of Subject Code, Curriculum element, Delivery Method, and Student Population fields on the course record and on the EMIS Overrides tab of the section.
4. Pay careful attention to all four values before editing a record to ensure you are updating the correct one.
5. Click on the ✏ next to the Subject Area to edit the HQT value.
6. Select the appropriate value from the How the teacher meets highly qualified definition: dropdown.
7. Click Save .

B. Removing Highly Qualified Definitions for courses the teacher no longer instructs. (optional)

1. Navigate to *StudentInformation* » *Management* » *School Administration* » *Scheduling Administration* » *Highly Qualified Teacher Update*.
2. Select a teacher from the Filter By Teacher: dropdown.
3. Courses the teacher instructs will be displayed.
4. Ensure you are deleting the correct record for the Subject Code combination.
5. Click the 🗑 next to the obsolete value.

C. Adding missing Highly Qualified Definitions:

1. Navigate to *StudentInformation* » *Management* » *School Administration* » *Scheduling Administration* » *Highly Qualified Teacher Update*.
2. Select a teacher from the Filter By Teacher: dropdown.
3. Courses the teacher instructs will be displayed.
4. Click Add HQT Definition.
5. Select the appropriate value in the EMIS Definition: dropdown. NOTE: Values in the dropdown are populated from EMIS tab of the course record in Course Maintenance and on the EMIS Overrides tab of the section based on the Subject Code, Curriculum element, Delivery Method, and Student Population fields.
6. Fill in the How the teacher meets highly qualified definition: field.
7. Click Save.

D. Run the HQT report to verify the values or use the report as a checklist to see which values are missing from the courses that need this value for the Civil Rights Report

StudentInformation > SIS > School > Highly Qualified Teacher Report

Task 10 – Verify and Update Student Schedules

📄 Student Schedules Report – displays all student schedule information in a spreadsheet format.

Verify student schedules by running the Class List Formatter

StudentInformation > SIS > Marks > Marks Reports > Class List Formatter (R703)

REPORT: R703
FORMAT-02

HIGH SCHOOL

Run Date: 8:43 AM 3/29

CLASS LIST

TEACHER	COURSE NAME	COURSE	SECTION	COURSE TERM	MEETING TIME DESCRIPTION
Teacher583, Ryan	STUDY HALL 2PD 1SEM	SH 2	19	1st Semester	F: 2 (145)

STUDENT NUMBER	STUDENT NAME	GRADE	DISABILITY CONDITION	GENDER	HOMEROOM	PROGRAM	HOME SCHOOL
303137236	Aabbccddee, Mark	11		M	FILL		
149625	Student54188, Ciara	10		F	KIRI	Not applicable	
148156	Student54314, Lucy	10		F	HOEE		
148079	Student54376, Vegas	10		F	MCGO		
148029	Student54429, Connar	10		F	HOEE	Not applicable	
148018	Student54444, Adam	10		M	KIRI		
146073	Student54504, Tyler	10		M	KIRI	Not applicable	
146006	Student54578, Hannah	10		F	OBRE	Not applicable	
145002	Student54749, Hannah	10		F	OBRE		

Student Subject records reported to EMIS are created based off the student's course section assignments.

Make any necessary changes to schedules using the Course Section Assignments page or Request Assignments page.

Refer to the ***Student Schedule Changes Procedural Checklist***

Task 11 – Process CLISEMIS/CTRMEMIS in Verify Mode and correct errors

1. Change your context to the district level and the current year.
2. Navigate to **StudentInformation > EMIS > Staff/Course Reporting Collection L.**
3. On the `Request Type` tab choose the `⦿ Verify Staff/Course Data` option.
4. Click `Next >`.
5. On the `Program Selection` tab choose `⦿ Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)`.
6. Click `Next >`.
7. Choose the buildings in the district you would like to run CLISEMIS/CTRMEMIS for.
8. Choose the run type you wish to perform. If you're verifying the data, choose `Run Type: ⦿ Verify EMIS Reportable Only`
9. Next, select how many errors you would like to be displayed per page: `Number of Courses Per Page: [All ∨]`
10. Click `Submit`
11. Once the process is completed the CLISEMIS/CTRMEMIS errors will display on the page.

Correcting errors:

1. CLISEMIS/CTRMEMIS errors are interactive links which allow you to navigate to the screen needing to be corrected without leaving the CLISEMIS/CTRMEMIS page.
2. To correct errors, click on the Link in each error message.

Building IRN	Building	Course Code	Course Name	EMIS Subject Code
006759	CLHS	003047	ENGLISH 9	050160

Course Section Messages: 7 Error 51: The course section does not have a teacher history record for a specific time.
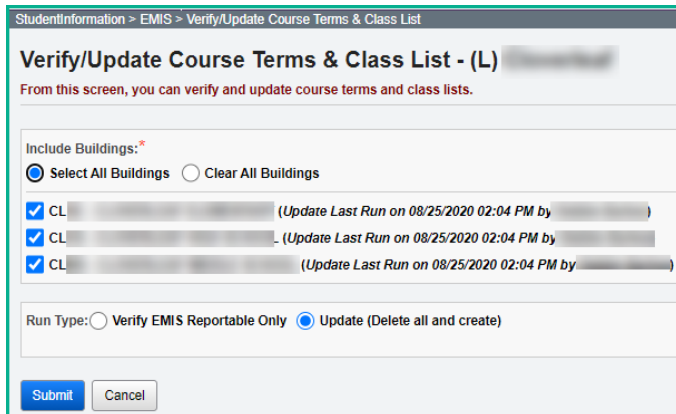
3. Depending on the error message, you will be taken to the Course screen, the course section or the staff HQT page for corrective action. Links display in blue on the error.
4. Correct the errors and save your changes.
5. After resolving the errors run CLISEMIS/CTRMEMIS again to verify the errors are no longer there.

Refer to the **CTRMEMIS Error Resolution Guide** for detailed instructions on how to correct each error.

Task 12 – Run CLISEMIS/CTRMEMIS in Update Mode

Vocational Course sections (Curriculum value begins with V) with zero students assigned will have Student Staff Classroom records created automatically.

CTRMEMIS should be processed in update mode each time you are submitting your data to ODE to catch any schedule changes made since the last submission. This is an on-going process.

Run AFTER final corrections are made to the CLISEMIS/CTRMEMIS verification report.

Once CLISEMIS/CTRMEMIS has been run in update mode the records may be viewed by going to the following pages:

StudentInformation » _EMIS_ » _Maintenance_ » _Student Staff Classroom_
StudentInformation » _EMIS_ » _Maintenance_ » _Student Subject Record_
StudentInformation » _EMIS_ » _Maintenance_ » _Student Subject Record By Class_

CTRMEMIS looks at the Staff record for the Staff ID for the CN or CU records.

If multiple teachers are considered the teacher of record for a course section, then a CU record will be created for each teacher of record.

Each teacher record (CU) for a course section will have an indicator of either Lead Teacher or Co-Teacher. If two teachers are assigned to a course section as teacher of record, both teachers must be reported as Co-Teachers. You cannot report one teacher as the lead and the other as the Co-Teacher.

The course section Teacher History tab must be updated if a teacher starts or stops teaching on a day other than the course term start or stop date. If a teacher's start and stop dates overlap with another teacher for the same course section, both teachers

would be considered Co-Teachers. If both teachers did not teach the course section at the same time, make sure there is no overlap with their dates. Both teachers would be considered Lead Teachers.

Start and Stop Dates:
Start dates on the student subject records (GN) will only be reported for students who entered the course after the course term start date of the course section.

Example: If the course term start date was September 1, 2020 but the student started the course on February 27, 2021, a start date of February 27th will get reported for that student. No start date will be reported for students who have been in the course since day one.

Stop dates on the student subject records (GN) will only be reported for students who withdrew prior to the course term end date.

If the student drops a course before the course term stop date, a drop date will be reported.

If a student was in a course section multiple times, a record will be reported for each time the student was in the course.

GN150 & GN152 – High School Credit Earned & Partial/Override Credit Elements

StudentInformation, with approval of ODE, has handled the reporting of these elements in the following manner:

Description	GN150	GN152	Explanation
Courses that are not 'for high school credit'	Y	0	Indicates these courses do not earn high school credit
Courses that are 'for high school credit'	P	Amount of credit earned including 0 if no credit earned	ODE uses the amount of credit that is reported in the Partial/Override Credit element instead of the credit amount from the CN course master record. This is reported this way in case the amount of credit a student is awarded when the credit is different than what is reported on the course master record.

Task 13 – Verify Vocational Correlated Records have been entered

Once CTRMEMIS has been processed in Update mode, the Local Classroom Codes for all course sections being reported exist in EMIS Maintenance and are available for use on the Correlated Records page.

1. At the building level, navigate to: ***StudentInformation* > *EMIS* > *Maintenance* > *Vocational Correlated Records.***
2. Click on Add Vocational Correlated Records button to add a new record.
3. Choose the proper local classroom code from the dropdown for each of the three fields as applicable.
4. Save the record.

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

Vocational Correlated Records

From this screen, you can create vocational correlated records.

Add Vocational Correlated Record

		Anchor Classroom ▲	First Correlated Classroom	Second Correlated Classroom
🗑	✏	BJSA-252522-01 (252525)	BJSA-252521-01 (252010)	
🗑	✏	BJVS-178000CT-01 (178000)	BJVS-171002-08 (178029)	BJVS-992462-52 (178029)
🗑	✏	BJVS-178000CT-01 (178000)	BJVS-171002-08 (178029)	BJVS-992462-52 (178029)
🗑	✏	BJVS-178000MA-01 (178000)	BJVS-990364-04 (990363)	BJVS-990364-24 (990363)
🗑	✏	BJVS-178003-03 (178003)	BJVS-171012-03 (178029)	BJVS-031500A-01
🗑	✏	BJVS-178003-03 (178003)	BJVS-171012-03 (178029)	
🗑	✏	BJVS-178004-03 (178004)	BJVS-171012-03 (178029)	
🗑	✏	BJVS-252522CBI-01 (252525)	BJVS-251110CBI-01 (252010)	

Task 14 – Verify Vocational Mapping Records have been entered

The mapped local classroom code record allows a district to map (combine) the students from a specific class into another class. Mapping means combining (merging) students from two or more classes in EMIS to look like a single class. The students that are reported in the "Mapped from Local Classroom Code" will be mapped (moved) to the "Mapped to Local Classroom Code" and for EMIS reporting, will no longer exist in the "Mapped From Local Classroom Code" in the EMIS flat files.

In order to map classes together, both classes must have the same values in the following elements:
- Subject Code
- Curriculum Element
- Employee ID
- Delivery Method
- Educational Option
- Student Population

Only classes with a Semester Code of '1', '2', or 3 will be eligible to be included in the mapping process. Trimester courses can't be mapped.

NOTE:

This process should only be used for Career Technical Courses.

Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

Add Mapped Local Classroom Code

		Mapped From Classroom Code ▲	Mapped To Classroom Code	Message
🗑	✏	BJVS-340035-51 (340120)	BJVS-340035-52 (340120)	
🗑	✏	BJVS-975001-08 (Not Found)	BJVS-975001-01 (175001)	• The Mapped From Classroom Code does not exist in the current reporting period

Task 15 – Update <u>Student</u> College Credit values for Dual Credit Courses

These records are not reported in Period L, but need to be updated annually to be available to create the dual credit Core Summary records which are reported in Period G.

For any student who earned transcripted college credit for Dual Credit, update the college credit amount students earn. The college credit earned will be reported on the GC Core Summary Records. The college credit amount must be the transcripted college credit amount that will appear on the student's college transcript. Use the College Credit Management page to update the values based on the courses and/or manual course history records flagged as dual credit courses. Students must earn a passing mark in the course. **Courses must be marked 'Dual Credit' to be included on the College Credit Management course sections.**

1. Change Context to the building level and 20/21.
2. Navigate to ***StudentInformation » Management » Ad-Hoc Updates » College Credit Management***

EMIS Student Tab Updates
3. On the **EMIS Student tab,** select the dual credit Course whose college credit value you want to update for any student.
4. In the course Sections drop-down list, select the appropriate course section for which you want to perform the update.
5. Select the Check box in the row of each student whose college credit you want to update for the selected course section. (You can also select **Check All** to select all students).
6. Enter the college credit for the selected students using one of the following methods:
   A. Update selected students individually - In the row of each student, in the **College Credit** column, enter the college credit the student earned in the course section; Click **Save Selected**.
   B. Bulk update selected students - In the text box above the grid, enter the amount of college credit earned by all the selected students; Click **Bulk Assign & Save Selected**.

Manually Entered Courses

1. On the **Manually Entered Courses tab,** when the tab is selected, any student who has a manual course history record with the College Credit flag set will appear on a grid on the page.

2. Select the Check box in the row of each student whose college credit you want to update for the selected course section. (You can also select **Check All** to select all students).

3. Enter the college credit for the selected students using one of the following methods:

    A. Update selected students individually - In the row of each student, in the **College Credit** column, enter the college credit the student earned in the course section; Click **Save Selected**.

    B. Bulk update selected students - In the text box above the grid, enter the amount of college credit earned by all the selected students; Click **Bulk Assign & Save Selected**.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

| EMIS Student | Manually Entered Courses | | | | | | |

| Save Selected | | Bulk Assign & Save Selected | | | | | |

Select All	Student Number	Student	Grade	School Year	Course	CORE Subject Area	College Credits Earned
☐			12	2019-2020	0111 GP - CP ENGLISH 12 GP	ENG	
☐			12	2019-2020	CCP33001 - CCP ENGLISH COMPOSITION I	ENG	
☐			11	2019-2020	0111 GP - CP ENGLISH 12 GP	ENG	

Task 16 – Updates for the Student Grade (FR) Records

Beginning in FY21, any EMIS Reporting entity that reports Course Master (CN) and Student Courses (GN) records showing students could earn high school graduation credit in a course, must report the Student Grade (FR) Records.

Districts will need to map the following records so that the data is available to be included in the Student Course Grade transfer records.
1. Reporting Terms Maintenance – add EMIS Term
2. Marks Maintenance – map the mark to an EMIS Grade
3. Grade Status – automatically calculated

Reporting Terms Maintenance/EMIS Term
For each building that offers courses that are 'for high school credit', you will want to update the Reporting Terms Maintenance with an EMIS Code value.
1. Change Context to the building level and 20/21.
2. Navigate to ***StudentInformation » Management » Scheduling Administration » Initialization » Reporting Terms Maintenance***
3. For each Reporting Term that grades should be reported for, an EMIS Term needs to be added. For example, to report the 1st 9 week grade, you would click on the [✏] with 1st 9 week, and update the EMIS Term: [Q1 ▾] with the Q1 Emis Term value.
4. Once the update is made, click [Save].
5. Repeat as needed for each of the Reporting Terms that grades will be reported.
6. **Note:** What districts typically think of as an interim (a report between grading periods) does not need to have an EMIS Term assigned to it, as those do not need to be reported to ODE.
7. See sample below:

StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Reporting Terms Maintenance

Reporting Terms Maintenance
From this screen, you can display and change data pertaining to reporting terms.

[Add Virtual Term] [Save Changes] [Cancel Changes]

				Code	Name	Start Date	End Date	Planned Days	Actual Days	Sort Order	EMIS Term	Marks Start Date	Marks Cutoff Date	Archive Date	Active
🔒	✏		↓	GP1	1st 9 week	Sep 08, 2020	Nov 06, 2020	43.00	43.00	1	Q1				🟢
🗑	✏	↑	↓	INT1	1st 9 week interim			0.00	0.00	2					🟢
🔒	✏	↑	↓	GP2	2nd 9 week	Nov 09, 2020	Jan 22, 2021	42.00	42.00	3	Q2				🟢
🗑	✏	↑	↓	INT2	2nd 9 week interim			0.00	0.00	4					🟢
🗑	✏	↑	↓	EX1	EX1			0.00	0.00	5					🟢
🔒	✏	↑	↓	GP3	3rd 9 week	Jan 25, 2021	Mar 26, 2021	43.00	43.00	6	Q3				🟢
🗑	✏	↑	↓	INT3	3rd 9 week interim			0.00	0.00	7					🟢
🔒	✏	↑	↓	GP4	4th 9 week	Mar 29, 2021	Jun 09, 2021	47.00	48.00	8	Q4				🟢
🗑	✏	↑	↓	INT4	4th 9 week interim			0.00	0.00	9					🟢
🗑	✏	↑	↓	EX2	EX2			0.00	0.00	10					🟢
🗑	✏	↑		FIN	FIN			0.00	0.00	11	YE				🟢

☑ Show Active Only

Marks Maintenance/EMIS Grade

For each building that offers courses that are 'for high school credit', you will want to map the Marks to an EMIS grade.

1. Change Context to the building level and 20/21.
2. Navigate to *StudentInformation » Management » School Administration » Marks Administration Menu » Marks*
3. An EMIS Grade needs to be mapped to each Mark. The EMIS Grades do not include '+' or '-'. An A+, A or A- would all be mapped to 'A'.
4. For each EMIS Grade being added, click the [pencil icon], and update the EMIS Grade: A ⌄ with the appropriate value for the mark.
5. Once the update is made, click **Save**.
6. Repeat as needed for each of the Marks that will be reported.
7. See sample below:

StudentInformation > Management > School Administration > Marks Administration Menu > Marks

Marks Maintenance

From this screen, you can display, add, change and delete data pertaining to marks for the current school year.

Add Mark

		Mark ▲	Mark Name	Description	EMIS Grade	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dq Mark	Active
🗑	✏	A	A	EXCELLENT	A	4.000000	3.990000			1.000000	☐	☑	☑	☐	🟢
🗑	✏	A-	A-	EXCELLENT	A	4.000000	3.500000			1.000000	☐	☑	☑	☐	🟢
🗑	✏	A+	A+	EXCELLENT	A	4.000000	4.000000			1.000000	☐	☑	☑	☐	🟢
🗑	✏	AU	AU	AUDIT		0.000000				1.000000	☐	☐	☐	☐	🟢
🗑	✏	B	B	GOOD	B	3.000000	2.990000			1.000000	☐	☑	☑	☐	🟢

Grade Status

The Grade Status is also required to be reported as part of the Student Grade (FR) records. This value indicates whether the grade reported is a final mark or an interim mark (grade that hasn't earned credit but is printed on a report card or transcript).

This value is automatically calculated as follows when the course is marked Report to EMIS and a mark record is created:

- Reporting Term is Progress1 = 'I'
- Reporting Term is Progress2 = 'I'
- Reporting Term is Progress3 = 'I'
- Reporting Term is Progress4 = 'I'
- Reporting Term is Earned = 'F'
- Reporting Term is Not Used = no record generated

Note: Although the value of 'P' is also an acceptable value to be reported, this process will not select the 'P' value since it is for grades in progress, such as assignment grades collected in GradeBook.

Task 17 – Run CHECK_EMIS for Period L to ensure all updates have been performed before transfers are performed

Run CHECK_EMIS to get an audit trail of what processes have been performed, what hasn't been performed and what processes were performed too early for each building in your district. The CHECK_EMIS page lists which EMIS Verify, Update, and Transfer processes have been run. The CHECK_EMIS report will provide you with a listing of when each process was run, what time, and which user completed the process for each building in the district.

At this point in the checklist, it is important to verify the following has been completed:

1. Make sure all processes have been run in Verify mode for each building.
2. Make sure all updating processes have been run in Update mode at least one time for the district.
3. Make sure all the necessary transfers were performed after the update processes were run.
4. **If updates were rerun, also make sure that transfers were rerun as well.**
5. Make sure that no process was run too early.

CHECK_EMIS can be processed at anytime during the reporting period for a status report.

Task 18 – Period L Transfer

Once you have completed the data updates, transfer your data to the Data Collector. Navigate to the Staff/Course Reporting Collection (L) menu and choose Select All Transfers.

Task 19 – Run the Collection

Before running the Data Collector, make sure the most recent version of the manifest is downloaded.

1. While logged into the Data Collector, click on the **Collection Requests** tab.
2. Begin the collection.
3. Mark the applicable SIF Zone and Data Sources boxes according to instructions from you ITC. It is important to know the type of fiscal software used by your district when determining which SIF Zone and Data Sources need to be selected.
4. Once the collection has been completed, proceed to the Prepare step.
5. Once the Prepare has completed, review the Validation errors.
6. Return to StudentInformation to make corrections and updates resolving the Validation errors.
7. After creating a new transfer file in StudentInformation and submitting it to the Data Collector, begin a new collection.
8. If satisfied with the results, submit the collection to ODE for processing.
9. Once the collection has been processed by ODE, you should receive Level 2 Report errors. Review the Level 2 Report errors and make corrections in StudentInformation.

Don't forget – once you correct errors and rerun any required updates in StudentInformation, a new transfer to the Data Collector must be performed. Once the transfer is complete rerun your collection.

**FY21 Period S Reporting Checklist
All Districts, All 'S' Windows**

Change Log

Date	Section Number/Name	Change Description
6/4/21	Task 15 – Updating Retained Students	Added clarification
5/14/21	Task 50 – Period S Transfer	Updates regarding the GC records
5/5/21	Task 29 – Update Student Gifted Records	Updates regarding the ACT/SAT screenings
4/30/21	Task 26 – Update Third Grade Reading Guarantee Values	Updated screenshot
4/30/21	Task 14 – Update English Learning Option for Students	Updated LEP to English Learner
4/30/21	Task 29 – Update Student Gifted Records	Updates regarding the ACT/SAT screenings
4/27/21	Task 37 – District and Building Records	Updates for removed DN Attributes
4/14/21	Task 14 – Update English Learner Options for Student	Updated LEP to English Learner
4/14/21	Task 47 – Run MAJOREMIS to calculate Majority of Attendance IRN	Updates for the new process
4/14/21	Task 37 – District and Building Records	Updates for new DN attributes
1/25/21	New Task 48 added, tasks after 48 were updated to include new numbers	Inserted new task 48 – Student Non-graduate CORE Summary Reporting
1/25/21	Task 6 – Verify the Percent of Time field for students who don't attend 100% of time	Under Unique Situations, paragraph 3, additional information pertaining to the Edit Calendar Percentages
1/25/21	Reminders: College Credit Plus Students	Additional information regarding District Relationship for CCP students
1/25/21	Task 37 – Update the District and Building Records: DN & DT	Notes regarding the removal of DN Attribute INFOTECIRN
10/27/20	Task 39 – Add/Update Student Memberships (Programs)	Added the new Graduation Seal codes
9/17/20	Task 37 – Update the District and Building Records, DN & DT	Added EMIS Change 21-51
9/16/20	Overall Document	Updated with changes for FY21

Table of Contents

Introduction

FY21 Period S Checklist

The Period S Checklist includes all reporting windows for Period S for the Traditional districts (first window, second window and final window) as well as all reporting windows for Period S for the Community/STEM districts (first window and final window). We believe this assists districts in having all needed information quickly updated and located in one place for the Period S reporting.

Please note there are *three* tasks that Community/STEM districts must complete that Traditional districts do not complete and those are noted and labeled in a separate section. Traditional users can ignore those three tasks, and do not need to print those sections.

The checklist also includes a list of Ad Hoc reports that will assist in data verification for reporting.

Collection Requests

Each collection request will include transactions from July 1 through the end of the Collection Request. Reporting is on-going meaning there is no cut-off date. As students are enrolled in your district, their data will be included in the next transfer regardless of enrollment date. Below is a chart of the fields that must be reported for each window for both collections.

Trad. 1st Window	Trad. 2nd Window	Trad. Final Window	CS/Stem 1st Window	CS/Stem Final Window
Sept. – Dec.	Jan. – April	May - July	July - January	February - July
GI	GI	GI	GI	GI
GJ	GJ	GJ	GJ	GJ
FS, exc. FS320, FS330, FS 340	FS	FS	FS, exc. FS320, FS330, FS 340	FS
FD, exc. FD150, FD160, FD190, FD200, FD180, FD120, FD140	FD	FD	FD, exc. FD120, FD140, FD160, FD180, FD190,	FD
FN270, FN110	FN270, FN370, FN140, FN290, FN110, FN220, FN310, FN120	FN140. FN290, FN110, FN080, FN220, FN310, FN390, FN120, FN370, FN270, FN430	FN270, FN400, FN110	FN140, FN290, FN110, FN080, FN220, FN310, FN390, FN120, FN400, FN370, FN270, FN430
GE	GE	GE	GE	GE
FE	FE	FE	FE	FE
FC	FC	FC	FC	FC
FL	FL	FL	FL	FL
DN Include: STUKGBRDAY STUHOMESCL STUNPNTSRV TFRPSESCYS TFRPSESCNO ASMTFG3ELA ASMTSPRELA ASMTSPRMSS	DN Include: STUKGBRDAY STUHOMESCL STUNPNTSRV TFRPSESCYS TFRPSESCNO PBISIMPSTG ASMTFG3ELA ASMTSPRELA ASMTSPRMSS	DN Include: STUKGBRDAY STUHOMESCL STUNPNTSRV STUNPNTELG STUPSTCBTR STUPSTCATR LCLWELLPOL TFRPSESCYS TFRPSESCNO CCPDENIALS CCPREIMBCT CCPRESTITU PHYSEDPLOT Phys Ed Evaluation Group Attributes Initial IEP Eye Exam Group	DN Include: C_STUEEPOL STUKGBRDAY ASMTFG3ELA ASMTSPRELA ASMTSPRMSS	DN Include: C_STUEEPOL STUKGBRDAY LCLWELLPOL CCPDENIALS CCPREIMBCT CCPRESTITU PHYSEDPLOT Physical Education Eval Group Elements Initial IEP Eye Exam Group Elements PBISIMPSTG ASMTFG3ELA ASMTSPRELA ASMTSPRMSS

Trad. 1st Window	Trad. 2nd Window	Trad. Final Window		CS/Stem 1st Window	CS/Stem Final Window
		Attributes PBISIMPSTG ASMTFG3ELA ASMTSPRELA ASMTSPRMSS			
GQ	GQ	GQ		GQ	GQ
		DT			DT
	FB	FB			FB
	GG	GG			GG
GD	GD	GD		GD	GD
	FT	FT			FT
				FP	FP
				FF	FF
				FG	FG

Ad-Hoc Reports

Each of the reports listed below can be run in an excel format allowing the user to easily isolate the data they need. Examples include but are not limited to, hiding columns or rows, filtering columns on specific items, sorting, custom sorting, and all other excel functionality. Please view the Analytics Hub for all available reports; they are now in separate categories according to subject matter. Documentation for all reports is available in Reporting Report List document.

FS Tab Data Verification
1. **SSID Search** - Allows a user to search for an SSID within their district and report will provide information for any school year the student has been registered.
2. **Sub-Calendar Hours Analysis** – Lists all calendars for a building and their actual days, calculated hours per day, and any sub-calendar day exceptions.
3. **SSID Missing Fields** - Provides a list of students who will not receive an SSID automatically due to missing information.
4. **EMIS FS Standing Attendance Detail** – Displays all fields for each student on the FS Standing tab, including the FS Standing Attendance tab.

FS Attendance Tab Data Verification (HB410 Absence Data)

1. **Attendance Process Warnings Detail** – Identifies absences that are skipped during the calculations and displays messages to indicate the issues.
2. **Attendance Skipped Student Detail** – Identifies students that are skipped during the calculations and displays messages to indicate the issues.
3. **Absence Thresholds Detail** – Lists the type of threshold each student has exceeded and the trigger date(s). If a trigger date is within the last 7 days of running the report, it is highlighted in blue.
4. **Consecutive Absence Detail –** Identifies if any students have met or exceeded at least 15 hours of consecutive unexcused absences. If there are no consecutive absences for a student, you receive the message 'No Data qualified for this Report.

FD Tab Data Verification
1. **EMIS FD Detail** - Displays all fields for each student on the FD Attributes tab.

FN Tab Data Verification
1. **Third Grade Testing Diagnostic Detail** – Report will show diagnostic results for students in grades KG-3.
2. **Non-Report to EMIS** – Provides a list of each student not marked Report to EMIS along with their EMIS Situation.
3. **MOA Summary** – Report to be run after MOA EMIS process has been run. Pulls Effective FS and FN Data along with District Withdraw Date to verify Non-MOA students. Default Filter to Non-MOA only.
4. **EMIS FN Attributes Detail** – Provides EMIS FN Attribute Tab information on students.
5. **EMIS FN Graduate Detail** – Provides a report showing the fields required on the FN Graduate Tab.

6. **CTE Concentrator Detail** - Displays the CTE Program Area of Concentration for each student.

Other

1. **5 Credit Rule Check** - Report for EMIS Coordinators to run against grades 9-12 students and see who has met the 5-credit attempted rule for the year and who has not according to their schedule. Best viewed in Excel.
2. **EMIS Admission Calendar Comparison** – Compares the Assigned Calendar field on the General tab to the Reporting Calendar on the FD tab for each student to locate discrepancies.
3. **EMIS Gifted Detail –** Lists the gifted data for each student by assessed areas.

NOTE: The EZ Query SIS Student Search can be used to generate a report with data from multiple EMIS tabs.

Reminders

Wipe and New from the Period L Checklist

The Wipe and New process in the Period L Checklist should be run at the beginning of the school year. This is especially important to be run prior to running the assessment pre-identification exports. Refer to the Period L EMIS Checklist for a review of this item.

Community Eligibility Provision

Any district/building that participates in the Community Eligibility Provision (CEP) of the school lunch program needs to verify they have reviewed every student they are reporting as economically disadvantaged. Please see the newer codes in the 'Update Disadvantagement Values on the FD tab' task.

Services Only Students

Students who attend non-public school but receive special education services from your public school need to be reported. They should have a zero Percent of Time since they are not being instructed and are only receiving services.

Home-schooled and Non-public Students

Districts are not required to report home-schooled and non-public students who are participating in extra-curricular activities only.

Autism Scholarship Students

Autism Scholarship Program students (ASP) are required to be reported to EMIS and are included in the Federal October Child count. They should not be withdrawn from the resident district. See EMIS Manual section 2.1 for details.

Jon Peterson Scholarship Students

If you are the resident district sending a student out on a JPS, use EMIS situation 473, even if the JPS program is housed at a non-pub. If your district is not the resident district of a JPS student at a non-pub, use a services-only EMIS situation.

Preschool students found to be ineligible for service

PS students found ineligible for services must be admitted and withdrawn on the same day. Remember to put these students on a non-attending calendar so they aren't reported with any attendance hours when ATTUPEMIS runs.

> **NOTE:** If the PS student doesn't have an SSID, register the student and wait for an SSID to be returned before withdrawing the student. The SSID Locator does not process withdrawn students.

College Credit Plus Students

Students attending elsewhere as College Credit Plus students must be reported as attending elsewhere for the percent of time they are taking college credit courses – even if they are taking courses after school hours. Schools will still be funded 100% for the time at their district and the time at the CCP Institution.

Note: Students who have a Sent to Percent of Time for 'PS' that is greater than zero, must have a District Relationship of '1'. If the district reporting the student is responsible for the cost of the College Credit Plus course, then they must report the PS sent to percent of time, and since CCP counts as providing instruction (even if it is via the college), they are a relationship 1.

STEM School Students

There are two different types of STEM schools
1. District STEM School: STEM school that *is not* considered a building in a regular district
2. Building STEM School: STEM school that *is* part of a regular district.

- Students who attend a District STEM School are withdrawn from their resident district using the normal withdrawal procedures using a withdraw code of "41".
- District STEM Schools report students as non-residents attending using a "How Received" value of "K". The How Received IRN is the IRN of the student's resident district.
- Students from other districts who attend a Building STEM School do so through Open Enrollment and are not withdrawn from their resident district.
- If a resident student attends a Building STEM School, the STEM building IRN is used for the Accountability IRN and the Attending Building Area IRN.

FD & FN Tabs/Student Profile

Remember there are additional fields on the FD Attributes tab and the FN Attributes Tabs that need to be completed and reported in addition to the fields listed within this checklist. Some of those values are as follows:

FD Attributes
- Migrant Status
- Disability Condition
- Free/reduced Lunch Status
- Homeless Status
- Unaccompanied Youth
- Migrant Status
- Immigrant Status
- Foreign Exchange Graduation Plan

FN Attributes & FN Graduate
- Accountability IRN
- Attending Building IRN Next Year
- OGT Graduation Alternative
- Military Compact Graduation Alternative
- Proficient Foreign Languages (for Transcripts only)

Student Record Updates

Task 1 – Verify Student Admission and Withdrawals

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 EMIS FS Standing Attendance Detail Report - verifies students who have been withdrawn, the withdraw reason and the date of withdraw.

Verify student admissions and withdraws. Due to the Student Cross Reference system reporting, **it is no longer appropriate to expunge no-shows.** Once a student is reported in the SCR collection for the school year, you must continue to report them all year long.

Withdrawal Codes to Note

81 - Student reported in error- never should have been reported

A. Verify the following types of students are withdrawn from 20/21:
  i *No shows* - Students who are new to the district in 20/21 but NEVER show up. These students must be reported in SCR.
   - *Scenario # 11* from the ***20/21 Withdrawal Scenarios*** doc

  ii. *Prior Year Withdrawals* – Students who withdrew from the district on or before the last day in 19/20 but were already promoted to 20/21 should be expunged from 20/21 unless they have already been submitted to the SCR.
   - *Scenario #5* from the ***20/21 Withdrawal Scenarios*** doc

  iii. *Summer Withdrawals*- Students who were enrolled in 19/20 but withdrew over the summer and will not be attending in 20/21.
   - *Scenario #2* from the ***20/21 Withdrawal Scenarios*** doc

  iv. *Summer Graduates* – Students who were enrolled in 19/20 but withdrew from the district prior after June 30 and prior to the first day of the new school year and who have a Summer diploma date and diploma type. The student's graduate information is reported in 20G, but their withdrawal information is reported in 21S.
   - *Scenario #33 from the **20/21 Withdrawal Scenarios** doc*

  v. *Newly Enrolled – Late Start -* *A new student enrolls and is supposed to start the first day of school but doesn't show until the third day.*
   - *Scenario #17 from the **20/21 Withdrawal Scenarios** doc*

B. Process Students who were supposed to graduate last year but did not

Students who have met all their course requirements and were supposed to graduate in 19/20, but did not because they didn't pass the testing requirements should be handled as follows:

i. *Enrolled in courses* - If the student is enrolled in courses in 20/21, report the student with Grade Level 13 on the FD tab. Do *not withdraw the student*. Report summer test results in 20A, Assessment Collection Request.

ii. *Dropout -* If the student drops out in the 20/21 school year, report the student as Grade Level 13 on the FD tab – State Equivalent Grade Level and a withdrawal date and withdraw reason of *75 – Student Completed course requirements but did NOT pass the appropriate statewide assessments required for Graduation* on the student's latest FS record. Change the EMIS Grade Next Year on the FN tab to "DR".

iii. *Dropout who becomes a Graduate during the 20/21 school year* – If the student was a dropout as indicated in (ii) above and takes and passes the required assessments during the school year, the following steps need to be taken to report the student in both S and G reporting.
A. Expunge the student from 20/21.
B. Add a Student Summer Withdrawal Record (FL) with the original withdraw date and reason.
C. Re-enroll the student in 20/21 as a Grad Only student.

C. Register students who were previously withdrawn and have returned to the district, including expelled students

i. Previously withdrawn in 19/20 but returning to the district in 20/21
   o Scenario #3 from the *20/21 Withdrawal Scenarios* doc

ii. Expelled in 19/20 and is not receiving instructional services but returned to the district in 20/21
   o Scenarios #14 and #15 from the *20/21 Withdrawal Scenarios* doc

Refer to the Admissions and Withdrawals section of the EMIS Manual (2.1.1) and the FY21 Admission & Withdrawal Scenarios document for more additional scenarios.

Task 2 – Reporting Preschool Students

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 EMIS Preschool Student Coding Report – lists the EMIS Situation and situation values for each student.

Students in ECE, regardless of the resident district are to have 'E' reported for their How Received Element.   A student cannot be enrolled in more than one program at a time. In addition, a student can have a How Received value of 'E' and receive special education services.

If a resident preschool student is enrolled in Federal Head Start, then '*' is reported for the How Received Element.

Non-resident preschool students enrolled in a traditional district who are not ECE, should be reported with the appropriate How Received value for their situation as well as the How Received IRN. Any of the EMIS Situations contained in the EMIS Situations document for traditional districts can be used for preschool students.

Students enrolled in an ESC who are not in an ECE program are to have 'H' reported for the How Received element. Students who are not in an ECE program and are enrolled in a traditional district that is not their resident district are to be reported with a How Received code that accurately reflects how they arrived at the district (i.e., through open enrollment, court placement, etc.). If the student is enrolled in special education and ECE, then 'E' is reported for the How Received element.

Options 'E' and 'H' are only valid for Preschool students. A How Received IRN value is also required to be reported. These options take precedence over reporting the type of entity.

How Received Values exclusively for PS students:

> E – Preschool ECE Early Childhood Education Grant
> H – ESC Providing Instruction and Related Services (ESC Only)
> I – Student receiving non-instructional, supplementary or related services

In the student's district of residence, How Received options used currently for school aged students are also now available to be reported.

Task 3 – Obtain and Verify SSIDs

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 Use the Student SSID Missing Fields Report under Ad Hoc Reports to view students who are missing fields required to obtain an SSID.

Obtain:
If all the following required fields are filled in during registration, an SSID will automatically be assigned as part of the registration process by the SSID Locator.

> *First Name or Legal Name if first name is not the legal name.*
> *Middle Name or Legal Name if middle name is not the legal name*
> *Last Name or Legal Name if last name is not the legal name*
> *Date of Birth*
> *Gender*
> *Native Language*
> *Ethnicity*
> *Birthplace City*
> *Admission Reason*

JVSs and ESCs must collect all required fields to obtain an SSID during the registration process. If students are sent to the JVS from the home school using the Student Transfer process in StudentInformation the SSID, if available, will come over with the student.
Community and STEM schools must collect all required fields to obtain an SSID during the registration process unless they obtain the SSID from the student's prior district.

For exceptions, the StudentInformation SSID extract may be used.
   a. Perform a sweep of students missing an SSID. IBM will bulk assign the SSIDs.
      StudentInformation > Management > Import/Export > State Student ID Export
   b. Log into the IBM site to obtain the SSIDs manually for individual students

All students must have the mandatory fields filled in to get an ID.

A. Verify:
Run the SSID report to verify all students have an SSID. The report will list students missing elements which would prevent them from receiving an SSID. Prior to school beginning, *'sweeps'* can be run using the State Student ID Export to obtain SSIDs for newly registered students, and the State Student ID Import will import the SSIDs received from IBM. Once school has begun, the SSID Locator will send out newly registered student data to obtain an SSID that is automatically inserted on the latest FS record. The SSID Locator will only request an SSID for a student one time, so if all the required values to obtain an SSID are not present, the State Student ID Export can be used to obtain SSIDs for students once the remaining required data is entered.
B. How to Add/Update an SSID:

i.   *Records returned by the Locator:* If an SSID is returned for a student by the locator, only the current FS record will be updated. Manually enter the SSID by editing the remaining FS records for the student where no SSID is specified.

ii. *Students previously assigned an SSID now assigned a new SSID:* If the student was previously assigned an SSID and now has a different SSID, add a new FS record recording the new SSID to indicate a change in the value. Do not change the SSID value on prior records. This permits the old SSID associated with the student to still be reported. Invalid SSIDs should be deactivated manually in the IBM system.

Task 4 - Verify Non-reportable Students

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 EMIS Non-Report to EMIS - provides a list of each student that has "Report to EMIS" unchecked.

The Verify Non-reportable Students page lists each student who is enrolled in the current school year but their **Report To EMIS:** checkbox on the **FN-Attributes** tab is unchecked. This process should be run multiple times throughout the year to make certain all reportable students are being reported in a timely manner. Failure to report in a timely manner can affect funding.

Any student listed that needs to be reported to ODE may be updated by marking the **Report To EMIS:** checkbox next to their name and clicking Save.

Task 5 – Run the STAT report to verify students' EMIS situation assignments

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 **EMIS FS Standing Attendance Detail Report – Displays the EMIS Situation and situation values for each student.**

The STAT report provides a list of students and their EMIS situation. The report may be used to verify that each student has the proper EMIS situation assigned. The report will include the EMIS situation from the latest FS record for the current school year.

Any student missing an EMIS Situation will have a blank value in the EMIS Situation Description column. Students missing FS records will also have a blank value in the EMIS Situation Description column.

StudentInformation > SIS > School > Student Reports > Student Status/Attendance Code (STAT)

REPORT: DASL - REPO STAT			HIGH SCHOOL		RUN AT 7:52 AM 3/29
			STUDENT STATUS / ATTENDANCE CODE		PAGE 1 OF 43

ID	STUDENT NAME	GN	GR	EMIS SITUATION DESCRIPTION	DISABILITY CONDITION
889091629	Aab, Anthony (Kyle)	M	11	5 - Resident attending Full Time	**
889091628	Student22988, JOSHUA	M	09	151 - Resident open enrolled elsewhere F/T	**
889091627	Student22989, KENZIE	F	09	151 - Resident open enrolled elsewhere F/T	**
889091619	Student22990, JOSEPH	M	10	151 - Resident open enrolled elsewhere F/T	**
889091611	Student22991, James	M	11	151 - Resident open enrolled elsewhere F/T	**
889091610	Student22992, Salvatore	M	10	151 - Resident open enrolled elsewhere F/T	**
889091579	Student23004, Mychalela	F	10	151 - Resident open enrolled elsewhere F/T	**
889091575	Aabb, Jinkyung (Kristina)	F	09	5 - Resident attending Full Time	05
889091561	Student23014, Kevin	M	12	151 - Resident open enrolled elsewhere F/T	**
889091558	Student23016, Alicia	F	10	151 - Resident open enrolled elsewhere F/T	09
889091554	Student23019, Kayla	F	09	151 - Resident open enrolled elsewhere F/T	**

Task 6 – Verify the Percent of Time Field for students who don't attend 100% of time

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

EMIS FS Standing Attendance Detail Report – Displays the Percent of Time values for each student.

Refer to ODE's definition of Percent of Time in section 2.4 Student Standing FS Record chapter of the EMIS manual on ODE's Website.

The percent of time field indicates the percent of time the student is instructed by *your* district's employees. The Percent of Time: field is **shared by all buildings in the district.** If a student is enrolled in more than one building within the district at the same time, the Percent of Time: should reflect the total time he is receiving instruction in both buildings.

Preschool students, including itinerant students, should now be reported with the actual Percent of Time that they attend.

ODE has advised that the 'true' percent of time should be calculated for these students, and that 50% and 100% of time is no longer the standard.

Please view the calendar set up for these students with the Percent of Time in the ***Master and Sub-calendar Maintenance including EMIS Exceptions*** documentation.

UNIQUE SITUATIONS:

1. <u>Non-preschool ESC students</u>: The Percent of Time: at the resident district should include the time spent receiving instruction from ESC staff.

2. <u>Resident students who attend College Credit Plus and the JVS</u>:
   The resident district must report the percent of time the student spends at the College Credit Plus institution in the Sent To 2: Percent of Time: field. The Sent To 1: IRN: would point to the JVS but since the JVS is an EMIS reporting entity, the Sent To 1: Percent of Time: would be zero.

3. <u>Students who attend multiple buildings within the same district</u>:
   The Percent of Time: field should reflect the total time spent receiving instruction by all buildings in the district – not just the building the student spends the majority of time in. Additionally, students who attend multiple buildings within the district will need to review and update the Edit Calendar Percentages page (StudentInformation > SIS > Student > Admission History > Edit Calendar Percentages) to enter the appropriate Attendance Percentage for each building the student is enrolled in.

Edit Calendar Percentages

Edit the attendance percentages of calendars for date ranges in which the student attends more than one school building.

Start Date	Stop Date	School	Calendar	Attendance Percentage (%)
Jul 01, 2020	Aug 19, 2020	BARBERTON HIGH SCHOOL	Default	100
Aug 20, 2020	Jun 02, 2021	BARBERTON HIGH SCHOOL	Default	50 → Defaults to 50/50; district must update to correct value
		BARBERTON MIDDLE SCHOOL	Default	50 →

Save   Cancel

Note If your district changes the start date or end date of the calendars after the Attendance Percentages have been updated, they will need to review the Edit Calendar Percentages page for any students enrolled in multiple buildings. Changing the start and/or end dates, will revert the Attendance Percentages to 50/50, and they will need to be updated to the correct values.

4. The amount of time spent at the following entities is NOT included in the student's percent of time.
   a) BDDs (formerly known as MRDD)
   b) Entities providing contracted career technical instruction
   c) Pilot program site

Task 7 – Verify/Update County of Residence on FS tab

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 EMIS FS Standing Attendance Detail Report – Displays the County of Residence value for each student.

Note: Casino Counts are taken the Friday of the first full week in October and the Friday of the first full week in May. Funding can be affected if the students do not have the correct County of Residence populated at these times.

The County of Residence code reported should be the code for the county in which the student is living.

- If the student is living with parents, report the county of the parents' home address. If the parents are not living together, report the county of the parent who has primary custody of the student.
- For a student who is not living with parents, report the county in which the student is domiciled. If foster placed, for example, it would be the county of the home of the foster parent(s).
- If a student is homeless and has an established residence, such as a homeless shelter or is in a doubled-up situation, the county of that residence should be reported. Otherwise report the county code where the student spends the night.
- If the domicile of the student is out of state, use "**".

DYS does not need to report this element. For students with a Sent Reason (FS200 or FS230) = "FP", the value in this element will not be used.

If the County of Residence Code changes during the duration of the student's enrollment in the district, the existing Student Standing record should be closed and a new one opened using the new Effective Start Date as the day the student began to live at the new address.

District Relationship: 1 - Stud. rcvg instr. in whole/part from rep. dist ⌄	**District of Residence:** 043539 - Barberton City SD 🔍
How Received: * - Not Applicable ⌄	**How Received IRN:** ****** - 🔍
Percent of Time: 100	**Tuition Type:** N - Non-tuition student (default) ⌄
Attending Building IRN: 020503 - BMS Middle School ⌄	**Assigned Building IRN:** ****** ⌄
County of Residence:* 77 - Summit ⌄	

Task 8 – Update Fiscal Year Began 9th for all incoming Freshmen

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 EMIS FN Attributes Detail Report – Displays the Fiscal Year Began 9th values for each student.

This field is required to be reported in all Period S reporting windows. Use the Student Profile Bulk Update process to mass update the field value for all 9th grade students entering 9th grade this school year.

> 1. Navigate to ***StudentInformation > Management > Ad-Hoc Updates > Student Profile Bulk Update*** .
> 2. Create an ad-hoc of all 9th graders in 20/21 and select the ad-hoc membership from the Ad Hoc: dropdown.
> 3. Click Next > until the FN-Attributes-No Date tab displays.
> 4. Place a check in the box below Fiscal Year Began 9th: and enter 2021.
> 5. Click Next > until the Review updates tab displays.
> 6. Click Submit .
> 7. The following message will display
>   Student Profile Bulk Update was completed successfully.
> 8. Finally put a 9th grader in context and go to the FN-Attributes tab and verify the Fiscal Year Began 9th: field was populated with 2021.

Be sure you do NOT include any **retained** 9th graders from 19/20 in your ad-hoc file. You don't want to change the year they began 9th as it should remain 2020 for retained 9th graders.

Note: Grad Points does not calculate for students if the Fiscal Year began 9th field is not populated.

Note: When registering students in grades 9-12 using registration wizard, the Fiscal Year Began 9th is automatically entered for those students. Be sure to review it for accuracy.

Task 9 – Update Disadvantagement Values on the FD Tab

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

EMIS FD Detail Report – Displays the Disadvantagement values for each student.

In FY17 new disadvantagement codes were added to report that students have been verified as economically disadvantaged. Validation of the disadvantagement value is mandatory for these students. If your school is a Community Eligibility Provision (CEP) district, verification for each student is required to ensure you have documentation proving students have an economic disadvantagement. The new codes are:

> 4 – Economic Disadvantagement in a CEP building or LEA where the student has not been determined to meet one of the 4 conditions listed in the Economic Disadvantagement reporting instructions

> 5 – Both Economic and Academic Disadvantagement in a CEP building or LEA where the student has not been determined to meet one of the 4 conditions listed in the Economic Disadvantagement reporting instructions

> 6 – Economic Disadvantagement in a CEP building or LEA where the student has been determined to meet one of the 4 conditions listed in the Economic Disadvantagement Reporting Instructions.

> 7 – Both Economic and Academic Disadvantagement in a CEP building or LEA where the student has been determined to meet one of the 4 conditions listed in the Economic Disadvantagement Reporting Instructions.

Students who meet any of the following conditions must be reported as Economically Disadvantaged:
- Eligibility for Free or Reduced-Price Lunch
- Resident of a household in which a member is eligible for Free or Reduced Price lunch
- Student who is a known recipient of Public Assistance
- Title I Application student

Academic Disadvantagement is only to be reported for Career-Technical students and refers to a student who is having an academic problem that is not due to an identified disability condition. A career-technical student should only be reported as academically disadvantaged if he/she:
- Lacks knowledge in one or more of the academic areas of Mathematics, English/Language Arts, Science or Social Studies, and
- Performs two or more years below grade level on standardized tests.

Task 10 – Verify Race/Ethnicity for newly enrolled students

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

Any newly enrolled student or a student whose District of Residence changes must have their Race/Ethnicity recollected.

The Local Ethnic Category field is not used for EMIS purposes but is the value used on most StudentInformation (RXXX) reports.

Recollected:

Gender:*	M ✓	Birthdate:*	06/03/2014 📅 Age: 6
Local Ethnic Category:	W - WHITE ✓	Verified With:	B - BIRTH CERT. ✓
Hispanic/Latino:*	N - No, the student is not Hispanic/Latino ✓	Birthplace City:	Akron
Racial Group(s):	☐ A-Asian ☐ B-Black or African American ☐ I-American Indian or Alaska Native ☐ P-Native Hawaiian or Other Pacific Islander ☑ W-White *		
Summative Race:*	W - White, Non-Hispanic ✓		
Native Language:	ENG - English (Default) ✓	Home Language:	ENG - English ✓

Not recollected:

Gender:*	M ✓	Birthdate:*	02/06/2003 📅 Age: 17
Local Ethnic Category:	W - WHITE ✓	Verified With:	B - BIRTH CERT. ✓
Hispanic/Latino:*	* - Not Re-Collected ✓	Birthplace City:	HOUMA
Racial Group(s):	☐ A-Asian ☐ B-Black or African American ☐ I-American Indian or Alaska Native ☐ P-Native Hawaiian or Other Pacific Islander ☐ W-White		
Summative Race:*	W - White, Non-Hispanic ✓		
Native Language:	ARA - Arabic ✓	Home Language:	*** - Neither LEP no ✓

Race/Ethnicity Coding:

Student Situation	Hispanic/Latino Element Value (GI580)	Summative Race Element Value (GI090)	Race Detail Value (GJ record – one per response)
Information Not Recollected	*	Same as FY10 Yearend – W, B, H, A, I, P, M	No GJ Record Reported
Recollected – Student is of Hispanic/Latino Heritage	Y	H	All Races Chosen from the Following: W, B, A, I, P
Recollected – Student is not of Hispanic/Latino Heritage – only one race being chosen	N	Race Chosen – Only one of the following: W, B, A, I, P	No GJ Record Reported
Recollected – Student is not of Hispanic/Latino Heritage - more than one race being chosen	N	M	All Races Chosen from the Following: W, B, A, I, P

Task 11 - Verify Home Language and Native Language Fields

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

The Home Language: field is the language spoken at home. This field is required for LEP and immigrant students. All other students will have ****.

The Native Language: field is the language spoken at the onset of speech.

Both the Home Language: and Native Language: fields may be updated using the Student Profile Bulk Update.

StudentInformation > SIS > Student > Edit Profile

Task 12 - Verify and Update CTE Program of Concentration

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
	✔	✔			✔

📄 EMIS CTE Concentrator Detail Report - Displays the CTE Program of Concentration area for each student.

⚡CRITICAL

The Program Area of Concentration values will affect the CTE Report Card as well as next year's Period D reporting. Check the EMIS manual for a complete list of Program of Concentration Codes.

The Program of Concentration is used when creating WebXam files, so it is best to update students as soon as their program of concentration is known. The CTE Program of Concentration field is required to be reported with the FN record.   The CTE Program of Concentration Element designates the program area of concentration for a CTE concentrator.

The CTE Program of Concentration Element designates the program area of concentration for a CTE Concentrator. A 'CTE Concentrator' is a secondary student who has completed at least two approved Workforce Development courses in a single career technical education program.

The Office of Career-Technical Education has developed additional documentation to clarify business rules, which can be found by searching for 'Career-Technical Education Data and Accountability' on the Ohio Department of Education website. The link to access this information is as follows and will bring you to the screen located below, http://education.ohio.gov/Topics/Career-Tech/CTE-Performance-Data-and-Accountability

Career-Technical Education Data and Accountability

Select a Career-Technical Education data and accountability resources below for more information.

CAREER-TECHNICAL EDUCATION DATA AND ACCOUNTABILITY RESOURCES

Career-Technical Education Data and Accountability Guidebook	Concentrator Reporting Examples Matrix	CTE Teacher Licensure Override Instructions
Ohio School Report Cards	2018-2019 Approved CTE Courses | (2017-2018)	CTE Teacher Licensure Override Request Template

Perkins Resources

The Concentrator Reporting Examples Matrix provides several examples of when students should be reported as Concentrators.
The district that employs the workforce development teacher is responsible for identifying and reporting CTE concentrators and the CTE Program of Concentration.

Only the code for one area of concentration may be reported for a student within a reporting period. Once a student is identified as a CTE concentrator, the student is a CTE concentrator for the rest of his/her schooling. Current grade level has no relationship to whether a student is identified as a concentrator; i.e., a student can be a freshman and be identified as a concentrator.

Update the CTE Program of Concentration field on the FN Attributes tab for applicable CTE students. First, select the area of Concentration from the CTE Program Area dropdown and then select the specific code from the CTE Program of Concentration dropdown.

The CTE Program of Concentration field may be updated using the Student Profile Bulk Update.

Students with a CTE Program of Concentration in the prior year will have that same CTE Program of Concentration on the FN Attributes tab in the current year if Fall Initialization was processed for your district.

The CTE Program of Concentration may also be updated via the CTE Management page.

Task 13 - Update October IEP Outcome field

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

EMIS FN Attributes Detail Report - Displays values contained in the October IEP Outcome field.

This element is reported for those students with a change in their Least Restrictive Environment (LRE) since their most recent IEP as of October. In general, the LRE will not change without a new IEP being completed and reported, but there are some cases, especially with IEPs reported in the prior year that are still in effect as of the end of October, where the LRE could change. Examples include but are not limited to a student whose parent originally consented to services but pulled the student from services prior to October 31st and situations where an expelled student is given an alternative placement that will be in effect on October 31st. In addition, for a preschool student (especially for those who are part time,) a parental placement in a private preschool program could change the LRE for that student.

When completing the Federal Child Count, ODE will review the LRE on the latest reported IEP event effective (including IEPs reported in the prior yearend and IEP events reported in the current 'S' reporting period) and the value of this element. The value of this element will take precedence.

For this element to be valid for the Federal Child Count, the student must already have an IEP reported to ODE that is valid on October 31st (e.g., October 31st is between the reported Outcome Beginning and End dates on a IEP that was reported to ODE in the prior yearend or in the current reporting period.) If no reported IEP is valid on October 31st, the value in this element will be ignored.

StudentInformation > SIS > Student > Edit Profile

Edit Student Profile

From this screen, you can display and change information regarding a students profile.

| General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | FN-Graduate | Transportation |

Save **Cancel**

Last Modified: 09/1/2020 3:38 PM by User: janice

EMIS Grade Next Year: 02 - Second Grade

ⓘ Changing the EMIS Grade Next Year does not change the District Grade Next Year.
The General tab can be used to change the District Grade Next Year.

Retained Status: * - Student was not retained at the end of the previous school year

Oct Childcount IEP Outcome: IE13 - Special Education outside the regular class < 21% of the day

Military Student: * - Not Applicable (Not a Military Student)

Task 14 – Update English Learner Option for students

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

EMIS FD Detail Report - Displays the English Learner status for each student.

The LEP Reclassification Date is no longer reported. The value is derived at ODE from other reported records. If you have a value in this field, it will be ignored when submitted to ODE.

Note: Limited English Proficiency has been updated throughout the application to **English Learner**.

For students who are English Learners, the English Learner value on the Student Profile, FD Attributes tab, needs to be updated to the correct value.

Field	Value
Effective Start Date:*	7/1/2020
District Withdraw Date:	
Withdraw Reason	** - Not Applicable, Did not withdraw/was not truant
State Equivalent Grade:	06 - Sixth Grade

ℹ Changing the State Equivalent Grade does not change the Building Grade. The General tab can be used to change the Building Grade.

Field	Value	Field	Value
Disability Condition:	** - Not Applicable	Section 504 Plan:	N
Disadvantagement:	* - Not Applicable	Free/Reduced Lunch Status:	None
English Learner:	S - Enrolled in U.S. Schools for 2nd year	LEP Reclass Date:	
Homeless Status:	* - Not Applicable	Unaccompanied Youth:	N

The Valid codes for English Learner Status are:

N – No – Student is not an English Learner

Y – Yes – English Learner student who has been enrolled in U.S. Schools for more than 360 school days (or the equivalent of two school years) OR Previously exempted from taking the spring administration of either of the State' English Language arts assessments (reading or writing)

L – LEP – Enrolled in U.S. Schools for First Time – A recently arrived English Learner student who has been enrolled in US schools for **no** more than 180 school days

M – LEP – Trial Mainstream

S – LEP Enrolled in U.S. Schools for 2nd Year – A recently arrived English Learner student who has been enrolled in US schools for more than 180 school days and less than 360 days (or the equivalent of two school years).

Task 15 – Update Retained students

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
		✔			✔

Beginning in FY21, the Retained Status element is only reported for students in grade 03.

In the current school year, all students who will be retained in their current grade level for the future school year need to be reported in the final period S window of the current year with the appropriate Grade Level Next year and next building IRN value.

The following elements need to be updated on the student profile page to indicate the student is retained:

- **General Tab – Grade Level Next Year** – update to the correct grade for next school year
- **FN Attributes Tab – Update EMIS Grade Level Next Year** to the correct grade for next school year
- **FN Attributes Tab – Attending Building IRN Next Year** if the student will be in the same grade level in a different building or if the value was already updated to a different building due to promotion
- If the student has already been promoted to another building for the future school year, withdraw the student from the building and then enroll him in the correct building for the next school year (Scenario 8 of the 20/21 Admissions/Withdrawals documentation)

NOTE: Grade 03 students also need to be reported in the FY22 Retention collection with the retained status element reported for them at that time. See FY22 Period S Retention Reporting Checklist.

Task 16 - Update Military Student Identifier

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
		✔			✔

📄 EMIS FN Attributes Detail Report - Displays the values contained in the Military Student Identifier field.

Districts, including JVSDs, are required to identify students whose parents or legal guardians have been an active member of the Armed Forces or National Guard at any time throughout the current school year. Report the option that best describes the student's Military Student identifier status at any point during the school year. If the student is reported with a value other than '*', and the parent/legal guardian becomes discharged at any point during the school year, continue to report the established value for the entire school year. If a parent or legal guardian's status changes from 'B' to 'A' or vice-versa, report the latest occurring option.

The valid options for this field are:

      * – Not applicable (Not a Military Student)

      A – Active Duty – Student is a dependent of a member of the Active Duty Forces (Army, Navy, Air Force, Marines Corp or Coast Guard)

      B – National Guard – Student is a dependent of a member of the National Guard (Army or Air)

      C – Reserves

| General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | **FN-Attributes** | FN-Graduate | Transportation |

Save **Cancel**

Last Modified: 09/1/2020 3:38 PM by User: janice

EMIS Grade Next Year: `02 - Second Grade`

ℹ Changing the EMIS Grade Next Year does not change the District Grade Next Year.
The General tab can be used to change the District Grade Next Year.

Retained Status: `* - Student was not retained at the end of the previous school year`

Oct Childcount IEP Outcome: `**** - No Change from latest IEP reported to ODE`

Military Student: `B - National Guard - Student is a dependent of a member of the National Guard (Army National Guard or Air National Guard)`

Task 17 - Update Admitted From IRN and Withdrawn To IRN

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 EMIS FS Standing Attendance Detail Report – Displays the Admitted from IRN and Withdrawn to IRN for students who have values other than '******'.

Districts are required to report the IRN of the district a student comes from when registering into your district for the first time. If the student is newly enrolled in the current school year and the student's admission reason is '3','6', or '7', the admitted from IRN will need to be reported.

Note: The Admitted From IRN will also be reported when the District Relationship of a student changes to a value of '1', from a '2' or '3'. All restrictions for updating this field have been removed from the Edit Student Profile page. It may be updated at any time.

This IRN value must be a district IRN. If the student is not new to the district in this school year or had a change in District Relationship, the field value will default to "******". The Admitted from IRN field can be found on the following pages in StudentInformation:

- Student Profile Edit – FS Tab
- Registration Wizard
- Student Registration
- EZQuery Student Demographics
- EZQuery SIS Student Search
- Home School Import – Students tab

Student Profile Edit – FS Tab:

District Admission Date: 8/1/2018 📅	Admission Reason:* 7 - Not newly enrolled in this school district ▼
	Admitted From IRN: 142950 - Ohio Virtual Academy 🔍 *
District Withdraw Date: 📅 [Withdraw]	Withdraw Reason: ** - Not Applicable, Did not withdraw/was not truant ▼
	Withdrawn To IRN: ****** - 🔍

When the student is admitted from a non-public school, use the IRN of the non-public school for the Admitted from IRN value and not the IRN of the Diocese.

If the admission reason is '7' and the Admission Date is on or after the first day of school in 20/21, this means the student was previously in the district, left the district and has now returned to the district. Since the student is returning to the district after school has started, you must indicate the IRN of the district the student was in previously. Admission reason '6' could be used for this student because he did go to another district in between enrollments in the current district.

If the student attended your district through the end of the prior school year but withdrew from the district prior to June 30th and was reported in June as withdrawn, but has

returned to the district again this year, the student would be re-admitted to your district, admission reason '7' would be used, and you will need to report your own District IRN in the Admitted from IRN field.

If the student attended your district last year, dropped out of school and is now returning to your district, admission reason '7' would be reported for the student and the Admitted from IRN would be the IRN of your district.

Districts are required to report the IRN of the district a student is going to upon withdrawing from their own district. The Withdraw to IRN value must be reported any time a student withdraws from your district to attend another district. Students with withdraw reason '41','42', and '45' must have a value in the Withdraw to IRN field.

If the student is withdrawing to attend a non-public school, use the non-public school building IRN for the withdraw to IRN value. If the non-public school does not have a valid IRN, report 999999.

The Withdraw to IRN value is stored on the student's latest FS record at the time of the district withdrawal.

Task 18 – Run the Student Roster Detail (R101A) to verify student demographic and disability information is correct

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

StudentInformation > SIS > School > Student Reports > Student Roster Detail (R101-A)

Use R101A to verify the details of the student's demographic records and disability condition as well as rosters of students – both active and inactive in each grade level.

Verify that all students who have withdrawn from the district are no longer actively enrolled and have the appropriate student status. Also check the accuracy of the student's Birth Date, Ethnicity, Disability Condition, and EMIS Situation. The Ethnicity value listed on this report is the **Local Ethnicity** field and not the ethnicity which is part of the Summative Race value.

Report: R101A   . HIGH SCHOOL
Printed Thu, Aug 12, .   8:15 AM
                                                              Student Roster Detail
_____
                                                              AGE RANGE: ALL AGES

ID	STUDENT NAME	STATUS	GR	GN	HMRM	HOME SCHOOL	PARENT/GUARDIAN NAME
SCH CD	STUDENT ADDRESS		DISAB		AGE	BIRTHDATE	TELEPHONE
	HOME SCHOOL NAME						ETHNICITY - ETHNICITY CODE
		EMIS SITUATION					PROGRAM - PROGRAM CODE

200800073 Student1003, Morgan	ROE	12	F			
ELHS 645 S Main St	**			17	04/03/1993	(555) 555-5555
Lima, OH 45804-1241						WHITE - W
151 - Resident open enrolled elsewhere F/T						-

200800070 Student1005, JAMES (JAMES)	ROE	09	M			
ELHS 645 S Main St	**			14	03/22/1996	(555) 555-5555
Lima, OH 45804-1241						WHITE - W
151 - Resident open enrolled elsewhere F/T						-

200800048 Student1027, JAMIIL	ROE	12	M			
ELHS 645 S Main St	**			17	09/18/1992	(555) 555-5555
Lima, OH 45804-1241						BLACK, NON-HISP - B
151 - Resident open enrolled elsewhere F/T						-

Task 19 – Run Student Verification (UNCLEMIS) and correct errors

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

UNCLEMIS checks are no longer EMIS Reporting Period specific.

1. Change your context to the district level and the current year.
2. Navigate to **_StudentInformation_** > **_EMIS_** > **_Student Reporting Collection (S)_**.
3. On the [Request Type] tab choose the ⦿ Verify Student Data option.
4. Click [Next >].
5. On the [Program Selection] tab select ⦿ Verify - Student Demographic (UNCLEMIS).
6. Click [Next >].
7. Next, choose the buildings in the district you would like to run Student Verification for.
8. Choose how many students you would like to see per page in the Number of Students Per Page: dropdown.
9. Click [Verify].
10. Once the process is complete the Student Verification errors will display on the page.

Depending on your StudentInformation security role, you may have access to run UNCLEMIS only at a specific building. Contact the Security Administrator at your district or ITC if you have questions concerning your StudentInformation security role.

How to run Student Verification at the building level

1. Change your context to the building level and the current year.
2. Navigate to **_StudentInformation_** > **_EMIS_** > **_Student Verification._**
3. Choose how many students you would like to see per page in the Number of Students Per Page: dropdown.
4. Click [Verify].
5. Once the process is complete the Student Verification errors will display at the bottom of the page.

Unclemis errors are interactive links which allow you to navigate to the profile of the student with the error and correct the error without leaving the Unclemis page.

Please review the **_UNCLEMIS Error Resolution_** document for detailed explanations on how to correct each Student Verification error.

Community School *Only* Tasks (Tasks 20, 21 & 22)

Task 20 – Update Previous Year District IRN (FLICS IRN)

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
				✔	✔

EMIS FN Attributes Detail Report – Displays the Previous Year District IRN values.

Indicates the IRN of the Ohio school district where the student resided during October count week of the prior school year. This element is only to be completed by community schools/STEM schools for students who were not enrolled in an Ohio EMIS reporting entity the prior year or for situations where the current school determines that the IRN assigned by ODE for the prior year is incorrect. This element resides on the FN – Attributes tab of the Edit Student Profile page.

1. Navigate to ***StudentInformation*** **>** ***SIS*** **>** ***Student*** **>** ***Edit Student Profile***.
2. With the student in context, select the `FN-Attributes` tab.
3. Enter the IRN of the non-public district or the IRN of the district the student resided in last year if the student was home-schooled.

Previous Year District IRN: `******` - [   ] 🔍

Student Transportation Records

Task 21 – Update Transportation Records for Students who were transported any day of Count Week

<mark>Community School Only Task</mark>

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
				✔	✔

Use the transportation tab of the Edit Student Profile Page to collect the values for Count Week Transportation days for each student who was transported any day during count week. Select a value from the dropdown for Distance student was transported from residence to School Building and set the appropriate checkbox for each day of the week the student was transported by the Community School. Use Student Profile Bulk Update to mass update the flag. Only students who were transported must have a record reported. Reporting records for students not transported is optional. Leaving the boxes unchecked indicates the student was not transported.

1. Create an ad-hoc membership group of students whose transportation pattern would be the same.
2. Navigate to ***StudentInformation > Management > Ad-Hoc Updates > Student Profile Bulk Update*** .
3. Select the ad-hoc membership from the **Ad Hoc:** * dropdown.
4. Click **Next >** until the **Annual record** tab displays.

5. Choose a value in the 'Distance student was transported from residence to school building' element, select the appropriate value from the dropdown and check the box beside the field to include in the update.

Distance student was transported from residence to school building:

☑ M2 - More than two miles ⌄

6. Place a check in the first checkbox in the Count Week Transportation Days block and check any of the weekday checkboxes that apply to the group of students you're updating.

┌─**Countweek Transportation Days:**──────────────
│
│ ☑ ┌──┐
│   │ ☑ **Monday** ☑ **Tuesday** ☑ **Wednesday** ☑ **Thursday** ☑ **Friday** │
│   └──┘

7. Click [Next >] until the [Review updates] tab displays. Depending on your selections for updating, the review tab will display the values you've chosen to update.

ⓘ Please review all of the profile selections before finalizing.

Profile Item	New Values
Distance student was transported from residence to school building:	M2 - More than two miles
Countweek Transportation Monday:	True
Countweek Transportation Tuesday:	True
Countweek Transportation Wednesday:	True
Countweek Transportation Thursday:	True
Countweek Transportation Friday:	True

[Submit]

8. Click [Submit].

9. The following message will display

Student Profile Bulk Update was completed successfully.

Note: Student Data Tasks (StudentInformation > Management > School Administration > Student Promotion > Student Data Tasks) 'Copy Transportation Assignments' can be used to copy the Transportation Assignments from prior year to current year if this was not completed in Promotion/Bulk Enroll. This task copies the transportation data forward when the student is in the same building as last year.

Note: A Transportation Import is available to use at the building level. See the StudentInformation Import Export Guide for instructions as well as the actual Transportation Import Template.

Student Contact Records

Task 22 – Reporting FF – Student Contact Records & FG – Student Contact Address Records

<mark>Community School Only Task</mark>

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
				✔	✔

Community schools are required to report a contact record for the Parent or Guardian of each student attending the community school. This record is used to determine the residency of the parent/guardian. Each contact reported must have at least one address record reported to indicate residency. Each student is required to have at least one FF and one FG record reported. These fields must be reported before a student in the SOES collection is funded.

Each contact type code to be reported must be mapped to an NCES Contact Type code at the district level on Contact Type Codes Maintenance. If additional information is needed to set up the Contact Type Codes, refer to the ***ProgressBook StudentInformation Student and Registration Guide, Contact Type Codes Maintenance section***. Only contacts with Legal Guardian checked will be reported to EMIS.

Verify the contact types as well as verifying an address is included on the contact record(s) that will be reported for a student. Every student must have at least one record reported. In the FF – Student Contact Record transfer file, there will be a record for the student containing any additional record(s) for any contact that is flagged as the Guardian. The contact type of 'SELF' should only be reported for students who are their own legal guardian. In that situation, a contact record must be defined indicating the student's information.

FG address records should be reported in the event of an address change for the guardian as well as the date of the change. If a guardian had an address change, the prior address will be reported on one record including the date of the address change. A second address record with the same sequence number will be reported indicating the date of the new address. If the date field is reported as all zeroes, the data collector will automatically change the date to the date the collection is prepared.

In the event the address has changed after school has ended, no update would be made. However, if the address changed during the school year, but the change isn't being made in StudentInformation until after school has ended, additional steps need to be taken to report the correct date the address changed.

The FG – Student Contact Address records are reported for each of the contacts included in the FF – Student Contact record file. Each contact record must have an address reported. If the address has changed, make sure to indicate a Date of Residency Change. The FG Transfer will use the following values from the contacts specified as Guardian:
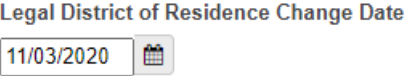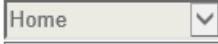
FG Contact Record Element	Student Contact Record Element
Sequence	Sequence will correspond to the sequence value for the contact used in the FF file (Starting in FY17, there may be multiple address records with the same sequence number for a contact)
Address Line 1	Address 1 on Contact record
Address Line 2	Address 2 on Contact record
Address Type Code	Will be determined based on the address type on contact: Home = 0765 – Physical Location Address Mailing = 0123 – Mailing address If a contact has multiple addresses, the first address listed will be reported
City	City
State	State
Postal Code	Zip Code
Country Code	Always 'US'
Date of Residency Change	Date of residency change from the contact record. **If '00000000', the date of the prepare will be used by ODE.**

Reporting Historical Addresses to SOES
When a contact changes residency, it is necessary to report multiple FG contact address records to indicate the date of change for the prior address as well as report the new address of residency.

To submit an address change during the school year:
1. With the building and student in context, navigate to _**StudentInformation > SIS > Student > Contacts Summary**_.
2. Click the Edit Pencil for the contact which needs to be updated.
3. Click 🟢 Address and choose [SOES historical ⌄] from the dropdown. Complete the address fields for the SOES Historical address with the 'old' home address information.

   Legal District of Residence Change Date
   [11/03/2020 📅]

4. Then navigate to the ^ and fill it in with a date that is during the period of time that the address was valid for this student.
5. Return to the 🟢 Address selection and update the [Home ⌄] address section with the new address information.
6. [Save].

To submit an address change that occurred during the school year but is not being reported until after the school year ends:
1. With the building and student in context, navigate to _**StudentInformation > SIS > Student > Contacts Summary**_.

2. Click the Edit Pencil for the contact which needs to be updated.

3. Click ⊕ Address and choose [SOES historical ▾] from the dropdown. Complete the address fields for the SOES Historical address with the 'old' home address information.

4. Then navigate to the

Legal District of Residence Change Date
[11/03/2020 📅]

and fill it in with the date during the school year that this address became valid for the student.

5. Return to the ⊕ Address selection and update the [Home ▾] address section with the new address information.

6. [Save].

The **Legal District of Residency Change date** recorded on the contact record should be one day before the date the address changed from the old value in the SOES historical address to the new residency. Two FG record will be reported for the student, one for the SOES historical address and a second record with the new Home address for the contact.

Transferring FF & FG Contact Records

1. With the district in context, navigate to *StudentInformation* > *EMIS* > *Student Reporting Collection (S)*

2. Select the ◉ Transfer Student Data and click Next.

3. From the Program Selection menu, Select the Student Contact (FF) and Student Contact Address (FG) options.
4. Select from the Transfer Type options.
5. Click Submit. Upon completion, the Contact records will be transferred to the data collector.

<u>Reminder</u>
If you're changing a contact's address and the change results in a district of residence change for the student, make sure to add a new FS record reflecting the change, as well as updating the County of Residence if needed.

Calendars, Exception Days and Attendance Patterns

Task 23 – Verify Sub-calendars and EMIS Exceptions are set up correctly

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final

 EMIS Sub-Calendar Analysis Report - Assists to verify the accuracy of your calendars. The report includes all exceptions on each calendar.

Sub-Calendars will be used to calculate a student's hourly attendance values. It is important that all sub-calendars correctly reflect the days in session as well as any exception types, which will be reported in the Calendar reporting period. Sub-Calendars and the EMIS Exceptions are reported in Period C, however, it is imperative that they be set up correctly at the beginning of the school year so that each student's attendance is calculated correctly.

 Please consult the ***Master and Sub-calendar Maintenance including EMIS Exceptions*** document for step-by-step directions on setting up sub-calendars.

Task 24 – Verify students are assigned to the correct attendance calendar

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

EMIS Admission Calendar Comparison Report - Verify the accuracy of student calendar assignments. If a student is assigned to a calendar from the wrong building, the student will be highlighted in red on the report.

A. Verify:

Use the EMIS Admission Calendar Comparison report to verify students are assigned to the correct calendar based on their % of time. Additionally, verify the Admission Calendar and the Reporting Calendar match.

EMIS Admission Calendar Comparison

Student Number	Last Name	First Name	Status	Grade	FS Effective Date	Attendance %	EMIS Situation	FD Effective Date	Attendance Pattern	FD Calendar Building	FD Calendar	Admission Calendar Building	Admission Calendar
			A	12	07/01/2020	100	5 - Resident attending Full Time	07/01/2020	SR	BAHS	Senior Calendar	BAHS	Senior Calendar
			I	9	07/01/2020	0	123 - non-res non-public	07/01/2020	**	BAHS	Default Non-attending Calendar	BAHS	Default Non-attending Calendar
			A	11	07/01/2020	72	18 - Resident attending elsewhere as contract vocational student P/T	08/11/2020	**	BAHS	Default	BAHS	Default
			N	12	07/01/2020	57	90 - non-res attends your dist. and another	08/11/2020	SR	BAHS	Senior Calendar	BAHS	Senior Calendar

B. Update:

If a calendar change is required because of a change in the student's EMIS situation or % of Time in the current EMIS situation, a new FS record and a new FD record would be added. If the attendance pattern value is incorrect, the calendar would need to be corrected on the existing FD record to point to the correct calendar/attendance pattern.

When a student has a calendar change, the calendar needs to be updated both on the General tab (Attendance Calendar) and the FD tab (Reporting Calendar) of the Student Profile.

Follow these steps to make a calendar change for a student.

1. With the building in context, navigate to: ***StudentInformation > SIS > Student > Edit Profile.***
2. Find the student you wish to perform a calendar change for.
3. On the General Tab, select the appropriate calendar from the Attendance Calendar: dropdown.
4. Click Save.
5. A new screen will appear indicating the student's previous calendar assignment, their new calendar assignment and a Calendar Change Effective Date field.
6. Enter the Effective Date of the calendar Change. The date selected must be a day within the school year.
7. Click Save.
8. Next, select the FD – Attributes Tab.
9. You will need to add a new Attributes record with the updated attendance

calendar if this is a true calendar change and not a correction to existing calendar assignment.

10. Enter the Effective Start Date. Use the same date that was used on the General Tab for the Calendar Change Date.

11. Select the appropriate calendar from the Reporting Calendar Dropdown. When a calendar is selected, the Attendance Pattern value will change to show the attendance pattern associated with that calendar.

12. Click Save to save the record.

| Attendance Pattern: | SR - Senior attendance ⌄ | | Preschool Poverty Level: | N - Not a Preschool student ⌄ |
| Reporting Calendar: | SR - Senior Calendar ⌄ | | | |

The Student Profile Bulk Update may also be used to update the calendar on both the General Tab and the FD tab of the student profile.

Student Acceleration Records & Third Grade Guarantee

Task 25 – Add Student Acceleration Records

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
	✔	✔			✔

EMIS/EMIS Assessment – FB Acceleration Detail, lists all FB records for students reported to EMIS when running FB Transfer.

ODE requires some students, in any grade level, to be tested at their accelerated subject level for the Next Generation Assessments. Records are reported only for students who have a referral from the district's Acceleration Evaluation Committee and were placed on a Written Acceleration Plan (WAP).

Acceleration stops being reported if the student is no longer subject or whole grade accelerated. If the student was subject accelerated in Math and Reading, but is no longer subject accelerated in Reading, the acceleration for Reading is no longer reported.

For additional guidance, please see the document 'Testing Rules for Subject-Accelerated Students' by visiting www.ode.state.oh.us and search for *academic acceleration*.

General Guidelines
The Student Acceleration Record (FB) is reported for one or more of the following reasons:
- Student was accelerated in the current school year in one or more of the valid subjects for acceleration collected via this record, or
- Student took a state assessment at an accelerated grade level, regardless of whether the acceleration first occurred this year or in a prior year

"Accelerated in the current school year" means that the student received instruction at the accelerated grade level in the current year. If the decision to accelerate a student is made this year but will be implemented next year, then the acceleration record would be reported next year. A separate record is required for each subject area in which the student is accelerated.

Task 26 – Update Third Grade Reading Guarantee Values

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
	✔	✔			✔

Use the EMIS Third Grade Testing Diagnostic Detail report under Ad Hoc Reports to view the values for Math, Reading and Writing Diagnostics for students in Grades K-3.

The Third-Grade Reading Guarantee options are reportable in the 2nd & Final 'S' Collection Requests; however, it is best to update these values as the information is received.

Based on the Third Grade Reading Guarantee, districts/schools must administer a reading diagnostic assessment to all students in kindergarten through grade three. Districts must administer a reading diagnostic assessment to students in grades 1 through grade 3 by Sept. 30 and to students in kindergarten by Nov. 1 of each school year to meet the requirements of the Third Grade Reading Guarantee. Beginning with the 2017-2018 school year, districts are no longer required to administer the mathematics diagnostic test to students in grades 1-2 and the writing diagnostic to students in grades 1-3 but may do so at the discretion of the district board per ORC 3301.079 (D)(3).
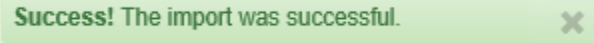
The Reading Diagnostic Result Code can be updated either on the Student Profile, FN Attributes tab or utilizing the **Student Profile Bulk Update**.

Valid Values are:
- ** - Not Required
- RN – Required, not assessed
- AO – Assessed, on Track
- NO – Assessed, Not on Track
- EX – Exempt from Diagnostic Assessment

If your district utilizes DataMap, they can export the On Track Statuses on the RIMPs from DataMap to StudentInformation. Once exported, utilize the steps below to import the On-Track Statuses.
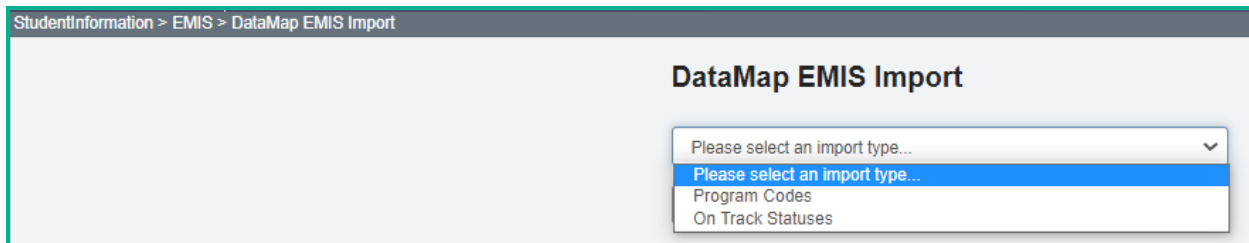
1. With the building in context, navigate to: ***StudentInformation*** > ***EMIS*** > ***DataMap EMIS Import.***
2. Select 'On Track Statuses' from the dropdown.
3. Click **Preview Import** .
4. Select the students you wish to update or check the Select All button if you wish to update all of them. Once your selection has been made, choose **Import Selected** .
5. Once complete, the following message will be received:

   Success! The import was successful.   ✕ .
6. Reminder: RIMPS are created with the values of 'AO' and 'NO', so students who have other values will need to be utilizing a different method than the DataMap EMIS Import.

The Latest Third Grade Reading Promotion Status now displays on the FN record below the Third-Grade Reading Results. This value comes from the Next Generation Assessment Record under Student Assessment. Currently this value populates with the **most recent** assessment value.

Student Withdrawal Override and Summer Withdrawal Records

Task 27 – Add Student Withdrawal Override Records (FC)

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

ODE has indicated this record also will be used to update an incorrectly reported withdraw reason and/or withdraw date from prior years. This is to assist in eliminating appeals as well as positioning the student into the correct graduation cohort. A Student Withdrawal Override (FC) Record should be reported for:

> • SSIDs appearing on the Missing Student Report and where an override is warranted,
> • SSIDs where the district failed to report a withdrawal that occurred in a prior school year,
> • SSIDs whose withdrawal was reported with an incorrect date or reason in a prior school year, and
> • SSIDs for whom the EMIS reporting entity has received new information since the withdrawal was reported which indicates that the withdrawal reason should be updated for the student to properly count within the longitudinal graduation rate.

This record is now reportable in Period S or Period G. The Reporting Period defaults to Period S when opening this page; however, if the record is to be reported in Period G, the user will need to select 'G' in the dropdown. There are a limited number of withdraw codes that the user can report in Period G, they include: 40, 42, 43, 45, 46, 48, 51, 52 and 81.

Once reported, the FC record should continue to be reported for the remainder of the S collections for the fiscal year.

The SSIDs entered into this record are not checked against prior year data. These records are school year specific. The comments section of the record is not reported to ODE but is only for user reference.

See Section 2.17 of the ODE EMIS Manual for additional information regarding the Student Missing Override Record.

Summer Withdrawal Record

Task 28 – Add Summer Withdrawal record (FL) optional

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

A Student Summer Withdrawal Record (FL) may be reported for any student who was enrolled in the district at the end of the prior school year but withdrew from the district prior to the start of the current school year. If a student attends even a single day of the current school year in the district, the FL record may not be used to report the student's withdrawal.

A student who withdraws over the summer may be reported with a Student Attributes – Effective Date Record (FD), a Student Standing Record (FS), and a Student Demographic Record (GI), OR the student may be reported with a single FL record.

NOTE: If FD/FS/GI records are reported, all elements on those records must have values that are valid for the current school year. If a district reports an FL record, that student cannot also be reported with FD/FS/GI records during the current school year.

StudentInformation > EMIS > Maintenance > Student Summer Withdrawal Record

Student Summer Withdrawal Record

From this screen, you can display, add, edit and delete data pertaining to student missing summer withdrawal records.

SSID:*   XX1234567

Student Last Name: Smith

Student First Name: James

Withdrawal Date:*   07/25/2020

Withdrawal Reason:*   40 - Transferred to another school district outside Ohio

Withdrawn to IRN: ****** -

Comment: Moved out of state over the summer

[Save] [Save And New] [Cancel]

Gifted Record Reporting

Task 29 - Update Student Gifted Records

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
	✔	✔			✔

📄 EMIS Gifted Detail and Gifted Summary - Displays gifted data for each student.

The Gifted record is used for the reporting of screening, assessed, identified, and served gifted data. All enrolled students, whether gifted or not, must have a gifted record.

Districts are required to administer either the SAT or the ACT to their juniors each year. The SAT and the ACT should be considered as a gifted screening. For this reason, a building level screening rule should be put in place for the juniors taking either of these assessments. In the event a junior does not test on the test date, the screening record would need to be removed from his gifted record.

Juniors taking the SAT are automatically considered screened for gifted in the subjects of Math and Reading/Writing.

Juniors taking the ACT are automatically considered screened for gifted in the subjects of Math, Reading/Writing and Science. To verify whether the student has met an identified score value, questions should be directed to your Area Gifted Coordinator.

Resident districts do not need to report students attending elsewhere full-time if that entity is required to report the record, but they do need to report the gifted record for students going full-time to a JVSD, ESC, or College Credit Plus institution. Community schools are also required to report the Gifted Record. JVSDs and ESCs are not. Refer to the Gifted Step by Step Checklist for instructions on maintaining your gifted records.

Screening, Assessment, and Served values on the gifted record should only reflect screening, assessments, and services performed during the current school year.

Identified values carry over from year to year. If a student was identified as gifted in a prior year, they are still considered gifted, and the original Identified Date must be reported. If any updates are needed for students who have been Assessed or Identified, or for those who have been Identified and are being Served, you will need to manually update those individuals. Manually update any students who are exceptions to the mass screening defaults.

Task 30 – Run Gifted Students Missing Records Report

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
	✔	✔			✔

To verify which students do not have a gifted record, the Gifted Students Missing Record report can be used.

For any student found to have a missing gifted record do either of the following:

- Run the gifted mass update for the default blank rule with the Overwrite Existing unchecked

- Manually update gifted records for individual students by clicking on Save.

Student Special Education Reporting

Task 31 – Create Student Special Education Records

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 Special Education Student Verification Detail - Displays student IEPs and ETRs.

StudentInformation > SIS > Student > Special Education

New for FY21 only: Disability Condition '16' Developmental Delay previously available only to Preschool students, can now be used for Kindergarten students through December 1, 2020. After that date, the disablity condition will revert to being available only to preschool students. On or before December 2, 2020, a new FD record will need to be created to update the disability code if the Kindergarten student previously had '16' for the disability condition. Add a special education event record as needed for the disability condition change.

Items to note:

1. **SEMD** Special Education Manifestation Determination Date Type is used for students with a disability who have accumulated more than 10 days of suspensions or expulsions. The actual manifestation determination meeting is required to be held within 10 days of the date the district decided to suspend or expel the student that causes the number of suspension/expulsion days for the student for the school year to exceed 10.

2. **NIEP** No IEP is used for students who continue to receive services even though they have no active IEP. Outcome Begin Date would be the same as Event Date. The Outcome End Date is usually left blank.
   Non-Compliance IDs to be used with NIEP:
   - 10 – Student newly transferred in – IEP adoption determination not complete, service being provided based on prior IEP
   - 11 – IEP expired, new IEP not in place – service being provided based on prior IEP
   - 12 – IEP current but not reported in EMIS in prior reporting period, services provided based on current IEP

Returning students:
- Any student with a disability or suspected of having a disability who was enrolled in 19/20 and continues to be enrolled in 20/21 should have a Special Education event record reported for all events that occur from July 1, 2020 through June 30, 2021. Not every student with a disability will have a Special Education record reported in the first or second 'S' traditional Collection Request.

Newly enrolled students:

- Students with a disability or suspected of having a disability that were newly enrolled in 20/21 should have at least one Special Education record reported by the end of the Final Collection Request for the school year
- Since the student is new to the district, it is possible to have a record with a date prior to July 1, 2020.

AIEPs may be reported when any of the following have occurred:
- Change to an existing Outcome ID Element
- Change in IEP Test Type Element
- Change to the Secondary Planning Element
- Change in the exemption from consequences of OGT

CIEP – Parent withdrawals consent
A CIEP event is reported when a parent/guardian of a special education student with an IEP withdraws consent to the current IEP. CIEP cannot be reported unless a TIEP, RIEP, or IIEP is already in effect. Once a CIEP Date Type is reported, the student immediately becomes a non-special education student. Accordingly, if a parent changes their mind after withdrawing IEP consent, the student will go through the same process as a student entering special education for the first time. Once a CIEP Date Type is reported, modifications to the FD record and/or the Accommodations Elements on all applicable tests may be needed. When a CIEP Date Type is reported, the only other Student Special Education Record data element reported with a value other than "Not Applicable" is the Outcome ID and Date Elements.

The **Secondary Planning:** element on the Special Education record is used for students age 14 and above and determines when a student will have completed coursework and will graduate or will have completed coursework but needs additional education services in preparation for employment or enrollment in college.

IMPORTANT: Make sure all events that take place on or before 6/30/21 are entered in StudentInformation and reported in FY21S or these students will appear on your FTE Adjustments report and you will not receive the Special Ed weighted funding for these students.

In addition, if you had students in 20S that were not funded because their spring IEP event was not reported in 20S, make sure you code this year's IEP event for those students with the '09 out-of-compliance code'. This will let ODE know you were not out of compliance - you only failed to report the data correctly in EMIS last year.

ESCs do not report Special Education records for Preschool students. The resident district is responsible for reporting the Special Education records.

Task 32 – Create FE Student Graduation Requirement Record

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

End of Course exams and OGT Subject Areas are available in the Assessment Area options for the Special Education Graduation Requirement Records.

An FE record is to be reported for **any** student who is exempt from the Graduation Requirement. This includes students who are taking Alternate Assessments.

This record is reported whenever an IEP determination is made to add, confirm, or cancel an exemption from the consequences of any graduation assessment and/or individual graduation assessment areas.

If the record is being used to report a granting of an exemption in a particular Assessment Type/Area combination, it is reported in the first school year of the IEP determination and every year thereafter, thereby confirming the IEP team has continued the exemption on the IEP. This is true even if there is no change in the granted exemptions from one IEP to the next.

If the record is being used to report removing or cancelling an exemption in a particular Assessment Type/Area combination, removal of the exemption is reported in the initial year of the IEP change and optionally thereafter.

If a student is never exempted from a particular Assessment Type/Area combination, then it is not necessary to report a Student Special Education Graduation Requirement Record for that combination.

Separate records are submitted per graduation Assessment Type/Area. For example, if the student no longer needs to meet the passing requirements of three of the EOC subjects, then three records must be reported.

NOTE: When this record is reported, a matching Student Special Education Record (GE), matching on Date and Date Type, MUST be reported for the IEP that reflects the determination of the exemption(s).

NOTE: Who Needs It, Graduation Eligibility, and Transcripts still look at the Required for Graduation checkbox on the test record.

NOTE: ODE has indicated that the FE record should continue to be reported for students who have the FE record, even if they score enough points on the assessment they attempt to allow them to graduate utilizing their actual EOC scores.

Task 33 – Verify Special Education Records

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 Special Ed Events – A listing of special education events per student.

Once Special Ed Event records have been entered, run the Special Education Verification at the district level to check for errors.

Each error listed when choosing Download File – Verification messages is an interactive link which brings you to the student's Special Education record. Correct any of the students who have missing events or have errors on any events for the 20/21 school year and rerun the verification to ensure the errors have been corrected.

When running Verify Special Education for a specific S Collection Request, populate the Run Date with the last reportable date for the period

- Traditional First S Window – 6/30/21
- Traditional Middle S Window – 6/30/21
- Traditional Final S Window – 6/30/21

To view a report of missing Special Ed events, choose the following:

To receive a report of all special education events, not just the students with errors, choose Download File – Student Special Ed. Events.

To receive a report listing all of the Student Special Education Graduation Requirements, choose Download File – Student Special Ed. Grad. Req.

Graduate End-of-Year Updates

Task 34 – Update Graduation Date and Diploma Type

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
		✔			✔

📄 EMIS FN Graduate Detail Report – Verifies values to be reported for graduates.

The Graduation Date and Diploma Type fields may be updated during the school year so the information will be available for final transcripts. The actual Graduation Date and Diploma Type will not be reported until period G data is submitted.

JVS Students

The JVS does not need to fill in a Graduation Date and Diploma Type. Only the resident district reports the Graduation Date and Diploma Type for students attending the JVS. However, the JVS does need to withdraw the graduation students with a withdraw code of '41'.

Contract Vocational Students

For students who are non-residents attending a contract vocational school district,
- The contract vocational district should report the withdraw date and code of 41 if the student will be graduating from the resident district.
- If the student isn't graduating and is returning to the resident district, the contract vocational school withdraws the student with a withdraw reason of '41'.

Graduating Underclassmen

Any non-senior who will be graduating needs to have his/her graduation date manually entered. If your district considers an 11th grade graduate to be a 12th grader upon graduation, the following steps need to be completed:
- Update the State Equivalent Grade Level on the latest FD record to grade 12
- Update the Grade Level Next Year on the FN tab to 'GR'
- On the general tab, update the student's grade level if you wish to show them as a 12th grade student at that point.

Early Graduates

Students who graduated after the first day of school but before the end of the school year should already be withdrawn using withdraw reason '99'. Make sure their Graduation Date and Diploma type values have been filled in to reflect the actual date of graduation from your district.

Create a student status code named EG: Early Graduate with an overall status of Active. Assign this status code to all early graduates so the students will still be included in GPA calculations, honor roll and ranking even though they are withdrawn.

Summer Graduates (after 20/21 ends and before 21/22 begins)
Students who have not finished their course work by the district's graduation date, but who do finish their coursework and graduate before the 1st day of the 21/22 school year are reported in period 21G. Students who graduate after the last day of the school year but before June 30th are reported as withdrawn in the period S Final Window and are also reported in period 21G as graduates.

Students who graduate after June 30th may have already been promoted to the 21/22 school year. Upon graduating, these students should be withdrawn in the 21/22 school year as summer graduates with a withdraw date prior to the first day of the new school year. Update the FN Graduate tab with their graduation date and diploma type.

Grad Only students
Students who are not enrolled in your district but graduate by completing their graduation requirements at your district, are Grad Only students. They should be entered as a Grad Only student following the steps in the **Registering Grad Only Students** documentation. **Starting in FY21, the graduation date reported for a Grad Only student may be a date from the current school year or a prior school year.**

Continuing Special Education Students
If all the following are true, use grade level '23' as the EMIS grade next year for the student and do not report a graduation date:
- Student has a disability condition
- Student Completes educational requirements
- Student elects to remain in the district for further training
- Student is under age 22
- Student has not graduated

On-time Graduating Students
Use the bulk updates available to update Diploma Date and Diploma Type. Best practice would indicate that this option should be applied *no more than 10 days prior to the end of the school year*.

Updating Diploma Date
Student Diploma dates may be updated individually by student on the Edit student profile page or using the bulk updates.
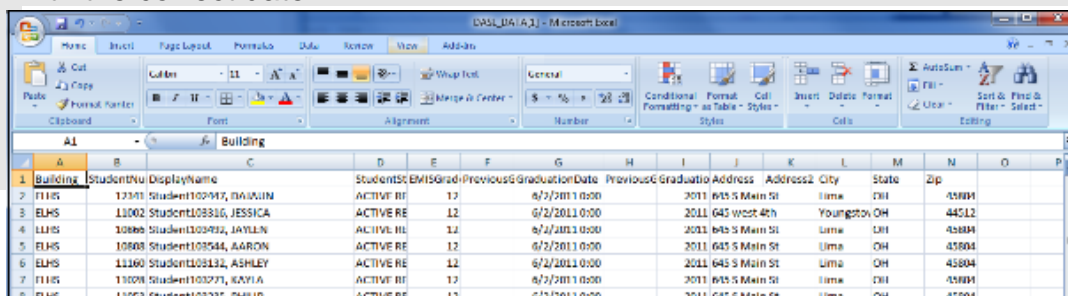
Manually update the Graduation Date and Diploma Type Fields:

1. Change your context to the building level and the current school year.
2. Navigate to ***StudentInformation > SIS > Student > Edit Profile***.
3. On the FN Graduate tab, fill in the student's graduation date in the
   Graduation Date: field.
4. Next, select the appropriate diploma type from the Diploma Type: dropdown.
5. Click Save .

Bulk Update Student Graduation Date:

1. Change your context to the building level and the current school year.
2. Navigate to ***StudentInformation*** > ***Management*** > ***Ad-Hoc Updates*** > ***Update Graduation Date***.
3. By default, only students with an EMIS Grade Level of 12 are updated. All other grade levels will need to be updated manually.
4. Select the applicable status codes in the Select the Student Statuses to be included: dual select.
5. In the ☁ File Download Options section select

CSV ∨	Download ∨

6. Enter the graduation date in the Graduation Date: field.
7. If Override Existing: ☑ is marked, any student who is a 12ᵗʰ grader and matches the status codes selected above will have their graduation date updated.
8. Next select ⦿ Verify in the Run Type: section.
9. Click **Submit** .View the output file and verify the students who will be updated with the correct date.

10. Once you have verified the output, choose Run Type: ⦿ Update .

11. Once the process is complete the following message will be displayed:

   There were 4 EMIS graduation dates and 4 SIS graduation years updated   ✖

12. Now navigate to a student's profile.

13. Verify the student's Graduation Date: on the FN-Graduate tab has been updated and the Graduation Year field on the Additional tab has also been updated.

⚠ CAUTION! **Students included on the output file who aren't going to graduate will need to have the Graduation Date and diploma type manually removed from their FN-Graduate tab.**

Bulk update Diploma Type:

1. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***Ad-Hoc Updates*** *»* ***Update Diploma Type*** .
2. In the Assigned Graduation Dates dual select pull over the graduation date you used in the Bulk Update Graduation Date process above.

All Graduation Dates	Assigned Graduation Dates
07/31/2018	06/14/2018
09/18/2018	
01/28/2019	

3. Choose a diploma type from the Set diploma type to: dropdown.
4. If you would like to use Graduation Verification rules to further narrow down students who will be updated with the selected diploma type, fill in the for students passing rule: and Mark Type: fields.
5. Click Submit .
6. The following message will be displayed: The update student diploma type job has been successfully submitted
7. Verify the Diploma Type: field on the FN-Graduate tab has been updated.

Note: When the Bulk Update process for diploma type is used, select the diploma type that reflects the type earned by the majority of students included in the update. Once completed, manually update the diploma type on the FN Graduate tab for any student whose diploma type differs from what was selected in the bulk update.

Task 35 – Power Withdraw graduating Seniors from your district

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
		✔			✔

Power Withdraw is a very powerful tool. Verify the list of students to withdraw before executing the bulk withdrawal

THIS TASK IS NOT RUN UNTIL NEAR THE END OF THE SCHOOL YEAR!

Power Withdraw has the ability to select students by ad-hoc membership, Grade Level Next Year, or Home School IRN.

CRITICAL

Seniors should be withdrawn using the last day of student attendance, not the last day of school.

The Power Withdraw process doesn't perform a complete withdrawal. Power Withdraw only enters a withdraw date and code. Power Withdraw doesn't drop course section assignments, apply fee waivers, or change the student's status. If seniors are Power Withdrawn prior to running their final transcripts, their transcripts will include their withdrawal date.

CRITICAL

If you fail to withdraw graduating students in 20/21, they will show on the Missing Student Report for FY22 Period S – First Window.

The Honor Roll Report is one of the few reports in StudentInformation that honors the homeroom date on the submission screen. If attempting to generate an Honor Roll for seniors that have already been power withdrawn, make sure you use their withdrawal date as the homeroom date on the Honor Roll Report submission screen.

1. At the building level navigate to ***Home » Management » Power Withdraw***.
2. The School: dropdown will default to the building in context.
3. In the Withdraw Reason: dropdown select 99 - Completed High School Graduation Requirements.
4. The Withdraw Date: will default to the last day of school and can be changed if desired.
5. The Withdrawn to IRN: will default to ******.
6. In the Search Mode: section select the Search Criteria radio button.
7. Use the filters to narrow down your search criteria.
8. Ensure ☑ Students Selected by Default is checked.
9. Click Search.
10. Verify the students on the list are correct.
11. Uncheck the students who won't be graduating and don't need withdrawn.
12. Double check the list to make sure it is correct before continuing.

13. Click **Withdraw** .
14. The following message will display when the process is complete

All selected students were successfully withdrawn

15. If errors occur the following message will be displayed

Errors occurred while withdrawing students. Students with errors were not withdrawn unless otherwise noted.

16. The students will be listed below the Search Mode: section.
17. View the students and correct the errors.
18. Rerun the Power Withdraw if needed.

Task 36 – Update Seniors not graduating from your district

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
		✔			✔

UNLESS YOU HAVE EARLY GRADS, THIS TASK IS NOT COMPLETED UNTIL NEAR THE END OF THE SCHOOL YEAR!

Students Graduating Elsewhere
For those seniors who are residents of your district attending elsewhere and graduating from another district (such as open enrollment students), do NOT report a graduation date or diploma type. These students will need to be withdrawn with a withdraw reason of '41' or '45' and the Withdrawn to IRN should be the district they are graduating from. This applies to any senior attending elsewhere as open enrollment, special education cooperative, tuition students and proprietary school students. The resident district should either use their own senior withdrawal date or their own last day of school and not the attending school's withdrawal date.

Students who pass course requirements, but not the Graduation Requirements in 20/21
For yearend reporting, if a student has completed their course requirements but not their Graduation Requirements, they should be withdrawn with a '75'. If they pass the test in the summer prior to the first day of school, the Graduation Date and Diploma type should be added to the FN Graduate tab of the Student Profile in the 20/21 school year. This student will then be picked up on the FY21G reporting period.

If the student doesn't take or pass the test and doesn't enroll in courses in 21/22
Report the student as a summer withdrawal (withdrawing the student in the 20/21 school year prior to July 1) with a withdrawal reason code of '75'.

If the student doesn't take or pass the test but enrolls in courses in 21/22
Do not withdraw the student. Report the student in 21/22 with Grade Level '12' on the FD Attributes Tab.

District & Building Records

Task 37 – Update the District and Building Records: DN & DT

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

StudentInformation > EMIS > Maintenance > District and Building Information

District Organization Info (DN) tab

ODE EMIS Change 21-51 – Make attributes **STUPSTCBTR & STUPSTCATR** on the DN Record required. District must report a count for these values even if it is zero.

Each of the items on the District Organization Info (DN) tab has been reorganized to flow better, and also each section indicates when the attributes in that section need to be reported. The Attributes on this tab are categorized as follows:

Delivery Models, Hardware and Connectivity (All Collections)
- **EDUMODELDB** – Initial delivery model used by the district/school at the start of the school year, and updated at any time the delivery model changes
- **LEAPRVHARD** – Reported if the district provides computer hardware to all students in one or more grade levels for completing schoolwork at their primary residence
- **LEAPRVWIFI** – reported if the district provides Wi-Fi access to the students outside the building

Student Group
- **STUKGBRDAY (As of First Day of School)** – Date Student is required to be five years old to be admitted into kindergarten
- **STUHOMESCL (Cumulative Count for School Year) –** Count of home-schooled resident students

- **STUNPNTSRV (Cumulative Count for School Year) –** Count of resident and non-resident nonpublic students within district boundaries eligible for special education services but not being served by the district
- **STUNPNTELG (Cumulative Count for School Year**) – Count of resident and non-resident nonpublic students within district boundaries evaluated and determined ineligible for special education services
- **STUPSTCBTR (Cumulative Count for School Year**) – Count of preschool transition conferences held by 3rd birthday, no disability suspected, no additional evaluation
- **STUPSTCATR (Cumulative Count for School Year**) **–** Count of preschool transition conferences held after 3rd birthday, no disability suspected, no additional evaluation

Student Group (All Collections)		
Date student is required to be five years old to be admitted into kindergarten:*		B - August 1st ▾
Count of home schooled resident students:		21
Count of resident and non-resident nonpublic students within district boundaries eligible for special education services but not being served by the district:		3
Count of resident and non-resident nonpublic students within district boundaries evaluated and determined ineligible for special education services:		2
Count of preschool transition conferences held by 3rd birthday, no disability suspected, no additional evaluation:		6
Count of preschool transition conferences held after 3rd birthday, no disability suspected, no additional evaluation:		4

Local Wellness Policy
- **LCLWELLPOL (Last Day of School) –** Local wellness policy

Local Wellness Policy (Final Collection)	
Local Wellness Policy:*	Yes ▾

Preschool Special Education Agreements
- **TFRPSESCYS –** Valid IRN of a traditional district or ESC if an ESC is providing preschool special education services for resident children and the district has authorized ODE to transfer funds for preschool special education students to the ESC providing those services
- **TFRPSESCNO –** Valid IRN of a traditional district or ESC if an educational service center (ESC) is providing preschool special education services for resident children and the district has not authorized ODE to transfer funds for preschool special education students to the ESC providing those services

Preschool Special Education Agreements (All Collections)			
District IRN	District Name	Authorized	Attribute
	There are no records to display		
Add New			

Comprehensive Eye Exams
- **EYEREQCNTA** Number of students with an IIEP written within the stated timeframe.
- **EYERECCNTB** Number of students with an IIEP written within the stated timeframe who received an eye exam within three months of be-ginning services.
- **EYENRCCNT1** Number of students with an IIEP written within the stated timeframe who received an eye exam more than three months after beginning services.
- **EYENRCCNT2** Number of students with an IIEP written within the stated timeframe who received an eye exam within nine months immediately prior to being identified with disabilities.

- **EYENRCCNT3** Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to withdrawing within three months of beginning services.
- **EYENRCCNT4** Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the student's hospitalization.
- **EYENRCCNT5** Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to parent refusal.
- **EYENRCCNT6** Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the lack of a conveniently available provider.
- **EYENRCCNT7** Number of students with an IIEP written within the stated timeframe who have not received an eye exam and are still within three months of beginning services.
- **EYENRCCNT8** Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to a reason not accounted for by another attribute name.

Comprehensive Eye Exams (Final Collection)	
Number of students with an IIEP written within the stated timeframe:	41
Number of students with an IIEP written within the stated timeframe who received an eye exam within three months of beginning services:	19
Number of students with an IIEP written within the stated timeframe who received an eye exam more than three months after beginning services:	6
Number of students with an IIEP written within the stated timeframe who received an eye exam within nine months immediately prior to being identified with disabilities:	5
Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to withdrawing within three months of beginning services:	8
Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the student's hospitalization:	6
Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to parent refusal:	7
Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the lack of a conveniently available provider:	22
Number of students with an IIEP written within the stated timeframe who have not received an eye exam and are still within three months of beginning services:	13
Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to a reason not accounted for by another attribute name:	9

SOES Only

- **C_STUEEPOL** Student early entrance policy flag, reported by community schools only

SOES Only (All Collections)	
Early Entrance for KG:*	⌄

Community School Only – These attributes are no longer required to be reported as of 4/26/21 (EMIS Change 21-169). This option will be removed from the District and Building screens at a later date.
- **MGMTCOMPYS**
- **MGMTCOMPNO**

Community School Only (All Collections)			
Current Management Company IRN	Current Management Company Start Date	Previous Management Company Stop Date	Attribute
	There are no records to display		
Add New			

College Credit Plus Student Denied Participation/Student Billed

- **CCPDENIALS (Cumulative Count for School Year)** – the count of CCP students denied participation because they did not give notice of CCP participation by the deadline date; it is possible that the value should be zero for some districts, if not applicable, then leave the field blank
- **CCPREIMBCT (Cumulative Count for School Year)** – the count of students who failed or dropped a course where districts sought reimbursement from the student for the cost of the course; it is possible that the value should be zero for some districts, if not applicable, then leave the field blank
- **CCPRESTITU (Cumulative Count for School Year)** – the total dollar amount a district is seeking for CCP reimbursement due to a dropped or failed course for

all students; it is possible that the value should be zero for some districts, if not applicable, then leave the field blank

College Credit Plus Student Denied Participation/Student Billed (Final Collection)

Enter the count of CCP students denied participation because they did not give notice of CCP participation by the deadline date.	5
Enter the count of students who failed or dropped a course where districts sought reimbursement from the student for the cost of the course.	3
Enter the total dollar amount a district is seeking for CCP reimbursement due to a dropped or failed course for all students.	1400

Calendar Type (This attribute is reported in the Calendar Collection) – This attribute is no longer required to be reported as of 4/26/21 (EMIS Change 21-169). This option will be removed from the District and Building screens at a later date.

- **C_CLDRTYPE** indicates whether the district is in hours or days

Calendar Type (Calendar Collection)

Calendar Type: *	⦿ Hours ◯ Days

Assessment Group

- **ASMTFG3ELA (First Day of District Test Window) –** Fall 3rd Grade ELA Assessment
- **ASMTSPRELA (First Day of District Test Window) –** Spring English Language Arts (all grades, including EOC)
- **ASMTSPRMSS (First Day of District Test Window) –** Spring Math, Science, Social Studies (all grades including EOC)

Assessment Group (All Collections) ⓘ

Starting date of the district assessment window for Fall 3rd Grade ELA Assessment	11/04/2020 📅
Starting date of the district assessment window for Spring English Language Arts (all grade levels including end-of-course exams)	03/15/2021 📅
Starting date of the district assessment window for Spring Math, Science, Social Studies (all grade levels including end-of-course exams)	04/01/2021 📅

Building Organization Info (DN) tab

Each of the items on the Building Organization Info (DN) tab has been reorganized to flow better, and also each section indicates when the attributes in that section need to be reported.   This tab should be completed for each building in the district. The Attributes on this tab are categorized as follows:

Physical Education Performance Measures
On the Building Organization Info (DN) tab, when reporting the values for each grade band, note the following:

The four bands of grade ranges to be reported are as follows:

- Grades KG-2
- Grades 3-5
- Grades 6-8
- Grades 9-12

Each Grade Band will have 5 different options to be reported. These values indicate the count of students by ability level at each grade band. They are as follows:

- Total students scoring Limited
- Total students scoring Proficient
- Total students scoring Advanced
- Total students Not Evaluated
- Total students not Applicable

1. Only report a value for Grade Bands that are in the building being reported in the Building Organization Info record. Example, if you are completing the high school building DN record, and only have grades 9-12 in that building, you would only fill in values for the 09-12 grade bands. The other grade bands would be left blank.
2. **Evaluation not conducted at this grade band for the building** should only be completed for a grade band if a building in the district includes one or more of the grades in the grade band, but the students are not evaluated at that building. For example, if a district has a Kindergarten only building, but the district elects to evaluate students in 2nd grade only, then at the Kindergarten only building, you would complete the number of students not being evaluated and insert that on the **Evaluation not conducted at this grade band for the building** field for the KG-02 grade band.
3. If a specific school building's grade levels served as reported in ODE's OEDS system overlap a grade band, the building should either have the first options

reported (Limited, Proficient, Advanced, Not Evaluated) or report only the ** (Not Applicable); it cannot be both.

4. Report zeroes if no value applies to an attribute (Limited, Proficient, or Advanced) in the building. For example, if a building only has proficient students in a grade band, enter zeros for the limited and advanced levels in that same grade band.

Physical Education Pilot Program

- **PHYSEDPLOT –** Reported by buildings participating in the Physical Education Pilot Program

Positive Behavior Implementation Status

- **PBISIMPSTG (Status as of Last Day of School for Building)** – Positive Behavior Intervention Support, includes number of months

District Testing – Year End (DT) tab

Create a record for each off-year assessment test administered for each grade level. If a district does not have any test records to be reported, a single record must be reported with the 'NT' None Tested value.

State Required Third Grade Reading Guarantee Assessments are not included in the DT records. If your district administers the Writing or Math Third Grade Reading Guarantee Diagnostics, which are no longer state required, to an entire grade level, then those assessments should be reported on the DT record.

StudentInformation > EMIS > Maintenance > District and Building Information

District and Building Information

From this screen, you can update your District and Building Information.

| District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN) |

Grade Level Assessed:*   Second Grade

Local Assessment Number:*   452

Number Of Students Taking Assessment:*   290

Assessed Students With Disabilities Headcount:*   42

Administered with Accommodations/Modifications:*   No, Accomodations were not available

Accommodations/Modifications Headcount:*   25

Alternate Assessments Provided:*   No, Alternate Assessments Were not Available

Alternate Assessment Headcount:*   0

Save   Cancel

Membership/Program Reporting
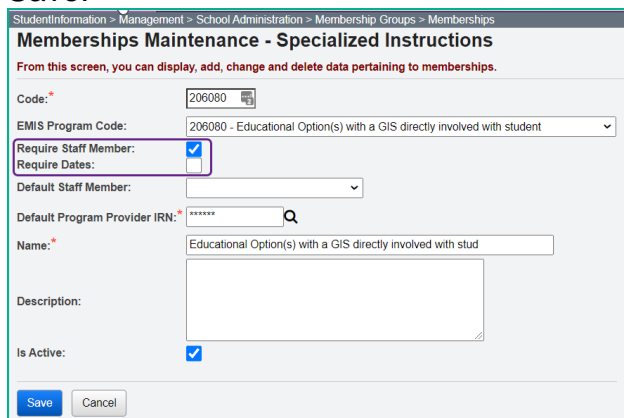
Task 38 – Verify and Update Membership Codes with Staff or Program Provider

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

All buildings must report student programs from the EMIS Manual, Section 2.9 Student Program Record for any student participating in the program during the current school year.

Certain program codes require that a staff member be reported. With the building level in context, navigate to ***StudentInformation* > *Management* > *School Administration* > *Membership Groups*** and click interactive blue link for the area where the membership you need to update is stored, ex. Specialized Instructions. Then click the edit pencil for the code which needs to be updated, ex. 206080. Check the Require Staff Member: checkbox and select the default staff member from the dropdown. Save.

The following EMIS program codes require a staff member to be reported:

> 305003 – Career Assessment program code
> 206XXX – Gifted program codes
> 310XXX – Work based learning codes
> 220100 – Preschool Itinerant Services program code (requires staff member and dates)

StudentInformation requires start dates on all memberships, but not stop dates. Preschool Itinerant 220100 is the only program code which requires **effective start and end dates to be reported**. Edit the program code through the breadcrumb trail above and check the Require Dates: checkbox. If Preschool Itinerant services are given through the ESC, the resident district does not report the program code.

Memberships with Contracted Staff:
Fill out the following default values on the membership:
Credential ID (aka State Staff ID on Staff record in StudentInformation)
Program Provider element

Memberships with Non-Contracted Staff
EMIS ID
Program Provider should be ******

NOTE: Any student assigned to the membership will show the default staff member and Program Provider IRN. If the staff member or Program Provider IRN differs from the default value assigned, edit the student's membership record and change the value of the credential id or program provider IRN element.

Task 39 – Add/Update Student Memberships (Programs)

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

New Program Codes for FY21:

Graduation Seal Codes
Membership group **51 - Ohio Means Jobs** has been renamed **51 - Graduation Seals**. It now contains the program codes for each of the graduation seals that may be earned as well as codes for seals students are planning to earn. Records should be reported for students that earn a seal or plan to earn a seal regardless of grade level.

Graduation Pathway Program Codes (52XXXX)
Program codes for three additional Graduation Pathways were added under the group 52 – Graduation Pathways.

Delivery Model and Hardware & Connectivity Program Codes (70XXXX)
Three new sections of program codes have been added for the following areas:
- **Hardware and Connectivity** – indicates whether the district is providing hardware to the student as well as the type of connectivity which may be provided to the student at his/her primary residence
- **Delivery Model** – indicates the level a student may have participated in remote learning during the schoolyear

All other Program/Memberships
Student memberships may be entered in multiple places in StudentInformation.

> ***StudentInformation > SIS > Student > Edit Memberships***
> ***StudentInformation > SIS > School > Membership Members***

Add all program/membership records as soon as they are available to you. StudentInformation will transfer all program codes that are entered, while ODE will exclude any program codes not applicable for a specific reporting window.

Use the Program Provider IRN field to indicate the service being reported is provided by a contracted entity. Blank values in the Program Provider IRN are not valid. StudentInformation will default a blank value to ******.

Reading Improvement and Monitoring Plan Intervention Programs.
Reading Improvement and Monitoring Plans are required for K-3 students identified by the reading diagnostic assessment as not reading at grade level. Districts and community schools are required to report reading improvement interventions/programs provided during the school year in EMIS during the 'S' data collection. One or more interventions (RIMP) must be reported for any K-3 student identified who is not on track for reading.

Districts can now import the Program Codes on the RIMPs from DataMap to StudentInformation. Once exported utilize the steps below to import the Program Codes.
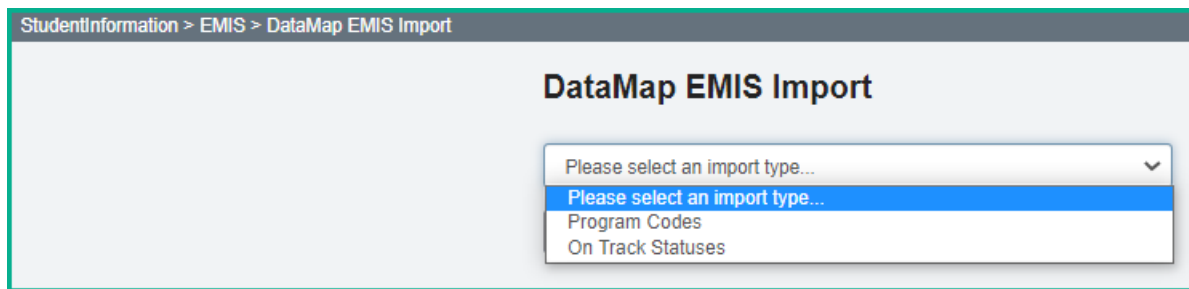
1. With the building or in context, navigate to: ***StudentInformation > EMIS > DataMap EMIS Import.***
2. Select 'Program Codes' from the dropdown.
3. Click **Preview Import** .
4. Select the students you wish to update or check the Select All button if you wish to update all of them. Once your selection has been made choose **Import Selected** .
5. Once complete, the following message will be received:
   Success! The import was successful. ✕ .
6. You can then verify that the values were updated as expected.

Copy Membership functionality
- Allows selected student membership assignments to be copied from the previous year to the current year
- Will not copy memberships from one building to another if student changed buildings this year
- If the membership code has already been added to the student's memberships for the current year, the student will not appear on the list of students available to copy up for that membership.
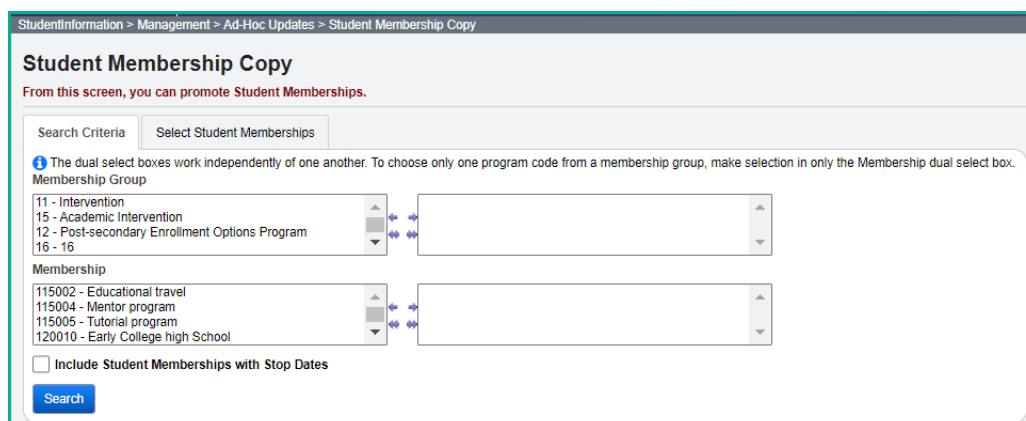
Task 40 – Run Student Roster by Membership (R102) to verify student memberships

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

For each Collection Request, run Student Roster by Membership and verify the student memberships to ensure that the proper students are appearing with the correct membership records.

StudentInformation > SIS > School > Student Reports > Student Roster By Membership (R102)

Report: R102
Printed Tue, Sep 15, 2020, 9:54 AM

HIGH SCHOOL
2020-2021
Student Roster By Membership

STUDENT CONTROL GROUP: Special Education Services   Membership Date Range: ALL DATES

ID	STUDENT NAME AND ADDRESS	TELEPHONE	AGE	ST	GR	GD	HMRM	STUDENT MEMBERSHIP CODE	EFFECTIVE DATE
	OH 43938-7939	(740)	16	A	11	M	11-4	215008 Occupational Therapy Services	Start Date: 3/22/2012 Stop Date: 3/21/2013

Task 41 – Run MEMBEMIS to verify student memberships

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

Process MEMBEMIS to determine if there are any issues with existing student memberships and services that will be reported. If errors are encountered, make the corrections and then rerun MEMBEMIS to verify that the issue has been taken care of.

MEMBEMIS runs in verify mode only. Any EMIS reportable membership added for a student will be included in the transfer file regardless of which window ODE will be looking for them in. ODE will ignore any program that is not to be reported in the window of a collection.

Running MEMBEMIS

MEMBEMIS has an option to verify Special Education Services separately from all other memberships. The verification process for Special Education Services can still be used to verify any service codes that you may have entered.

How to correct Student Membership outside the range of the fiscal year MEMBEMIS errors:

1. Navigate to ***StudentInformation*** **»** ***Management*** **»** ***School Administration*** **»** ***Membership Groups***.
2. Click on the blue link of the membership code in the **Name** column.
3. The page will refresh, and you will be brought to the Memberships page where a listing of all memberships for the two-digit code will display
4. Click on the corresponding blue link of the membership
5. The page will refresh and the ***StudentInformation*** **»** ***SIS*** **»** ***School*** **»** ***Membership Members*** will display.
6. Choose the membership group from the **Membership Group:** dropdown.
7. Select **Membership:** from the dropdown.
8. Click **Go** .
9. Verify each student has a start or end date within the school year.

Membership Members

From this screen, you can maintain the students associated with the selected membership.

Membership

Group: 20 - Specialized Instructions ⌄   Membership: 205040 - Guidance Services ⌄

○ Show Active Members   ○ Show Members From: 10/2/2014 📅 To: 10/2/2014 📅   Go

[Add Students to Membership] [Bulk Addition of Students]

	ID	Name ⌃	Homeroom	Staff Member	Start	End	Grade	Prog Prov IRN
✕	00001111	Banter, Susan	217		Sep 01, 2014			******
✕	00002222	Banters, Lucy	217		May 31, 2014			******
✕	00003333	Bantersmith, Bobo			Sep 01, 2014			******
✕	00004444	Bantersmithly, Donald			Sep 01, 2014			******

Discipline Reporting

Task 42 – Verify Discipline Data and begin reporting Discipline Data

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

Use the Discipline Detail Report and/or the Students without Discipline Report - Assists in accurate discipline reporting.

ODE EMIS Change 21-72 – Collect Discipline (GD) data year-round. This is a change from past years when we did not report discipline in the first reporting windows.
ODE EMIS Change 21-28 – ESCs report discipline data for their PS students.

ESCs will want to verify that they have updated the values for Action Code and Infraction Type Code in the Discipline Code Types. The EMIS values for these fields are located in the EMIS Manual, Student Discipline, Chapter 2.11.
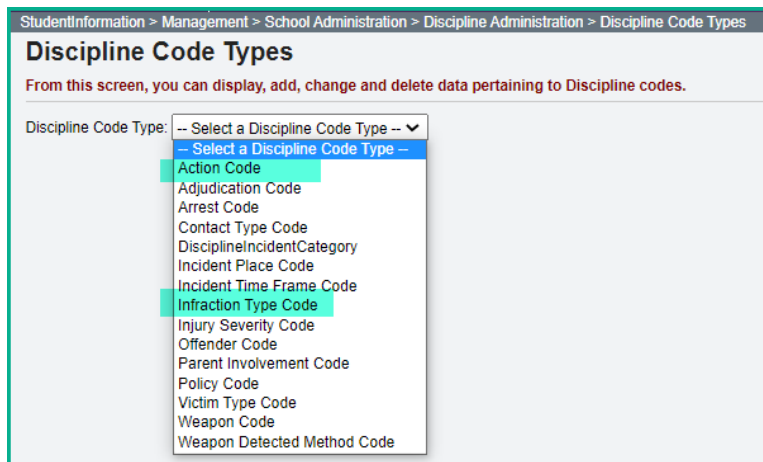
GD130 – Victim of Student Violence
If multiple victims are involved, each victim should have a separate victim record added. The EMIS Discipline Transfer (GD) will calculate the appropriate victim type code to report based on all victims associated with the incident.
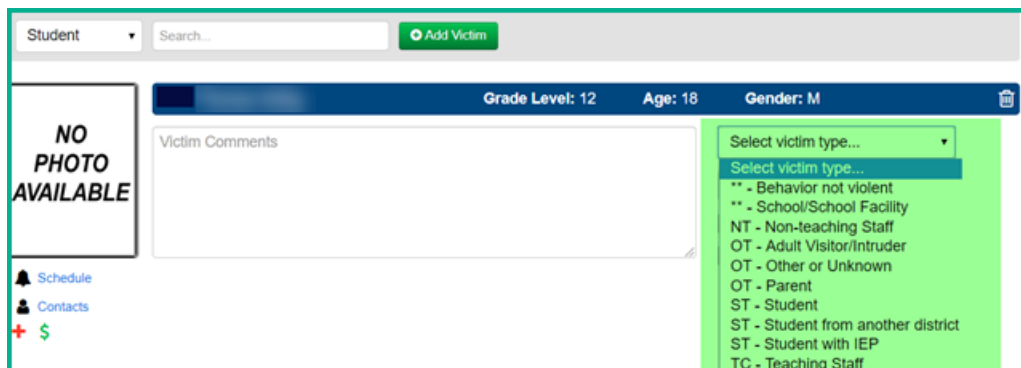
SIS Victim Code	Update to Victim Code Label Name	EMIS Code Column Value	IsActive
1	ST - Student	ST	Y
2	ST - Student with IEP	ST	Y
3	ST - Student from another distrit	ST	Y
4	OT - Parent	OT	Y
5	OT - Adult Visitor/Intruder	OT	Y
6	TC-District Employee (Teaching)	TC	Y
7	OT - Other or Unknown	OT	Y
8	** - School/School Facility	**	Y
ST	ST - Student	ST	Y
TC	TC - Teacher	TC	Y
NT	NT - Non Teaching Staff	NT	Y
OT	OT - Other (Not Student, Teacher or Non-Teaching Staff)	OT	Y
**	** - Behavior not violent/not directed at another person	**	Y

GD140 – Additional PS-3 Discipline Reason Detail

Students in grades Preschool through 3, who receive either an Out-of-School Suspension or an Expulsion, must also include a Discipline Reason Detail value. The selections for this element are available in the 'PS-3 Discipline Reason' dropdown. For any Discipline Incident not resulting in an Out-of-School Suspension or Expulsion, the default value of '* - Not Applicable' will be reported.

The reporting of discipline data is on-going. Districts may verify their discipline information and report any records that exist. The DISCEMIS process is only a verify process, there is no 'update'. Districts should run DISCEMIS periodically to clear up any errors on any existing discipline incidents.

Every discipline incident with an EMIS reportable action is required to be reported to EMIS. For an EMIS reportable action to be included in the transfer files, it must also have an EMIS reportable infraction. If a discipline incident has an EMIS reportable action, but no EMIS reportable infraction was listed, the infraction should be updated to the closest EMIS reportable infraction that applies. This will allow the incident to be reported as required.

All EMIS reportable discipline incidents must be entered in the Discipline Module in order to be included in the Discipline Record Transfer file. Refer to the Discipline Step-by-step checklist for complete instructions on maintaining discipline incident data.

To run DISCEMIS in Verify mode, with the district in context, navigate to
StudentInformation > EMIS > Student Reporting Collection (S) and select Verify Student
Data.

From the DISCEMIS Verify page, select the schools you wish to verify and the output
method. Errors will display in the lower portion of the page with interactive links to
assist in correcting the records.

Error messages with "W" at the end of the code are warning messages. Corrective
action may or may not be necessary. Error messages ending with "E" must be
corrected.

Once you have corrected your errors, include the GD – Student Discipline records in
your next 'S' Collection Request Transfer.

Attendance Reporting

Task 43 – Run and save a copy of the EMIS Attendance Hours Summary Report

📄 EMIS Attendance Hours Summary report - Provides an up-to-date listing of each student with their Attendance Hours including excused and unexcused absence hours. The student's percent of time is taken into consideration when these attendance hours are calculated.

EMIS Attendance Hours Summary
This report provides you with a list of each student based on the selected filters, along with their Total Enrollment Hours, Excused and Unexcused Hours, and their attendance percentage. This report is similar to the R500.

You may wish to run a copy of any of these reports the first day of school, at the end of each 'S' Collection Request and again the last day of school. Since there is no longer a count week for attendance, you may use this report for your own purposes. All attendance updates for the school year should be completed prior to running the 'final' report for the end of the year.

Some additional reports that are available to assist in verifying student attendance are listed below.

EMIS FS Standing Attendance Detail Report
This report provides you with details of the hours present and the excused and unexcused absences for a specified time period for each student. Each FS field is included in this report, and if you opt to use it, you may want to remove some of the columns to see just the information you wish to retain.

Yearly Absence Detail with Perfect Attendance
This report provides you with a list of the students who have perfect attendance for the current school year.

Yearly Absence Detail
This report provides you with a list of each student based on the selected filters, along with their Percent of Time, EMIS Situation, Excused/Unexcused Hours, Total possible School Hours and total Attending Hours.

Sub-Calendar Hours Analysis
This report provides you with the Calculated Hours, Actual Days and EMIS Exceptions for each of the sub-calendars for the entire school year.

Task 44 – ATTUPEMIS Update

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

EMIS Attendance Hours report – Contains up-to-date attendance values for students.

Absence Thresholds Detail and Absence Thresholds Summary reports – Provides up-to-date excessive absences and habitual truancy trigger dates.

Attendance Skipped Student Detail and Attendance Process Warnings Detail reports – Displays issues that needing correction that may adversely affect the students' attendance calculations.

ODE EMIS Change 21-73 – Collect attendance data on Student Standing (FS) on all records in main S reporting windows. This is a change from past years when we only reported attendance on the closed FS records until the final S windows.

Satellite Students: The FS Standing tab of the Student Profile now includes a ☑ Satellite Student flag to identify satellite students for the attendance calculator. This flag should only be checked at the **home district**, not the JVSD. When checked, students attending satellite courses in their **home district** will have attendance calculated for HB410 attendance as if they attended 100% of time in the district. However, for EMIS reporting, their attendance will be calculated according to the Percent of Time on their FS record.

The ☑ Satellite Student flag does not copy forward to future school years, and will need to be updated as needed.

CTE – Using the Home school calendar for CTE Satellite Students
Career Centers have the option of having ODE use the student's home district calendar for enrollment rather than maintaining and reporting a calendar at the Career Center. The key to accomplishing this is to assign the satellite students to a sub-calendar that is NOT reported to EMIS and has a unique attendance pattern. ODE will look for a matching calendar by attendance pattern in the JVS at the building level. If no match is found, they will check the district level calendars. If no match is found, they will use the student's district of residence and SSID to go back to the home district and see what calendar they are assigned to in their home district. When the match is found, ODE uses the home district calendar to calculate enrollment.

A calendar will still need to be maintained in the JVS building if attendance is to be calculated at the career center for Satellite students.   See the example below:

1. Johnny is at his home school 89% of time. Johnny is a JVS Satellite student (at his home school) 11% of time. Johnny's FS at the home school shows that he is 89% of time and 11% of time to the JVS as a satellite student.
2. Johnny is enrolled at the JVS as a satellite student with 11% of time.
3. At the home school, Johnny is on the default calendar. It will be calculated with 89% of time. That calendar is on his FD Attributes tab as the reporting calendar and is marked Include in Attendance Calculation and is marked Report to EMIS. This way his home school attendance is reported to ODE as expected on the FS record and the calendar is associated with Johnny.
4. At the JVS, Johnny is on a sub-calendar called Satellite ABC School. It will be calculated with 11% of time. That calendar is on his FD Attributes tab as the reporting calendar and is marked Include in Attendance Calculation and Report to EMIS is *UNCHECKED*. This way the attendance for this student is reported to ODE by the JVS as expected on the FS record.
5. The calendar at the JVS needs to be kept current for the EMIS Exceptions, and they should also be adding in any days the student is absent so that the attendance at the JVS is correct.
6. ODE will look at the home school calendar for this student based on the Location IRN the JVS is reporting for his courses because there wasn't a calendar Attendance Pattern at the JVS that matches the attendance pattern reported for him there.

This example does not apply to students in 'cloned buildings'.

CCP Students. Attendance is calculated for both HB410 and EMIS reporting as if the student is present for the time the student is attending CCP classes.

Students attending CCP part time will have attendance calculated for the time they are attending the district and attending CCP. The Percent of Time and the Sent to Percent of Time for the CCP will be added together in the attendance calculation for total attendance.

1. *Student attends CCP at the School District. Both FS Attendance and HB410 attendance will include all absences reported for the student based on the total Percent of Time.*
2. *Student attends CCP online or at the College. Both FS Attendance and HB410 attendance will include all absences reported for the student based on the total Percent of Time. When a student attends the school district part time (ex. 60%) and leaves early each day to go to the CCP courses, and the student is absent from the school district, an absence should be entered for the student with a partial qualifier indicating the time in and out that was missed at the school district. Utilizing this method, the remaining Percent of Time (ex. 40%) for CCP time at the college will not be included in the HB410 calculations for attendance/absences.*
3. *Students who are attending CCP 100% of the time on a DNAC sub-calendar will not have their attendance automatically calculated for them and will need to be calculated manually. However, if these students are placed on an attending calendar, their attendance will be calculated according to the days set forth on that calendar when running Attupemis.*

When running the nightly Attendance Calculation OR when running Attupemis, the Attendance Calculation completes and the updates to FS Attendance values as well as the HB410 reports will be seen immediately. The nightly Attendance Calculation still runs at the ITC level, however, districts that need to view more immediate results for their changes can do so by running Attupemis.

Attupemis calculates attendance in hours. The 'days' field displays on the FS Attending tab as a reasonableness check. Due to the attendance reporting requirements, Attupemis should be run in update mode **prior to every submission** so that it contains the most up to date attendance information available.

Attupemis calculates the attendance for each student using the attributes of the Reporting Calendar the student is assigned to on the FD Attributes tab of the Student Profile. For a Reporting Calendar to be included in the Attupemis process, the **Include in Attendance Calculation:** ☑ must be checked on the Sub-calendar.

Students who are on a sub-calendar that has the Include in Attendance Calculation: ☐ field unchecked, will not be included in the Attendance Calculations, and the Student Truancy records will **NOT** be created nor included in the Transfer file.

Student Attendance Calculation: The student's School Year Attendance Hours are calculated based on the number of hours of expected attendance for each day they are in session according to their calendar assignment minus the School Year Excused Absence Hours and the School Year Unexcused Absence Hours. The student's Percent of Time is applied to both the number of hours in attendance and the number of absence hours. Any student EMIS exceptions on the Reporting Calendar are included in the calculation.

For examples of how the attendance is calculated, refer to the HB410 District Task List documentation found under the Procedural Checklists, subsection Students.

Attupemis Update populates the Current Entity fields highlighted in the screenshot below.

If any additional hours are specified in the 'Other Entity' attendance fields, the values are added to the Current Entity values and reported as a combined total in the FS Transfer file. See the next task for details on manually entered attendance.

Task 45 – Manually enter attendance on the FS Attendance Tab for non-preschool students who attend the ESC, Board of DD Students, JVS Satellite Students and non-public students who are placed at district expense

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

📄 EMIS Attendance Hours report - Displays up to date attendance values for students.

Attupemis calculates attendance in hours instead of days, although the 'days' field displays too. The values in the Other Entity field are manually entered and are not updated by Attupemis. These can be used for reporting attendance for students that are not on a calendar within your district that calculates attendance.

Examples of students who may need to have their attendance calculated manually:
1. JVS Satellite Students (reported by JVS)
2. Non-Preschool Students attending the ESC
3. Students at the Board of DD
4. Non-public Students placed at District Expense

Attendance is calculated for the time students attend the CCP as if they have perfect attendance. If the student is part time at the educating district and part time CCP student and has an absence, the absence should be entered only for the time they miss from the educating district, not for CCP that is away from the educating district, ex. at the college or online.

During the transfer process, the FS EMIS record transfer adds together the values in the current entity hours of attendance fields to the other entity attendance and reports the total on the FS records.

Task 46 – Student Truancy and Excessive Absence (FT) Record (HB 410)

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
	✔	✔			✔

📄 Absence Thresholds Detail and Absence Thresholds Summary reports - Display up-to-date excessive absences and habitual truancy trigger dates.

📄 Absence Thresholds Detail and Absence Thresholds Summary reports – Provides up-to-date excessive absences and habitual truancy trigger dates.

📄 Attendance Skipped Student Detail and Attendance Process Warnings Detail reports – Displays issues that needing correction that may adversely affect the students' attendance calculations.

Note: FT records for Preschool students are not included in the FT Transfer file.

The Student Absence Intervention page is a tool that districts can use to assist in tracking the activities that are required for students with excessive absences or habitual absences. This page is also the location where the required data to create transfer records for the FT records are maintained.

This record is reported by all EMIS reporting entities who provide education to students in grades kindergarten and above. An event element is to be reported for students when the events outlined in House Bill 410 occur.

The four Event elements to be reported are as follows:
- A – Parent Notified of Excessive Absences
- B – Student becomes Habitually Truant
- C – Habitual Truant Violates Court Order
- D – Absence Intervention Plan Implemented

All Event Types are reported only once for each student with the exception of the 'C' event code. All incidents of a student violating a court order for Habitual Truancy need to be reported.

NOTE: A student must have reached a Habitual Truancy Threshold to have the Absence Event element 'D – Absence Intervention Plan Implemented' reported.

- **External Student Absences** –Student's External Absences page to view any external absences previously entered for a student
- **Student Absences** – Student's School Absences page to view school absences entered for the student
- **Intervention Plan Tab** – Entry screen and details for Intervention Plan
- **District Responsibilities Checklist Tab** – Tool for district staff to track what actions have been taken for each student who has excessive absences or habitual truancy
- **Trusted District Attendance Tab** – View absence data for a student who is enrolled in multiple district simultaneously and both districts have the District Trust set for HB410
- **Last Attendance Calculation** – Provides the date and time the Attendance Calculation was run

Create FT Transfer records for students who only have absences in your district as utilizing the Student Absence Intervention page to enter truancy events.

Creating Student Truancy Records for students that have been or currently are in multiple districts:

Truancy data needs to be manually combined for students who moved from one district to another within the same school year and for students who attend multiple districts at the same time during the same school year. Districts can use the following items to assist with these calculations:
1. External Absences – absences imported with the student
2. Trusted District Attendance – utilized under the Shared District Trust, and displays absences at both districts
3. Communication with other district

An example of students who are shared between districts is a student attending his resident district 60% of time and going to the JVS 40% of time.

Districts and joint vocational school districts should work to create collaborative policies and processes to ensure all HB 410 requirements are met. Unless the district and the joint vocational school district have policies and processes outlining different procedures, they should implement the following:

- If a student attends the joint vocational school district full time, the joint vocational school district is responsible for ensuring it meets all requirements for this student, including tracking and reporting attendance by the hour.
- If a student attends both a joint vocational school district and a home school, the entity in which the student spends the majority of his or her time is responsible for ensuring all HB 410 requirements are met for that student. Similarly, the entity where the student spends the majority of his or her time is responsible for reporting the four required EMIS reporting elements for that student.
- If a student splits time evenly between the home district and the joint vocational school district, the home district and the joint vocational school district should

work together to determine which entity will fulfill the HB 410 requirements for the student, including EMIS reporting.

Students who left a district and moved to another district:
Each district is responsible for reporting the events that occurred while the student was enrolled at their district. When a student withdraws from a district and enrolls to a different district, the absence information should be sent to the new district, and be included in all truancy calculations for the student. The new district is then responsible for reporting any events that after the student is enrolled with them.

<u>Adding FT Records to be included in the Transfer files for students with combined attendance:</u>
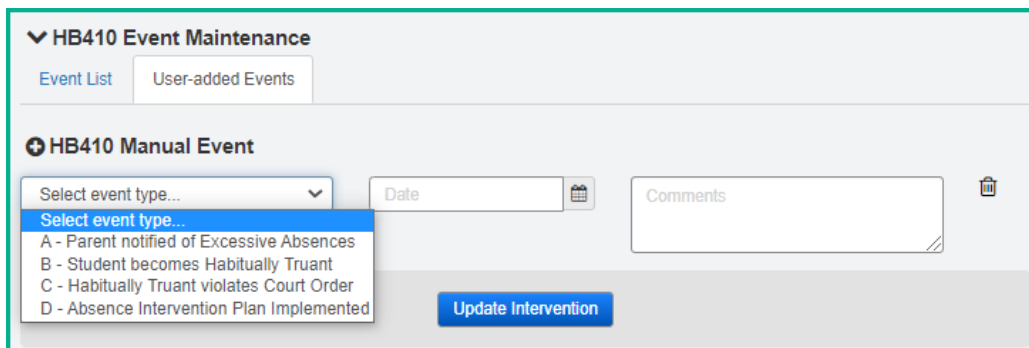
After the events for a student are determined, navigate to the HB410 Event Maintenance on the Intervention Plan tab, and click the User Added Events. Then click the **⊕ HB410 Manual Event** and select the appropriate event from the event type dropdown, fill in the date and click Update Intervention to save the record. This record will then be included in the FT transfer file during Period S reporting. To see a complete listing of all records to be reported for a student, with the student in context, click on the Event List tab and it will display all records that are on record for the student.

Majority of Attendance Reporting

Task 47 – Run MAJOREMIS to calculate Majority of Attendance IRN

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
	✔	✔			✔

📄 EMIS MOA Summary report - Displays majority of attendance data for students.

ODE EMIS Change 21-20 – Majority of attendance review. This change consolidates/simplifies the dates of MOA that are listed in the EMIS Manual. The MOA IRN end date will be March 31 for all students.

Majority of Attendance is the IRN of the building or district where a student is continuously enrolled from the end of October Count Week through the spring test administration date.

Majority of attendance will never be an IRN outside of the district boundary. When the determination is made, the following rules are applied:
- If the student was continuously enrolled in the building for the designated time period, the student's majority of attendance IRN will be equal to the building IRN
- If the student is continuously enrolled in the district but has changed buildings in the district during the designated time period, the student's majority of attendance IRN will be equal to the district IRN
- If the student was not continuously enrolled within the building or district during the designated time period, the student's majority of attendance IRN will be equal to '******".

The resident district is responsible for reporting the Majority of Attendance IRN using the above rules for the following students:
- CCP, Post-Secondary Institution – Sent Reason PS
- MRDD – Sent Reason MR
- JVS – Sent Reason JV
- Contract Career-Technical – Sent Reason CT
- Non-public at District Expense – Sent Reason NP
- Attending a State School – Sent Reason - OS
- School age ESC

The ESC is responsible for reporting the Majority of Attendance element for preschool students. **Majority of Attendance fields are used for the** Local Report Card**, so you will want to be certain the data is as accurate as possible.**

NOTE: For students with a District Relationship of '3' who are Autism Scholarship, English Learners (LEP students) or JDC students who are at the district for the entire year, ODE will change it regardless of what you report. ODE updates the MOA IRN to
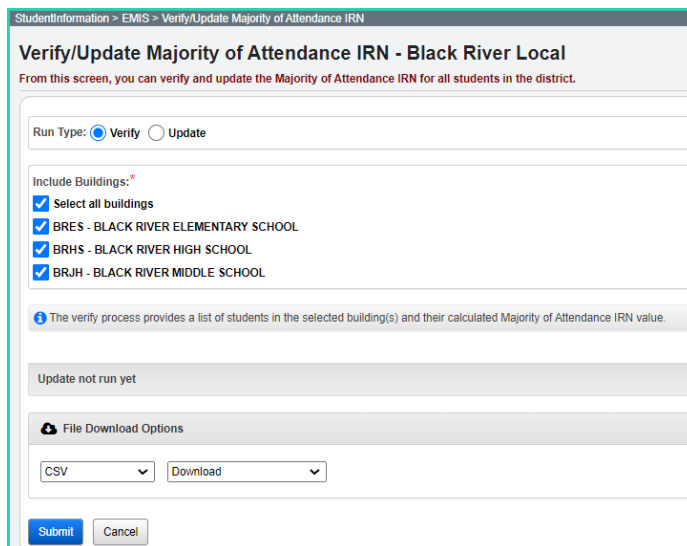
'******', and these students are counted at the State Level.   See "*Technical Documentation Ohio's Where Kids Count Business Rules*" on ODE's website for additional information.

MAJOREMIS

MAJOREMIS is located on the Period S Menu of options. When selecting the period S Student Reporting Collection option from the menu, select 'Verify Student Data'. Next, select Verify/Update – Majority of Attendance IRN (MAJOREMIS) from the program selection menu.

Beginning in FY21 MAJOREMIS will be run from one screen. The MOA IRN can be calculated for all students at one time. The Verify mode must be run prior to running the process in Update Mode.

When running the process in Verify Mode, a downloadable file is provided to assist in verifying the data. The following fields are included on this verification:

- Student Number
- EMIS ID
- Name
- Building IRN
- State Equivalent Grade Level
- MOA IRN
- Match Type
- Student Status (new in FY21)
- Withdraw Date (new in FY21)

Once the verification has been completed, the Update process can be run. At that time the MOA IRN will be populated on the students FN Attributes tab of the Student Profile. Any updates required for individual students will then need to be made manually.

Non-Graduate Core Summary

Task 48 – Reporting the Non-Graduate CORE Summary Records

The Non-Graduate Core Summary records are reported in a separate Period S Collection Window called **'Current Graduation Credit Progress Collection (FY21)'**. For FY21, the collection window begins **11/5/20** and ends **9/17/21**. This means that when transferring the FY21 records, you need to be sure you are transferring the records while the **2020/2021** school year is in context.

Prior to running the Non-Graduate Core Summary, you will want to verify that any current final or earned student marks have been entered as well as confirming that the *StudentInformation>Management>Ad-Hoc Updates>College Credit Management* screen has been updated for completed CCP courses (regular courses & manually entered courses) to include the college credit the student has earned.

The CORE Summary Verify/Update looks at students grades 9-11 who are enrolled anytime within the school year. Run the CORE Summary Verify/Update process in Verify mode to make sure that no courses or manual course history records have been missed. The verification process may be run for a single building or multiple buildings in the same run. You will want to be sure to include any buildings where grades 9-11 are enrolled. This process creates an interactive list of courses or course history records that do not have a CORE Subject Area specified.
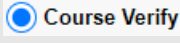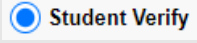
When processed for "Course Verify", only the Course records will be included in the verification. When processed for "Student Verify", manually entered course history records will be verified.

Calculating the credits earned for CORE will be based on courses the student took where high school credit was earned that counts towards graduation. This may or may not include courses taken in the district. If the student earned credit towards graduation from another entity and the school district accepts it as credit towards their graduation requirements, it needs to be used in the calculation of credits for CORE. This could include courses taken from the following entities:

- Courses taken at the district that will award the diploma
- Courses taken at the JVSD/Contract Vocational School
- Courses taken at a Post-Secondary Institution
- Courses taken at another school district
- Correspondence Courses
- Any other experiences for which the district that will award the diploma has awarded credits toward graduation for the student, subject to any relevant local and state policies.

Records for these types of courses would have been created manually on the Course History module. Courses taken in middle school where a student earns high school credit would also count.

The Period S CORE Summary Verify/Update only needs run in buildings where there are students in Grades 9-11.

1. Navigate to ***StudentInformation » EMIS » Student Reporting Collection (S) » Non-graduate CORE Summary Verify / Update***.
2. Run the Non-Graduate CORE Summary Verify/Update in verify mode first. Choose ⊙ **Course Verify**. It automatically verifies the school year you are in, and you can select to choose any or all previous school years as well by pulling them over to the School Years To Verify box.
3. Click **Submit** and you will receive an interactive list of courses that require updates. By choosing the blue link under Course Code, you can go to the screen required, make the updates and save. You will then return to this page to continue making updates.
4. Once you've made all the corrections, you can proceed to check ⊙ **Student Verify** and click **Submit**. This page will list any students with Manually Entered Courses that require updates. By choosing the interactive blue link, you will be taken to the Manually Entered Course page to update the CORE Subject Area for each course. Once the updates have been made and saved, you will return to this page to continue making updates.

Once the data has all been corrected and you have run the **Update** process, when navigating to the Student Non-Graduate CORE Summary, the students' records will appear with both the CORE count for high school credit courses and the Dual Credit for the CCP courses.

StudentInformation > EMIS > Maintenance > Student Non-graduate CORE Summary

Student Non-graduate CORE Summary

From this screen, you can display, add, change and delete data pertaining to student CORE Summary records.

Add CORE Summary Record

		CORE Area Code	CORE Area	CORE Count	Dual Credit
🗑	✏	CTA	Career/Technical units	4.00	0.000000
🗑	✏	ELE	Elective Units	1.50	0.000000
🗑	✏	FAR	Fine Arts Units	2.00	0.000000
🗑	✏	ENG	English Language Arts Units	3.50	0.000000
🗑	✏	FLR	Foreign Language Units	2.00	0.000000
🗑	✏	HTH	Health Education Units	0.50	0.000000
🗑	✏	SCP	Science - Physical Science Units	1.00	0.000000
🗑	✏	SCL	Science - Life Science Units	1.00	0.000000
🗑	✏	MTA	Mathematics - Algebra II or Equivalent Units	1.00	0.000000
🗑	✏	PHE	Physical Education Units	0.50	0.000000
🗑	✏	SOH	Social Studies - American History units	2.00	0.000000
🗑	✏	SOG	Social Studies - American Government Units	1.00	0.000000
🗑	✏	MTO	Mathematics Units Other than Algebra II or Equivalent	4.00	0.000000
			Totals:	24.00	0.000000

Data Submission

Task 49 – Run CHECK_EMIS for Period S

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

CHECK_EMIS is available on each reporting period menu. The version under each menu will check only those processes specific to that particular reporting period.

Run CHECK_EMIS to get an audit trail of what processes have been performed for each building in your district. The CHECK_EMIS page lists which EMIS Verify, Update, and Transfer processes have been run. The CHECK_EMIS report will provide you with a listing of when each process was run, what time, and which user completed the process for each building in the district.

At this point in the checklist, it is important to verify the following has been completed:

1. Make sure all processes have been run in Verify mode where applicable for each building.
2. Make sure all update processes have been run in Update mode where applicable at least one time for the district.
3. Make sure all the necessary transfers were performed after the update processes were run.
4. If any processes were run too early, make sure they are rerun during the appropriate timeframe.

CHECK_EMIS may be processed at any time during the reporting period for a status report.

Task 50 - Period S Transfer

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

Once you have completed the data updates, transfer your data to the Data Collector. Navigate to the Student Reporting Collection (S) menu and choose Select All Transfers. Individual file transfers for a specific record type may be performed as needed.

Traditional

Remember:
The Non-Graduate Core Summary Transfer is in the separate S Collection Window called **Current Graduation Credit Progress Collection (FY21).** This window is currently scheduled to close on 9/15/21 which is two months after the End of Year Student Collection. As the Non-Graduate Core Summary Records may be updated through the summer due to manual Course History or CCP Credit received being updated, the GC records should be submitted separately through the **Current Graduation Credit Progress Collection (FY21).**

StudentInformation > EMIS > Student Reporting Collection (S)

EMIS - Create Flat Files - Select Files
From this screen, you can transfer Student Collection (S) records.

| Request Type | Program Selection |

☑ Select all transfers

☑ Transfer - District Testing (DT)

☑ Transfer - Organization - General Information (DN)

☑ Transfer - Student Acceleration (FB)

☑ Transfer - Student Attributes - Effective Date (FD)

☑ Transfer - Student Attributes - No Date (FN)

☑ Transfer - Student Demographic (GI)

☑ Transfer - Student Demographic - Race Detail (GJ)

☑ Transfer - Student Discipline (GD)

☑ Transfer - Student Gifted Education (GG)

☑ Transfer - Student Non-graduate Core Summary (GC)

☑ Transfer - Student Program (GQ)

☑ Transfer - Student Special Ed. Graduation Requirement (FE)

☑ Transfer - Student Special Education (GE)

☑ Transfer - Student Standing (FS)

☑ Transfer - Student Summer Withdrawal (FL)

☑ Transfer - Student Truancy and Excessive Absence (FT)

☑ Transfer - Student Withdrawal Override (FC)

Transfer Type:*

◯ Flat file transfer

◉ Flat file transfer for Data Collector

[< Back] [Submit] [Cancel]

CS/STEM

Remember:
The Non-Graduate Core Summary Transfer is in the separate S Collection Window called **Current Graduation Credit Progress Collection (FY21).** This window is currently scheduled to close on 9/15/21 which is two months after the End of Year Student Collection. As the Non-Graduate Core Summary Records may be updated through the summer due to manual Course History or CCP Credit received being updated, the GC records should be submitted separately through the **Current Graduation Credit Progress Collection (FY21).**

StudentInformation > EMIS > Student Reporting Collection (S)

EMIS - Create Flat Files - Select Files
From this screen, you can transfer Student Collection (S) records.

| Request Type | **Program Selection** |

☑ Select all transfers
☑ Transfer - District Testing (DT)
☑ Transfer - Organization - General Information (DN)
☑ Transfer - Student Acceleration (FB)
☑ Transfer - Student Attributes - Effective Date (FD)
☑ Transfer - Student Attributes - No Date (FN)
☑ Transfer - Student Demographic (GI)
☑ Transfer - Student Demographic - Race Detail (GJ)
☑ Transfer - Student Discipline (GD)
☑ Transfer - Student Gifted Education (GG)
☑ Transfer - Student Non-graduate Core Summary (GC)
☑ Transfer - Student Program (GQ)
☑ Transfer - Student Special Ed. Graduation Requirement (FE)
☑ Transfer - Student Special Education (GE)
☑ Transfer - Student Standing (FS)
☑ Transfer - Student Summer Withdrawal (FL)
☑ Transfer - Student Truancy and Excessive Absence (FT)
☑ Transfer - Student Withdrawal Override (FC)

Transfer Type:*
○ Flat file transfer
● Flat file transfer for Data Collector

[< Back] [**Submit**] [Cancel]

Task 51 – Run the Collection

Trad 1st	Trad 2nd	Trad Final		CS/Stem 1st	CS/Stem Final
✔	✔	✔		✔	✔

1. While logged into the Data Collector, click on the **Collection Requests** tab.
2. Begin the collection.
3. Mark the Data Sources section.

4. District can choose the Collect Only option and then do the Prepare later, or they can choose the Collect and Prepare so both are completed at the same time.

5. Once the Prepare has completed, review the Level 1 Validation errors.
6. Return to StudentInformation to make corrections and updates resolving the Level 1 Validation errors.
7. After creating a new transfer file in StudentInformation and submitting it to the Data Collector, begin a new collection.
8. If satisfied with the results, go ahead and submit the collection to ODE for processing.
9. Once the collection has been processed by ODE, you should receive Level 2 Reports. Review the Level 2 Reports for accuracy and make corrections in StudentInformation.

It's **important** that once you correct errors and rerun any required updates in StudentInformation, a new transfer to the Data Collector must be performed. Once the transfer is complete rerun your collection.

FY22 Period S Retention Reporting Checklist

Change Log

Date	Section Number/Name	Change Description
7/21/21	Task 1 – Update the Retained Status Field	Options '*' and '1' were updated for new descriptions from ODE
6/24/21		Document revised for FY22

Table of Contents

Period S Retention

Reporting Window – Approximately July through August, depending on dates provided by ODE as to when Collection Request opens [EMIS Calendar shows 7/15 - 9/10/2021]

Record Types to Include – FN

All City, Local, Exempted Village, and Community districts are required to report the Retained Status element for **third grade students** who have the following parameters:

1. Any grade 3 student enrolled at the end of the 20/21 school year who was retained. In 20/21, the FN Attributes EMIS Grade Next Year should be updated to equal their grade level in that school year.

2. Any grade 3 students who **may have withdrawn** from your district on or after the last day of school and prior to July 1.

   Note: The withdrawn students referenced in Item 1. above are not automatically included in the transfer files to the Data Collector. If your district has students in 20/21 who met this criteria, be sure to follow the steps in Task 2 to include all students in the transfer file to the Data Collector. (The FFE will need to be utilized.)

3. All grade 3 students who were retained at the end of the 20/21 school year, and update the Retention Status to the correct value in the 21/22 school year. This includes students withdrawn on or after 7/1 and before the first day of school. Students newly enrolled to your district in 21/22, but who were not in your district on the last day of school in FY21, are included in the transfer file. Once loaded to the data collector those students will be placed into the Excluded records preview file in the Data Collector.

ODE EMIS Change 20-195

- Subset of 3rd graders to be reported
- Grades K-2 and 4-12 not required to be reported; this data will be derived based on the FD grade level from one year to the next
- For the current year Retention Reporting, StudentInformation will continue to include all grade levels in the transfer file; ODE will exclude the records which aren't required

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Task 1 – Update the Retained Status Field

NOTE: Prior to making updates to the FN Attributes tab as noted below, determine whether Fall Initialization has been run for your district or if it still needs to be run. (Not all districts choose to have Fall Initialization run.) If the retention updates are made prior to Fall Initialization being run, the ☐ **Exclude FN Records from Fall Initialization Updates** will need to be checked so that the values aren't updated during Fall Initialization. If the box is not checked and the updates are made prior to Fall Initialization, the Retained Status will update to '*' and the EMIS Grade Next Year will revert to the value on the previous school year's FN Attributes tab during the Fall Initialization process. The Retention reporting period is typically a short window, so it is best to make these updates as soon as possible.

In FY22, navigate to the FN-Attributes tab of the Student Profile for any student who should be reported with a Retained Status other than [* - Student was not retained at the end of the previous school year ▼] and update the value to the option that best describes the student's retention status as of the first day of the current school year. For students not retained on the first day of school, but after a period of time the student moves back to the prior grade level, the retention status would not be updated.

Any student reported in FY21 as Grade 3 with a Next Generation Assessment Grade 3 Reading SubScore (promotion score) below 46 must have a retained reason of A, D-N or 5. To assist in locating this subset of Grade 3 students, the AdHoc report State *Assessment Below Reported Score* (located in the Ad Hoc EMIS Folder), can be used. Note: See the Summary section at the bottom to see the selections made for the various filters (also see paragraph at top of next page).

Filter By	Condition	Value
School Year	Equal To	2019-2020
Test School Year	Equal To	2019-2020
School Name	Equal To	
Status Name	Is Not One Of	
Grade Level	Is Not One Of	
Assessment Test Name	Equal To	
Assessment Part Name	Is One Of	
Reported Score	Less Than Or Equal To	45

Okay   Cancel

When selecting the values in the filters to use in the State Assessment Below Reported Score Report, be sure to select the 3rd grade students, the Assessment Test Name of Next Generation Assessment and the Assessment Part Name of Grade 3 Reading Promotion. The Reported Score should be less than or equal to 45, as those are the scores that would not have passed the required score of 46.

Depending on the value selected for Retained Status, the Student's State Equivalent Grade (FD Attributes) and EMIS Grade Next Year (FN Attributes) may also need to be updated.

Retained Status Valid Options

*	Student was not retained at the end of the previous school year. Includes all 3rd grade students promoted to 4th grade who received the required promotion score on any administration of the state 3rd grade reading assessment before the start of the next school year and 3rd grade students who were promoted under the flexibility provided in House Bill 409.
1	Student was retained at end of the previous school year for reasons other than the Third Grade Reading Guarantee and is still retained and 3rd grade students who have been retained in the 3rd grade because the principoal and reading teacher agree the student is not reading at grade level and is not prepared for 4th grade (as outlined in House Bill 409).
2	Student was retained at the end of the previous school year for reasons other than the Third Grade Reading Guarantee, but advanced because of successful completion of summer school.
3	Student was retained at the end of the previous school year for reasons other than the Third Grade Reading Guarantee, but advanced at parent request.
4	Student was retained at the end of the previous school year for reasons other than the Third Grade Reading Guarantee, but advanced for a reason other than completion of summer school or parents' request.
5	Student demonstrated adequate performance on the TGRG Alternative Assessment for Promotion to grade 4, but was retained for reasons other than the Third Grade Reading Guarantee.
A	Student was retained at the end of the previous school year due to the Third Grade Reading Guarantee and is still retained.
D	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was not retained because student met the ELL exemption.
E	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was not retained because student met the IEP exemption.
F	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was exempt from retention because student received intensive reading remediation for two years and was previously retained in any K-3 grade(s).
G	Student with significant cognitive disabilities is exempt from the Third Grade Reading Guarantee and not retained.
H	Student retained at the end of the previous school year due to the Third Grade Reading Guarantee is not enrolled this school year.
J	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was not retained due to adequate performance on the Alternative Assessment – Iowa before the start of the next school year.
K	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was not retained due to adequate performance on the Alternative Assessment – NWEA-Map before the start of the next school year.
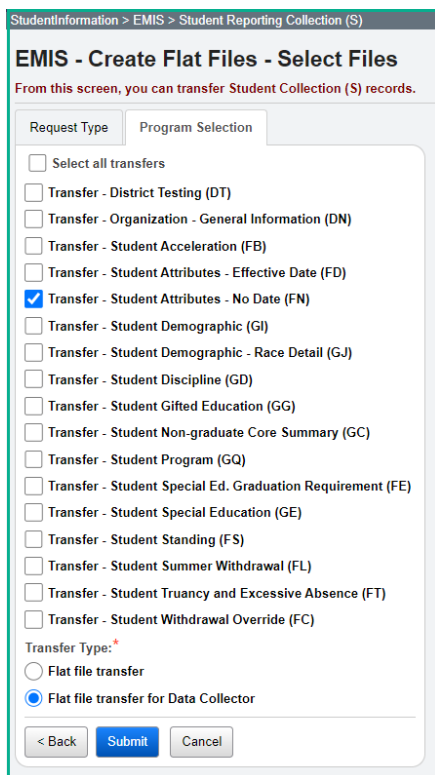
L	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was not retained due to adequate performance on the Alternative Assessment – Terra Nova before the start of the next school year.
M	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was not retained due to adequate performance on the TGRG Alternative Assessment – STAR Reading before the start of the next school year.
N	Student did not meet the reading requirement in the Third Grade Reading Guarantee, but was not retained due to adequate performance on the TGRG Alternative Assessment – iReady before the start of the next school year.

Task 2 – Period S Retention Transfer

Once you have completed the data updates, transfer your data to the Data Collector.

If you have no students from 20/21 that were withdrawn as indicated in the 'Note' below, then proceed as follows:

Navigate to *StudentInformation* > *EMIS* > *Student Reporting Collection (S)* menu and select just the 'Student Attributes – No Date (FN)' records to be transferred to the Data Collector. All FN fields will be included in the transfer file sent to the Data Collector, but any fields not required for this collection will be ignored.

Proceed with Task 3.

Note: **Students enrolled through the end of the 20/21 school year will appear on an ODE Missing List until reported.**

Note: **If a student who was retained at the end of the school year, was enrolled at your district through the end of the school year in 20/21, but withdrew on or before June 30, your district is responsible for reporting the retained status of that student in the FY22S Retention Collection. If your district has students who meet this criteria, you will need to utilize the Flat File Editor (FFE) to report all**

students in the Period S Retention Reporting window. Proceed with the steps below.

The Data Collector permits only one file source, so if you have students that were withdrawn on or after the last day of school in 20/21 but on or before June 30, you will need to use the Flat File Editor (FFE) to report all students in the FY22 Retention collection. The following steps can be taken to append their records to the file so that these withdrawn students, as well as the FY22 students, are properly reported.

1. In 21/22, navigate to *StudentInformation* > *EMIS* > *Student Reporting Collection (S)*, and select ☑ Transfer - Student Attributes - No Date (FN) , ⦿ Flat file transfer , [Submit] .

2. Click the gear icon and select Management.
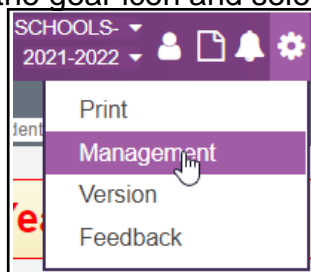
3. When the Job Status is Complete, click on the Job Name to open the file.

Job Name	Job Description	Job Status
DASL_EMIS_EXTRACT	>StudentCollectionTransferFN	Complete

4. Save the file on your computer with a name that is recognizable to you. Be sure to save it with the **.txt** file extension.

5. Once the file has been saved, navigate to the file and right click on the file name. Select 'Rename' and change the file extension from **.txt** to **.seq**.

6. At this point you are ready to login to the FFE and select 'Import data'.
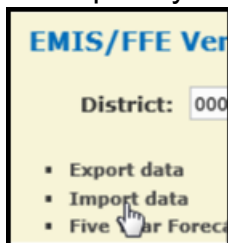
7. From the Import Screen, click 'Choose File' to find the **.seq** file you saved and then click 'Upload File'.
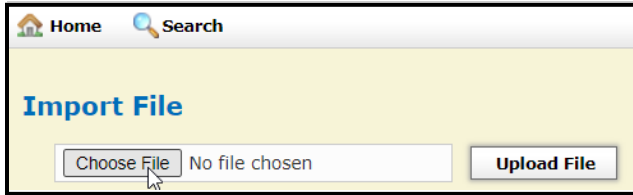
8. It will then display 'Records to Load' with FN file checked, click 'Import File'.
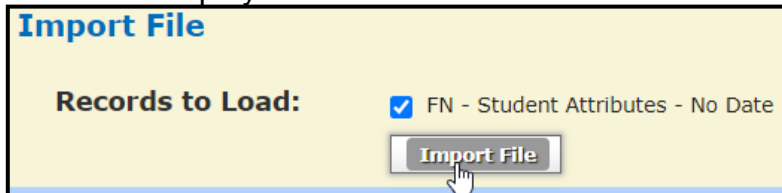
9. Once Loading is complete, a confirmation message will display.
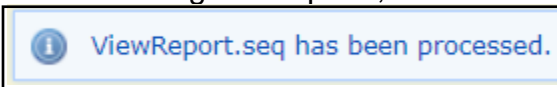
10. Return to the Home screen and click on the FN file.

11. At this point you will see the 'StudentAttributeNoDate' list of records that you just uploaded from the StudentInformation transfer file. To add the FN records for the students withdrawn on or after the last day of school but prior to July 1 in 20/21, click on 'New StudentAttributeNoDate'.
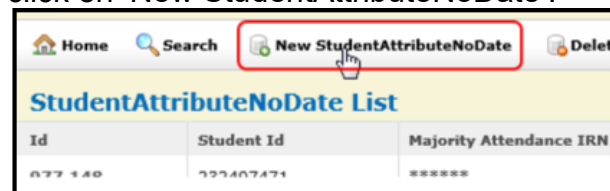
12. Then a 'Create StudentAttributeNoDate' box will open. The Student ID value is the student's EMIS ID. It is imperative that the Retained Status field has the correct value [default is asterisk (*)]. All fields highlighted in red must be completed for the record to save. However, other than the Student ID and the Retained Status, those other fields can be completed with asterisks (for not applicable) to save the record since they are not used in the Retention collection.
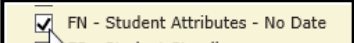
13. Click 'Create' to save that new student FN record.

14. Continue manually adding all required FN records for withdrawn students. Once all students have been added, select 'Export Data'.

- Export data
- Import data
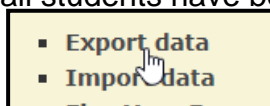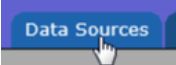
15. On the Export Options screen, update the Fiscal Year to 2022 and the Data Set to 'S-Student'.

Export Options

Fiscal Year:	2022
Data Set:	S - Student

16. All file types for any of the 'S' collections are checked by default, so at the bottom of this screen, click **Uncheck All** and then check just FN: ☑ FN - Student Attributes - No Date

17. At the bottom of this screen, click **Export File** .

18. Save this file on your computer (FFE file names will default to '[your IRN]_FFE' but you can name it something more descriptive for it to display in the Data Collector).
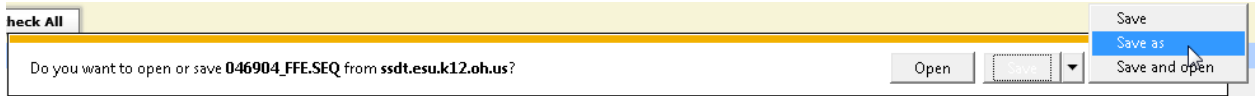
19. This file then needs to be uploaded into the Data Collector under the **Data Sources** tab.

20. Click on 'Upload Files'.
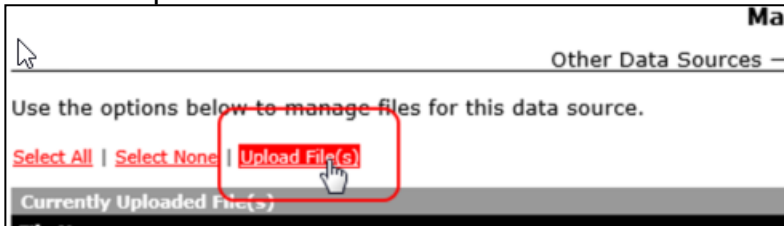
21. Click 'Choose File' and find the FN file that you just saved on your computer.
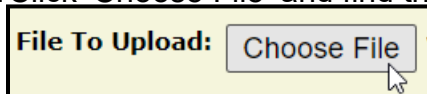
22. When the file name is displayed, click 'Upload'.
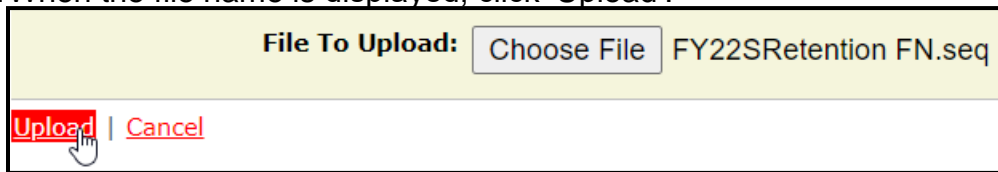
23. Proceed to Task 3.

Task 3 – Run the Collection

Before starting a collection, make sure the most recent version of the manifest is available.

1. While logged into the Data Collector, click on the **Collection Requests** tab.
2. Begin the collection.
3. Check the Data Sources section.

☑ All Files data sources		
Data Sources	**Availability**	**Collection Status**
☑ BA-Files	✓ Ready	Not Started

4. Once the collection has been completed, proceed to the Prepare step.
5. Once the Prepare has completed, review the Level 1 Validations.
6. Return to StudentInformation to make corrections and updates resolving any Level 1 Validation errors.
7. After creating a new transfer file in StudentInformation and submitting it to the Data Collector, begin a new collection.
8. If satisfied with the results, go ahead and submit the collection to ODE for processing.
9. Once the collection has been processed by ODE, you should receive Level 2 Reports. Review the Level 2 Reports for errors, make corrections in StudentInformation and repeat the process if needed.

REMINDER!

Don't forget – once you correct errors and rerun any required updates in StudentInformation, a new transfer to the Data Collector must be performed. Once the transfer is complete, rerun your collection.

21/22 Admission and Withdrawal Scenarios With Appendix

Change Log

Date	Section Number/Name	Change Description
8/12/21		Updates for 21/22
8/18/20		Updates for 20/21
2/3/20	Scenario 34 – Middle school student taking two classes at the high school; the high would like to take attendance for the student while they are in the building	Clarification on calendar updates
8/7/19		Updates for 19/20
7/2/18		Updates for 18/19

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<u>Reminders</u>

Several scenarios in this document reference **whacking** a student from the new school year. ODE EMIS requires students that are reported to EMIS be reported to EMIS for the entire school year. Whacking students can still be performed, but it needs to be performed prior to the district submitting their first Period S SCR Data Collector collection. Once that has been submitted, the student has likely been reported and will need to be reported with a withdraw reason of **81** for the entire school year if they were reported in error. You may need to work with your EMIS coordinator if utilizing the **whacking** procedure for a student in the **new** school year if the withdraw is being processed on or after 7/1/xx of that fiscal year.

Scenario 1 – A student finishes out the 20/21 school year and lets the district know by June 30 that they will not be back for 21/22.

A student finished out the 20/21 school year and has already been promoted to the 21/22. The student's parents let the district know before June 30, 2021, that their child will not be returning to the district for the 21/22 school year.

Enroll	Whack	Withdrawal
N/A	Whack the student from 21/22	Withdraw the student in 20/21 using the last day of school as the withdrawal date.

Complete Solution:
If you know prior to June 30, 2021 that the student will not be returning to the district for the 21/22 school year, you can withdrawal the student in 20/21 using the last day of school. The student does not need to be reported in 21/22 and would need whacked from the 21/22 school year.

Steps to Complete:
1. Withdraw the student in 20/21. (See Appendix D for instructions on completing a withdrawal.)
2. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The withdrawal date and code will be posted to the latest FS record in 20/21.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.
5. The student will be deleted out of 21/22 once the whack is performed.

Scenario 2 – Previously Attending Student Summer Withdrawal

A student finished out the 20/21 school year and was promoted to 21/22. The student will not be returning to the district in 21/22.

Enroll	Whack	Withdrawal
N/A	N/A	Do a summer withdrawal in 21/22 with a date of 7/1/21 thru the day before school starts. The student must be reported in 21/22.

Complete Solution:
In 21/22, withdraw the student and use a date of 7/1/21 thru the day before school starts. You will be prompted by StudentInformation to confirm the student is a summer withdrawal.   Student must still be reported in EMIS for period S.

Steps to Complete:
1. Perform a summer withdrawal in 21/22. (See Appendix C for instructions on completing a summer withdrawal.)

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Students who were summer withdrawn appear on the Student Archive page with Type = Summer Withdraw.

Scenario 3 – A student who was previously summer withdrawn returns in the winter of the 21/22 school year.

A student finished out the 20/21 school year and was promoted to 21/22. The student will not be returning to the district in 21/22. A summer withdrawal is processed at that time. In December 2021, the student returns to the district.

Enroll	Whack	Withdrawal
Use registration wizard to register the student upon his return to the district.	N/A	N/A

Complete Solution:
In 21/22, use Registration Wizard to enroll the student in the district

Steps to Complete:
1. Register Student in 21/22.

Outcome:
1. A new FS and FD record will be created with an effective start date equal to the student's new admission date.

Scenario 4 – A student who previously withdrew in 21/22, returns a couple weeks or months later.

A student began the 21/22 school year, but withdrew a couple of weeks into the school year to move out of state to live with his father. The student decides he would rather live with his grandma and returns to your district one week later.

Enroll	Whack	Withdrawal
Use registration wizard to register the student upon his return to the district.	N/A	N/A

Complete Solution:
In 21/22, use Registration Wizard to enroll the student in the district

Steps to Complete:
1. Register Student in 21/22.
2. The student's schedule will need to added back in by hand, course by course.

Outcome:
1. A new FS and FD record will be created with an effective start date equal to the student's new admission date.

The student must be registered again. Simply editing the student's FS records will not work. The student needs an FS record showing the district withdrawal and a separate FS record showing the return admission a couple of weeks later.

Scenario 5 – Student withdrawals before school is out in 20/21, but has already been promoted to 21/22.

A student withdraws the day before school is out and has already been promoted to 21/22.

Enroll	Whack	Withdrawal
N/A	Whack the student from 21/22	Withdraw the student in 20/21

Complete Solution:
Withdraw the student in 20/21 and whack the student from 21/22 since they withdrew prior to the end of the current school year and do not need to be reported in 21/22.

Steps to Complete:
1. Withdraw the student in 20/21 using a day before school is out. (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The student's FS, FD, FN and Student annual records will be deleted for the 21/22 school year.

Students who were whacked appear on the Student Archive page with Type = Withdraw.

StudentInformation > SIS > School > Student Archive

View Archived Student Data
From this page users can view Student's deleted enrollment data.

	Student	Type	By	Date
Q		Withdraw	Jami	7/28/2020 1:54:00 PM
Q		Bulk Enroll Withdraw	Jami	6/17/2020 3:21:00 PM

Scenario 6 – Student decides to attend another building. The student never attended one of the buildings.

A district has two elementary schools, North and South. A student is promoted to North Elementary for 21/22, but her parent decides to send her to South. The student never attended North Elementary.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into South.	Whack the student from the building they are not attending in 21/22, which in this example would be North	N/A

Whacking the student from one building in your district will not affect the Student Cross Reference (SCR) **IF** the student is still in another building in the district for the school year.

Complete Solution:
There are several ways to handle the situation, but most importantly the student needs whacked from North since she will not be attending one day there. Now the school can student transfer the student from 20/21 to South 21/22. Or they can use Registration Wizard in South 21/22 and StudentInformation will find a match and they can enroll the match. Or they can change the progression track on the student's profile in 20/21 and redo promotion/bulk enrollment.

Steps to Complete:
1. Whack the student from the old building. (See Appendix F for instructions on whacking a student.)
2. Register the student in the new building. Make sure you use a registration day that is before the first day of school. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

StudentInformation > SIS > Registration Wizard

Student Registration Wizard

From this screen users can register students

| Registration Pre-requisites | **Possible Matches** | Complete Registration | Family Group | EMIS |

Change primary / EMIS attending building?

● Yes

○ No

Next >

Outcome:

1. A new FS and FD record will be created for the student's admission into South, the new building. Verify on the new FD record that the Reporting Calendar is a calendar in the new building.

2. If you register the student in the new school in the district first and then whack them out of the other building, the student's original FS and FD record for the old building will not be deleted and will still display in the summary section on the FS and FD tabs. It will be considered a closed record.

Scenario 7 – Student is being retained after they have already been promoted to the same building next year. The 21/22 school year has not started yet.

A student is a 5th grader in the elementary in 20/21. She is promoted to a 6th grader in 21/22 at the same elementary. The student is being retained in the 5th grade. The 21/22 school year has not started yet.

Enroll	Whack	Withdrawal
N/A	N/A	Edit the student's profile in 21/22 and change their grade level. Adjust their homeroom, locker, and schedule accordingly.

Complete Solution:
Edit the student's profile in 21/22 and change their grade level. Adjust their homeroom, locker, and schedule accordingly.

Steps to Complete:
1. The following steps would be considered a correction to a student's situation, not a change – since school has not started.
2. Edit the **General** tab in 21/22 and correct the student's **Building Grade** dropdown and **Grade Next Year** dropdown to the correct year. Also, correct **Grade Next Year** in 20/21.
3. Navigate to the **FD-Attributes** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
4. Choose the correct grade level from the **State Equivalent Grade** dropdown.
5. Place a check in the **Exclude FD Records from Fall Initialization Updates** option.
6. Click **Save** to save your corrections.
7. Next, navigate to the **FN-Attributes** tab and correct the student's **EMIS Grade Next Year** dropdown. Also, correct **EMIS Grade Next Year** in 20/21.
8. In the **Retained Status** dropdown, select the appropriate Retained Status.
9. Place a check in the **Exclude FN Records from Fall Initialization Updates** option.
10. Click **Save** to save your corrections.
11. Adjust the student's homeroom, locker and schedule as needed.

Outcome:
1. This is a correction not a change since school has not started.
2. No effective date needs to be updated and no records need closed because we are working with a new record which was created for the 21/22 school year.

Scenario 8 – Student is being retained after they have already been promoted to a different building next year. School has not started yet.

A student is in the 8th grade in 20/21 at the elementary. The student was promoted to the 9th grade at the high school for 21/22. The student is being retained in the 8th grade. The 21/22 school year has not started yet.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the Elementary	Whack the student from the high school in 21/221 since they will not be attending that building	N/A

Complete Solution:
Whack the student from the high school. Use registration wizard, promotion, or student transfer to get the student into 21/22 at the elementary.

Steps to Complete:
1. Whack the student from the high school in 21/22 since they will not be attending that building. (See Appendix F for instructions on whacking a student.)
2. Register the student in the new building. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.
3. Edit the **FN-Attributes** tab and select the appropriate Retained Status from the **Retained Status** field.
4. Mark the appropriate tabs to be excluded from Fall Initialization.

Outcome:
1. A new FS and FD record will be created for the student's admission into the elementary. Verify on the new FD record that the Reporting Calendar is a calendar in the new building.
2. If you register the student in the new school in the district first and then whack them out of the other building, the student's original FS and FD record for the old building will not be deleted and will still display in the summary section on the FS and FD tabs. It will be considered a closed record.

Scenario 9 – Student is new to your district, but will attend elsewhere full time. School has not started yet.

A student is newly registered in the district over the summer. The student is going to attend elsewhere full time as of the first day of school.

Enroll	Whack	Withdrawal
Use registration wizard to register the student in the building he would attend if he were physically attending the district.	N/A	N/A

Complete Solution:
Student is registered using Registration Wizard; the student's EMIS Situation reflects the situation applicable for attending elsewhere at the time of registration.

Steps to Complete:
1. Register the student in 21/22.

Outcome:
1. All appropriate records created at the time of registration. No further action is needed since the correct situation was chosen at time of registration.

Make sure all new students are registered in StudentInformation within 30 days of registering within the district, and reported to EMIS via the SCR Collection within 30 days of their registration date. If the students are not reported timely, it can affect the funding received for them.

Scenario 10 – Student is new to your district and decides to attend the JVS full time. School has not started yet.

A student is newly registered in the district over the summer. The student is enrolled as attending full time, but later decides to attend the JVS full time. The decision to attend elsewhere is made prior to the first day of school.

Enroll	Whack	Withdrawal
Use registration wizard to register the student in the building he would attend if he were physically attending the district.	N/A	N/A

Complete Solution:
Student is registered using Registration Wizard. When the student was originally registered their EMIS Situation reflected a resident attending full time. The student's EMIS Situation needs corrected to reflect a new non-attending situation. This is a correction and no new FS needs created since school has not started yet.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
2. Correct the **EMIS Situation** dropdown to reflect the correct situation.
3. Edit checks on the page will guide in making the remainder of the required corrections.
4. Click **Save** to save your corrections.
5. You will receive the following message: **The FS – Student Standing information was successfully saved.**
6. Navigate to the **FD-Attributes** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Correct the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your corrections.
8. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.** You will receive the following message: **The General Information was successfully saved.**

Outcome:
1. This is a correction to the existing FS, FD and General records since school has not started.
2. The original FS record is edited to reflect the new EMIS Situation.
3. No new FS or FD records need to be created.

Scenario 11 – A new student enrolls, but never shows up.

A new student enrolls during the summer to begin attending in the fall, however, he never shows up.

Enroll	Whack	Withdrawal
N/A	N/A	Withdraw the student using Withdrawal Code 81 and a day before the first day of school

Complete Solution:
No Shows must be reported in EMIS for the entire year.

Steps to Complete:
1. Withdraw the student with the same start and end date (at least one day prior to the start of school) with withdraw code 81.

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Student will be reported as withdrawn, and the admission date and withdrawal date will be the same date in the EMIS transfer file if withdraw reason **81- Student reported in error, never should have been** is used.

Scenario 12 – Preschool student ineligible to receive services.

A Preschool student is screened for services, but is found ineligible. The student must be admitted and withdrawn on the same day.

Enroll	Whack	Withdrawal
Register the student in 21/22	N/A	Withdraw the student from 21/22

Complete Solution:
Since the student is ineligible and will not be attending the district, we must record the fact that the student was screened by the district, but is not going to receive any instruction or services from the district.

Steps to Complete:
1. Register the student in the 21/22 school year.
2. Use **EMIS Situation 372 – PS evaluated but ineligible**.
3. Withdraw the student in 21/22 and use a withdrawal date equal to the student's admission date and a **Withdraw Reason 36 – Withdrew from Preschool/PS student WD from PS program for any reason**.
4. See Appendix D for instructions on withdrawing a student.

Outcome:
1. When the student is registered, a FS, FD, and FN record are created.
2. When the student is withdrawn, the withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
3. The withdrawal date and code will display on the FD record.
4. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
5. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Scenario 13 – A student moved over the summer, but never officially withdrew.

A student attended in the 20/21 school year, but moved out of the district over the summer, but never informed the district he has withdrawn.

Enroll	Whack	Withdrawal
N/A	N/A	*see solution below

Complete Solution:
The district has three options:

1. The student is counted absent until the time he officially withdraws from the district.
2. The student is withdrawn as a summer withdrawal using a dropout withdrawal reason.
3. Student may be withdrawn if student shows up in another district according to ODDEX Student Cross Reference System.

Steps to Complete:
Option 1 – No steps to complete, continue marking the student absent until he officially withdraws.
Option 2 – Perform a summer withdrawal in 21/22. (See Appendix C for instructions on completing a summer withdrawal.)
Option 3 – Student is withdrawn using the day prior to his start date at the new district as set forth in ODDEX.

Outcome:
Option 1:
1. No changes can be made to the FS and FD records until the student withdraws from the district.
2. The FS and FD records must remain open until the student actually withdraws from the district.

Option 2 and 3:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to ** - Not Applicable**.

Scenario 14 – Expelled student, not receiving services in 20/21, coming back for the 21/22 school year.

A student was expelled in the 20/21 school year prior to the end of school. He was withdrawn at the time of promotion so the student was never promoted to the 21/22 school year. The student is returning in 21/22 for the first day of school.

Enroll	Whack	Withdrawal
Register the student in 21/22	N/A	N/A

Complete Solution:
Student must be re-enrolled in the 21/22 school year since they were previously withdrawn from the district.

Steps to Complete:
1. Register the student in the new building. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

Outcome:
1. A FS and FD record will be created for the student's readmission into the district in 21/22.

Scenario 15 – Student, not receiving services, is expelled in the fall and then comes back in the winter.

A student was expelled in fall of the 21/22 school year. The student returns in a couple of months after his expulsion is served. He was withdrawn at the time of his suspension and now is returning to the district.

Enroll	Whack	Withdrawal
Register the student in 21/22	N/A	N/A

Complete Solution:
Student must be re-enrolled in the 21/22 school year since they were previously withdrawn from the district.

Steps to Complete:
1. Register the student. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

Outcome:
1. A FS and FD record will be created for the student's readmission into the district in 21/22.

Scenario 16 – A student's percent of time is incorrect and has been since the first day of school.

A student currently is attending elsewhere part-time; however, his percent of time is incorrect. His current record indicates that he is attending the resident district 75 percent of time and the other district 25 percent of time. The time the student is attending has not changed; it is just incorrect on the record.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
No new records need to be added, this would be considered a correction. Edit the existing FS record to make the necessary corrections.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
2. Correct the appropriate **Percent of Time** field so the percent of time is accurate.
3. Click **Save** to save your corrections.

Outcome:
1. This is a correction not a change.
2. The student's current FS event is edited and the Percent of Time corrected.

Scenario 17 – A new student enrolls and is supposed to start the first day of school, but he does not show up until the 2nd week of school.

A student enrolls in the summer to begin attending in the fall. His admission date is entered as the first day of school however, he does not start attending until the 2nd week school is in session.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
Since the student did not start attending until the 2nd week of school, the student's admission date needs to be corrected.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
2. Correct the **District Admission Date** field so the date reflects the first day of attendance for the student.
3. Click **Save** to save your corrections.
4. Navigate to ***StudentInformation » SIS » Student » Admission History » Edit History Details*** and correct the student's admission date.

Outcome:
1. This is a correction not a change.
2. The student's current FS event is edited and the district admission date corrected.

Scenario 18 – A student is withdrawn by mistake.

A student is accidentally withdrawn.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
The withdrawal date and reason will need deleted. The student's next grade level will also need corrected. The student's schedule will need to be added back in by hand, course by course.

Steps to Complete:
1. Navigate to the ***StudentInformation » SIS » Student » Admission History » Edit History Details*** page.
2. Click on the **Trash Can** icon that corresponds with the incorrect withdraw.

| 🗑 | ✏ | 2020 - 2021 | Aug 01, 2020 | Summer Withdraw | Bellefontaine High School | DFLT | Transferred to another Ohio School District - loca |

3. You will receive the following message:

StudentInformation > SIS > Student > Admission History > Edit History Details

Admission/Calendar History Details
Click on the edit and delete icons to manage the student's admission events.
Are you sure you want to delete the following admission event?

Summer Withdraw on 8/1/2020

[OK] [Cancel]

4. Click **OK**.
5. Edit the **General** tab and correct the student's **Grade Next Year** dropdown to the correct year.
6. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Delete the date in the **District Withdraw Date** field.
8. Correct the **Withdraw Reason** dropdown to say **** - Not Applicable, Did not withdraw/was not truant.**
9. Remove the **Withdrawn To IRN**, if applicable.
10. Click **Save** to save your corrections.
11. You will receive the following message: **The FS – Student Standing information was successfully saved.**
12. Edit the **FN-Attributes** tab and correct the **EMIS Grade Next Year** dropdown to say the appropriate grade level next year.

Outcome:
1. This is a correction and not a change since the district is correcting a mistake.
2. The FS record is manually corrected and the corrections are also displayed on the FD and FN tabs.

Scenario 19 – A student is withdrawn using the 1ˢᵗ day of school by mistake. The student is supposed to be a summer withdrawal.

A student is accidentally withdrawn using the 1ˢᵗ day of school by mistake.
The student is supposed to be a summer withdrawal.

Enroll	Whack	Withdrawal
N/A	N/A	Process a summer withdrawal

Complete Solution:
The erroneous withdrawal needs deleted from the Edit History Details. Next, go to the Withdrawal Student page and enter a withdrawal date of a day before the first day of school, which will invoke the summer withdrawal logic. Carry out the withdrawal.

Steps to Complete:
1. Navigate to the ***StudentInformation » SIS » Student » Admission History » Edit History Details*** page.
2. Click on the **Trash Can** icon next to the erroneous withdrawal.

| 🗑 | ✏ | 2020 - 2021 | Aug 01, 2020 | Building Withdraw | INDIAN LAKE HIGH SCHOOL | DFLT | Transferred to another School District outside of |

3. The screen will refresh and you will see the following message:

StudentInformation > SIS > Student > Admission History > Edit History Details

Admission/Calendar History Details
Click on the edit and delete icons to manage the student's admission events.

Are you sure you want to delete the following admission event?

Building Withdraw on 8/1/2020

[OK]   [Cancel]

4. Click **OK**.
5. Now perform a summer withdrawal in 21/221. (See Appendix C for instructions on completing a summer withdrawal.)

Outcome:
1. No action is needed on the FS, FD, or FN tabs.
2. The new summer withdrawal date is automatically populated on the FS tab, overriding the erroneous date that was entered the first time.

Scenario 20 – A student withdraws from the district, but the wrong withdrawal date was used.

A student withdraws from the district, but the wrong withdrawal date was used.

Enroll	Whack	Withdrawal
N/A	N/A	Student's Withdrawal Date is updated to correct date.

Complete Solution:
The withdrawal date needs updated on the Edit History Detail page and the **FS-Standing** tab.

Steps to Complete:
1. Navigate to the ***StudentInformation » SIS » Student » Admission History » Edit History Details*** page.
2. Click on the **Edit Pencil** icon that corresponds with the District Withdraw.
3. Edit the **Withdrawal Date** field and enter the correct withdrawal date.
4. Click **Save**.
5. The following message will display: **The admission event was saved successfully. The student's FS record will need to be updated manually.**
6. Next, navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Correct the date in the **District Withdraw Date** field.
8. Click **Save** to save your corrections.
9. You will receive the following message: **The FS – Student Standing information was successfully saved.**

Outcome:
1. This is a correction and not a change since the district is correcting a mistake.
2. The student's Edit History Detail page needs manually corrected and so does the FS record.

Scenario 21 – A student enrolls in your district, but the wrong admission date is used.

A student enrolls in your district, but the wrong admission date is used.

Enroll	Whack	Withdrawal
Student's Admission Date is updated to correct date.	N/A	N/A

Complete Solution:
The admission date needs updated on the Edit History Detail page and the **FS-Standing** tab.

Steps to Complete:
1. Navigate to the ***StudentInformation*** » ***SIS*** » ***Student*** » ***Admission History*** » ***Edit History Details*** page.
2. Click on the **Edit Pencil** icon that corresponds with the District Admission.
3. Edit the **Admission Date** field and enter the correct admission date.

		2020 - 2021	Aug 01, 2020	District Admission	Indian Lake Local Schools		
🗑	✏	2020 - 2021	Aug 01, 2020	Building Admission	INDIAN LAKE ELEMENTARY SCHOOL	KGAK	FIRST SCHOOL ATTENDED

4. Click **Save**.
5. The following message will display: **The admission event was saved successfully. The student's FS record will need to be updated manually.**
6. Next, navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Correct the date in the **District Admission Date** field.
8. Click **Save** to save your corrections.
9. You will receive the following message: **The FS – Student Standing information was successfully saved.**

Outcome:
1. This is a correction and not a change since the district is correcting a mistake.
2. The student's Edit History Detail page needs manually corrected and so does the FS record.

Scenario 22 – Student decides to attend another building in your district after school starts.

A district has two elementary schools, North and South. A student is promoted to North Elementary for 21/22, but her parent decides to send her to South in late November.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard or Student Transfer	N/A	Since school has already started, the student will need to remain in the old building. Do a building withdraw to record the date of the student's withdraw from this building

Complete Solution:
Since school had already started, the student cannot be whacked from North elementary so a building withdrawal must be recorded and the student admitted to the new building, South. The withdrawal date from North needs to be the day prior to the admission date into South.

Steps to Complete:
1. Building withdraw the student in 21/22 in the building they are no longer attending. (See Appendix E for instructions on withdrawing a student.)
2. Register the student in 21/22 in the new building. Make sure the enrollment date is the day after the withdrawal date.

Outcome:
1. Once the student is enrolled at South, which is the new building, a new FS record will be created with an effective date equal to the student's building admission date to South.
2. The prior FS record will have an effective end date equal to the date prior to the effective start date on the new FS record.
3. A new FD record with the same effective start date as the new FS record will be created with an effective date equal to the student's building admission date to South. The Reporting Calendar will also be updated to a calendar in the new building. Verify that it is the correct calendar.
4. Review the Profile - General tab Attendance Calendar and verify that it is correct. If not, update the Attendance Calendar and save the record.

Scenario 23 – Student is expelled mid-year and is not receiving services.

A student is expelled and not receiving services. The student is expelled during the current school year.

Enroll	Whack	Withdrawal
N/A	Whack the student from 22/23	Withdraw the student performing a district withdrawal.

Complete Solution:
If the student is not receiving services while expelled, withdraw the student. If the student comes back for this school year, you will need to re-register her.

Steps to Complete:
1. Withdraw the student in 21/22 (current year). (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 22/23. If the student is not whacked prior to being reported in the SCR Collection for 22/23, they will need to be reported in 22/23 with the withdraw code of **81**. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Scenario 24 – Student is expelled before the end of the school year and is not receiving services, but has already been promoted to the new school year.

A student is expelled and not receiving services. The student is expelled during the current school year, but has already been promoted to 22/23.

Enroll	Whack	Withdrawal
N/A	Whack the student from 22/23	Withdrawal the student performing a district withdrawal.

Complete Solution:
If the student is not receiving services while expelled, withdraw the student. Since the student left the district, they will need whacked from 21/22. If the student does decide to come back in 21/22, use Registration Wizard to enroll the student.

Steps to Complete:
1. Withdraw the student in 21/22. (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 22/23. If the student is not whacked prior to being reported in the SCR Collection for 22/23, they will need to be reported in 22/23 with the withdraw code of **81**. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable.**

Scenario 25 – A Special Ed student is expelled and still receiving services.

A Special Ed student is expelled and still receiving services.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
If the student is expelled and still receiving services, you cannot withdraw the student, you just report the discipline.

Steps to Complete:
None – the student cannot be withdrawn because they are still receiving services.

Outcome:
No changes to FS and FD records.

Scenario 26 – Student who was a resident moves out, but still wants to attend your district.

A student is attending as a resident, but moves out of the district and wants to continue as a non-resident open enrolled to your district.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
The student's EMIS Situation is changed from one of a resident attending to a non-resident attending.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and click the **New Student Standing** button.
2. Enter the date the change in the EMIS Situation takes effect in the **Effective Start Date** field.
3. Next, change the **EMIS Situation** dropdown to reflect the new situation.
4. Edit checks on the page will guide in making the remainder of the required changes.
5. Click **Save** to create the new record.
6. You will receive the following message: **The FS – Student Standing information was successfully saved.**
7. Navigate to the **FD-Attributes** tab and choose **New Student** Attributes. Start on the same **Effective Start Date** as the new **FS – Student Standing Effective Start Date**.
8. If needed, update the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your corrections.
9. If needed, navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.** You will receive the following message: **The General Information was successfully saved.**

Outcome:
1. This is a change not a correction.
2. The previous FS and FD records will be closed and a new FS and FD record created.

Scenario 27 – Student is withdrawn from one building in the district, but never enrolls in another building in the district.

Student withdraws from a building within the district, but never enrolls in another building within the same district. School has already started.

Enroll	Whack	Withdrawal
N/A	N/A	Student is building withdrawn from the current building.

Complete Solution:
Building withdraw the student from the current building. Since the student has not registered yet in another building within the district, no record is going to be updated or created until the student is registered in the new building. Student admission history will display the building withdrawal.

Steps to Complete:
None

Outcome:
1. No changes are made to the FS or FD records.

Scenario 28 – Student is transferred to a different district. What should the original district do?

District A is student transferring a student to district B. The student is withdrawing from district A to reside in and attend district B. District A uses student transfer to move the student to the new district and then district withdraws the student since they have left the district. This situation addresses the student being withdrawn from District A.

Enroll	Whack	Withdrawal
N/A	N/A	In district A, the student is withdrawn from the district.

Complete Solution:
The student is transferred out of the district and then withdrawn from the district.

Steps to Complete:
1. Complete the student transfer process for the individual student.
2. Withdraw the student from 21/22. (See Appendix D for instructions on withdrawing students.)

Outcome:
1. The student transfer process does not touch the FS and FD records.
2. The students FS and FD records are updated when the student is district withdrawn.

Scenario 29 – Student is transferred to a different district. What should the receiving district do?

District A is student transferring a student to district B. The student is withdrawn in district A and is currently in the pending transfers queue in district B.
This situation addresses receiving the student in district B.

Enroll	Whack	Withdrawal
Enroll the student using the Pending Students page	N/A	N/A

Complete Solution:
Student is registered in the receiving district as a new student to the district.

Steps to Complete:
1. Enroll the student via the Pending Students page.

Outcome:
1. When the student is registered, a FS, FD, and FN record are created.

Scenario 30 – A student is a resident attending full-time. In October, the student decides to open enroll in another district.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
The resident district is still responsible for reporting the student. The student's calendar needs changed to the non-attending calendar. The student's EMIS Situation needs changed.

Steps to Complete:
1. Navigate to the **FS-Standing** tab.
2. Click on the **New Student Standing** button to create a new record.
3. Enter the date the change in the EMIS Situation is effective in **Effective Start Date** field.
4. Next, change the **EMIS Situation** dropdown to reflect the new situation.
5. Edit checks on the page will guide you in making the remainder of the required changes.
6. Click **Save** to create the new record.
7. You will receive the following message: **The FS – Student Standing information was successfully saved.**
8. Navigate to the **FD-Attributes** tab and choose **New Student Attributes**. Start on the same **Effective Start Date** as the new **FS – Student Standing Effective Start Date**.
9. Update the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your changes.
10. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.** You will receive the following message: **The General Information was successfully saved.**

Outcome:
1. This is a change not a correction.
2. The previous FS and FD records will be closed and a new FS and FD record created.

Scenario 31 – A student decides to attend the JVS part-time as a satellite student for 2nd semester.

A student is a resident attending full-time, but is going to attend the JVS as a part-time satellite student starting second semester. This situation addresses the changes that need to be made at the home school.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
Since the student will still be educated by the home district, the student cannot be withdrawn. A new FS record must be created for the student since this is a change to his EMIS attending situation.

Steps to Complete:
1. Navigate to the **FS – Standing** tab.
2. Click on the **New Student Standing** button to create a new record.
3. Enter the date the change in the EMIS Situation is effective in **Effective Start Date** field.
4. Next, change the **EMIS Situation** dropdown to reflect the new situation.
5. Edit checks on the page will guide you in making the remainder of the required changes.
6. Check the **Satellite Student** checkbox, if applicable.
7. Click **Save** to create the new record.
8. You will receive the following message: **The FS – Student Standing information was successfully saved.**

Outcome:
1. This is a change not a correction.
2. The previous FS record will be closed and a new FS record created.
3. No change is needed to the current open FD record.

Scenario 32 – A student switches grade level mid-year.

A student started the 21/22 school year as a 10th grader. As of November 15, 2021, the student has enough credits to be promoted to the 11th grade.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
Edit the student's General, FD, and FN tabs.

Steps to Complete:
1. Navigate to the **General** tab of the student's profile.
2. Edit the **Building Grade** dropdown and choose the student's new grade level.
3. Click **Save**.
4. The **Grade Next Year** field will automatically update after saving.
5. Next, edit the **FD-Attributes** tab.
6. Click the **New Student Attributes** button.
7. Enter the date the student's grade level change is effective in **Effective Start Date** field.
8. Next, in the **State Equivalent Grade** dropdown, select the student's new grade level. This should be the same grade level you chose on the **General** tab.
9. Click **Save** to create the new record.
10. You will receive the following message: **The FD – Student Attributes – Effective Date information was successfully saved.**
11. If the student is placed on a different calendar due to the grade change, update the **Reporting Calendar and Attendance Pattern** on the **FD – Student Attributes** and save.
12. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.**   You will receive the following message: **The General Information was successfully saved.**
13. Now, navigate to the **FN-Attributes** tab.
14. In the **EMIS Grade Next Year** field, choose the correct value.
15. Click **Save**.

Outcome:
1. This is a change not a correction.
2. A new FD record will be created.

Scenario 33 - Summer Graduate

A senior in the 20/21 school year needs one more class to graduate. The student takes and completes the class in summer school and is considered a summer graduate.

Enroll	Whack	Withdrawal
N/A	N/A	Process a summer withdrawal.

Complete Solution:
Since the student did not meet the graduation requirements in 20/21, they will need reported in Period G as a graduate. Once the graduation requirements have been met - summer withdraw the student.

Students who have passed all tests, did not finish coursework prior to end of school in 20/21, but complete coursework and receive diploma prior to June 30, 2020

Steps to Complete:
1. Withdraw student with **99** on the last day of school (and make sure to re-transfer EMIS demographic records for Period S final window).
2. Update student's withdraw date on the FS-Standing tab and also under the Edit History Details to reflect the date the diploma was received.
3. Update FN Graduate tab with the Graduation Date and Diploma Type.
4. Go back into 20/21 and re-transfer EMIS demographic records for Period G.

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
3. The FN Graduate tab will contain the Graduation Date and Diploma Type.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated too.

Students who have passed all tests, did not finish coursework prior to June 30, but complete coursework and receives diploma prior to the first day of school in 21/22

Steps to Complete:
1. Student is enrolled in 21/22 and taking summer courses to complete his coursework requirements.
2. Student completes the coursework prior to the first day of school in 21/22.

3. Withdraw student with **99** on the date his diploma is received (after June 30, but prior to the first day of school in 21/22).
4. Update student's course history with the completed courses (manual course history entries).
5. Update FN Graduate tab with the Graduation Date and Diploma Type.
6. This student should be reported both in FY22S and FY21G.

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
3. The FN Graduate tab will contain the Graduation Date and Diploma Type.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated too.

NOTE: Summer Withdrawn students will continue to be reported in **Reporting Period S** for the entire year.

Scenario 34 - Middle school student taking two classes at the high school. The high school would like to take attendance for the student while they are in the building.

A middle school student is taking two courses at the high school. The high school would like to monitor the student's classroom attendance and progress in the courses using StudentInformation.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard or Student Transfer	N/A	N/A

Complete Solution:
Register the student in the high school and place them on the appropriate calendar at the high school.

Steps to Complete:
1. Register the student at the high school for 21/22, when asked if you want to change the primary/EMIS attending building, answer **NO**.
2. Assign the student to either an attending or a non-attending attendance calendar (General Tab) at the high school, depending on who will be taking attendance for the student while at the high school.
3. Navigate to the **Edit Calendar Percentages** page and enter the appropriate Attendance Percentage value for each calendar. **Save**.
4. The student remains enrolled at the middle school on the attending calendar.

Outcome:
1. FS and FD records are not changed.
2. The student's attendance calculation (ATTUPEMIS) will calculate the attendance correctly based upon the percentages inserted on the Edit Calendar Percentages page.
3. Currently, UNCLEMIS generates an error saying the student has overlapping admission records. This error can be ignored.

Scenario 35 - The JVS has a Satellite student that has completed requirements in 20/21 and will not be returning to the JVS in 21/22.

A JVS Satellite student has completed the course requirements in 19/20 and will not be coming back to the JVS for the 20/21 school year. What should the JVS do?

Enroll	Whack	Withdrawal
N/A	Whack the student in 21/22	Withdraw the student in 20/21

Complete Solution:
If the JVS has a Satellite student that has completed the course requirements in 20/21, the student should be withdrawn from the JVS in the 20/21 school year with a withdrawal date of the last day of school and withdrawal code of **99**. The student should be reported in 20S. The student does not need reported in the 21/22 school year so the student should be whacked out of the JVS in 21/22.

Steps to Complete:
1. Withdraw the student in 20/21 using the last day of school and withdrawal code = **99**. (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)

Outcome:
The student's FS, FD, FN and Student annual records will be deleted for the 21/22 school year.

Scenario 36 - The JVS has a Satellite student that will complete the course requirements in 20/21. The JVS knows before the last day of school that the student will be returning to the JVS to pursue a program in 21/22.

A JVS Satellite student has completed the course requirements in 20/21 and will be coming back to the JVS for the 21/22 school year. What should the JVS do?

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the JVS	N/A	N/A

Complete Solution:
If the JVS has a Satellite student that will complete the course requirements in 20/21, but the JVS knows the student will be returning to the JVS to pursue a program full or part-time, the student should be promoted to 21/22. Once the student has been promoted, edit their FS record and change their EMIS Situation to reflect the appropriate situation.

Scenario 37 - A non MR/DD student finished out the 20/21 school year as a certain EMIS Situation and now has a different EMIS Situation for 21/22.

A non MR/DD student was a Resident attending full-time in 20/21 and is now a Resident Attending the JVS full-time for 21/22.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
StudentInformation does not carry the prior year's EMIS record over, but rather starts off the school year with a new record for all students who were enrolled the previous year with an effective start date of 7/1/2021. Since they have a new record for the year, we are telling them that they do not have to close this record and open a new one if the student is starting the school year out with a new EMIS Situation.

Steps to Complete:
None

Outcome:
The student will have a single FS record in 21/22 which reflects the student's EMIS Situation for 21/22.

Scenario 38 - A student attended a MR/DD school for 20/21. The student will be attending a regular district for 21/22.

If a student was attending an MR/DD last school year and will be attending the regular district this school year, but the student was being educated by the MR/DD through the summer, the student's July 1st FS record would need closed with an effective end date and a new FS record added to reflect the new EMIS Situation.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
StudentInformation does not carry the prior year's EMIS record over, but rather starts off the school year with a new record for all students who were enrolled the previous year with an effective start date of 7/1/2020. Since the student continued to be educated over the summer, the student's FS record dated 7/1/20 will be closed and a new FS record opened to reflect the student's new EMIS Situation for the 21/22 school year.

Steps to Complete:
1. Navigate to the **FS – Standing** tab.
2. Close out the student's 7/1/20 record by adding a new FS record clicking on the **New Student Standing** button.
3. Select the student's new EMIS Situation from the **EMIS Situation** dropdown.
4. Edit checks on the page will guide you in making the remainder of the required changes.
5. Click **Save** to create the new record.
6. You will receive the following message: **The FS – Student Standing information was successfully saved.**
7. Navigate to the **FD-Attributes** tab and choose **New Student** Attributes. Start on the same **Effective Start Date** as the new **FS – Student Standing Effective Start Date**.
8. Update the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your corrections.
9. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.**   You will receive the following message: **The General Information was successfully saved.**

Outcome:
The student will have two FS and two FD records in 21/22. The latest FS record will reflect the student's current EMIS Situation for 21/22.

Scenario 39 - A student is evaluated at the JVS.

A student is evaluated at the JVS for possible future enrollment.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the JVS	N/A	Withdraw the student at the JVS with the same date as the admission date.

Complete Solution:
The student's home school does not need to do anything. The JVS should enroll and withdraw the student using the same date with an EMIS Situation of **358 – Vocational Evaluation** only. Put the student on the non-attending calendar and zero percent of time.

Steps to Complete:
1. Register the student at the JVS using **358** as the EMIS Situation.
2. Withdraw the student using the same withdraw date as admission date.

Outcome:
The student will have a single FS record in 21/22 which reflects the student's EMIS Situation for 21/22.

Scenario 40 - A student was promoted or enrolled into wrong building.

A student was accidentally promoted to the wrong building in the district for 21/22.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the correct building.	Whack the student from the building they were accidentally enrolled into for 21/22.	N/A

Complete Solution:
There are several ways to handle the situation, but most importantly the student needs whacked from the building they were accidentally enrolled into, since they will not be attending one day there.

Now, the school can student transfer the student from 20/21 to the correct building in 21/22. Or they can use Registration Wizard in the correct building for 21/22 and StudentInformation will find a match and they can enroll the match. Or they can change the progression track on the student's profile in 20/21 and redo promotion/bulk enrollment.

Steps to Complete:
1. Whack the student from the incorrect building. (See Appendix F for instructions on whacking a student.)
2. Register the student in the correct building. Make sure you use a registration day that is before the first day of school. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

Outcome:
1. A new FS and FD record will be created for the student's admission into the new building.
2. If you register the student in the new school in the district first and then whack them out of the other building, the student's original FS and FD record for the old building will not be deleted and will still display in the summary section on the FS and FD tabs. It will be considered a closed record.

Scenario 41 - A student graduated on time last year, but was not reported as withdrawn in Period S in 20/21.

A student graduated on time in 20/21 with his class, but was not withdrawn and reported as withdrawn in Period S for the 20/21 school year. Period S is now closed.

Enroll	Whack	Withdrawal
N/A	N/A	Whack the student from the 21/22 school year

Complete Solution:
The student needs to be reported in 21G as a graduate. Additionally, if the student has already been reported in the FY22 SCR or in FY22S, the student can be whacked from that location and a Student Withdrawal Override created for him in the FY22 school year so that he is reported as expected.

Steps to Complete:
1. Report the student as a graduate in 21G by adding his Graduation Date and Diploma type to the FN-Attributes tab on the 20/21 Student Profile. He will then be included in the FY21G transfer files.
2. Whack the student from the 21/22 school year.
3. In 21/221, add a Student Withdrawal Override (FC) record in EMIS Maintenance using a withdrawal code of 99.

Scenario 42 - A summer withdrawn student in 21/22 becomes a Graduate Only student in 21/22.

A student in 20/21 should have graduated, but did not pass all their required assessments. Student is promoted to 21/22 while awaiting assessment results. Required assessment results are returned and student did not pass. Student is summer withdrawn on or after 7/1/21, but prior to the first day of school with a 7X withdraw reason. Student takes the assessment again later in the school year and passes.

Enroll	Whack	Withdrawal
Enroll the student as a Grad Only student in 21/22.	Whack the student in 21/22	Withdraw the student in 21/22 using the Student Summer Withdrawal Record with a 7X withdraw code

Complete Solution:
The district is still responsible to report this student in Period S with the 7X withdraw code. Additionally, the student needs to be Reported as a Grad Only student in FY22 Graduate reporting. The student records need updated to reflect both items.

Steps to Complete:
1. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)
2. Navigate to the **Student Summer Withdrawal Record** and click the **Add Student Summer Withdrawal Record.**
3. Enter a summer withdrawal record for this student using the same **Withdrawal Date** and **Withdrawal Reason** previously entered for this student (likely a 7X withdraw code).
4. Re-register this student as a **Grad Only** (or non-attending graduate) in the 21/22 school year using **Registration Wizard**.

Outcome:
1. This student will be removed from the missing list for FY22S when the Student Summer Withdrawal Record is reported.
2. This student will be reported as a graduate only student in FY22G.

Scenario 43 – Student withdraws after last day of school, but prior to July 1.

A student leaves the district after school ends, but prior to July 1. Student needs to be withdrawn on a date after the last day of school, but prior to July 1.

Enroll	Whack	Withdrawal
N/A	Whack the student from 21/22 if promoted	Withdraw the student from 20/21

Complete Solution:
Withdraw the student in 20/21 with the appropriate withdraw code. If student was promoted to 21/22, whack the student from that school year. If the student has already been reported in the SCR collection in 21/22, the student would then need to be withdrawn in 21/22 with withdrawal reason **81**.

Steps to Complete:
1. Process a withdraw for student using the last day of school as the withdraw date.
2. Once the withdraw is complete, navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
3. Correct the **District Withdraw Date** field so the date reflects the last day of enrollment for the student.
4. Click **Save** to save your corrections.
5. Navigate to _**StudentInformation**_ _**» SIS**_ _**» Student**_ _**» Admission History**_ _**» Edit History Details**_ and correct the student's withdrawal date.
6. If the student was enrolled in the future year, whack the student in the future year. (See Appendix F for instructions on whacking a student.)

Outcome:
1. This is a correction not a change.
2. The student's current FS event is edited and the district admission date corrected.

Appendix A: Registration Defaults

1. Navigate to ***StudentInformation*** *» **Management*** *» **School Administration*** *» **School Building Administration*** *» **Registration Defaults*** at the district level or building level.
2. In the **Hispanic/Latino** dropdown, choose Yes or No from the dropdown that best describes the majority of students in the district or building in context.
3. In the **Local Ethnic Category** dropdown, select an ethnicity from the dropdown that best describes the majority of students in the district or building in context. Local Ethnic Category will be used on reports and is not reported to EMIS.
4. In the **Racial Group(s)** section, mark the appropriate racial groups that best describes the majority of students in the district or building in context.
5. In the **Citizenship** dropdown, choose a citizenship type that best describes the majority of students in the district or building in context.
6. The **Admission Code** dropdown should be left blank at the district level and defined at the building level. NOTE: Admission Code is not reported to EMIS.
7. In the **Native Language** dropdown, choose a native language value that best describes the majority of students in the district or building in context.
8. In the **Home Language** dropdown, choose a home language value that best describes the language the majority of students speak at home.
9. Leave the **Student Status** dropdown blank at the district level unless the student status codes are set up at the district level. A majority of districts will define the Student Status dropdown at the building level.
10. In the **Free/Reduced Lunch** dropdown, choose a status value that best describes the majority of students in the district or building in context.
11. In the **Building Prog Track** dropdown, choose a progression track that best describes the majority of students in the district.
12. Leave the **Grade** dropdown blank.
13. In the **City** field, enter a city that best describes the city the majority of students live in.
14. The **State** dropdown automatically defaults to **OH**.
15. In the **Zip** field, enter the zip code that best describes the zip code the majority of students live in. In larger metropolitan areas, the school may choose to leave the zip code field blank.
16. In the five **Flags** fields, enter applicable data.
17. In the **Country of Origin** dropdown, choose a value that best describes the majority of students.
18. Next, in the **EMIS Situation** dropdown, select an EMIS Situation or use the ellipses.
19. Based on the selection in the **EMIS Situation** dropdown, other fields that comprise the student's EMIS Situation will be automatically filled-in.
20. In the **Admission Reason** dropdown, select an admission reason that best describes the majority of students.

21. The following fields are populated based on the EMIS Situation: District Relationship, District of Residence, How Received, How Received IRN, and Tuition Type.
22. In the **Percent of Time** field, enter the corresponding time percentage.
23. Leave the **Attending Building IRN** and **Assigned Building IRN** fields blank at the district level.
24. In the **County of Residence** dropdown, select a county.
25. The Sent To 1 section is automatically populated based on the EMIS Situation chosen.
26. At the district level, select **Family Group Defaults Matching Criteria** to be used by default on Registration Wizard pages.
27. Click **Save**.

Registration Defaults

From this screen, you can set default values for the Student Registration Screen.

Registration Information

Hispanic/Latino:	N - No, the student is not Hispanic/Latino ▾	Local Ethnic Category:	W - White,Non-Hispanic ▾

Racial Group(s):

☐ A-Asian ☐ B-Black or African American ☐ I-American Indian or Alaska Native ☐ P-Native Hawaiian or Other Pacific Islander ☑ W-White

Citizenship:	04 - United States citizen ▾	Admission Code:	▾
Native Language:	ENG ▾	Home Language:	ENG ▾
Student Status:	▾	Free/Reduced Lunch:	None ▾
Building Prog Track:	▾	Grade:	▾
City:		State:	OH ▾
Zip:			

Flags: 1 2 3 4 5

Country of Origin: ▾

EMIS Situation: 5 - Resident attending Full Time ▾ [...]

Admission Reason: 6 - Transferred from other Ohio public district/community school ▾ 🛈

District Relationship: 1 - Stud. rcvg instr. in whole/part from rep. dist ▾

District of Residence: 049452 - Madison Local SD 🔍

How Received: * - Not Applicable ▾

How Received IRN ****** - 🔍

Percent of Time: 100

Tuition Type: N - Non-tuition student (default) ▾

Attending Building IRN ▾

Assigned Building IRN ▾

County of Residence: ▾

Sent To 1:

Reason: NA - Not sent to another district ▾

IRN ****** - 🔍

Percent of Time:

Sent To 2:

Reason: ▾

IRN - 🔍

Percent of Time:

Family Group Defaults:
Matching Criteria:

☐ Address ☑ City ☑ State
☑ Zip Code ☑ Student Last Name ☑ Phone Number

[Save] [Cancel]

Appendix B: Registering a student using Registration Wizard

Note

To Register a Grad Only student, refer to the **Registering Grad Only Students** documentation.

1. Navigate to *__StudentInformation__* » *__SIS__* » *__Registration Wizard__* at the building level.
2. In the **First Name** field, enter the students first name, which is a required field.
3. Tab or click into the **Middle Name** field and enter an optional middle name.
4. Next, tab or click into the **Last Name** field and enter the student's last name, which is a required field.
5. In the **Called Name** field, enter an optional nickname.
6. In the **Social Security** field, enter the student's social security number which is optional.
7. The **EMIS ID** field is optional. If no EMIS ID is entered, StudentInformation will automatically assign an EMIS ID.
8. Next, in the **Student Number** field, enter the unique number that identifies the student in the district. This number is most likely different than the student's EMIS ID and StudentInformation State Support does not recommend using the student's social security number.
   Note: Student Numbers are district specific. If you would like StudentInformation to automatically assign the student an ID, leave the Student Number field empty. If your district has assigned a Student Number 1001, there is nothing preventing a district in another county from assigning one of their students number 1001.
   Student Numbers are not school year specific. If a student in your district was assigned number 5000, you will not be able to assign number 5000 to a new student in the current school year even if number 5000 is not currently an active student; the number is still assigned to someone who previously attended your district.
9. Enter the student's date of birth in the **Birthdate** field.
10. The student's **Age** will automatically be calculated when you tab or click out of the Birthdate field.
11. Next, fill in the student's gender in the **Gender** field.
12. Finally, choose the student's grade level from the **Grade** dropdown.
13. Click **Next**.
14. If StudentInformation finds a student matching the one you entered, the 2nd tab named **Possible Matches** will display.
15. If StudentInformation does not find a match, the 3rd tab named **Complete Registration** will display instead.
16. Several of the fields on the Complete Registration tab are populated based on what is filled out on the Registration Defaults page. Please see Appendix A for more information about Registration Defaults.

17. The following are required fields:
Hispanic/Latino, Racial Group(s), Admission Date, Student Status, Attendance Calendar, Free/Reduced Lunch Status, Grade, Address of Residence, Mailing Address, Admission Reason, and County of Residence. NOTE: The **Admitted From IRN** field is enabled and required for students newly enrolled after July 1 with an admission reason 3, 6 or 7. Joint Vocational School Districts (JVSDs) and Education Service Centers (ESCs) are required to report ****** in this field. This field is defaulted to ****** and disabled when re-registering a student into a building in the same district as the building from which the student was withdrawn. This field is disabled and given a value of ****** when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).
18. If you click **Finish**, a new Family Group will be created and the student will automatically be assigned to the Family Group.
Note: the Family Group tab will display if the Uses Family Groups option is checked on the District Options page.
19. Click **Next** to advance to the **Family Group** tab where you can assign the student to an existing Family Group or click **Next** again to advance to the **EMIS** tab. In the **Family Group Search** selection section, choose how you want to search for the Family Group – by Name or by Criteria.
20. Place a check next to the Family Group you wish to add the student to and click **Next** to advance to the **EMIS** tab or **Finish** to complete the registration process.
21. After clicking **Finish**, regardless of what tab you are on, the following message will display: **The student was successfully saved.**
22. Now, navigate to *__StudentInformation__ » __SIS__ » __Student.__*
23. Type the student's name in the **Find Students** box to verify the student is registered.

Appendix C: Summer Withdrawal

F.Y.I.

A summer withdrawal is a partial whack. All student records are deleted except for those needed for EMIS reporting. A summer withdrawal is performed when a student finished out the previous school year, but will not be returning in the fall to the next school year.

1. Navigate to ***StudentInformation*** *» **SIS** » **Student** » **Withdraw Student**.
2. The page defaults to the **District** tab.
3. Enter a withdrawal date of 7/1/2021 thru the day before the 1st day of school in the **Withdraw Date** field. This will invoke the Summer Withdrawal logic.
4. Choose the appropriate Withdrawal Code in the **Withdraw Reason** dropdown.
5. The **Withdraw to District IRN** field is enabled and required when withdraw reason 41, 42 or 45 is selected. Click the magnifying glass to go to the Ohio Department of Education Search Organization Web page. The default value is ******. This field is disabled and given a value of ****** when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).
6. Enter optional comments about the withdrawal in the **Withdraw to District Comments** field.
7. Choose the appropriate Student Status from the **Student Status** dropdown. (Most users choose Inactive.)
8. If you would like to remove the student's locker assignment which frees up the locker to be assigned to another student, leave the box marked next to **Remove Locker Assignment**.
9. If you would like to remove the student's homeroom assignment which lowers the homeroom capacity, leave the box marked next to **Remove Homeroom Assignment.**
10. Click **Submit.**
11. The following message will display: **The withdraw date (07/01/2021) indicates a summer withdraw. A summer withdraw will delete all student records for the current school year except those required for EMIS reporting. Choose OK to proceed with a summer withdraw. Choose Cancel to select a date within the school year (8/15/2021 – 5/20/2022).**
12. Click **OK**.
13. The page will refresh and you will be brought to the Admission/Calendar History page. The page details the district withdrawal.
14. Next, go to the ***StudentInformation*** *» **SIS** » **School** » **Student Archive** page and the student is listed as a summer withdraw.

Appendix D: Withdrawing a student from the district

1. Navigate to ***StudentInformation*** *» **SIS** » **Student** » **Withdraw Student***.
2. The page defaults to the **District** tab.
3. Enter the student's withdrawal date in the **Withdraw Date** field.
4. Choose the appropriate Withdrawal Code in the **Withdraw Reason** dropdown.
5. The **Withdraw to District IRN** field is enabled and required when withdraw reason 41, 42 or 45 is selected. Click the magnifying glass to go to the Ohio Department of Education Search Organization Web page. The default value is ******. This field is disabled and given a value of ****** when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).
6. Enter optional comments about the withdrawal in the **Withdraw to District Comments** field.
7. Choose the appropriate Student Status from the **Student Status** dropdown. (Most users choose Inactive.)
8. If you would like to remove the student's locker assignment which frees up the locker to be assigned to another student, leave the box marked next to **Remove Locker Assignment**.
9. If you would like to remove the student's homeroom assignment which lowers the homeroom capacity, leave the box marked next to **Remove Homeroom Assignment.**
10. Click **Submit**.
11. The page will refresh and you will be brought to the Admission/Calendar History page. The page details the district withdrawal.

Appendix E: Withdrawing a student from a building

1. Navigate to ***StudentInformation*** **»** ***SIS*** **»** ***Student*** **»** ***Withdraw Student***.
2. Select the **Building** tab.
3. Enter the student's withdrawal date in the **Withdraw Date** field.
4. Choose **** - Not Applicable, Did not withdraw/was not truant** from the **Withdraw Reason** dropdown. This signifies the student is moving to a new building in the district.
5. Enter the IRN of the building the student is going to, if known, otherwise leave the **Withdraw to School IRN** field blank. If an IRN is entered, the student will display on the Portal as a Pending Enrollment for the IRN used.
6. Enter optional comments about the withdrawal in the **Withdraw to School Comments** field.
7. Choose the appropriate Student Status from the **Student Status** dropdown. (Most users choose Inactive.)
8. If you would like to remove the student's locker assignment which frees up the locker to be assigned to another student, leave the box marked next to **Remove Locker Assignment**.
9. If you would like to remove the student's homeroom assignment which lowers the homeroom capacity, leave the box marked next to **Remove Homeroom Assignment.**
10. Click **Submit**.
11. The page will refresh and you will be brought to the Admission/Calendar History page. The page details the building withdrawal.

Appendix F: Whacking a student

'No Shows' should no longer be whacked

Whacking a student is the process of permanently deleting the student from the school building in context. Whacking a student will permanently delete all records associated with the student, including the student's transfer history. If the student was sent to another district and the other district has not accepted the transfer yet, the transfer will be deleted.

The only evidence the student was ever in the building the year the whack was performed is on the Student Archive page.

If a student is accidentally whacked, the only way to get them back in the system is to re-register them and manually enter all the information that was deleted.

1. In 21/22, with the student in context, navigate to ***StudentInformation » SIS » Student » Admission History » Edit History Details***.
2. Click the **Trash Can** icon next to the year the student is being permanently deleted from.
3. The following message will display: **Deleting this admission record will completely remove the student for the selected school year. This includes all records associated with the student, course history, fees, grades, etc.**
4. Click **OK**.
5. You are brought to the ***StudentInformation » SIS » School » Student Archive*** page and the student is listed as withdrawn.

Appendix G: Change versus Correction

Change: A change to a student's record means the previous value on the record was correct, but now is different than it was before. There is always a new Effective Start Date when reporting a change.

Examples of changes include:
1. At the beginning of the school year, Sally is not eligible to receive free/reduced lunch. Her father loses his job in November and now Sally is eligible as of December 1st. This would be a change and the **New Student Attributes** button would need clicked on the **FD-Attributes** tab.
2. Tommy begins the 21/22 school year as a 4th grader. Two months into the school year, it is decided that it is in Tommy's best interest to repeat the 3rd grade. This would be a change to Tommy's record.

Correction: You are editing an existing record because the wrong information was entered.

Examples of a correction include:
1. The school's EMIS Coordinator noticed that Linda's **Disability Condition** field on her **FD-Attributes** tab is incorrect. The field says **** - Not Applicable**. The field should have said **02 – Deaf-Blindness** all along. The EMIS Coordinator would want to edit the latest FS record and correct it.
2. Heather was a 1st grader last year and was accidentally promoted to 5th grade in 21/22. She should be in 2nd grade in 21/22. Since the school is correcting a mistake, they would edit the latest FD record and correct it.

Appendix H: FS – Standing tab

EMIS ID - Local EMIS ID given to the student by the district. Example: Social Security number (not recommended) or number with district assigned prefix.

State Student ID (SSID) - The state assigned unique identifier.

Effective Start Date - The first day that all values on this page go into effect.

Satellite Student – Indicates that this student is a satellite student and for the attendance calculator to calculate the student's attendance as if their Percent of Time at the district is 100% for HB410 reporting. This does not change the FS record's Percent of Time values and EMIS attendance is still calculated according to the student's Percent of Time values.

District Admission Date - The day the student entered the school district or the re-entry date into the district for the student.

Admission Reason - Describes how the student arrived at the district.

Admitted From IRN - The field is enabled and required for students newly enrolled after July 1 with an admission reason 3, 6 or 7. Joint Vocational School Districts (JVSDs) and Education Service Centers (ESCs) are required to report ****** in this field. This field is defaulted to ****** and disabled when re-registering a student into a building in the same district as the building from which the student was withdrawn. This field is disabled and given a value of ****** when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).

District Withdraw Date - The day the student left the district.

Withdraw Reason - Why the student left the district.

Withdrawn To IRN - The field is enabled and required when withdraw reason 41, 42 or 45 is selected. Click the magnifying glass to go to the Ohio Department of Education Search Organization Web page. The default value is ******. This field is disabled and given a value of ****** when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).

EMIS Situation - Defines why the student is either attending the district or a resident attending elsewhere.

District Relationship - The educational relationship between the student and the district. Example: The student is receiving instruction, in whole or in part, from the reporting district or the student is receiving services from the district, but not instruction.

District of Residence - The six-digit IRN number of the school district in which the parent(s) is a resident.

How Received - How the student arrived at the district.

How Received IRN - The district from which the student is received.

Percent of Time - The amount of time the student is educated by the reporting district.

Tuition Type - Defines the manner in which the student is paying tuition to the reporting district. Example: Non-tuition student or Tuition student.

Attending Building IRN - The IRN of the building within the district that the student attends.

Assigned Building IRN - The IRN of the building the student would normally attend according to the standard district attendance policy.

County of Residence - The Ohio county in which the student lives in.

Sent To 1:
Reason – Reason a student is sent to another district.

IRN - The IRN of the district to which a student is sent.

Percent of Time - The average percent of time, for the week, that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

Sent To 2:
Reason – Reason a student is sent to another district if the student is sent to second district.

IRN – The IRN of the district the student is sent to if the student is simultaneously being sent to a second district.

Percent of Time - The average percent of time, for the week, that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

Exclude FS Records from Fall Initialization Updates - If checked, will exclude student from Fall Initialization. By default, it is unchecked. There is only one flag that applies to all FS records. The 'Exclude from Fall Initialization' flags will be set to false when:

- A student is newly enrolled or re-enrolls in the district
- A student is promoted/bulk enrolled into a new school year
- A student transfers into a new school district

Appendix I: FS – Attendance tab

Effective Start Date - The first day that all values on this page go into effect.

District Withdraw Date - The day the student left the district.

Current Entity
Attendance Days - The number of days the student was present for the FS record. This field is not editable.
Excused Absence Days - The number of days the student was excused for the FS record. This field is not editable.
Unexcused Absence Days - The number of days the student was unexcused for the FS record. This field is not editable.

Attendance Hours - The number of hours the student was present for the FS record.
Excused Absence Hours - The number of hours the student was excused for the FS record.
Unexcused Absence Hours - The number of hours the student was unexcused for the FS record.

Other Entity
Attendance Days - The number of days the student was present in a school outside your district.
Excused Absence Days - The number of days the student was excused in a school outside your district.
Unexcused Absence Days - The number of days the student was unexcused in a school outside your district.

Attendance Hours - The number of hours the student was present in a school outside your district.
Excused Absence Hours - The number of hours the student was excused in a school outside your district.
Unexcused Absence Hours - The number of hours the student was unexcused in a school outside your district.

Appendix J: FD – Attributes tab

Effective Start Date - The first day that all values on this page go into effect.

District Withdraw Date - The day the student left the district.

Withdraw Reason - Why the student left the district.

State Equivalent Grade - The grade level in which the student will be included for reporting purposes.

Disability Condition - Describes the disability of a student at or below 22 years of age who has been officially identified with a disability by an ETR (Evaluation Team Report), an IEP (Individualized Education Program), and one of the valid disability condition options.

Section 504 Plan - Student who is identified with a disability under Section 504 of the Rehabilitation Act of 1973, and is being served by a 504 plan that has been developed to meet the specific needs of the student.

Disadvantagement - Identifies the student who meets the definition of economic and/or academic disadvantagement.

Free/Reduced Lunch Status – Indicates if the student qualifies for free or reduced school lunches.

English Learner - Indicates if a student speaks limited English.

LEP Reclass Date - Date the student is no longer considered Limited English Proficient (LEP). This is an optional field.

Homeless Status - Student who lacks a fixed regular and adequate night-time residence.

Unaccompanied Youth - A homeless student not in the physical custody of a parent or guardian.

Migrant Status - A migrant student or migratory child is a child who is, or whose parent, spouse, or guardian is, a migratory agricultural worker, including a migratory dairy worker, or a migratory fisherman, and who, in the preceding 36 months, in order to obtain, or accompany such parent, spouse, or guardian in order to obtain, temporary or seasonal employment in agricultural or fishing work has moved from one school district to another, or from one administration area to another in a single school district [this is a state with only one school district], or resides in a school district of more than 15,000 square miles, and migrates a distance of 20 miles or more to a temporary residence for fishing purposes.

Immigrant Status - A student who was born outside the United States regardless if the student's parents are citizens of the United States.

Foreign Exchanged Graduation Plan - The foreign exchange status of a student as it relates to the student's graduation plans. Example: Not applicable (Student is not a foreign exchange student) or Foreign exchange student does not plan to graduate in Ohio.

Attendance Pattern - The pattern of attendance which a student attends on a weekly basis.

Preschool Poverty Level - The poverty level of the preschool student's family, as determined by Federal Poverty Guidelines.

Reporting Calendar – The student's reporting calendar. Your selection in this field determines the associated Attendance Pattern.

Exclude FD Records from Fall Initialization Updates - If checked will exclude student from Fall Initialization. By default, it is unchecked. There is only one flag that applies to all FD records. The 'Exclude from Fall Initialization' flags will be set to false when:
• A student is newly enrolled or re-enrolls in the district
• A student is promoted/bulk enrolled into a new school year
• A student transfers into a new school district

Appendix K: FN – Attributes tab

EMIS Grade Next Year - The grade level the student is assigned to next year.

Retained Status - Indicates if a student was retained at the end of a school year and whether he/she will advance to the next grade level.
Examples: Student was not retained at the end of the previous school year.
Student was retained at the end of the previous school year and is still retained.

Oct Childcount IEP Outcome - Least Restrictive Environment (LRE) outcome as of the October count week for a student whose IEP currently on file with ODE does not reflect the current LRE for a student with a disability.

Military Student – Indicates if a student's parent is active military.

CTE Program Area - The Career Technical Education program the student is considered a concentrator in.

Fiscal Year Began 9th - The fiscal year in which the student first began ninth grade. Applicable to high school students only.

CTE Program of Concentration - The primary CTE Workforce Development Program for which a student has met the requirements to be considered a concentrator.

Tech Prep Completer - Indicates if a student completed a Tech Prep program. This field is no longer utilized.

Majority Of Attendance IRN - The IRN of the building or district where a student is continuously enrolled from the end of October Count Week through the spring test administration dates.

Accountability IRN - The building IRN within the district that is responsible for the student's performance measures.

Attending Building IRN Next Year – The building IRN within the district the student will attend next year.

Admission to Current High School Date – The date the student was admitted to the current high school the student attends.

Previous Year District IRN – The district IRN the student attended in the previous year.

Third Grade Reading Guarantee
Math Diagnostic Result Code – The Math diagnostic result code for the student. No longer required.

Reading Diagnostic Result Code – The Reading diagnostic result code for the student.

Writing Diagnostic Result Code – The Writing diagnostic result code for the student. No longer required.

Latest Third Grade Reading Promotion Status – Indicates the student's promotion status based on the most recent assessment entered on the Next Generation Assessment Grades 3-8 screen.

Report To EMIS - Indicates if the student is required to be reported to the state.

Exclude FN Records from Fall Initialization Updates - If checked will exclude student from Fall Initialization. By default, it is unchecked. There is only one flag that applies to all FN records. The 'Exclude from Fall Initialization' flags will be set to false when:
• A student is newly enrolled or re-enrolls in the district
• A student is promoted/bulk enrolled into a new school year
• A student transfers into a new school district

Appendix L: FN – Graduate tab

Student is a Non-Attending Graduate – Indicates whether the student is a non-attending graduate.

CORE Economics and Financial Literacy Requirement Met - Indicates if a student has met the CORE Economics and Financial Literacy Requirement.

CORE Fine Arts Requirement Met - Indicates if a student has met the CORE Fine Arts Requirement.

CORE Graduation Requirement Exemption – Indicates if a student qualifies for the CORE Graduation Requirement Exemption. Refer to the ODE EMIS Manual for more details on reporting this element.

CORE Graduation Requirement Exemption Date – The effective date of the CORE Graduation Requirement Exemption.

CORE Graduation Requirement Met – If selected, indicates if a student has met the CORE Graduation Requirement.

Exempted from Physical Education Graduation Requirement - Indicates if the district has adopted a policy to exempt certain students from the Physical Education graduation requirement and if the student has met the policy's requirements.

Expected Graduation Date – The date a student at this grade level is expected to graduate.

Graduation Date - The date the student received his/her diploma.

Diploma Type - The type of diploma received by the graduating student. Example: Not Applicable (not a graduating student) or Regular Diploma.

OGT Graduation Alternative - Identifies that passage on one graduation test was met using the alternative criteria.

Military Compact Graduation Alternative - Indicates if the student is not using the military compact graduation alternative criteria or how many Ohio graduation assessments the student does not have to pass. Refer to the ODE EMIS Manual for more details on reporting this element.

Non-Attending Graduates
Courses Completed IRN – IRN where non-attending graduate completed their courses.

Courses Completed Date – Date when non-attending graduate completed their courses.

Proficient Foreign Languages – Identifies the foreign languages in which a student has earned the Seal of Biliteracy for their transcript.

Appendix M: Intrabuilding Progression versus Building Admission

Intrabuilding Progression: If a student is promoted to another grade or retained in the same building, an Intrabuilding Progression will display.

Building Admission: If a student is new to the district or to a building in the district, a Building Admission will display.

Appendix N: Strict versus Possible (Non-strict) Registration Matches

All of the following must be identical for StudentInformation to find a *Possible Match*:
1. First initial of First Name
2. Entire Last Name
3. Birthday
4. Gender

Either of the following must be identical for StudentInformation to find a *Strict Match*:
1. EMIS ID
2. Social Security Number

21/22 Admission and Withdrawal Scenarios Without Appendix

Change Log

Date	Section Number/Name	Change Description
8/12/21		Updates for 21/22
8/18/20		Updates for 20/21
2/3/20	Scenario 34 – Middle school student taking two classes at the high school; the high would like to take attendance for the student while they are in the building	Clarification on calendar updates
8/7/19		Updates for 19/20
7/2/18		Updates for 18/19

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Reminders

Several scenarios in this document reference **whacking** a student from the new school year. ODE EMIS requires students that are reported to EMIS be reported to EMIS for the entire school year. Whacking students can still be performed, but it needs to be performed prior to the district submitting their first Period S SCR Data Collector collection. Once that has been submitted, the student has likely been reported and will need to be reported with a withdraw reason of **81** for the entire school year if they were reported in error. You may need to work with your EMIS coordinator if utilizing the **whacking** procedure for a student in the **new** school year if the withdraw is being processed on or after 7/1/xx of that fiscal year.

Scenario 1 – A student finishes out the 20/21 school year and lets the district know by June 30 that they will not be back for 21/22.

A student finished out the 20/21 school year and has already been promoted to the 21/22. The student's parents let the district know before June 30, 2021, that their child will not be returning to the district for the 21/22 school year.

Enroll	Whack	Withdrawal
N/A	Whack the student from 21/22	Withdraw the student in 20/21 using the last day of school as the withdrawal date.

Complete Solution:
If you know prior to June 30, 2021 that the student will not be returning to the district for the 21/22 school year, you can withdrawal the student in 20/21 using the last day of school. The student does not need to be reported in 21/22 and would need whacked from the 21/22 school year.

Steps to Complete:
1. Withdraw the student in 20/21. (See Appendix D for instructions on completing a withdrawal.)
2. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The withdrawal date and code will be posted to the latest FS record in 20/21.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.
5. The student will be deleted out of 21/22 once the whack is performed.

Scenario 2 – Previously Attending Student Summer Withdrawal

A student finished out the 20/21 school year and was promoted to 21/22. The student will not be returning to the district in 21/22.

Enroll	Whack	Withdrawal
N/A	N/A	Do a summer withdrawal in 21/22 with a date of 7/1/21 thru the day before school starts. The student must be reported in 21/22.

Complete Solution:
In 21/22, withdraw the student and use a date of 7/1/21 thru the day before school starts. You will be prompted by StudentInformation to confirm the student is a summer withdrawal. Student must still be reported in EMIS for period S.

Steps to Complete:
1. Perform a summer withdrawal in 21/22. (See Appendix C for instructions on completing a summer withdrawal.)

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Students who were summer withdrawn appear on the Student Archive page with Type = Summer Withdraw.

Scenario 3 – A student who was previously summer withdrawn returns in the winter of the 21/22 school year.

A student finished out the 20/21 school year and was promoted to 21/22. The student will not be returning to the district in 21/22. A summer withdrawal is processed at that time. In December 2021, the student returns to the district.

Enroll	Whack	Withdrawal
Use registration wizard to register the student upon his return to the district.	N/A	N/A

Complete Solution:
In 21/22, use Registration Wizard to enroll the student in the district

Steps to Complete:
1. Register Student in 21/22.

Outcome:
1. A new FS and FD record will be created with an effective start date equal to the student's new admission date.

Scenario 4 – A student who previously withdrew in 21/22, returns a couple weeks or months later.

A student began the 21/22 school year, but withdrew a couple of weeks into the school year to move out of state to live with his father. The student decides he would rather live with his grandma and returns to your district one week later.

Enroll	Whack	Withdrawal
Use registration wizard to register the student upon his return to the district.	N/A	N/A

Complete Solution:
In 21/22, use Registration Wizard to enroll the student in the district

Steps to Complete:
1. Register Student in 21/22.
2. The student's schedule will need to added back in by hand, course by course.

Outcome:
1. A new FS and FD record will be created with an effective start date equal to the student's new admission date.

The student must be registered again. Simply editing the student's FS records will not work. The student needs an FS record showing the district withdrawal and a separate FS record showing the return admission a couple of weeks later.

Scenario 5 – Student withdrawals before school is out in 20/21, but has already been promoted to 21/22.

A student withdraws the day before school is out and has already been promoted to 21/22.

Enroll	Whack	Withdrawal
N/A	Whack the student from 21/22	Withdraw the student in 20/21

Complete Solution:
Withdraw the student in 20/21 and whack the student from 21/22 since they withdrew prior to the end of the current school year and do not need to be reported in 21/22.

Steps to Complete:
1. Withdraw the student in 20/21 using a day before school is out. (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The student's FS, FD, FN and Student annual records will be deleted for the 21/22 school year.

F.Y.I.

Students who were whacked appear on the Student Archive page with Type = Withdraw.

StudentInformation > SIS > School > Student Archive

View Archived Student Data

From this page users can view Student's deleted enrollment data.

	Student	Type	By	Date
🔍		Withdraw	Jami	7/28/2020 1:54:00 PM
🔍		Bulk Enroll Withdraw	Jami	6/17/2020 3:21:00 PM

Scenario 6 – Student decides to attend another building. The student never attended one of the buildings.

A district has two elementary schools, North and South. A student is promoted to North Elementary for 21/22, but her parent decides to send her to South. The student never attended North Elementary.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into South.	Whack the student from the building they are not attending in 21/22, which in this example would be North	N/A

Whacking the student from one building in your district will not affect the Student Cross Reference (SCR) **IF** the student is still in another building in the district for the school year.

Complete Solution:
There are several ways to handle the situation, but most importantly the student needs whacked from North since she will not be attending one day there. Now the school can student transfer the student from 20/21 to South 21/22. Or they can use Registration Wizard in South 21/22 and StudentInformation will find a match and they can enroll the match. Or they can change the progression track on the student's profile in 20/21 and redo promotion/bulk enrollment.

Steps to Complete:
1. Whack the student from the old building. (See Appendix F for instructions on whacking a student.)
2. Register the student in the new building. Make sure you use a registration day that is before the first day of school. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

StudentInformation > SIS > Registration Wizard

Student Registration Wizard

From this screen users can register students

| Registration Pre-requisites | Possible Matches | Complete Registration | Family Group | EMIS |

Change primary / EMIS attending building?

● Yes

○ No

Next >

Outcome:
1. A new FS and FD record will be created for the student's admission into South, the new building. Verify on the new FD record that the Reporting Calendar is a calendar in the new building.
2. If you register the student in the new school in the district first and then whack them out of the other building, the student's original FS and FD record for the old building will not be deleted and will still display in the summary section on the FS and FD tabs. It will be considered a closed record.

Scenario 7 – Student is being retained after they have already been promoted to the same building next year. The 21/22 school year has not started yet.

A student is a 5th grader in the elementary in 20/21. She is promoted to a 6th grader in 21/22 at the same elementary. The student is being retained in the 5th grade. The 21/22 school year has not started yet.

Enroll	Whack	Withdrawal
N/A	N/A	Edit the student's profile in 21/22 and change their grade level. Adjust their homeroom, locker, and schedule accordingly.

Complete Solution:
Edit the student's profile in 21/22 and change their grade level. Adjust their homeroom, locker, and schedule accordingly.

Steps to Complete:
1. The following steps would be considered a correction to a student's situation, not a change – since school has not started.
2. Edit the **General** tab in 21/22 and correct the student's **Building Grade** dropdown and **Grade Next Year** dropdown to the correct year. Also, correct **Grade Next Year** in 20/21.
3. Navigate to the **FD-Attributes** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
4. Choose the correct grade level from the **State Equivalent Grade** dropdown.
5. Place a check in the **Exclude FD Records from Fall Initialization Updates** option.
6. Click **Save** to save your corrections.
7. Next, navigate to the **FN-Attributes** tab and correct the student's **EMIS Grade Next Year** dropdown. Also, correct **EMIS Grade Next Year** in 20/21.
8. In the **Retained Status** dropdown, select the appropriate Retained Status.
9. Place a check in the **Exclude FN Records from Fall Initialization Updates** option.
10. Click **Save** to save your corrections.
11. Adjust the student's homeroom, locker and schedule as needed.

Outcome:
1. This is a correction not a change since school has not started.
2. No effective date needs to be updated and no records need closed because we are working with a new record which was created for the 21/22 school year.

Scenario 8 – Student is being retained after they have already been promoted to a different building next year. School has not started yet.

A student is in the 8th grade in 20/21 at the elementary. The student was promoted to the 9th grade at the high school for 21/22. The student is being retained in the 8th grade. The 21/22 school year has not started yet.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the Elementary	Whack the student from the high school in 21/221 since they will not be attending that building	N/A

Complete Solution:
Whack the student from the high school. Use registration wizard, promotion, or student transfer to get the student into 21/22 at the elementary.

Steps to Complete:
1. Whack the student from the high school in 21/22 since they will not be attending that building. (See Appendix F for instructions on whacking a student.)
2. Register the student in the new building. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.
3. Edit the **FN-Attributes** tab and select the appropriate Retained Status from the **Retained Status** field.
4. Mark the appropriate tabs to be excluded from Fall Initialization.

Outcome:
1. A new FS and FD record will be created for the student's admission into the elementary. Verify on the new FD record that the Reporting Calendar is a calendar in the new building.
2. If you register the student in the new school in the district first and then whack them out of the other building, the student's original FS and FD record for the old building will not be deleted and will still display in the summary section on the FS and FD tabs. It will be considered a closed record.

Scenario 9 – Student is new to your district, but will attend elsewhere full time. School has not started yet.

A student is newly registered in the district over the summer. The student is going to attend elsewhere full time as of the first day of school.

Enroll	Whack	Withdrawal
Use registration wizard to register the student in the building he would attend if he were physically attending the district.	N/A	N/A

Complete Solution:
Student is registered using Registration Wizard; the student's EMIS Situation reflects the situation applicable for attending elsewhere at the time of registration.

Steps to Complete:
1. Register the student in 21/22.

Outcome:
1. All appropriate records created at the time of registration. No further action is needed since the correct situation was chosen at time of registration.

Make sure all new students are registered in StudentInformation within 30 days of registering within the district, and reported to EMIS via the SCR Collection within 30 days of their registration date. If the students are not reported timely, it can affect the funding received for them.

Scenario 10 – Student is new to your district and decides to attend the JVS full time. School has not started yet.

A student is newly registered in the district over the summer. The student is enrolled as attending full time, but later decides to attend the JVS full time. The decision to attend elsewhere is made prior to the first day of school.

Enroll	Whack	Withdrawal
Use registration wizard to register the student in the building he would attend if he were physically attending the district.	N/A	N/A

Complete Solution:
Student is registered using Registration Wizard. When the student was originally registered their EMIS Situation reflected a resident attending full time. The student's EMIS Situation needs corrected to reflect a new non-attending situation. This is a correction and no new FS needs created since school has not started yet.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
2. Correct the **EMIS Situation** dropdown to reflect the correct situation.
3. Edit checks on the page will guide in making the remainder of the required corrections.
4. Click **Save** to save your corrections.
5. You will receive the following message: **The FS – Student Standing information was successfully saved.**
6. Navigate to the **FD-Attributes** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Correct the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your corrections.
8. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.** You will receive the following message: **The General Information was successfully saved.**

Outcome:
1. This is a correction to the existing FS, FD and General records since school has not started.
2. The original FS record is edited to reflect the new EMIS Situation.
3. No new FS or FD records need to be created.

Scenario 11 – A new student enrolls, but never shows up.

A new student enrolls during the summer to begin attending in the fall, however, he never shows up.

Enroll	Whack	Withdrawal
N/A	N/A	Withdraw the student using Withdrawal Code 81 and a day before the first day of school

Complete Solution:
No Shows must be reported in EMIS for the entire year.

Steps to Complete:
1. Withdraw the student with the same start and end date (at least one day prior to the start of school) with withdraw code 81.

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Student will be reported as withdrawn, and the admission date and withdrawal date will be the same date in the EMIS transfer file if withdraw reason **81-Student reported in error, never should have been** is used.

Scenario 12 – Preschool student ineligible to receive services.

A Preschool student is screened for services, but is found ineligible. The student must be admitted and withdrawn on the same day.

Enroll	Whack	Withdrawal
Register the student in 21/22	N/A	Withdraw the student from 21/22

Complete Solution:
Since the student is ineligible and will not be attending the district, we must record the fact that the student was screened by the district, but is not going to receive any instruction or services from the district.

Steps to Complete:
1. Register the student in the 21/22 school year.
2. Use **EMIS Situation 372 – PS evaluated but ineligible**.
3. Withdraw the student in 21/22 and use a withdrawal date equal to the student's admission date and a **Withdraw Reason 36 – Withdrew from Preschool/PS student WD from PS program for any reason**.
4. See Appendix D for instructions on withdrawing a student.

Outcome:
1. When the student is registered, a FS, FD, and FN record are created.
2. When the student is withdrawn, the withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
3. The withdrawal date and code will display on the FD record.
4. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
5. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Scenario 13 – A student moved over the summer, but never officially withdrew.

A student attended in the 20/21 school year, but moved out of the district over the summer, but never informed the district he has withdrawn.

Enroll	Whack	Withdrawal
N/A	N/A	*see solution below

Complete Solution:
The district has three options:

1. The student is counted absent until the time he officially withdraws from the district.
2. The student is withdrawn as a summer withdrawal using a dropout withdrawal reason.
3. Student may be withdrawn if student shows up in another district according to ODDEX Student Cross Reference System.

Steps to Complete:
Option 1 – No steps to complete, continue marking the student absent until he officially withdraws.
Option 2 – Perform a summer withdrawal in 21/22. (See Appendix C for instructions on completing a summer withdrawal.)
Option 3 – Student is withdrawn using the day prior to his start date at the new district as set forth in ODDEX.

Outcome:
Option 1:
1. No changes can be made to the FS and FD records until the student withdraws from the district.
2. The FS and FD records must remain open until the student actually withdraws from the district.

Option 2 and 3:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Scenario 14 – Expelled student, not receiving services in 20/21, coming back for the 21/22 school year.

A student was expelled in the 20/21 school year prior to the end of school. He was withdrawn at the time of promotion so the student was never promoted to the 21/22 school year. The student is returning in 21/22 for the first day of school.

Enroll	Whack	Withdrawal
Register the student in 21/22	N/A	N/A

Complete Solution:
Student must be re-enrolled in the 21/22 school year since they were previously withdrawn from the district.

Steps to Complete:
1. Register the student in the new building. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

Outcome:
1. A FS and FD record will be created for the student's readmission into the district in 21/22.

Scenario 15 – Student, not receiving services, is expelled in the fall and then comes back in the winter.

A student was expelled in fall of the 21/22 school year. The student returns in a couple of months after his expulsion is served. He was withdrawn at the time of his suspension and now is returning to the district.

Enroll	Whack	Withdrawal
Register the student in 21/22	N/A	N/A

Complete Solution:
Student must be re-enrolled in the 21/22 school year since they were previously withdrawn from the district.

Steps to Complete:
1. Register the student. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

Outcome:
1. A FS and FD record will be created for the student's readmission into the district in 21/22.

Scenario 16 – A student's percent of time is incorrect and has been since the first day of school.

A student currently is attending elsewhere part-time; however, his percent of time is incorrect. His current record indicates that he is attending the resident district 75 percent of time and the other district 25 percent of time. The time the student is attending has not changed; it is just incorrect on the record.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
No new records need to be added, this would be considered a correction. Edit the existing FS record to make the necessary corrections.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
2. Correct the appropriate **Percent of Time** field so the percent of time is accurate.
3. Click **Save** to save your corrections.

Outcome:
1. This is a correction not a change.
2. The student's current FS event is edited and the Percent of Time corrected.

Scenario 17 – A new student enrolls and is supposed to start the first day of school, but he does not show up until the 2nd week of school.

A student enrolls in the summer to begin attending in the fall. His admission date is entered as the first day of school however, he does not start attending until the 2nd week school is in session.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
Since the student did not start attending until the 2nd week of school, the student's admission date needs to be corrected.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
2. Correct the **District Admission Date** field so the date reflects the first day of attendance for the student.
3. Click **Save** to save your corrections.
4. Navigate to _**StudentInformation** » **SIS** » **Student** » **Admission History** » **Edit History Details**_ and correct the student's admission date.

Outcome:
1. This is a correction not a change.
2. The student's current FS event is edited and the district admission date corrected.

Scenario 18 – A student is withdrawn by mistake.

A student is accidentally withdrawn.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
The withdrawal date and reason will need deleted. The student's next grade level will also need corrected. The student's schedule will need to be added back in by hand, course by course.

Steps to Complete:
1. Navigate to the ***StudentInformation*** » ***SIS*** » ***Student*** » ***Admission History*** » ***Edit History Details*** page.
2. Click on the **Trash Can** icon that corresponds with the incorrect withdraw.

3. You will receive the following message:

4. Click **OK**.
5. Edit the **General** tab and correct the student's **Grade Next Year** dropdown to the correct year.
6. Navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Delete the date in the **District Withdraw Date** field.
8. Correct the **Withdraw Reason** dropdown to say **** - Not Applicable, Did not withdraw/was not truant.**
9. Remove the **Withdrawn To IRN**, if applicable.
10. Click **Save** to save your corrections.
11. You will receive the following message: **The FS – Student Standing information was successfully saved.**
12. Edit the **FN-Attributes** tab and correct the **EMIS Grade Next Year** dropdown to say the appropriate grade level next year.

Outcome:
1. This is a correction and not a change since the district is correcting a mistake.
2. The FS record is manually corrected and the corrections are also displayed on the FD and FN tabs.

Scenario 19 – A student is withdrawn using the 1ˢᵗ day of school by mistake. The student is supposed to be a summer withdrawal.

A student is accidentally withdrawn using the 1ˢᵗ day of school by mistake. The student is supposed to be a summer withdrawal.

Enroll	Whack	Withdrawal
N/A	N/A	Process a summer withdrawal

Complete Solution:
The erroneous withdrawal needs deleted from the Edit History Details. Next, go to the Withdrawal Student page and enter a withdrawal date of a day before the first day of school, which will invoke the summer withdrawal logic. Carry out the withdrawal.

Steps to Complete:
1. Navigate to the ***StudentInformation*** **»** ***SIS*** **»** ***Student*** **»** ***Admission History*** **»** ***Edit History Details*** page.
2. Click on the **Trash Can** icon next to the erroneous withdrawal.

| 🗑 ✎ | 2020 - 2021 | Aug 01, 2020 | Building Withdraw | INDIAN LAKE HIGH SCHOOL | DFLT | Transferred to another School District outside of |

3. The screen will refresh and you will see the following message:

StudentInformation > SIS > Student > Admission History > Edit History Details

Admission/Calendar History Details
Click on the edit and delete icons to manage the student's admission events.

Are you sure you want to delete the following admission event?

Building Withdraw on 8/1/2020

[OK]   [Cancel]

4. Click **OK**.
5. Now perform a summer withdrawal in 21/221. (See Appendix C for instructions on completing a summer withdrawal.)

Outcome:
1. No action is needed on the FS, FD, or FN tabs.
2. The new summer withdrawal date is automatically populated on the FS tab, overriding the erroneous date that was entered the first time.

Scenario 20 – A student withdraws from the district, but the wrong withdrawal date was used.

A student withdraws from the district, but the wrong withdrawal date was used.

Enroll	Whack	Withdrawal
N/A	N/A	Student's Withdrawal Date is updated to correct date.

Complete Solution:
The withdrawal date needs updated on the Edit History Detail page and the **FS-Standing** tab.

Steps to Complete:
1. Navigate to the ***StudentInformation » SIS » Student » Admission History » Edit History Details*** page.
2. Click on the **Edit Pencil** icon that corresponds with the District Withdraw.
3. Edit the **Withdrawal Date** field and enter the correct withdrawal date.
4. Click **Save**.
5. The following message will display: **The admission event was saved successfully. The student's FS record will need to be updated manually.**
6. Next, navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Correct the date in the **District Withdraw Date** field.
8. Click **Save** to save your corrections.
9. You will receive the following message: **The FS – Student Standing information was successfully saved.**

Outcome:
1. This is a correction and not a change since the district is correcting a mistake.
2. The student's Edit History Detail page needs manually corrected and so does the FS record.

Scenario 21 – A student enrolls in your district, but the wrong admission date is used.

A student enrolls in your district, but the wrong admission date is used.

Enroll	Whack	Withdrawal
Student's Admission Date is updated to correct date.	N/A	N/A

Complete Solution:
The admission date needs updated on the Edit History Detail page and the **FS-Standing** tab.

Steps to Complete:
1. Navigate to the **_StudentInformation_** » **_SIS_** » **_Student_** » **_Admission History_** » **_Edit History Details_** page.
2. Click on the **Edit Pencil** icon that corresponds with the District Admission.
3. Edit the **Admission Date** field and enter the correct admission date.

		2020 - 2021	Aug 01, 2020	District Admission	Indian Lake Local Schools		
🗑	✏	2020 - 2021	Aug 01, 2020	Building Admission	INDIAN LAKE ELEMENTARY SCHOOL	KGAK	FIRST SCHOOL ATTENDED

4. Click **Save**.
5. The following message will display: **The admission event was saved successfully. The student's FS record will need to be updated manually.**
6. Next, navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
7. Correct the date in the **District Admission Date** field.
8. Click **Save** to save your corrections.
9. You will receive the following message: **The FS – Student Standing information was successfully saved.**

Outcome:
1. This is a correction and not a change since the district is correcting a mistake.
2. The student's Edit History Detail page needs manually corrected and so does the FS record.

Scenario 22 – Student decides to attend another building in your district after school starts.

A district has two elementary schools, North and South. A student is promoted to North Elementary for 21/22, but her parent decides to send her to South in late November.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard or Student Transfer	N/A	Since school has already started, the student will need to remain in the old building. Do a building withdraw to record the date of the student's withdraw from this building

Complete Solution:
Since school had already started, the student cannot be whacked from North elementary so a building withdrawal must be recorded and the student admitted to the new building, South. The withdrawal date from North needs to be the day prior to the admission date into South.

Steps to Complete:
1. Building withdraw the student in 21/22 in the building they are no longer attending. (See Appendix E for instructions on withdrawing a student.)
2. Register the student in 21/22 in the new building. Make sure the enrollment date is the day after the withdrawal date.

Outcome:
1. Once the student is enrolled at South, which is the new building, a new FS record will be created with an effective date equal to the student's building admission date to South.
2. The prior FS record will have an effective end date equal to the date prior to the effective start date on the new FS record.
3. A new FD record with the same effective start date as the new FS record will be created with an effective date equal to the student's building admission date to South. The Reporting Calendar will also be updated to a calendar in the new building. Verify that it is the correct calendar.
4. Review the Profile - General tab Attendance Calendar and verify that it is correct. If not, update the Attendance Calendar and save the record.

Scenario 23 – Student is expelled mid-year and is not receiving services.

A student is expelled and not receiving services. The student is expelled during the current school year.

Enroll	Whack	Withdrawal
N/A	Whack the student from 22/23	Withdraw the student performing a district withdrawal.

Complete Solution:
If the student is not receiving services while expelled, withdraw the student. If the student comes back for this school year, you will need to re-register her.

Steps to Complete:
1. Withdraw the student in 21/22 (current year). (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 22/23. If the student is not whacked prior to being reported in the SCR Collection for 22/23, they will need to be reported in 22/23 with the withdraw code of **81**. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable**.

Scenario 24 – Student is expelled before the end of the school year and is not receiving services, but has already been promoted to the new school year.

A student is expelled and not receiving services. The student is expelled during the current school year, but has already been promoted to 22/23.

Enroll	Whack	Withdrawal
N/A	Whack the student from 22/23	Withdrawal the student performing a district withdrawal.

Complete Solution:
If the student is not receiving services while expelled, withdraw the student. Since the student left the district, they will need whacked from 21/22. If the student does decide to come back in 21/22, use Registration Wizard to enroll the student.

Steps to Complete:
1. Withdraw the student in 21/22. (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 22/23. If the student is not whacked prior to being reported in the SCR Collection for 22/23, they will need to be reported in 22/23 with the withdraw code of **81**. (See Appendix F for instructions on whacking a student.)

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The withdrawal date and code will display on the FD record.
3. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated to **** - Not Applicable.**

Scenario 25 – A Special Ed student is expelled and still receiving services.

A Special Ed student is expelled and still receiving services.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
If the student is expelled and still receiving services, you cannot withdraw the student, you just report the discipline.

Steps to Complete:
None – the student cannot be withdrawn because they are still receiving services.

Outcome:
No changes to FS and FD records.

Scenario 26 – Student who was a resident moves out, but still wants to attend your district.

A student is attending as a resident, but moves out of the district and wants to continue as a non-resident open enrolled to your district.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
The student's EMIS Situation is changed from one of a resident attending to a non-resident attending.

Steps to Complete:
1. Navigate to the **FS-Standing** tab and click the **New Student Standing** button.
2. Enter the date the change in the EMIS Situation takes effect in the **Effective Start Date** field.
3. Next, change the **EMIS Situation** dropdown to reflect the new situation.
4. Edit checks on the page will guide in making the remainder of the required changes.
5. Click **Save** to create the new record.
6. You will receive the following message: **The FS – Student Standing information was successfully saved.**
7. Navigate to the **FD-Attributes** tab and choose **New Student** Attributes. Start on the same **Effective Start Date** as the new **FS – Student Standing Effective Start Date**.
8. If needed, update the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your corrections.
9. If needed, navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.** You will receive the following message: **The General Information was successfully saved.**

Outcome:
1. This is a change not a correction.
2. The previous FS and FD records will be closed and a new FS and FD record created.

Scenario 27 – Student is withdrawn from one building in the district, but never enrolls in another building in the district.

Student withdraws from a building within the district, but never enrolls in another building within the same district. School has already started.

Enroll	Whack	Withdrawal
N/A	N/A	Student is building withdrawn from the current building.

Complete Solution:
Building withdraw the student from the current building. Since the student has not registered yet in another building within the district, no record is going to be updated or created until the student is registered in the new building. Student admission history will display the building withdrawal.

Steps to Complete:
None

Outcome:
1. No changes are made to the FS or FD records.

Scenario 28 – Student is transferred to a different district. What should the original district do?

District A is student transferring a student to district B. The student is withdrawing from district A to reside in and attend district B. District A uses student transfer to move the student to the new district and then district withdraws the student since they have left the district. This situation addresses the student being withdrawn from District A.

Enroll	Whack	Withdrawal
N/A	N/A	In district A, the student is withdrawn from the district.

Complete Solution:
The student is transferred out of the district and then withdrawn from the district.

Steps to Complete:
1. Complete the student transfer process for the individual student.
2. Withdraw the student from 21/22. (See Appendix D for instructions on withdrawing students.)

Outcome:
1. The student transfer process does not touch the FS and FD records.
2. The students FS and FD records are updated when the student is district withdrawn.

Scenario 29 – Student is transferred to a different district. What should the receiving district do?

District A is student transferring a student to district B. The student is withdrawn in district A and is currently in the pending transfers queue in district B.
This situation addresses receiving the student in district B.

Enroll	Whack	Withdrawal
Enroll the student using the Pending Students page	N/A	N/A

Complete Solution:
Student is registered in the receiving district as a new student to the district.

Steps to Complete:
1. Enroll the student via the Pending Students page.

Outcome:
1. When the student is registered, a FS, FD, and FN record are created.

Scenario 30 – A student is a resident attending full-time. In October, the student decides to open enroll in another district.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
The resident district is still responsible for reporting the student. The student's calendar needs changed to the non-attending calendar. The student's EMIS Situation needs changed.

Steps to Complete:
1. Navigate to the **FS-Standing** tab.
2. Click on the **New Student Standing** button to create a new record.
3. Enter the date the change in the EMIS Situation is effective in **Effective Start Date** field.
4. Next, change the **EMIS Situation** dropdown to reflect the new situation.
5. Edit checks on the page will guide you in making the remainder of the required changes.
6. Click **Save** to create the new record.
7. You will receive the following message: **The FS – Student Standing information was successfully saved.**
8. Navigate to the **FD-Attributes** tab and choose **New Student Attributes**. Start on the same **Effective Start Date** as the new **FS – Student Standing Effective Start Date**.
9. Update the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your changes.
10. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.** You will receive the following message: **The General Information was successfully saved.**

Outcome:
1. This is a change not a correction.
2. The previous FS and FD records will be closed and a new FS and FD record created.

Scenario 31 – A student decides to attend the JVS part-time as a satellite student for 2nd semester.

A student is a resident attending full-time, but is going to attend the JVS as a part-time satellite student starting second semester. This situation addresses the changes that need to be made at the home school.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
Since the student will still be educated by the home district, the student cannot be withdrawn. A new FS record must be created for the student since this is a change to his EMIS attending situation.

Steps to Complete:
1. Navigate to the **FS – Standing** tab.
2. Click on the **New Student Standing** button to create a new record.
3. Enter the date the change in the EMIS Situation is effective in **Effective Start Date** field.
4. Next, change the **EMIS Situation** dropdown to reflect the new situation.
5. Edit checks on the page will guide you in making the remainder of the required changes.
6. Check the **Satellite Student** checkbox, if applicable.
7. Click **Save** to create the new record.
8. You will receive the following message: **The FS – Student Standing information was successfully saved.**

Outcome:
1. This is a change not a correction.
2. The previous FS record will be closed and a new FS record created.
3. No change is needed to the current open FD record.

Scenario 32 – A student switches grade level mid-year.

A student started the 21/22 school year as a 10th grader. As of November 15, 2021, the student has enough credits to be promoted to the 11th grade.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
Edit the student's General, FD, and FN tabs.

Steps to Complete:
1. Navigate to the **General** tab of the student's profile.
2. Edit the **Building Grade** dropdown and choose the student's new grade level.
3. Click **Save**.
4. The **Grade Next Year** field will automatically update after saving.
5. Next, edit the **FD-Attributes** tab.
6. Click the **New Student Attributes** button.
7. Enter the date the student's grade level change is effective in **Effective Start Date** field.
8. Next, in the **State Equivalent Grade** dropdown, select the student's new grade level. This should be the same grade level you chose on the **General** tab.
9. Click **Save** to create the new record.
10. You will receive the following message: **The FD – Student Attributes – Effective Date information was successfully saved.**
11. If the student is placed on a different calendar due to the grade change, update the **Reporting Calendar and Attendance Pattern** on the **FD – Student Attributes** and save.
12. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date.** Complete this field with the appropriate date, click **OK.** You will receive the following message: **The General Information was successfully saved.**
13. Now, navigate to the **FN-Attributes** tab.
14. In the **EMIS Grade Next Year** field, choose the correct value.
15. Click **Save**.

Outcome:
1. This is a change not a correction.
2. A new FD record will be created.

Scenario 33 - Summer Graduate

A senior in the 20/21 school year needs one more class to graduate. The student takes and completes the class in summer school and is considered a summer graduate.

Enroll	Whack	Withdrawal
N/A	N/A	Process a summer withdrawal.

Complete Solution:
Since the student did not meet the graduation requirements in 20/21, they will need reported in Period G as a graduate. Once the graduation requirements have been met - summer withdraw the student.

Students who have passed all tests, did not finish coursework prior to end of school in 20/21, but complete coursework and receive diploma prior to June 30, 2020

Steps to Complete:
1. Withdraw student with **99** on the last day of school (and make sure to re-transfer EMIS demographic records for Period S final window).
2. Update student's withdraw date on the FS-Standing tab and also under the Edit History Details to reflect the date the diploma was received.
3. Update FN Graduate tab with the Graduation Date and Diploma Type.
4. Go back into 20/21 and re-transfer EMIS demographic records for Period G.

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
3. The FN Graduate tab will contain the Graduation Date and Diploma Type.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated too.

Students who have passed all tests, did not finish coursework prior to June 30, but complete coursework and receives diploma prior to the first day of school in 21/22

Steps to Complete:
1. Student is enrolled in 21/22 and taking summer courses to complete his coursework requirements.
2. Student completes the coursework prior to the first day of school in 21/22.

3. Withdraw student with **99** on the date his diploma is received (after June 30, but prior to the first day of school in 21/22).
4. Update student's course history with the completed courses (manual course history entries).
5. Update FN Graduate tab with the Graduation Date and Diploma Type.
6. This student should be reported both in FY22S and FY21G.

Outcome:
1. The withdrawal date, code, and withdrawal to IRN (if applicable) will be posted to the latest FS record.
2. The FS and FD records will be updated with an effective end date equal to the student's withdrawal date.
3. The FN Graduate tab will contain the Graduation Date and Diploma Type.
4. The student's **EMIS Grade Next Year** on the **FN-Attributes** tab will be updated too.

NOTE: Summer Withdrawn students will continue to be reported in **Reporting Period S** for the entire year.

Scenario 34 - Middle school student taking two classes at the high school. The high school would like to take attendance for the student while they are in the building.

A middle school student is taking two courses at the high school. The high school would like to monitor the student's classroom attendance and progress in the courses using StudentInformation.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard or Student Transfer	N/A	N/A

Complete Solution:
Register the student in the high school and place them on the appropriate calendar at the high school.

Steps to Complete:
1. Register the student at the high school for 21/22, when asked if you want to change the primary/EMIS attending building, answer **NO**.
2. Assign the student to either an attending or a non-attending attendance calendar (General Tab) at the high school, depending on who will be taking attendance for the student while at the high school.
3. Navigate to the **Edit Calendar Percentages** page and enter the appropriate Attendance Percentage value for each calendar. **Save**.
4. The student remains enrolled at the middle school on the attending calendar.

Outcome:
1. FS and FD records are not changed.
2. The student's attendance calculation (ATTUPEMIS) will calculate the attendance correctly based upon the percentages inserted on the Edit Calendar Percentages page.
3. Currently, UNCLEMIS generates an error saying the student has overlapping admission records. This error can be ignored.

Scenario 35 - The JVS has a Satellite student that has completed requirements in 20/21 and will not be returning to the JVS in 21/22.

A JVS Satellite student has completed the course requirements in 19/20 and will not be coming back to the JVS for the 20/21 school year. What should the JVS do?

Enroll	Whack	Withdrawal
N/A	Whack the student in 21/22	Withdraw the student in 20/21

Complete Solution:
If the JVS has a Satellite student that has completed the course requirements in 20/21, the student should be withdrawn from the JVS in the 20/21 school year with a withdrawal date of the last day of school and withdrawal code of **99**. The student should be reported in 20S. The student does not need reported in the 21/22 school year so the student should be whacked out of the JVS in 21/22.

Steps to Complete:
1. Withdraw the student in 20/21 using the last day of school and withdrawal code = **99**. (See Appendix D for instructions on withdrawing a student.)
2. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)

Outcome:
The student's FS, FD, FN and Student annual records will be deleted for the 21/22 school year.

Scenario 36 - The JVS has a Satellite student that will complete the course requirements in 20/21. The JVS knows before the last day of school that the student will be returning to the JVS to pursue a program in 21/22.

A JVS Satellite student has completed the course requirements in 20/21 and will be coming back to the JVS for the 21/22 school year. What should the JVS do?

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the JVS	N/A	N/A

Complete Solution:
If the JVS has a Satellite student that will complete the course requirements in 20/21, but the JVS knows the student will be returning to the JVS to pursue a program full or part-time, the student should be promoted to 21/22. Once the student has been promoted, edit their FS record and change their EMIS Situation to reflect the appropriate situation.

Scenario 37 - A non MR/DD student finished out the 20/21 school year as a certain EMIS Situation and now has a different EMIS Situation for 21/22.

A non MR/DD student was a Resident attending full-time in 20/21 and is now a Resident Attending the JVS full-time for 21/22.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
StudentInformation does not carry the prior year's EMIS record over, but rather starts off the school year with a new record for all students who were enrolled the previous year with an effective start date of 7/1/2021. Since they have a new record for the year, we are telling them that they do not have to close this record and open a new one if the student is starting the school year out with a new EMIS Situation.

Steps to Complete:
None

Outcome:
The student will have a single FS record in 21/22 which reflects the student's EMIS Situation for 21/22.

Scenario 38 - A student attended a MR/DD school for 20/21. The student will be attending a regular district for 21/22.

If a student was attending an MR/DD last school year and will be attending the regular district this school year, but the student was being educated by the MR/DD through the summer, the student's July 1st FS record would need closed with an effective end date and a new FS record added to reflect the new EMIS Situation.

Enroll	Whack	Withdrawal
N/A	N/A	N/A

Complete Solution:
StudentInformation does not carry the prior year's EMIS record over, but rather starts off the school year with a new record for all students who were enrolled the previous year with an effective start date of 7/1/2020. Since the student continued to be educated over the summer, the student's FS record dated 7/1/20 will be closed and a new FS record opened to reflect the student's new EMIS Situation for the 21/22 school year.

Steps to Complete:
1. Navigate to the **FS – Standing** tab.
2. Close out the student's 7/1/20 record by adding a new FS record clicking on the **New Student Standing** button.
3. Select the student's new EMIS Situation from the **EMIS Situation** dropdown.
4. Edit checks on the page will guide you in making the remainder of the required changes.
5. Click **Save** to create the new record.
6. You will receive the following message: **The FS – Student Standing information was successfully saved.**
7. Navigate to the **FD-Attributes** tab and choose **New Student** Attributes. Start on the same **Effective Start Date** as the new **FS – Student Standing Effective Start Date**.
8. Update the **Reporting Calendar and Attendance Pattern** to reflect the correct calendar. Click **Save** to save your corrections.
9. Navigate to the **General** tab and select the correct **Attendance Calendar.** Click **Save.** You will be prompted for a **Calendar Change Effective Date**. Complete this field with the appropriate date, click **OK.**   You will receive the following message: **The General Information was successfully saved.**

Outcome:
The student will have two FS and two FD records in 21/22. The latest FS record will reflect the student's current EMIS Situation for 21/22.

Scenario 39 - A student is evaluated at the JVS.

A student is evaluated at the JVS for possible future enrollment.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the JVS	N/A	Withdraw the student at the JVS with the same date as the admission date.

Complete Solution:
The student's home school does not need to do anything. The JVS should enroll and withdraw the student using the same date with an EMIS Situation of **358 – Vocational Evaluation** only. Put the student on the non-attending calendar and zero percent of time.

Steps to Complete:
1. Register the student at the JVS using **358** as the EMIS Situation.
2. Withdraw the student using the same withdraw date as admission date.

Outcome:
The student will have a single FS record in 21/22 which reflects the student's EMIS Situation for 21/22.

Scenario 40 - A student was promoted or enrolled into wrong building.

A student was accidentally promoted to the wrong building in the district for 21/22.

Enroll	Whack	Withdrawal
In 21/22, use Registration Wizard, Student Transfer or Promotion/Enrollment to get the student into the correct building.	Whack the student from the building they were accidentally enrolled into for 21/22.	N/A

Complete Solution:
There are several ways to handle the situation, but most importantly the student needs whacked from the building they were accidentally enrolled into, since they will not be attending one day there.

Now, the school can student transfer the student from 20/21 to the correct building in 21/22. Or they can use Registration Wizard in the correct building for 21/22 and StudentInformation will find a match and they can enroll the match. Or they can change the progression track on the student's profile in 20/21 and redo promotion/bulk enrollment.

Steps to Complete:
1. Whack the student from the incorrect building. (See Appendix F for instructions on whacking a student.)
2. Register the student in the correct building. Make sure you use a registration day that is before the first day of school. StudentInformation will find a match. When you receive the following prompt, choose **Yes**.

Outcome:
1. A new FS and FD record will be created for the student's admission into the new building.
2. If you register the student in the new school in the district first and then whack them out of the other building, the student's original FS and FD record for the old building will not be deleted and will still display in the summary section on the FS and FD tabs. It will be considered a closed record.

Scenario 41 - A student graduated on time last year, but was not reported as withdrawn in Period S in 20/21.

A student graduated on time in 20/21 with his class, but was not withdrawn and reported as withdrawn in Period S for the 20/21 school year. Period S is now closed.

Enroll	Whack	Withdrawal
N/A	N/A	Whack the student from the 21/22 school year

Complete Solution:
The student needs to be reported in 21G as a graduate. Additionally, if the student has already been reported in the FY22 SCR or in FY22S, the student can be whacked from that location and a Student Withdrawal Override created for him in the FY22 school year so that he is reported as expected.

Steps to Complete:
1. Report the student as a graduate in 21G by adding his Graduation Date and Diploma type to the FN-Attributes tab on the 20/21 Student Profile. He will then be included in the FY21G transfer files.
2. Whack the student from the 21/22 school year.
3. In 21/221, add a Student Withdrawal Override (FC) record in EMIS Maintenance using a withdrawal code of 99.

Scenario 42 - A summer withdrawn student in 21/22 becomes a Graduate Only student in 21/22.

A student in 20/21 should have graduated, but did not pass all their required assessments. Student is promoted to 21/22 while awaiting assessment results. Required assessment results are returned and student did not pass. Student is summer withdrawn on or after 7/1/21, but prior to the first day of school with a 7X withdraw reason. Student takes the assessment again later in the school year and passes.

Enroll	Whack	Withdrawal
Enroll the student as a Grad Only student in 21/22.	Whack the student in 21/22	Withdraw the student in 21/22 using the Student Summer Withdrawal Record with a 7X withdraw code

Complete Solution:
The district is still responsible to report this student in Period S with the 7X withdraw code. Additionally, the student needs to be Reported as a Grad Only student in FY22 Graduate reporting. The student records need updated to reflect both items.

Steps to Complete:
1. Whack the student from 21/22. (See Appendix F for instructions on whacking a student.)
2. Navigate to the **Student Summer Withdrawal Record** and click the **Add Student Summer Withdrawal Record.**
3. Enter a summer withdrawal record for this student using the same **Withdrawal Date** and **Withdrawal Reason** previously entered for this student (likely a 7X withdraw code).
4. Re-register this student as a **Grad Only** (or non-attending graduate) in the 21/22 school year using **Registration Wizard**.

Outcome:
1. This student will be removed from the missing list for FY22S when the Student Summer Withdrawal Record is reported.
2. This student will be reported as a graduate only student in FY22G.

Scenario 43 – Student withdraws after last day of school, but prior to July 1.

A student leaves the district after school ends, but prior to July 1. Student needs to be withdrawn on a date after the last day of school, but prior to July 1.

Enroll	Whack	Withdrawal
N/A	Whack the student from 21/22 if promoted	Withdraw the student from 20/21

Complete Solution:
Withdraw the student in 20/21 with the appropriate withdraw code. If student was promoted to 21/22, whack the student from that school year. If the student has already been reported in the SCR collection in 21/22, the student would then need to be withdrawn in 21/22 with withdrawal reason **81**.

Steps to Complete:
1. Process a withdraw for student using the last day of school as the withdraw date.
2. Once the withdraw is complete, navigate to the **FS-Standing** tab and edit the latest event record by clicking on the **Edit Pencil** icon.
3. Correct the **District Withdraw Date** field so the date reflects the last day of enrollment for the student.
4. Click **Save** to save your corrections.
5. Navigate to ***StudentInformation » SIS » Student » Admission History » Edit History Details*** and correct the student's withdrawal date.
6. If the student was enrolled in the future year, whack the student in the future year. (See Appendix F for instructions on whacking a student.)

Outcome:
1. This is a correction not a change.
2. The student's current FS event is edited and the district admission date corrected.

Gifted Step by Step Checklist

Change Log

Date	Section Number/Name	Change Description
5/5/21	Task 2 - Create a separate grade level specific Gifted rule for the students who will be screened	Updated
4/30/21	Task 2 - Create a separate grade level specific Gifted rule for the students who will be screened	Updated
8/21/20		Updates for 20/21
2/25/20	Task 2 - Create a separate grade level specific Gifted rule for the students who will be screened	Clarification regarding gifted reporting for ACT/SAT and grade levels to be reported
12/10/19	Task 7 – Copy Student Served Values from one year to another	Added 2 notes to this section
9/4/19		Updates for 19/20
6/10/19	Task 2 – Create a separate grade level specific Gifted rule for the students who will be screened	Updates regarding the ACT/SAT
5/10/19	Task 2 – Create a separate grade level specific Gifted rule for the students who will be screened	Updates made to include required ACT/SAT testing of juniors
9/4/18		Updates for 19/20

Table of Contents

Task 1 - Create a default Gifted Rule to assign to all students in the district that are not being screened

As soon as your district knows what grade levels they are going to screen, State Support recommends the district run the Gifted Mass Update to assign all students a gifted record. This usually takes place in the fall. Once records have been created with default rule values, any subsequent updates could override any manual updates to the records.

A student can only have one gifted record per school year.
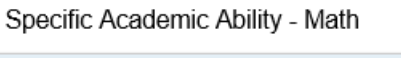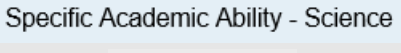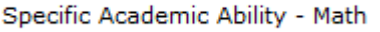
1. Change your context to the district level in the current school year.
2. Navigate to **_StudentInformation_** » **_Management_** » **_School Administration_** » **_EMIS_** » **_Gifted_** » **_Gifted Rules Maintenance_**.
3. Click **Add Gifted Rule**.
4. In the **Rule Name:*** field enter the text District Rule.
5. Leave the **Grade Level:** dropdown blank.
6. Do not check any of the **Screening** **Assessment** checkboxes.
7. Click **Save**.

Task 2 - Create a separate grade level specific Gifted Rule for the students who will be screened

Be sure to include all screenings for a specific grade level when creating the grade level rule. Once records have been created with default rule values, any subsequent updates could override any manual updates to the records.

If a district has multiple buildings that serve the same grade levels, it is possible that students in the same grade level may not be administered the same screenings, or if they do have the same screenings, they may not be administered on the same dates. For this type of situation, grade level specific gifted rule can be created at the building(s) that where the values are different than the District level grade level rule. Follow the steps below with the building in context.

Building Level Rules will only be displayed on the Gifted Rules Maintenance page in the buildings where they are created.

1. Change your context to the district level in the current school year.
2. Navigate to **_StudentInformation_** » **_Management_** » **_School Administration_** » **_EMIS_** » **_Gifted_** » **_Gifted Rules Maintenance_**.
3. Click **Add Gifted Rule**.
4. In the **Rule Name:** * field enter the text that will help you and others easily identify the rule, such as 3rd Grade Screening Rule.
5. In the **Grade Level:** dropdown select grade 03.
6. Place a check in the box next to the screening(s) the students will undergo.
7. Example: If 3rd grade students are going to be screened in Math and Science then place a checkbox in the **Screening** column only next to **Specific Academic Ability - Math** to **Specific Academic Ability - Science**.
8. Enter the **Screened Date** for the screening to be administered (ex. **Specific Academic Ability - Math**) in the **Screened Date** [_____] 📅 .If the district performs screening for two or more areas during the school year, place a checkmark in the **Screening** column for each area along with the appropriate **Screened Date** [_____] 📅 for each of the Screened areas.

9. Ninety-nine percent of districts will never create a rule to mass update the **Assessment** column on gifted records. Instead districts typically update individual student gifted records after the student is assessed.

10. Click **Save**.

Districts are required to administer either the SAT or the ACT to their juniors each year. The SAT and the ACT are assumed to be a gifted screening for specific subject matters. Although these are assumed to be gifted screenings, they still **must be** reported to ODE on the gifted record for these students.

For this reason, a building level screening rule should be put in place for the juniors taking either of these assessments in the subject areas listed below. In the event a junior does not test on the test date, the screening record would need to be removed from his gifted record.

Seniors taking the ACT or SAT would need to have their data manually entered.

Screened gifted areas for the SAT are Math and Reading/Writing.

Screened gifted areas for the ACT are Math, Reading/Writing and Science.

To verify whether the student has met an identified score value, questions should be directed to your Area Gifted Coordinator.

The Identified field and Identified Date need manually updated for any students meeting the threshold score (Your Gifted Area Coordinator can provide details on how this is calculated) achieved in the subject area. Additional information regarding the approved assessments for the current school year can be found at http://education.ohio.gov/Topics/List-of-Approved-Assessments The 11th grade students are the only students required to be assessed with the ACT or SAT. Any 11th or 12th grade student that qualifies as identified in any area would then need to have their gifted record manually updated with that information.

Task 3 - Run Gifted Mass Update to assign students the District Default Rule and the Grade Level Screening Rules simultaneously followed by running any screenings set up at the building level

If you are running a building specific screening after running the district screening check the Overwrite Existing Student Gifted records: ✔ and the building level rule will be applied to the students that already have the district rule. Any manual updates will be overwritten.

1. Change your context to the district level in the current school year.
2. Navigate to ***StudentInformation*** » ***Management*** » ***School Administration*** » ***EMIS*** » ***Gifted*** » ***Gifted Mass Update***.
3. In the Gifted Rules: dual select move all rules applicable to this year, including but not limited to District Default , 3rd Grade Screening Rule , and 4th Grade Screening Rule over to the right.
4. StudentInformation recommends checking the Overwrite Existing Student Gifted records: ✔ checkbox when you run the mass update for the first time. This will insure that any erroneous gifted records that were entered are cleaned up and replaced by the District Default Rule. When the Overwrite Existing Student Gifted records: ✔ is checked, all previously entered Screening and Assessment records will be removed and overwritten with the values of the rule currently being run in the gifted mass update.
5. Leave the Display results: ✔ box checked.
6. Click **Submit** .
7. The page will refresh, and the results will be displayed at the bottom of the screen.

2973 Records Displayed

Student	Grade Level	Rule	Status
	12	Default Gifted Rule	Created
	06	Default Gifted Rule	Created
	09	Default Gifted Rule	Created
	02	Default Gifted Rule	Created
	01	Default Gifted Rule	Created
	01	Default Gifted Rule	Created
	05	Default Gifted Rule	Created
	04	4th Grade Screening Rule	Created
	07	Default Gifted Rule	Created

Task 4 - After screening is administered manually update Assessed for those students who are undergoing further testing

1. At the building level with a student in context.
2. Navigate to **_StudentInformation_** » **_SIS_** » **_Student_** » **_Gifted_** » **_Student Gifted Record_**.
3. Place a check in the box in the `Assessment` column next to the area being assessed.
4. Example: If a third grade student was screened in Math and Reading/Writing but only showed that she needed further assessment in Reading/Writing, place a check in the box in the `Assessment` column next to `Specific Academic Ability - Reading/Writing`.
5. Since the student didn't require further assessment in Math nothing further needs to be done for Math.

StudentInformation > SIS > Student > Gifted > Student Gifted Record

Student Gifted Record

From this screen, you can display, add, change and delete data pertaining to a student's gifted record.

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☑	☐	☐	☐	
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☑	☑	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

Save   Discard Changes   Restore Default

6. Click **Save**.
7. Repeat the steps above for each student who was assessed in a certain area.

8. Some students may be assessed in all areas they were tested. Their gifted record would look as follows:

Student Gifted Record

From this screen, you can display, add, change and delete data pertaining to a student's gifted record.

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☑	☑	☐	☐	
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☑	☑	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

Save   Discard Changes   Restore Default

Task 5 - Edit the individual gifted records for those students identified as being gifted

Once a student has been identified as gifted, his identified area and identified date will copy forward on his gifted record each year.

1. At the building level with a student that was identified as gifted in context.
2. Navigate to ***StudentInformation*** *» **SIS** » **Student** » **Gifted** » **Student Gifted Record***.
3. Place a check in the box in the Identified column next to the area in which the student was identified as gifted.
4. Next enter the date the student was identified as being gifted in the Identified Date field.
5. In the example below the student was identified on 2/16/12 as being gifted in Reading/Writing, the Identified box and Identified Date field have both been filled in. The student was not identified as gifted in Math, so no further action is needed for Math.

6. Click Save.

Task 6 - If your district provides gifted services to students identified as gifted, update the student's gifted record

1. At the building level with a student that was identified as gifted in context.
2. Navigate to ***StudentInformation*** **»** ***SIS*** **»** ***Student*** **»** ***Gifted*** **»** ***Student Gifted Record***.
3. Place a check in the box in the **Served** column next to the area in which the student is being served.

Task 7 - Copy Student Served Values from one year to another

Note

The **Gifted Mass Update** must be run prior to running the **Gifted Initialization.**

The **Gifted Initialization** must be processed with the building level in context.

1. With a building in context, navigate to ***StudentInformation*** *» **Management** » **School Administration** » **EMIS** » **Gifted** » **Gifted Initialization***.
2. In the Copy From School Year: 2018-2019 ▾ select the school year to copy the Served values from.
3. In this example 18/19 is selected in the dropdown because the Served values need copied up to 19/20.

StudentInformation > Management > School Administration > EMIS > Gifted > Gifted Initialization

Gifted Initialization

Use this page to copy Student Gifted Served values from one year to another.

Copy From School Year: 2019-2020 ▾

Grade Levels to Copy:*

K - K
01 - 01
02 - 02
03 - 03

Submit   Reset Form

4. In the filter, select the grade levels in the current grade level that you would like to copy the Served values for.
5. Click **Submit**.
6. A message will display detailing how many records were updated.

The served values have been successfully copied. 0 records were created, 55 records were updated. ✕

7. Now navigate to a student's gifted record to verify the Served checkboxes were copied up to the year in context.

Student Gifted Record

From this screen, you can display, add, change and delete data pertaining to a student's gifted record.

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☑	☐	☐	☐	
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☑	☑	☑	☑	02/16/2018
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

Save   Discard Changes   Restore Default

Task 8 - Adding gifted records to new students who enter the district after the screening is administered

If you have a gifted grade level rule that has screenings on different dates, such as Math screening on 11/20/20 and Reading/Writing screening on 10/23/20, and if you run the gifted mass update for this grade level rule, the late enrollee student will be updated as follows: (a) If the student enrolls on 10/30/20, the student will receive only the screening for 11/20/20 on his gifted record; (b) If the student enrolls on 11/21/20, the student will receive a gifted record with no items checked.

1. Students who register in your district after the gifted mass updates have been processed will need to be updated. This includes students that are the same grade level of those previously screened (Grade Level Rule). Since the **Screened Date** [   ] 🗓 is required with any rules where Screening is updated, the Gifted Mass Update can be run for all the rules, both District Default and Grade Level specific rules, to add the correct gifted record for students who are late enrollees.
2. Change your context to the district level in the current school year.
3. Navigate to ***StudentInformation*** » ***Management*** » ***School Administration*** » ***EMIS*** » ***Gifted*** » ***Gifted Mass Update***.
4. In the **Gifted Rules:** dual select move all rules applicable to this year, including but not limited to **District Default** , **3rd Grade Screening Rule** , and **4th Grade Screening Rule** over to the right.
5. This will update each student who does not have a gifted record with the appropriate gifted record for their grade level.
6. Leave the **Overwrite Existing Student Gifted records:** [ ] checkbox unchecked because we don't want to overwrite any records that were previously added or updated. If this item is checked, all manual updates for screening and assessed values will be overwritten.
7. Keep the **Display results:** ✔ box checked.
8. Click **Submit** .
9. The screen will flash, and the following message will display:

   The student gifted records have been successfully updated.

10. The students who had a gifted rule added will display at the bottom of the screen.

Student	Grade Level	Rule	Status
	05	Default Gifted Rule	Created
	04	4th Grade Screening Rule	Created

Appendix A
Samples of a Student's Gifted Record

1. **Create a default Gifted Rule to assign to all students in the district that are not being screened** (Task 1).
   a. A default gifted record appears as follows

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☐	☐	☐	☐	
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☐	☐	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

2. **3rd Grade Screening tests are administered to all 3rd graders in the district.** (Task 3)
   a. Screening shows student was screened in a specific area.

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☑	☐	☐	☐	
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☑	☐	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

   b. Through Screening, students shown to need additional assessment in an area, and said assessment is performed, are then manually updated on the student's gifted record. (Task 4)

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☑	☐	☐	☐	
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☑	☑	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

3. Students identified as gifted.

a. Assessment process indicated the student is gifted. Manually update the student's gifted record, check Identified and enter an Identified Date. (Task 5)

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☑	☑	☑	☐	11/15/2015
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☑	☐	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

4. Does your district provide gifted services?

a. If the district doesn't provide gifted services, then no further action is needed.

b. If the district does provide gifted services, check Served on the Student's gifted record who is receiving said services. (Task 6)

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☑	☑	☑	☑	11/15/2015
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☑	☑	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

5. Students without a gifted record.

a. Students who have not received a gifted record will display the gifted record as follows:

Student Gifted Record

From this screen, you can display, add, change and delete data pertaining to a student's gifted record.
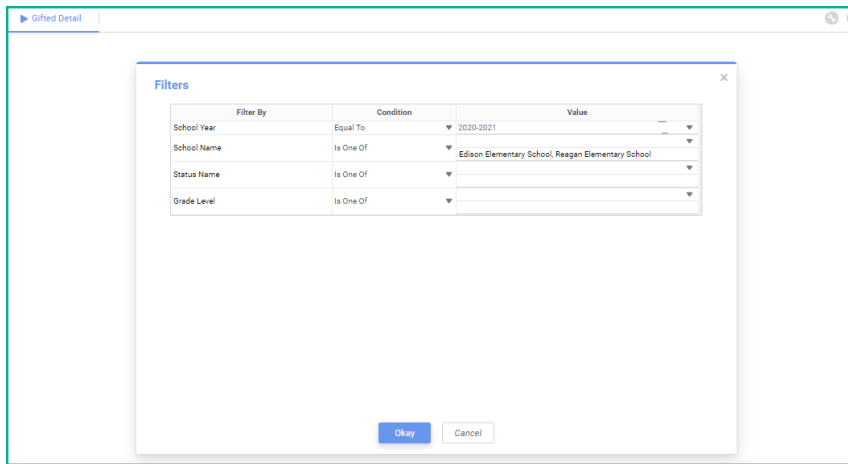
This student does not have an existing gifted record for this school year ✕

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	☐	☐	☐	☐	
Specific Academic Ability - Math	☐	☐	☐	☐	
Specific Academic Ability - Science	☐	☐	☐	☐	
Specific Academic Ability - Reading/Writing	☐	☐	☐	☐	
Specific Academic Ability - Social Studies	☐	☐	☐	☐	
Creative Thinking Ability	☐	☐	☐	☐	
Visual/Performing Arts	☐	☐	☐	☐	

Save   Cancel

Appendix B
Gifted Reports

1. AdHoc – Gifted Detail

StudentInformation > Local > Analytics Hub   ∨EMIS

The gifted updates must be run prior to running this report to pick up current year gifted data. Only students with a gifted record will be included. This report can be exported in either Excel or .csv format. It includes the School Code, Student Number, Last Name, First Name, Homeroom, Grade, Status, Identified Date, and for each of the Screened/Assessed areas it includes the Identified Date, Screening, Assessment, Identified and Served values.

2. AdHoc – Gifted Summary

StudentInformation > Local > Analytics Hub ⌄EMIS
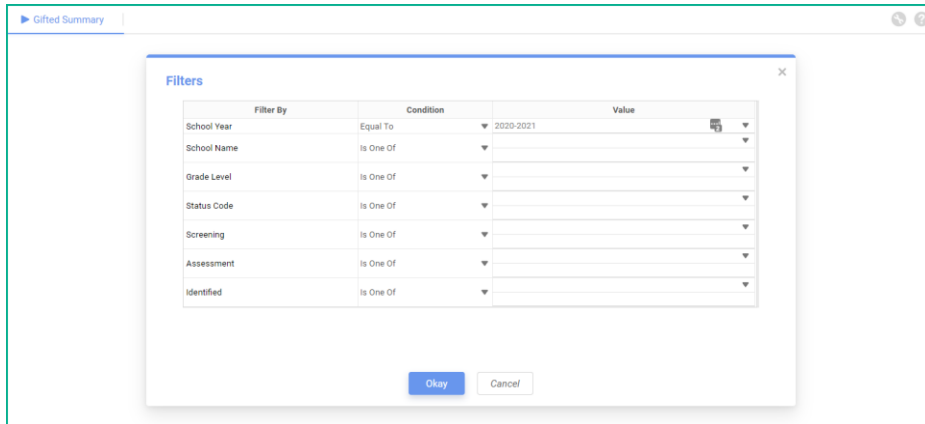
The Gifted Summary report provides summary data by student for the gifted records. You can also filter on 'Screening', 'Assessment' or 'Identified'.

3. Gifted Area Students

StudentInformation > SIS > School > Student Reports > Gifted Area Students

The Gifted Area Students report displays the selected students by gifted area, school, and grade level. It shows the identified date and served flag for each gifted area that was selected. The output is grouped by school, and grade level. Subtotals on the report included totals by grade level, school, and by gifted area. Detail output on the report includes student number, student name, gender, ethnicity, FTE, identified date, and served flag for each gifted area.

4. Gifted Student Courses

StudentInformation > SIS > School > Student Reports > Gifted Student Courses

The Gifted Student Courses report displays the courses (schedule) for the selected students along with the gifted area flags. Sorting options include student name, grade, or teacher/homeroom. Grouping options include homeroom, teacher, or grade level. Detail output on the report includes student name, student number, gifted area flags, course name, course section, credits, teacher, meeting time, EMIS Subject Code, and Core Subject Area. The total student credits are also displayed.

This report is run at the school level.

Report: Gifted Student Courses   ELEMENTARY
Printed Fri, Aug 21,   11:08 AM

Gifted Student Courses

Student Name	Student Number	Grade	Homeroom
		03	3B

Student Gifted Areas:	Cognitive	Math	Science	Reading/Writing	Social Studies	Creative Thinking	Visual/Performing Arts
	N	N	N	Y	N	N	N

Course Name	Course Section	Credits	Teacher	Meeting Time	EMIS Subject Code	Core Subject Area
HANDWRITING 3	316-32	0.00		1 (3B)	050152	
SOCIAL STUDIES 3	350-32	0.00		1 (3B)	151209	
ADMIN 3	ADMIN 3-32	0.00		1 (3B)		
SCIENCE 3	340-32	0.00		1 (3B)	132110	
MATHEMATICS 3	320-32	0.00		2 (3B)	110003	
Music 3	MUSIC3-32	0.00		2 (3B)	122000	
WORD STUDY 3	314-32	0.00		2 (3B)	050152	
Physical Education 3	PE3-32	0.00		2 (3B)	080300	
Art 3	ART3-32	0.00		E2 (3B)	020012	
WRITING 3	312-32	0.00		2 (3B)	050152	
READING 3	310-32	0.00		3 (3B)	050152	
WORK HABITS/SOCIAL SKILLS 3	WH/SS 3-32	0.00		3 (3B)		
LUNCH	LUNCH-3	0.00		L3 (CAF)		

Student Total Credits: 0.00

5. Gifted Student Detail Report

StudentInformation > SIS > School > Student Reports > Gifted Student Detail Report

The Gifted Student Detail Report displays the detailed gifted area information for each student selected. Sorting options include student name, grade, or teacher/homeroom. Grouping options include homeroom, teacher, or grade level. Detail output on the report includes student name, student number, grade, ethnicity, disability condition, gifted area and screen, assessed, identified, served, and identified date for each gifted area.

This report is run at the school level.

Report: Gifted Student Detail
Printed Fri, Aug 21, , 11:17 AM

ELEMENTARY

Gifted Student Detail

Student	Student Number	Grade	Ethnicity	Disability Condition		Homeroom
		03	White	**		3B
Gifted Area	Screened	Assessed	Identified	Served		Identified Date
Reading/Writing	N	N	Y	N		11/9/2018

Student	Student Number	Grade	Ethnicity	Disability Condition		Homeroom
		03	White	05		3A
Gifted Area	Screened	Assessed	Identified	Served		Identified Date
Math	N	N	Y	N		11/9/2018
Reading/Writing	N	N	Y	N		11/9/2018

Student	Student Number	Grade	Ethnicity	Disability Condition		Homeroom
		03	White	**		3A
Gifted Area	Screened	Assessed	Identified	Served		Identified Date
Reading/Writing	N	N	Y	N		11/9/2018

6. Gifted Students Missing Records

`StudentInformation > SIS > School > Student Reports > Gifted Students Missing Records`

The Gifted Students Missing Records report displays a list of students who are missing a gifted record. Sorting options include student name, grade level, ethnicity, and sent to IRN. Detail output on the report includes school code, school name, school IRN, student name, student number, grade, gender, ethnicity, FTE, sent to IRN, admission date, and withdrawal date. The Gifted Students Missing Records report will return all students who are missing a yearly gifted record, whether they have identified data or not.

This report can be run at the district or school level.

Report: Gifted Students Missing							East Holmes Local Schools		
Printed Fri, Aug 21, 11:29 AM									
							Gifted Students Missing Records		
School Code:		School Name:					IRN:		
Name	Student Number	Grade	Gender	Ethnicity	FTE	Sent To IRN	Admission Date	Withdrawal Date	
		02	F	White	100	******	8/1/2020		
		02	F	White	100	******	8/1/2020		

Master & Sub-calendar Maintenance including EMIS Exceptions

Change Log

Date	Section Number/Name	Change Description
8/12/21		Updates for FY22
9/4/20	Snow Days – How to enter Snow Days that occur on a reporting term start date; Snow Days - How to enter Snow Days or other non-attending days after the master calendar has been created that change course term start and stop dates	Note added to update the Master Calendar when required
8/28/20	DN Calendar Attributes including EMIS Exceptions; Snow Days	Updates for the appropriate EMIS Exceptions (EMIS Manual Updates 8/13/20)
8/13/20		Updates following Webinar
8/12/20		Updates for FY21

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Covid-19 Calendar Adjustments for FY22

At the present time ODE has advised that for districts/buildings that have hybrid or blended learning for FY22, the calendar itself should be no different than in the past. At this time there is no distinction on a calendar whether the students are attending face-to-face instruction, online instruction or a combination of the two. The calendars should be set up as they have been in the past.

Master Calendar

- The Master Calendar details each day a school is in session or not in session. It is the general calendar that districts adopt for the school year, however, it is not necessarily the calendar a student's attendance is tracked against. Any non-attending day on the Master Calendar also appears on each sub-calendar automatically. However, the building has the ability to change a day from a non-attending day to an attending day on a sub-calendar. This change should be applied only to the sub-calendar(s) where it is applicable.
- The Master Calendar is created when Calendar Wizard is run at the building level. See "School Year Initialization Step by Step" for additional information on Calendar Wizard.
- The attendance module uses the Sub-calendars to validate that the day is a school day. This allows attendance to be taken for dates outside of the master calendar.
- All sub-calendars initially match the master calendar until a day is changed.
- Each building in a district will have its own unique Master Calendar as well as sub-calendars to cover unique situations. If a district has five (5) buildings, there would be a unique Master Calendar in each building. For example, the district may require the high school students to attend the day before Thanksgiving, but the elementary and middle school students have the day off because of Parent Teacher Conferences. Having a separate Master Calendar in each building allows for this and other scenarios.
- The **Master Calendar is *not* used to create and report EMIS exceptions**. These are created and reported on the Sub-calendars.

Sub-calendars
- Sub-calendars are used to report attendance patterns for students and define what days students are in attendance.
- Sub-calendars may start or stop earlier or later than the master calendar start and end dates. Attendance can be taken for students on sub-calendars where the start date is earlier than the master calendar start date and where the end date is later than the master calendar end date.
- Each school will have at least two sub-calendars:
    - **Default calendar** – the main attending calendar the majority of students follow for attendance
    - **Non-attending calendar** – the calendar assigned to students attending elsewhere full time. This calendar has no attending days.
- Additional sub-calendars should be created for any group of students where their attending days differ from the default sub-calendar, some examples are as follows:

- Kindergarten students who attend only in the morning or in the afternoon
- Seniors whose last day is earlier than the rest of the grade levels
- Students attending other districts where the resident district is still responsible for reporting their EMIS attendance (ESC classes, etc.)
- Preschool students who attend only a couple days a week
- Before school starts, each sub-calendar will need to be edited and EMIS exceptions added for any days out, lengthened or shortened.

Defining Attendance Patterns

Attendance Pattern Codes are a unique code used to tie students to an individual attending calendar. Each district is required to define a set of attendance patterns to be used across the district. **Each attendance pattern should only be used once per building.** Attendance patterns defined last year are copied up to the current year during the school year initialization process. Make any necessary additions or deletions for the current school year. If you need to add new attendance pattern codes, there are several factors to keep in mind when defining attendance pattern code values:

- Only one attendance pattern may be designated as the Default value for all grade levels (**) on the building's default calendar. It is recommended that each attendance pattern only be assigned to one EMIS reportable calendar in each building but may be used in multiple buildings. If you choose to assign an attendance pattern to more than one calendar in the same building, the grade levels associated with the sub-calendar must be different. (**Note: If you have multiple buildings in your district with the same building IRN, you must use different attendance patterns at each building – especially if both buildings have the same grade levels).**
- If there is a chance a group of students may have different attendance days than other students, a separate attendance pattern is needed
- Each attendance pattern may represent students in multiple grade levels
- When multiple grade levels are specified, a separate calendar will be created in the EMIS transfer file per grade level/attendance pattern combination

With the district in context, navigate to **StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance**. Initially, all previously used Attendance Pattern codes from last year will display. Add and/or Inactivate codes as needed to define the set of codes to be used for all buildings.

The following example provides a separate pattern for seniors, AM or PM only calendars, Kindergarten Late/Staggered Start and an Alternative Schedule.

Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

Add Attendance Pattern

	Attendance Pattern ▲	Attendance Pattern Description	Is Active
🔒	**	Not Applicable	🟢
✏	12	Seniors	🟢
✏	AM	PS AM Attendance	🟢
✏	AS	Alternative Schedule	🟢
✏	KL	KG Late start	🟢
✏	MW	MON/WED	🟢
✏	NA	Non Attending	🟢
✏	PM	PS Afternoon	🟢
✏	TT	TUES/THURS	🟢

☑ Show Active Only

1. With the district in context, navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***EMIS*** *»* ***Attendance Pattern Maintenance***.
   a. Add an attendance pattern by clicking **Add Attendance Pattern**.
   b. Type in a **Code** that makes sense to you and your district.
   c. AM is used as the code in the example following this step by step for the pattern assigned to students who attend mornings only.
   d. Next give the **Attendance Pattern Description** a **Name** that represents the group. **Note: Attendance Pattern Name is required!**
   e. Make sure the **Is Active** checkbox is checked. Attendance patterns that do not have this box checked will not be available on Sub-calendar Maintenance.
   f. Click **Save**.
   g. See the example screenshot below this step by step.

Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

Attendance Pattern Code:	AM
Attendance Pattern Description:	PS AM Attendance
Is Active:	☑

Save   Cancel

Inactivate any attendance patterns that will not be used.   If you don't want any building to use an existing attendance pattern code, make it inactive so there is no chance it can be used. If an Attendance pattern is already assigned to a sub-calendar, do not inactivate it until you have assigned another attendance pattern to the calendar.

Non-attending days

- Non-attending days are days school is not in session or students are not expected to be in attendance.
- By default, Master Calendar non-attending days will exist on the sub-calendars, however, additional non-attending days may be added. If the non-attending day isn't applicable to the sub-calendar, it may be changed on the sub-calendar to an attending day.

Exceptions

- **Calendar Exceptions** – Days that the sub-calendar may have a 'non-attending' day, lengthened or shortened day while the master calendar is still a regular attending day. Calendar exceptions need to be defined on each sub-calendar. This indicates whether attendance can be taken for the day or not. In most cases, if you have a Calendar Exception, you must also have an EMIS Exception.
- **EMIS Exceptions** - EMIS exceptions create attribute records which represent days where the student's school day schedule has been modified. Attributes indicate the reason school was not in session, or if they are and the day is shortened or lengthened, it designates the reason for the modification.

Calendar Dates Wizard

- **Purpose:** The calendar dates wizard is used to alter the master calendar from when it was originally created. An example of where a modification would be needed is a change due to excessive snow days which ultimately causes a change in course term start and end dates, or corrections to the calendar. Changes made by Calendar Dates Wizard to the master calendar affects sub-calendars as well.
- When the stop date is modified for a term, the start date for the next sequential term is also adjusted in Teacher History for the course section. For example, if the stop date for the second nine-week reporting period is 1/13/22 and you set it to 1/14/22 the start date for the next nine week reporting period will be set to 1/17/22 (the next school day after the stop date of the previous period).
- **EMIS Exceptions**: Calendar Dates Wizard does not create EMIS exceptions when an event is added.
- **Teacher History:** Calendar Dates Wizard updates the Teacher History for course sections when the school boundary start or end date is modified on the Calendar Boundaries tab and the term stop date is modified for a term on the Schedule Term Dates tab.

Period C: Calendar Reporting Requirements

Period C is the Calendar Reporting Period. During this period, districts report detailed calendar information for each building and group of students who have a unique attendance pattern or calendar days for which the group of students is required to attend. Each group may require a separate calendar and attendance pattern to identify and differentiate the group from other groups of students. Both DL and DN records are reported in the Calendar window.

The EMIS reporting requirements allow for district level calendar reporting, however in StudentInformation, calendars are defined at the building level. Each building has a default calendar, which applies to the majority of students in the building. The building must report any additional sub-calendars for each of the other unique attending groups. These attending groups may consist of (but are not limited to) the following groups of students:

- KG grade level students with staggered start days (KG students starting on a later day than all other regular students)
- Seniors who get out of school earlier than all other students in the building
- Students who attend another district, but your district is responsible for reporting their attendance
- Any other attending pattern where events/exceptions are neither district wide nor building wide for a particular subset of students

If all students in a building follow the same calendar, they will have an attendance pattern of '**', which is also associated with the default calendar for the building. **Only one calendar per building may have the attendance pattern set to '**'.** Students who are assigned to the building's non-attending calendar will be reported to EMIS with the default attendance pattern value. Even though they are assigned to a different calendar, ODE is only interested in the attendance pattern for any student who is actually attending. The attendance pattern for students with a district relationship = '2' or '3' will be ignored.

Any attendance pattern assigned to students who are reported to EMIS must also be associated with a calendar that is reported to EMIS except for CTE students who attend a JVS as a satellite student. If no calendar/attendance pattern combination is reported for CTE students by the career center, ODE will use the student's home school calendar to calculate enrollment (if the Location IRN on all courses the student is taking is the same). These students must still be assigned to a calendar in the career center for attendance purposes but the calendar would not be flagged as report to EMIS. See the example below:

1. Johnny is at his home school 89% of time. Johnny is a JVS Satellite student (at his home school) 11% of time. Johnny's FS at the home school shows that he is 89% of time and 11% of time to the JVS as a satellite student.
2. Johnny is enrolled at the JVS as a satellite student with 11% of time.
3. At the home school, Johnny is on the default calendar. It will be calculated with 89% of time. That calendar is on his FD Attributes tab as the reporting calendar and is marked Include in Attendance Calculation and is marked Report to EMIS.

This way his home school attendance is reported to ODE as expected on the FS record and the calendar is associated with Johnny.

4. At the JVS, Johnny is on a sub-calendar called Satellite ABC School. It will be calculated with 11% of time. That calendar is on his FD Attributes tab as the reporting calendar and is marked Include in Attendance Calculation and Report to EMIS is **UNCHECKED**. This way the attendance for this student is reported to ODE by the JVS as expected on the FS record.

5. The calendar at the JVS needs to be kept current for the EMIS Exceptions, and they should also be adding in any days the student is absent so that the attendance at the JVS is correct.

6. ODE will look at the home school calendar for this student based on the Location IRN the JVS is reporting for his courses because there wasn't a calendar Attendance Pattern at the JVS that matches the attendance pattern reported for him there.

This example does not apply to students in 'cloned buildings'.

Additionally, the FS Standing tab of the Student Profile now includes a ☑ Satellite Student flag to identify satellite students for the attendance calculator. This flag should only be checked at the **home district**, not the JVSD. When checked, students attending satellite courses in their **home district** will have attendance calculated for HB410 attendance as if they attended 100% of time in the district. However, for EMIS reporting, their attendance will be calculated according to the Percent of Time on their FS record.

A student can move from one calendar to another between the first day of school and the last day of school. When this occurs, the current FD record should be closed (a record is considered closed when a new record with a more recent date is added) and a new one opened that accurately reflects the date of the change. At this time, the calendar should also be updated on the student's General tab to reflect the correct calendar.

DL (Grade Schedule) records will be reported at the level of detail defined in the calendars. If a building has a single calendar that will be followed by every student in the building regardless of grade, then only a single building-wide DL record with the first day of school, last day of school, and hours per day is reported. For each additional sub-calendar/attendance pattern combination marked to be reported to EMIS, DL records will be created in the transfer file.

For any fiscal year, the first version of a specific school year calendar will be collected per ODE's Data Collection Calendar. At a minimum, this initial version of the calendar must include:

- A building calendar, which will apply to all students within the building - all grades and all possible groups of students, will be considered to be following this pattern.
- EMIS Exceptions for any planned days out scheduled for the upcoming school year.
- **Sub-calendars will fatal in the initial Period C Collection if they don't have at least one EMIS Exception included for that specific sub-calendar.**

Buildings are encouraged to submit all calendars in the initial calendar submission time period. If the building chooses to wait until later to incorporate additional grade level/attendance pattern specific calendars, this must be done before the first day of student reporting for that school year. Buildings may later revise the calendar to reflect situations that change the calendar as the year progresses and calendar submission windows open.

Calendar Reporting

These steps are used by the EMIS Coordinator when reporting the Calendar data.

DN Calendar Attributes including EMIS Exceptions

The following table documents the StudentInformation Calendar Day Types and their respective EMIS Exception types. When updating the EMIS Event, use this table to determine the appropriate event type for the day. These are only suggestions on which days to use. Regardless of the day type selected for a date change on the calendar, only the EMIS Event attribute will be used to report the type of day it is for Period C.

Each table entry also indicates whether hours are required to be included in the EMIS event or not. Any attribute where hours are not required, ODE assumes the day type covers all hours the day is scheduled to meet. However, if you enter hours on the event, the hours will be included in the EMIS transfer file.

There are two groups of attributes – one for Students and one for Staff. Some day types may require both a Student Attribute and a Staff Attribute to be reported for the day.

Calendar Master Day Type	Description	Student/ Staff Attr	EMIS Exception Attribute	Use	Hours Req'd
School Day	Regular School Day (not shortened or lengthened)		None	Regular School Day, ODE will use hours reported on DL record	N
Holiday	Planned Holiday	Covers Student & Staff	C_DPLANNED	Full planned day when group is not in session	0.00
Snow Day	Calamity Day	Covers Student & Staff	C_ DCMTYTKN	Full day taken for cancellations due to weather, etc.	0.00
Snow Day (with Blizzard Bag Day)	Calamity Day with Blizzard Bag Day	Covers Student & Staff	C_ DCMTYTKN C_DBLZZARD	Calamity Day If Blizzard bag day is used, hours required for Blizzard Bag Attribute	0.00 Y
Other Calamity Day (see EMIS Manual, Chapter 5.3 for complete list)	School closed all day or more than two hours for disease epidemic, hazardous weather conditions, law enforcement emergency, etc.	Covers Students	C_DCMTYTKN C_DBLZZARD	Calamity Day If Blizzard bag day is used, hours required for Blizzard Bag Attribute	0.00 Y

Calendar Master Day Type	Description	Student/ Staff Attr	EMIS Exception Attribute	Use	Hours Req'd
Non-Attending Day	Weekend day on calendar or days when students are not expected to attend		None	Not a day where groups are expected to attend	N
Calamity Make-up Day	Make-up hours added to a regular school day	Covers Student & Staff	C_HRSLNGTH	Use only if regular day is extended for make up time.	Y (hours must be more than scheduled hours)
School Half Day	Regular school day shortened not due to weather, ex. early dismissal, late start, etc.	Covers Student & Staff	C_HSHRTNOP	Use only if regular day is shortened to half day for a reason other than weather	Y (hours must be less than scheduled hours)
Religious Holiday	Planned Holiday	Covers Student & Staff	C_DPLANNED	Full planned day when group is not in session	0.00
Parent-Teacher Day	Parent/Teacher Conference Date, Students attend full day	Staff Attends full day + PT conf hours	C_PTCONFRC	Parent/teacher conference hours this day, could be full day or partial day	Y
	If School day for students is shortened for PT Conferences, an additional attribute needs to be reported	Student	C_HSHRTPLN	Hours in session for students when day is shortened for planned reasons other than weather	Y
	If students do not attend at all on this day, a planned full day attribute needs to be reported	Student	C_DPLANNED	Full planned day when group is not in session	0.00
Teacher In-Service Day	Staff Professional Meeting date, full or partial day	Staff	C_PRFLMEET	Professional Teacher Meeting hours this day	Y
	If School day for students is shortened, an additional attribute needs to be reported	Student	C_HSHRTPLN	Hours in session for students when day is shortened for planned reasons other than weather	Y

Calendar Master Day Type	Description	Student/ Staff Attr	EMIS Exception Attribute	Use	Hours Req'd
Teacher Work Day	Staff Professional Meeting date, full or partial day (IF professional development is received)	Staff	C_PRFLMEET	Professional Teacher Meeting hours this day	Y
	If School day for students is shortened, an additional attribute needs to be reported	Student	C_HSHRTPLN	Hours in session for students when day is shortened for planned reasons other than weather	Y
School Day	Day shortened due to weather, not a full attendance day	Covers Student and Staff	C_HSHRTWEA	Actual hours in session on this day;	Y (hours should always be less than the scheduled hours)
Waiver Day	Waiver Day		C_DPLANNED	Only used for IPP Waiver, no longer used for weather related days	0.00
Vacation Day	Planned school vacation day	Covers Student and Staff	C_DPLANNED	Full planned day when group is not in session	0.00
Additional Exceptions					
	For students that attend on a Sat or Sun that is not in the regular schedule and not reported via C_YWKENDXX, can be make-up days, Other	Add Exception, Select Planned Weekend Make-Up Day	C_HRSWKEND	For students that attend on a Sat or Sun that is not in the regular schedule and not reported via C_YWKENDx x, can be make-up days, Other	Add Exception, Select Planned Weekend Make-Up Day

NOTE: When an unplanned EMIS exception occurs for all sub-calendars in the building, ex. the day is cancelled due to snow, in addition to adding the EMIS Exception to the sub-calendars, remember to update the **Actual School Day Type** on the Master Calendar to reflect that school was cancelled.

Additional Calendar Attributes

The following attributes are reported when specific values are checked on Sub-calendar Maintenance in the EMIS section. These attributes have no dates associated with them. When choosing the weekday options listed below that students are "Not expected to be in attendance between the first and last day of school on every", this submits an EMIS Exception that is included in the transfer file to ODE. **It does NOT automatically mark these days as non-attending days on the sub-calendar.** This must be done by entering a Calendar Exception, which can be performed using the Calendar Bulk Exception update. These attributes are reported when the checkboxes in the following sections are checked on sub-calendar maintenance:

Attribute Name	Description	Sub-calendar Maintenance Element
C_YWKDAYMN	For students who are **not** expected to be in attendance on every **Monday** between the first and last day of school.	Not expected to be in attendance: Monday
C_YWKDAYTU	For students who are **not** expected to be in attendance on every **Tuesday** between the first and last day of school.	Not expected to be in attendance: Tuesday
C_YWKDAYWD	For students who are **not** expected to be in attendance on every **Wednesday** between the first and last day of school.	Not expected to be in attendance: Wednesday
C_YWKDAYTH	For students who are **not** expected to be in attendance on every **Thursday** between the first and last day of school.	Not expected to be in attendance: Thursday
C_YWKDAYFR	For students who are **not** expected to be in attendance on every **Friday** between the first and last day of school.	Not expected to be in attendance: Friday
C_YWKENDSA	For students who **are** expected to be in attendance on every **Saturday** between the first and last day of school	Expected to be in attendance between the first and last day of school on every: Saturday

Attribute Name	Description	Sub-calendar Maintenance Element
C_YWKENDSU	For students who **are** expected to be in attendance on every **Sunday** between the first and last day of school	Expected to be in attendance between the first and last day of school on every: Sunday
C_CLDRSPEC	ODE provides the value for districts reporting this item; very few calendars qualify; check with ODE to determine if this is needed	Exempt from Minimum Total Hours and/or Days

Add EMIS Exceptions to Sub-calendars

Calendar exception days maintained on the master calendar are not reported for each sub-calendar. EMIS Exceptions **must be added to each sub-calendar** for any calendar exception day noted on the master calendar. From that point on, all sub-calendars must be maintained individually. Only EMIS exceptions defined for the specific sub-calendar will be reported. The Calendar Exceptions Management page provides a fast and convenient way to modify sub-calendars and add EMIS exceptions.

The Calendar Bulk Exception Management page provides the ability to modify multiple calendars at the same time. If you have a snow day that affects multiple calendars in the building, the Bulk Exception Management page allows you to define the exception once and assign it to multiple calendars all in the same transaction.

Note: If students will be attending school on any day on the sub-calendar for the building that may be a snow day for others in the same building, the master calendar day type can be changed to a non-attending day. However, the buildings who have sub-calendars where the students will be attending on those days will need to update their sub-calendar to reflect it is an attending day, and remove any EMIS exception that is no longer applicable. Attendance can be taken for students on the sub-calendars for days that the sub-calendar has an attending day when the Master Calendar does not. In this scenario, the snow day EMIS exception would only be added to those calendars where students didn't attend that day. The EMIS transfer will only include the attributes created for a day on each sub-calendar. The transfer _*DOES NOT*_ look at the Calendar day type or the Master Calendar.

Adding (or Editing) a Sub-calendar

1. With the building in context, navigate to: ***StudentInformation*** *» **Management** » **School Administration** » **Scheduling Administration** » **Sub-calendars***.

2. To add a new sub-calendar, click [Add Sub-Calendar]. If editing a subcalendar, select the appropriate edit pencil.

🗑	✏	📅	👥	GR	GR - Seniors	1.00	🟢
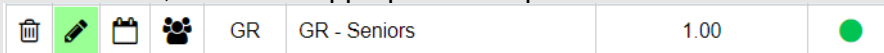
a. **Code**: Select a code up to 4 characters that makes the sub-calendar recognizable to you.
b. **Name**: Choose a name that corresponds to the Code selected.
c. **Max Absence Level**: This should be Full Absence unless it is a non-attendance sub-calendar. Then the selection should be Non-Attending.
d. **Daily Start Time & Daily End Time**: If these values are different than the master calendar, fill in the fields with the correct values for the sub-calendar.
e. **Calendar Start Date & Calendar Stop Date:** If either of these dates is different than those on the Master Calendar, update them to reflect the correct date.
f. **Attendance Pattern**: Select the appropriate value from the dropdown. Each value can only be used once per building (and it's best if it is just used once per district), and the '**' value should be used for the default sub-calendar in each building.
g. **All Grade Levels**: Only check the All Grade Levels for the default sub-calendar in each building (if applicable). For other sub-calendars, move the appropriate grade levels over to the right dual select box.
h. **To Be Reported**: Days or Hours. Most every district should be using Hours now unless their district still has a contract for 'days'.
i. **Hours Per Day**: This value should be the number of hours the building is open for education, and should not include the time for lunch.
j. **Exempt from Minimum Total Hours and/or Days:** Insert code from ODE, if applicable.
k. **Ignore Percent of Time in Attendance Calculation:** Check the box if you do not want the Attendance Calculation to utilize the Percent of Time on the student's FS Standing tab of the Edit Profile.
l. **Include in Attendance Calculation:** Uncheck the box if you do not want this calendar to be included in the Attendance Calculations.
m. **Date of Spring Administration – Math Test**: This field is obsolete. Ignore.
n. **Not expected to be in attendance between the first and last day of school on every**: Check any box where students on this calendar will never attend on a specific day.
o. **Expected to be in attendance between the first and last day of school on every:** Check any box where students on this calendar will be expected to attend on a weekend day on a regular basis.
p. **Report to EMIS:** Check this box for each subcalendar that should be reported to EMIS.

Save

q. **Once updates are complete,** **Save** the sub-calendar.

Any student assigned to this sub-calendar will now show the Attendance pattern associated with this calendar on their current FD record.

Repeat the steps listed above for each sub-calendar in each building that is to be reported to EMIS.

Creating EMIS Exception Days

For EMIS reporting, you will need to create exception days for days either inside or outside of the normal school calendar. All exceptions can now be updated from the Calendar Exceptions Management Page or the Calendar Bulk Exception Management Page, which allows you to update multiple calendars in the same transaction.

The Calendar Exceptions Management page may be accessed at the district or building level. With the district in context, you can select any calendar in any building in the district.
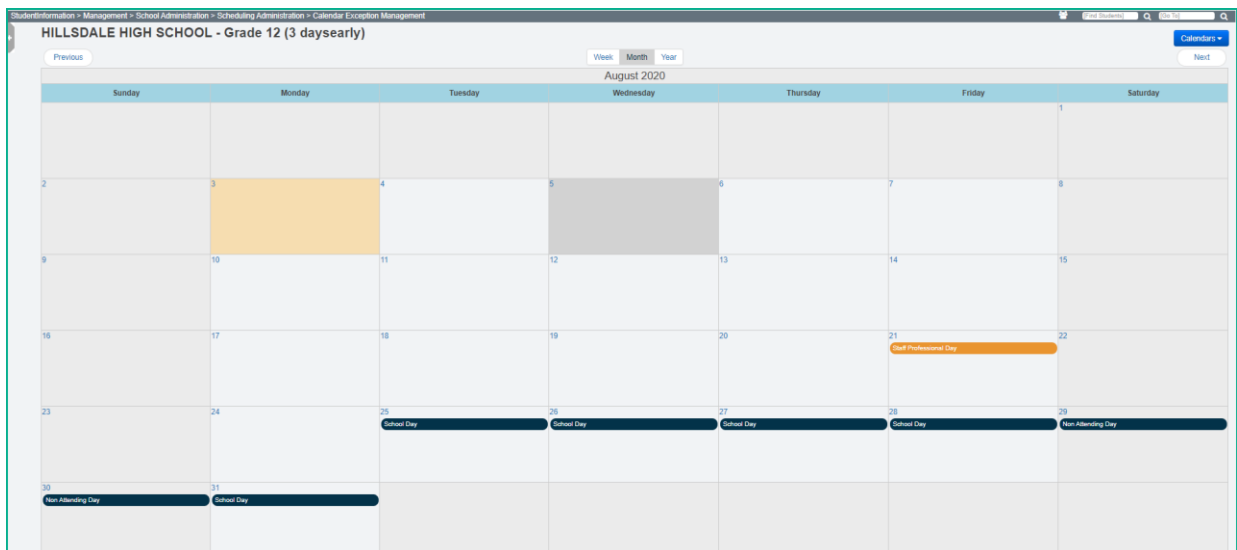
An event may be added or updated by clicking on the day on the calendar display. A separate page will display allowing you to complete the addition or update for that day. Multiple EMIS exceptions may be added to the day. The calendar Actual day type, Arrival and Departure Times, Periods of the Day, and Bell Schedules may also be adjusted through the calendar exception management page.

When adding EMIS exceptions, multiple exceptions may be entered on the same day. Select the exception type, enter the Hours (if hours are to be reported as 0.00, you must still enter the 0.00 hours value). When you click on a day, the following window is displayed:

08/27/2020

Sub Calendar Day

The **Sub Calendar Day Type** is used to override the Master Calendar Actual Day Type. This means that if the Master Calendar Actual Day Type changes, the **Sub Calendar Day Type** specified here is still used.

Enter a Daily **Start Time** and/or Daily **Stop Time** to override the current Sub-Calendar's or Master Calendar's start (7:55 AM) and stop (3:00 PM) time(s).

Master Calendar Day Type:	*School Day*
Sub Calendar Day Type:	Use Master Calendar Day Type ▾
Daily Start Time:	10 AM ⊙
Daily Stop Time:	⊙
Periods of the Day:	☐1 ☐2 ☐3 ☐5 ☐LA ☐LB ☐7 ☐8

> If the start or stop time is changed due to the EMIS Exception update the times here

State Reporting Exception(s)

🗑 Weather Related Shortened Day ▾   4.5

➕

Save   Cancel

To add an exception to a calendar day:
1. With the district or building in context, navigate to: ***StudentInformation » EMIS » Calendar Reporting Collection (C) » Calendar Exception Management.*** If you don't have access to EMIS but have access to scheduling, you may also access the page at ***StudentInformation » Management » School Administration >> Scheduling Administration > Calendar Exception Management.***
   a. Select a Calendar from the dropdown.

   Please Select A Calendar. **Calendars ▾**

   All calendars in the district will be listed by building. First select the building, and then the calendar for the building you're working with.
   b. Select the ***Date*** for the Exception by clicking on the date. Dates may be either inside or outside the school calendar.
   c. If the Actual day type needs to be changed from a School day to another type of day, select the appropriate value from the ***Sub-calendar Day***

Type dropdown.

   d. Update the Arrival or Departure time if day is lengthened or shortened.
   e. If the change is only for specific periods of the day, check the periods of the day that apply.
   f. To add the EMIS exception, click the ⊕ at the bottom of the State Reporting Exception(s) box. Select the Exception Day type from the dropdown, enter the hours for the exception even if the hours = 0.00.
   g. Click **Save**.

Days with exceptions are easily visible on the calendar.
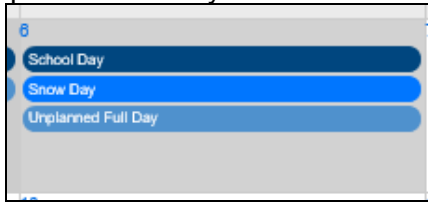
Day types and exceptions are color coded so that you can easily tell if the entry is for the master calendar day type, Actual Day, EMIS Student Exception or Staff Exception. See the key at the bottom of the calendar page to select which types of events you wish to display on the calendar.
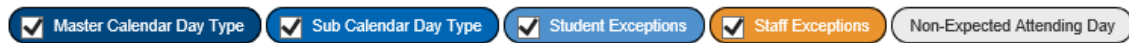
Additional display options at the top of the calendar provide the ability to change your display from a Week View, Month View or Year View. In addition, [Previous] and [Next] options allow you to scroll from month to month and back for all months defined in your school year.

Note: When adding EMIS exceptions for days outside of the master calendar, you will only be able to add EMIS exceptions since the Calendar day type is **NOT** a school day on the calendar. Any EMIS Exceptions added outside of the calendar start/end dates will be included in the EMIS transfer file, and attendance can be taken for students on those days.

NOTE: If a subcalendar has a start date prior to the beginning of the Master Calendar, the designation of 'school day' will not appear on the calendar. However, you can still add EMIS Exceptions for them, and enter absences for students on those dates.

The display would be similar to this:
Master Calendar start = 8/9/21; Junior Calendar Start = 8/2/21
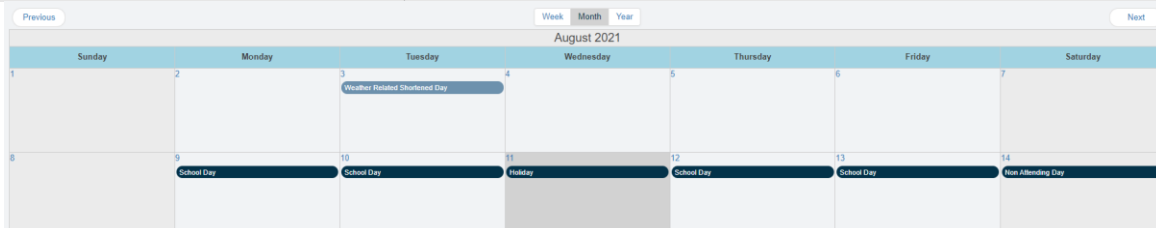
Creating EMIS Exception Days using the Calendar Bulk Exception Management Page

Use the Calendar Bulk Exception Management page to add EMIS exceptions to multiple calendars for the same date. When accessed at the district level, calendars from buildings throughout the district may be modified at the same time.

The Bulk page presents a different view than the calendar Exceptions page.
The page consists of four areas to update details.

1. **Sub-calendar Day –** this section provides the ability to change the type of calendar day the day reflects. For example, if the day was a school day but now it's a snow day, select the proper Sub Calendar Day type from the dropdown to change the day on selected calendars.

2. **State Reporting Exception(s)** – this section provides the ability to add, update or remove any EMIS exceptions for the selected days and calendars. Select the EMIS exception type from the dropdown and specify the hours for the exception.

3. Day(s) – this section provides the ability to select the calendar dates you wish to add exceptions to. You can select multiple days to update. Each day selected will appear in a box on the right as Added Days to apply the changes to. Click **⊕ Add Days** to begin selecting dates to update.

Once days are selected, they will appear in the Day(s) section.

4. Calendar(s) – use this section to select all calendars you wish to apply the changes to. Multiple calendars may be selected from each building. If you select the checkbox beside the school name, all calendars for that school will be selected. Leave it unchecked if you wish to select individual calendars from each building.

5. Once all selections have been made, click **Save** at the bottom of the page to save your changes.

Sub-calendar Examples

This section defines different scenarios for calendars that may be needed in a building. This is not an all-inclusive list, but each example may be used as a template for another calendar you may need.

When creating a sub-calendar, you are making a copy of the master calendar. Each Calendar day is associated with the master calendar until you add a sub-calendar exception and choose to disassociate the day from the master by selecting a day type which differs from the day type on the master calendar for the day (This disassociation also occurs when you select a different Day Type when using the Calendar Exception or Calendar Bulk Exception pages):

Once the day has been disassociated from the Master Calendar, when you edit the sub-calendar days, the disassociated day will appear with the edit pencil. This means that changes made for this date on the master calendar will not trickle down to this calendar. (This applies to day types only, no EMIS exceptions are located on the Master Calendar). Any other day associated with the master where no exception exists will still be updated when the master calendar day is updated.

Non-attending Calendar (DNAC)

1. Navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Sub-calendars***.
   a. Add a non-attending sub-calendar by clicking **Add Sub-calendar**.
   b. Type in a **Code** that makes sense to you and your school.
   c. DNAC is used as the code in the example following this step by step.
   d. Next give the sub-calendar a **Name** that makes sense to you and your school.
   e. Select the **Max Absence Level** from the dropdown. Since we are creating the non-attending calendar, choose ***Non-attending.***
   f. Uncheck the Report to EMIS checkbox for non-attending calendars.
   g. Complete the rest of the values on the page under the EMIS tab.
   h. Click **Save**.
   i. See the example screenshot below this step by step.

General

Code:*	DNAC
Name:*	Default Non-attending Calendar
Max Absence Level:*	Non-attending
Daily Start Time:		Enter a **Daily Start Time** and/or **Daily Stop Time** to override the current Master Calendar's start (7:40 AM) and stop (2:25 PM) time(s).
Daily Stop Time:		If you do not enter a value, the **Daily Start Time** and/or **Daily Stop Time** field(s) uses the value entered on the Master Calendar.
Is Active:	✓	

Half (1/2) Day Calendar

1. Navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Sub-calendars***.
2. Each sub-calendar you had in the prior year should have copied to the future year during SYI.
3. The Code, Name, and Max Absence Level get copied from the master calendar. The actual exceptions do not copy.
4. Be sure to update the Daily Start Time & Daily End Time if they are different than the values on the Master Calendar.
5. You'll notice the first calendar has a lock. This is the default calendar or the copy of the master calendar. Different schools call it different names. In the example screenshot following this step by step, the default or master calendar is called 1.
6. The other sub-calendars will not have locks.
7. When setting up the half day calendar, the Hours Per Day field should be the **total number of hours** in a regular school day. If all other students in the building attend 6 hours per day, then the Hours Per Day for a half day calendar should be 6, even if the students on this calendar attend only 50% of the time.
8. Click on the ✎ icon of one of the calendars that isn't locked. The Max Absence Level is no longer used in the attendance/absence calculations, so the value can be left at Full Absence.
9. Once I click on the 📅 icon I'm brought to the ***Sub-calendar Days*** page.
   a. You'll notice everyday has a lock on it. This means that each day is the same day type as the master calendar. The day types for each day in the calendar can also be viewed on the Calendar Exceptions Management Page.
   b. The locks mean the sub-calendar **wasn't** disassociated from the master calendar. Since the sub-calendar wasn't disassociated, anytime you change a day on the master calendar it automatically changes the day on the sub-calendar.
   c. An example would be if December 15th became a ***Snow Day*** instead of a ***School Day***. If you change December 15th to a ***Snow Day*** on the master calendar it will automatically change December 15th to a ***Snow Day*** on all sub-calendars.
   d. StudentInformation gives you the option of making everyday on the ½ day sub-calendar an actual ½ day. This step isn't necessary, but can be done. Right now the ***Day Type*** column matches the master calendar and says ***School Day***.
   e. To change each ***Day Type*** to a ***School Half-Day*** instead of ***School Day*** to better reflect the actual day type, click ***Create Exception(s)***.
   f. The ***Day Type*** dropdown is currently defaulting to ***Use Master Calendar Actual Day Type***.
   g. Since we are editing the ½ day calendar, change the ***Day Type*** to ***School Half-Day***.
   h. Click ***Recurring Pattern***.
   i. The screen will refresh.
   j. In the ***Begin*** field type in the first day of school and the last day of school since everyday during the school year will be a ***School Half-Day***.
   k. Check the appropriate ***Days of the Week***. In the example following this step by step M, T, W, R, F are checked.
   l. Put a checkmark in ***Replace Existing Exceptions***.

m. Click Save.

10. You will receive the following message:

<div style="border:1px solid #c0a000; background:#fdf3c9; text-align:center; color:green; font-weight:bold; padding:6px;">The pattern was applied. 99 calendar days were updated.</div>

11. Since the days have pencils instead of locks, I can tell this sub-calendar was disassociated from the master calendar. August 27, in the example below has been disassociated from the master calendar.

		Date ▲	Rotation Day	Time	Day Type
🔒	🔒	Sep 02, 2021	Thursday		School Day
🔒	🔒	Sep 03, 2021	Friday		School Day
🔒	🔒	Sep 04, 2021			Non Attending Day
🔒	🔒	Sep 05, 2021			Non Attending Day
🔒	🔒	Sep 06, 2021			Non Attending Day
🔒	🔒	Sep 07, 2021	Tuesday		School Day
🗑	✏	Sep 08, 2021	Wednesday	1, 2, 3	School Half-Day
🔒	🔒	Sep 09, 2021	Thursday		School Day
🔒	🔒	Sep 10, 2021	Friday		School Day

12. If you would change a school day to a Snow Day on the master calendar, the day wouldn't automatically update to a Snow Day on the sub-calendar since the sub-calendar had been disassociated.

EMIS Settings

For any calendar day that has been updated, add the EMIS exception to this calendar day using either the Calendar Exception Management or the Calendar Bulk Exception Management.

EMIS Exceptions

When entering EMIS Exceptions for calendars that are 'half-day' students only, the amount of time attended on the exception needs to be doubled in order for the student to get the full amount of attendance.

Ex. If the students are on a subcalendar whereby the 'Hours' value reported is 6, and the students attend from 9 a.m. to noon each day (3 hours), if school is delayed for two hours which provides one hour of attendance for them, and an Unplanned Shortened Day EMIS exception is entered for this half day calendar, districts will want to enter the exception with a value of 2 hours of attendance instead of one hour of attendance. This allows the student's 50% of time to calculate as expected in the attendance calculation, and the student's time attended will be one (1) hour.

Staggered Start KG Calendar

For KG Students, whose first day of school is later than the first day of school on the regular calendar, it is necessary to create a different calendar for this group of students. (If you have AM only and PM only students, separate calendars should be created for these groups as well.) Be sure to update the start and stop dates on these sub-calendars to the actual dates these students are expected to be in school. Follow these steps to set up the sub-calendar:

1. Navigate to: ***StudentInformation*** *» **Management** » **School Administration** » **Scheduling Administration** » **Sub-calendars***.
   a. Add a sub-calendar by clicking ***Add Sub-calendar***.
   b. **General Section:** Type in a *Code* that makes sense to you and your school.
   c. Next give the sub-calendar a *Name* that briefly describes the calendar.
   d. The *Max Absence Level* value can remain at Full Absence as it is no longer included in the attendance calculations.
   e. Since this is a PM calendar update the start and stop times to reflect the actual start and stop times these students are expected to be in attendance.
   f. Make sure Is *Active* is checked.

EMIS Section:
2. Enter the start date for the calendar.
3. Enter the end date for the calendar.
4. From the Attendance Pattern dropdown, select the attendance pattern to report for students assigned to this calendar. (Each KG calendar will need a different attendance pattern.)
5. Select the Grade levels to be assigned to his calendar. If this is not the default calendar for the building, do not check the 'all grades' checkbox.
6. Select Days or Hours from the 'To be reported' selection.
7. Enter the number of hours per day. If students attend only a half a day, enter the hours for a full day calendar. The student's Percent of Time will be used to adjust attending hours in attendance and enrollment calculations.
8. Leave the box blank for Exempt from Minimum Total Hours and/or Days. ODE will be providing values to be used for this attribute, if required.
9. Unless this calendar is a calendar where FTE is already taken into consideration in the days of the calendar (i.e. all-day Mon, all-day Wed, half-day Fri calendar), leave 'Ignore Percent of Time in Attendance Calculation' option unchecked.

10. Check the option 'Include in Attendance Calculation' if attendance is to be calculated for students assigned to this calendar.
11. Ignore 'Date of Spring Administration – Math Test'.
12. If students are not to be in attendance on any day of the week for all weeks on the calendar, check the boxes for the appropriate days under the section **'Not Expected to be in attendance between the first and last day of school on Every:'** option.
13. If students will attend on Saturdays or Sundays every week, check the boxes for the appropriate days students will attend every week under the option **'Expected to be in attendance between the first and last day of school on every:'** option.
14. Check the checkbox for '**Report to EMIS'** if this calendar is to be included in EMIS reporting.
15. Click **Save** to save the calendar.

Alternating Attendance Day Calendar

For students who attend Monday & Tuesday full days and Wednesday morning only, it is necessary to create a separate sub-calendar for them to indicate the days they are expected to be in attendance.

1. Navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Sub-calendars***.
   a. Add a sub-calendar by clicking ***Add Sub-calendar***.
   b. Type in a ***Code*** that makes sense to you and your school.
   c. Next give the sub-calendar a ***Name*** that makes sense to you and your school.
   d. The ***Max Absence Level*** value can remain at Full Absence as it is no longer included in the attendance calculations.
   e. Since the days on this calendar start and end at different times, do not update the start and stop times.
   f. Make sure ***Is Active*** is checked.
   g. See the example screenshot below this step by step.
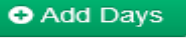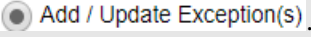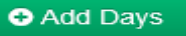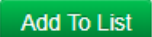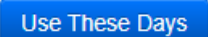

2. For this calendar, you will need to indicate which days students are not expected to be in attendance. In this scenario, students will never attend on Thursday or Friday. On the sub-calendar maintenance page, check the boxes beside Thursday and Friday to indicate students will not be in attendance. By checking these boxes, the attributes C_YWKDAYTH and C_YWKDAYFR will be reported for this calendar.

3. The next Step will be to create Calendar Exceptions to set the days off which students will never attend to non-attending days.
   a. Navigate to the Calendar Bulk Exceptions page at ***StudentInformation > Management > School Administration > Scheduling Administration > Calendar Bulk Exception Management.***
   b. Select ***Sub-calendar Day type*** of Non-Attending Day
   c. Click ⦿ Update in the first box.
   d. In the State Reporting Exception(s) box, click ⦿ No Action. Since we've

checked the boxes on the sub-calendar maintenance page to indicate students don't attend any Thursday or Friday, no additional EMIS exceptions are needed.

    e. In the Day(s) box, Click **⊕ Add Days** to begin selecting days on the calendar to apply exceptions to. For each month of the calendar, click on Thursday and Friday to add those days to the days selected box. Scroll through each month and select the days to add.

    f. In the Calendar(s) box, check the box beside the calendar(s) these exceptions apply to.

    g. Click *Save*.

    h. The Thursdays and Fridays on the sub-calendar then have the Sub-Calendar Day Type selected as Non-Attending Day.

4. The next Step will be to create EMIS Exceptions to report the half days off which students will not be attending.

    a. Navigate to the Calendar bulk Exceptions page at ***StudentInformation > Management > School Administration > Scheduling Administration > Calendar Bulk Exception Management.***

    b. Select ***Sub-calendar Day type*** of School Half-Day, and fill in the correct Daily Start Time and Daily Stop Time for the Half-Days.

    c. Click **◉ Update** in the first box.

    d. In the State Reporting Exception(s) box, click **◉ Add / Update Exception(s)**. Then click the **⊕** and enter the EMIS Exception of Planned Shortened Day with the number of hours the day will be in session.

    e. In the Day(s) box, Click **⊕ Add Days** to begin selecting days on the calendar to apply exceptions to. For each day that students will only be in attendance a Half Day (in ex., Wed mornings) choose the Recurring Days tab and select the first Wednesday of the school year as the Begin Date and the last Wednesday of the school year as the end date. Check the 'W' under Days of the Week and then click **Add To List**. The list of days will populate in the Added Days section. Be sure to remove any days which are not attending days (example over Christmas break), and once complete, click . **Use These Days**

    f. In the Calendar(s) box, check the box beside the calendar(s) these exceptions apply to.

    g. Click *Save*.

    h. The Wednesdays on the sub-calendar then have the Sub-Calendar Day Type selected as School-Half Day with an EMIS Exception indicating the day is only in session for half a day.

Graduates – Early Release Calendar

For seniors or other students who will be released from school at the end of the school year earlier than students on the regular calendar, it is necessary to create a different calendar for this group of students.

1. Navigate to: ***StudentInformation*** *» **Management** » **School Administration** » **Scheduling Administration** » **Sub-calendars***.
   a. Add a sub-calendar by clicking ***Add Sub-calendar***.
   b. Type in a ***Code*** that makes sense to you and your school.
   c. Next give the sub-calendar a ***Name*** that makes sense to you and your school.
   d. The ***Max Absence Level*** value can remain at Full Absence as it is no longer included in the attendance calculations.
   e. If the daily start and/or stop times are different than on the Master Calendar, update them. If they are the same times as the Master Calendar they do not need to be updated.
   f. Make sure ***Is Active*** is checked.
   g. See the example screenshot below this step by step.

The next step will be to update the Calendar End Date for these calendars to the actual last day these students are expected to be in attendance. For example, if the seniors are not expected to be in attendance the last 3 days of school, you would update the Calendar End Date from 5/21/21 to 5/18/21.

EMIS

	(Current Master Calendar Start Date: 8/25/2021)
Calendar Start Date:*	08/25/2021
	(Current Master Calendar Stop Date: 5/26/2022)
Calendar End Date:*	05/20/2022

EMIS Exceptions do not need to be created for those days after the last date of the sub-calendar. ODE will not be looking for any student attendance on those days.

Preschool Calendars

The FS Standing Percent of Time field is being calculated and reported for preschool students utilizing the same methods for all other grade students. ODE wants a better understanding of the amount of time PS students are receiving instruction.

Preschool percent of time calculation is based on what a full time preschool student could attend at your district and can be calculated as follows:

NOTE: No days should be checked on the sub-calendar for preschool students when the district offers preschool all five days, even if some students only attend 2 or 3 days a week. It should be utilized if a district offers preschool less than 5 days a week, ex. PS students can only attend M-Th, then Friday would be checked as indicated below.

Not expected to be in attendance between the first and last day of school on every:
Monday: ☐
Tuesday: ☐
Wednesday: ☐
Thursday: ☐
Friday: ☑

Preschool offered 5 days per week at district

> Denominator = 6 (hours per day) x 5 (days per week)
> Student attending M-W-F AM calculates as follows:
> 9 (hours per week attended) ÷ 30 (possible hours per week) = .3 or 30%
> for percent of time field on FS Standing tab

1. Navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Sub-calendars***.
   a. Add a sub-calendar by clicking ***Add Sub-calendar***.
   b. Type in a ***Code*** that makes sense to you and your school.
   c. Next give the sub-calendar a ***Name*** that makes sense to you and your school.
   d. The ***Max Absence Level*** value can remain at Full Absence as it is no longer included in the attendance calculations.
   e. If the daily start and/or stop times are different than on the Master Calendar, update them. If they are the same times as the Master Calendar they do not need to be updated.
   f. Make sure ***Is Active*** is checked.
   g. When the Percent of Time is included in the Attendance Calculation for students attending less than 100% of time for a full day PS calendar, the attendance values will be different than expected.
2. Since the Percent of Time is based on all days that Preschool is offered in a district, the 'Not expected to be in attendance between the first and last day of school on every' boxes would not be used for any preschool sub-calendar when the district offers Preschool five days per week.
3. The next step is to create **Calendar Exceptions** to label the non-attending days on a particular sub-calendar, ex. PSAM where students attend on M/W/F while T/R are non-attending days.
   a. Navigate to the Calendar Bulk Exceptions page at

> *StudentInformation > Management > School Administration >*
> *Scheduling Administration > Calendar Bulk Exception*
> *Management.*
>
> b. Select *Sub-calendar Day type* of Non-Attending Day
> c. Click ⦿ Update in the first box.
> d. In the State Reporting Exception(s) box, click ⦿ No Action. Since the district offers PS five days per week, no EMIS Exceptions are required for the days the students do not attend.
> e. In the Day(s) box, Click ⊕ Add Days to begin selecting days on the calendar to apply exceptions to. For each month of the calendar, click on Tuesdays and Thursdays to add those days to the days selected box. Scroll through each month and select the days to add.
> f. In the Calendar(s) box, check the box beside the calendar(s) these exceptions apply to.
> g. Click *Save*.
> h. The T/R on the sub-calendar then have the Sub-Calendar Day Type selected as Non-Attending Day.

Preschool offered 4 days per week at district

> Denominator = 6 (hours per day) x 4 (days per week)
> Student attending M-W AM calculates as follows:
> 6 (hours per week attended) ÷ 24 (possible hours per week) = .25 or 25% for percent of time field on FS Standing tab

1. Navigate to: ***StudentInformation*** *» **Management** » **School Administration** » **Scheduling Administration** » **Sub-calendars***.
   - h. Add a sub-calendar by clicking *Add Sub-calendar*.
   - i. Type in a *Code* that makes sense to you and your school.
   - j. Next give the sub-calendar a *Name* that makes sense to you and your school.
   - k. The *Max Absence Level* value can remain at Full Absence as it is no longer included in the attendance calculations.
   - l. If the daily start and/or stop times are different than on the Master Calendar, update them. If they are the same times as the Master Calendar they do not need to be updated.
   - m. Make sure *Is Active* is checked.
   - n. When the Percent of Time is included in the Attendance Calculation for students attending less than 100% of time for a full day PS calendar, the attendance values will be different than expected.

2. Since the Percent of Time is based on all days that Preschool is offered in a district, the only time that the 'Not expected to be in attendance between the first and last day of school on every' boxes would be checked is if there is a day(s) during the week that Preschool is not offered. For example, preschoolers have the option of attending on M/W or T/R but Preschool is never offered on Friday for any student. In this scenario, where no preschool is offered on Friday, each Preschool sub-calendar would have the checkbox for Friday checked to indicate students never attend on Friday. By checking this box, the attribute C_YWKDAYFR will be reported for each calendar By checking these boxes, the attribute C_YWKDAYFR will be reported for this calendar. In this scenario, if some students attended only M/W or T/R, the

non-attending days would **NOT** be checked on the sub-calendar maintenance page.


```
Not expected to be in attendance between the first and last day of school on every:
Monday:                                                                  ☐
Tuesday:                                                                 ☐
Wednesday:                                                               ☐
Thursday:                                                                ☐
Friday:                                                                  ☑
```

3. The next step is to create **Calendar Exceptions** to label the non-attending days on a particular sub-calendar, ex. PSAM where students only attend on Mondays, Wednesday. They would want to add Calendar Exceptions for T/R/F as non-attending days.
Navigate to the Calendar Bulk Exceptions page at ***StudentInformation > Management > School Administration > Scheduling Administration > Calendar Bulk Exception Management.***
   - i. Select ***Sub-calendar Day type*** of Non-Attending Day
   - j. Click 🔘 Update in the first box.
   - k. In the State Reporting Exception(s) box, click 🔘 No Action . Since we've checked the boxes on the sub-calendar maintenance page to indicate students don't attend any Friday, no additional EMIS exceptions are needed. This step is also utilized for Preschool calendars for students who attend only on M/W. The Calendar Exception of Non-Attending day should be selected for those days also.
   - l. In the Day(s) box, Click ➕ Add Days to begin selecting days on the calendar to apply exceptions to. For each month of the calendar, click on Fridays to add those days to the days selected box. Scroll through each month and select the days to add.
   - m. In the Calendar(s) box, check the box beside the calendar(s) these exceptions apply to.
   - n. Click ***Save***.
   - o. The T/R/F on the sub-calendar then have the Sub-Calendar Day Type selected as Non-Attending Day.

NOTE: ODE advised that the 'Not expected to be in attendance between the first and last day of school on every' should not be used for preschool calendars if other preschool calendars are in session on a specific day. They should only be used if Preschool is not in session on that day for the entire year for any Preschool calendars. The Preschool students are funded by way of a head count. They have also advised that it is important that the Percent of Time be correct for each student. For some calendars, the attendance for students may be off a little bit when calculated. This will not affect funding.

NOTE: At the present time it will also be best to set up a separate calendar for the preschool itinerant students using the example above. Typically, these students may only attend for an hour per week, which can be set up using the same steps above, but for those itinerant student schedules instead.

Adding a sub-calendar mid-year when attending days for one grade level within a separate sub-calendar have changed

There are occasions when a new sub-calendar may need added after school has begun. A couple examples of this would be:

 (1) A building has students in grades 9, 10 and 11 on a default sub-calendar. Later in the school year, a school day is set for Juniors to take the ACT or SAT school-wide. This day will now be a non-attending day for students in grades 9 and 10; or

(2) A building has students in grades 9, 10 and 11 on a default sub-calendar. Later in the school year, it is determined that juniors will take the ACT or SAT on a Saturday, which is a non-attending day on the calendar.

For these examples, a new sub-calendar will need to be created for the juniors to reflect an attending day when the remaining students on the default sub-calendar have a non-attending day.

The referenced selections below when setting up the new sub-calendar are to create a separate calendar for all-day juniors. Depending on the situation the new sub-calendar is needed for, your values *may be different*.

1. Determine the date the Juniors will be in attendance for the test.
2. For any sub-calendar in the building assigned to students who will not be required to attend school on testing day, add an EMIS exception for ***Planned Day for 0.00 hours*** to their calendar(s).
3. Add a unique Attendance Pattern for the new sub-calendar. With the district and current school year in context, navigate to ***StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance***, click **Add Attendance Pattern** and choose an Attendance Pattern Code, Attendance Pattern Description and Save.
4. With the building and current school year in context, navigate to ***StudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendars*** and click **Add Sub-Calendar** .
5. Complete all values:
   a. **Code** – Choose short code with meaning
   b. **Name** – Name of sub-calendar
   c. **Max Absence Level** – Full (not used in attendance calculations)
   d. **Daily Start Time** – If different than the Master Calendar Start Time
   e. **Daily Stop Time** – If different than the Master Calendar Stop Time
   f. **Is Active** – Check
   g. **Calendar Start Date** – same start date as the sub-calendar students are currently on (needs to be the beginning of the school year)
   h. **Calendar End Date** – last day of attendance for this grade level
   i. **Attendance Pattern** – newly created value in Step 3 above
   j. **All grade levels** – Unchecked
   k. **Grade Levels** – Select grade 11 only
   l. **Days or Hours** – whichever is appropriate for this district

m. **Hours Per Day** – enter the number of hours per day school is in session for a full day in this building
n. **Exempt from Minimum Total Hours and/or Days** – leave blank
o. **Ignore Percent of Time in Attendance Calculation** – unchecked
p. **Include in Attendance Calculation** – checked
q. **Date of Spring Administration of Math Test** – blank
r. **Not expected to be in attendance between the first and last day of school on every** – check only if applicable
s. **Expected to be in attendance between the first and last day of school on every** – check only if applicable
t. **Report to EMIS** – checked

6. Save the sub-calendar
7. Add all EMIS Exceptions for the entire school year. This should include holidays, planned days off, parent teacher conferences, etc. Also include any snow delays or other exceptions that have occurred to date.

Assigning students to the new calendar

8. Create an Ad-Hoc Membership for the students in this grade level who need to be assigned to the new calendar. With the building and current year in context, navigate to the Student Profile Bulk Update, ***StudentInformation > Management > Ad-Hoc Updates > Student Profile Bulk Update.***
9. On the ***Select Ad-Hoc*** tab, choose the Ad-Hoc Membership created for this purpose, and click Next > .
10. On the Student record tab, check the **Attendance Calendar:** field and choose the new sub-calendar from the dropdown. Then move to the **Admission History Effective Start Date:** field and fill in with the date the change is being made or the first day of school, whichever method you choose. This will update the calendar on the General tab of the student profile as well as in Admission History.
11. Continue clicking Next > until you reach the FS-Standing & FD-Attributes-Effective Date . On this tab, fill in the **Effective Start Date:** with the same date as the one in Step 10 above. On the same tab, navigate to the **Reporting Calendar:** field and select the new sub-calendar from the dropdown. The **Attendance Pattern:** field will be populated with the attendance pattern associated with the new sub-calendar. This will add a new FD record on the Student Profile with the date of the calendar change, and update the Reporting Calendar and Attendance Pattern as of that date.
12. Complete the Student Profile Bulk Update process. When getting to the Review updates tab, verify your selections are correct and click Submit.
13. Spot check some of the students in this grade level to verify the updated records.

Snow Days - How to enter Snow Days that occur on a reporting term start date

Qtr 2 was originally slated to end Friday, January 7th. Qtr 3 starts on Monday, January 10th. Inclement weather forces the district to cancel school on Friday, January 7th, pushing back the start of Qtr. 3 until Tuesday, January 11th instead.

1. At the building level in the school year you'd like to enter a snow day navigate to: ***StudentInformation*** **»** ***Management*** **»** ***School Administration*** **»** ***School Building Administration*** **»** ***Calendar Dates Wizard***.
2. Skip to tab 3 named **Schedule Term Dates** .
3. Change Quarter 2's Stop Date to the day before you want 2nd semester to start. (01/10/22 in the example below). This sets the last day of the course term to January 11th. The first day of the 3rd quarter will now be January 12th.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

| Calendar Boundaries | Configure and Confirm Boundary Changes | Schedule Term Dates | Non-Attending Days | Master Calendar Review |

ℹ The Schedule Terms Dates tab allows users to edit the stop dates of each schedule term configured for the master calendar.
Schedule Terms are units of the calendar where course terms may be scheduled.
Schedule Term also make up the units of reporting terms.
On this screen, Schedule Terms are listed from first to last in order of their stop dates.
Some Schedule Terms have stop dates that are shared with course terms and/or reporting terms.
Schedule Terms will not have course terms listed when they do not share a stop date.
Schedule Terms will not have reporting terms listed when they do not share a stop date.

#	Reporting Terms	Course Terms	Stop Date
1.	Quarter 1		10/22/2021
2.	Quarter 2		01/10/2022
3.	Quarter 3		3/18/2022
4.	Quarter 4		5/26/2022

☑ Changes to Stop Dates are Planned

[< Back] [Next >] [Cancel]

4. Click [Next >] to move to the **Non-Attending Days** tab.
5. In the **Date:*** [   ] 📅 field enter the date of the snow day. (01/7/22 in the example above)
6. In the **Day Type:*** dropdown select [Snow Day ⌄]
7. Click [Next >] .
8. Leave the ☑ **Change in Non attending dates are Planned** checked.

Date:* [01/07/2022] 📅 Thru: [   ] 📅 Day Type:* [Snow Day ⌄] Note: [School Cancelled] ☑ Change in Non attending dates are Planned [Save]

9. Now click [Save] to add the snow day. Click Next to move to the next tab.
10. On the **Master Calendar Review** tab, click [Finish] .

Note Student Course Section Assignment Start Dates **are not** updated by the Calendar Dates Wizard. Use the **Course Section Assignment Dates page** to update student course section start dates.

StudentInformation > Management > School Administration > Scheduling Administration > Course Section Assignment Dates

EMIS Settings

For the Snow Day, an EMIS exception must be entered for all calendars where applicable. The exception may be entered for either one sub-calendar or as many sub-calendars as applicable using the Calendar Bulk Exception Management.

1. If you're just adding the exception to one calendar, at the building or district level, navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Calendar Exception Management***.
2. Locate the day to change to a snow day. Click on the day on the calendar. (If the day is also a blizzard bag day, leave the day type as a school day so that attendance may be taken.)
   a. Under the Sub Calendar Day section, select 'Snow Day' from the dropdown section.
   b. Under State Reporting Exceptions, click the ⊕ to add a new exception. Select Calamity Day from the exceptions dropdown. Enter 0.00 in the hours field.
   c. If the Calamity Day is also a Blizzard Bag Day, click the ⊕ again and select Blizzard Bag day exception. Enter the hours to count towards the Blizzard Bag Day.
   d. Click *SAVE* to save the record.

NOTE: When an unplanned EMIS exception occurs for all sub-calendars in the building, ex. the day is cancelled due to snow, and the day is **NOT** a Blizzard Bag day, in addition to adding the EMIS Exception to the sub-calendars, remember to update the **Actual School Day Type** on the Master Calendar to reflect that school was cancelled.

Snow Days - How to enter Snow Days or other non-attending days after the master calendar has been created that don't change course term start and stop dates

1. If you're just adding the exception to one calendar, at the building or district level, navigate to: ***StudentInformation*** *» **Management** » **School Administration** » **Scheduling Administration** » **Calendar Exception Management***.

2. Locate the day to change to a snow day. Click on the day on the calendar.
   a. Under the Sub Calendar Day section, select 'Snow Day' from the dropdown section. (If the day is also a blizzard bag day, leave the day type as a school day so that attendance may be taken.)
   b. Under State Reporting Exceptions, Click the ⊕ to add a new exception. Select Calamity Day from the exceptions dropdown. Enter 0.00 in the hours field.
   c. If the snow day is also a Blizzard Bag Day, click the ⊕ again and select Blizzard Bag day exception. Enter the hours to count towards the Blizzard Bag Day.
   d. Click ***SAVE*** to save the record.

NOTE: When an unplanned EMIS exception occurs for all sub-calendars in the building, ex. the day is cancelled due to snow, and the day is **NOT** a Blizzard Bag day, in addition to adding the EMIS Exception to the sub-calendars, remember to update the **Actual School Day Type** on the Master Calendar to reflect that school was cancelled.

Makeup Days - How to change a non-attending to a school day

1. At the building level in the school year you'd like change the reporting term or schedule term, navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Master Calendar***.
2. Locate the day that will be a makeup day instead of a non-attending day.

    a. Click on the ✎ icon.

    b. In the `Actual School Day Type:*` dropdown, select `School Day ▾`.

    c. In the `Actual Rotation Day:*` dropdown, select the day of the week.

    Note: If the make-up day is a weekend day, you'll need to select one of the normal days of the week to assign to the date. (*this will look like you have two days of the week with the same day but it won't matter*)

    d. The Actual Student Attendance Day Count and Actual Staff Attendance Day Count automatically update to 1.0.

    e. Ignore the `Is Fixed:` checkbox because it is not functional at this time.

    f. In the `Tumble Rotation Day Duration:` section, only select ⦿ None .

    g. In the `Add Additional Day To:` section, leave both selections unchecked.

    h. Click `Save`.

3. Next verify the `Actual Days:` count is correct.
4. Click Save.
5. If this is a full make-up day with the same number of hours as every regular school day, then nothing further is required to be done. Changing it to a School Day with no EMIS Exceptions will allow it to be counted as a regular school day. If there are EMIS Exceptions already in place on the sub-calendars for these days, the EMIS Exceptions should be removed from any sub-calendar that will now be an attending day.
6. If this day is shorter or longer than the regular school day to make up hours missed, then the appropriate EMIS Exception should be entered for the day indicating the number of hours that the students will be in attendance.

    a. Longer Day – Choose Planned Lengthened Day with the total number of hours of attendance for that day; hours must be greater than the regular day hours

    b. Shorter Day – Choose Planned Shortened Day with the total number of hours of attendance for that day; hours must be shorter than the regular day hours

    c. Weekend Make-Up Day – Choose Planned Weekend Make up Day with the total number of hours of attendance for that day

Mass Updating calendars where this added day should NOT be an attending day.

1. Now that you've made this day a school day on the master calendar, it will be a school day on all sub-calendars unless you change the day to a non-attending day on calendars where this change doesn't apply. Use the Calendar Bulk Exceptions calendar page to update all sub-calendars at the same time.

    a. Navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Calendar Bulk Exception Management***.

b. In the Sub Calendar Day box, select Non Attending Day from the dropdown for Sub Calendar Day type. Click on ⊙ Update .

c. Click ⊙ No Action in the State Reporting box as no EMIS exception will be reported for this day.

d. In the Day(s) section, click on Add Days. From the calendar, click on the weekend day you changed on the master calendar to an attending day. Click Use These Days to save the selected date.

e. In the Calendar(s) box, check the box beside each calendar where the master calendar day change does NOT apply.

f. Click *SAVE* to save the record.

Reporting Terms - How to change the last day of a reporting term or schedule term

In order to update the first day of school or a reporting term start date to a date that has already passed, you will need to be granted extra security permissions named **- Update past on calendar dates wizard** . Please contact your security administrator to verify you have needed security permissions.

1. At the building level in the current school year you'd like to change the reporting term or schedule term, navigate to: **_StudentInformation_** **»** **_Management_** **»** **_School Administration_** **»** **_School Building Administration_** **»** **_Calendar Dates Wizard_**.
2. You will be on the **_Calendar Boundaries_** tab. Do not make any changes on this tab and click **_Next_**.
3. Now you will be on the 3rd tab named **_Schedule Term Dates_**.
   a. Change the Stop Date of the corresponding Reporting Term/Schedule Term.
   b. In this example, I have chosen to change the Stop Date of Quarter 2 which will affect the Start Date of Quarter 3 or 2nd Semester only classes.


On the **_Calendar Dates Wizard_** page on tab 3 **_Schedule Term Dates,_** I am changing Quarter 2 to end Monday, January 10th instead of Friday, January 7th.
   c. This will change the Quarter 3 start date to January 11th.
   d. Leave the checkbox in **_Changes to Stop Dates are Planned_**. At this time the checkbox is not functional.
   e. Click **_Next_**.
4. Now you are on the 4th tab named **_Non-Attending Days_**, click **_Next_** to move to the last tab.
5. Your changes are now reflected on the final tab named **_Master Calendar Review_**.
   a. On the Master Calendar Review tab, you'll notice the start date of the 2nd semester only class was automatically updated with the new start date of January 11th.

6. Next, check to make sure the reporting term start and stop dates updated by navigating to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Initialization*** *»* ***Reporting Terms Maintenance***.

Reporting Terms Maintenance

From this screen, you can display and change data pertaining to reporting terms.

[Add Virtual Term] [Save Changes] [Cancel Changes]

			Code	Name	Start Date	End Date	Planned Days	Actual Days	Sort Order	EMIS Term	Marks Start Date	Marks Cutoff Date	Archive Date	Active
🔒 ✏		↓	Qtr1	Quarter 1	Aug 25, 2021	Oct 22, 2021	43.00	43.00	1					🟢
🗑 ✏	↑	↓	Wrk1	Work Habit 1			0.00	0.00	2					🟢
🔒 ✏	↑	↓	Qtr2	Quarter 2	Oct 25, 2021	Jan 10, 2022	56.00	56.00	3					🟢
🗑 ✏	↑	↓	Wrk2	Work Habit 2			0.00	0.00	4					🟢
🗑 ✏	↑	↓	Ex1	Exam 1			0.00	0.00	6					🟢
🔒 ✏	↑	↓	Qtr3	Quarter 3	Jan 11, 2022	Mar 18, 2022	49.00	49.00	7					🟢
🗑 ✏	↑	↓	Wrk3	Work Habit 3			0.00	0.00	9					🟢
🔒 ✏	↑	↓	Qtr4	Quarter 4	Mar 21, 2022	May 26, 2022	49.00	49.00	11					🟢
🗑 ✏	↑	↓	Ex2	Exam 2			0.00	0.00	12					🟢
🗑 ✏	↑	↓	Fin	Final			0.00	0.00	14					🟢
🗑 ✏	↑		PBF	PBF			0.00	0.00	15					🟢

☑ Show Active Only

7. Finally make sure the schedule term dates updated by navigating to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Initialization*** *»* ***Schedule Terms***.
8. If you encounter any issues updating the reporting term/schedule term start or stop dates, please contact your ITC or State Support.

Student Course Section Assignment Start Dates

Student Course section assignment start dates are no longer updated through the calendar dates wizard. Use the new course section Assignment Dates page to adjust any Course section assignment start or end dates necessary.

Course Section Assignment Dates

Term Code	Term Name	Start Date	Stop Date	Original CSA Start Date	Original CSA Stop Date
1SEM	1st Sem Only	8/25/2020	1/11/2021		
2SEM	2nd Sem Only	1/12/2021	5/21/2021	01/08/2021	
ALYR	All Year	8/25/2020	5/21/2021		

[Save Changes]

EMIS Updates

No EMIS Attributes need to be reported in this Scenario, however, if the change results in the extension of the school year by a day or two, the last day of school value on the Master Calendar will change and this change will be reflected on the DL record reported for each sub-calendar unless EMIS End dates have been entered.

Earlier First Day of School - How to change the first day of school to start earlier than originally planned

F.Y.I. In order to update the first day of school or a reporting term start date to a date that has already passed, you will need to be granted extra security permissions named *- Update past on calendar dates wizard* . Please contact your security administrator to verify you have needed security permissions.

1. Navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***School Building Administration*** *»* ***Calendar Dates Wizard***.
2. In the example following this step by step, the school was supposed to start on 8/9/21.
3. I have decided to change the first day to 8/5/21.
4. On the first tab named ***Calendar Boundaries*** I typed in the new ***Start Date*** of 8/19/20.
   a. Click ***Next***.
5. On the 2nd tab named ***Configure and Confirm Boundary Changes*** I have to fill in the dropdowns for each day added.
   a. Since school was originally supposed to start on Monday, 8/9/21 and I'm changing the start to Thursday, 8/5/21, I am required to enter a ***Rotation Day Type***, ***School Day Type***, ***Student Att. Day Count***, ***Staff Att. Day Count*** for each day I've added.
   b. I am matching the ***Rotation Day Type*** dropdown with the same value in the ***Day*** column which for 8/19/20 is a Wednesday.
   c. In the ***School Day Type*** dropdown for 8/19/20, I chose ***School Day***.
   d. When you change the ***School Day Type*** dropdown to ***School Day***, the ***Student Att. Day Count*** field is automatically populated with 1.00 – which is correct.
   e. Click ***Next***.
6. The 3rd tab named ***Schedule Term Dates*** lists each schedule term and reporting term. If any stop date of any reporting term or schedule term has changed due to starting the school year early, make those adjustments here.
   a. Leave the check in the box next to ***Changes to Stop Dates are Planned***.
   b. Click ***Save***.
7. On the ***Non-Attending Days*** tab, add any non-attending day that wasn't added previously if necessary.
   a. Click ***Next***.
8. Once on the ***Master Calendar Review*** page, verify your changes. You should see the new start date of school reflected on this page.
9. Now navigate to the following page to make sure the correct start is listed in the ***Start Date*** field: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Master Calendar***.
10. If any of the reporting term or schedule term stop dates were changed, navigate to the following pages to ensure the changes took: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Initialization*** *»* ***Reporting Terms Maintenance*** and ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Initialization*** *»* ***Schedule Terms***.

11. Course section assignments that already exist are no longer updated with the new first day of the term. You must use the new Course Section Assignment Dates page to update the course section assignment start dates to reflect the new date.

12. Once on the page, for each course term starting on the first day of school, enter the original first day of school in the Original CSA Start Date column. If the course term stop date is also changing, enter the original course term stop date in the Original CSA Start Date column. Any course section assignment for the course term that has the original date for the start date or stop date will be updated to the new start and/or stop date. If only one date changed (start or stop), only fill in the date for the one changing. All assignments matching the start date selected will be updated to reflect the new start date.

13. Check all sub-calendars to verify the Calendar Start Date is correct; update if needed.

Course Section Assignment Dates

Term Code	Term Name	Start Date	Stop Date	Original CSA Start Date	Original CSA Stop Date
FULL	Full Year	8/5/2021	5/26/2022	08/09/2021	
SEM1	Semester 1	8/5/2021	1/14/2022	08/09/2021	
QTR1	Quarter 1	8/5/2021	10/22/2021	08/09/2021	
QTR2	Quarter 2	10/25/2021	1/14/2022		
SEM2	Semester 2	1/17/2022	5/26/2022		
QTR3	Quarter 3	1/17/2022	3/18/2022		
QTR4	Quarter 4	3/21/2022	5/26/2022		

Save Changes

EMIS Updates

No EMIS Attributes need to be reported in this Scenario, however, if the change results in the extension of the school year by a day or two, the first day of school value on the Master Calendar will change and this change will be reflected on the DL record reported for each sub-calendar. Make sure the EMIS Start Date on sub-calendar Maintenance is still correct.

Later First Day of School - How to change the first day of school to start later than originally planned

1. Navigate to: *StudentInformation* » *Management* » *School Administration* » *School Building Administration* » *Calendar Dates Wizard*.

2. On the first tab named   Calendar Boundaries   .
   a. Enter the new 1ˢᵗ day of school.
   b. Leave the check in ☑ Change in start date is planned .
   c. Click   Next > .

3. If any of the Schedule Term Stop dates need adjusted because of the change in the first day of school, make the adjustments on the   Schedule Term Dates   tab.
   a. Click   Next > .

4. Add any new non-attending days on the   Non-Attending Days   tab.
   a. Click   Next > .

5. On the   Master Calendar Review   tab, click   Finish .

6. Next go to *Reporting Terms Maintenance*, *Schedule Terms Maintenance*, and the *Master Calendar* pages to make sure the changes saved.

7. Check all sub-calendars to verify the Calendar Start Date is correct; update if needed.

EMIS Updates

No EMIS Attributes should be reported in this Scenario, however, if the change results in the extension of the school year by a day or two, the first day of school value on the Master Calendar will change and this change will be reflected on the DL record reported for each sub-calendar. Make sure the EMIS Calendar Start Date is still correct.

Later Last Day of School - How to change the last day of school to end later than originally planned using the *Calendar Dates Wizard* page

1. In the current school year at the building level, navigate to: ***StudentInformation*** **»** ***Management*** **»** ***School Administration*** **»** ***School Building Administration*** **»** ***Calendar Dates Wizard***.
2. Enter the new last day of school in the `End Date:*` field and leave the `☑ Change in end date is planned` checked.
3. Click `Next >`.
4. In the `Rotation Day Type` dropdown for each day, select the appropriate day of the week. If the day falls on a Saturday or Sunday, leave the field blank.
5. In the `School Day Type` dropdown for each day, select `School Day`. If the day falls on a Saturday or Sunday select `School Day`.
6. Click `Next >`.
7. You will receive the following message `The boundaries have been successfully saved.`
8. Click `Next >` twice to advance to the final tab named `Master Calendar Review`.
9. Click `Finish`.
10. Navigate to the Master Calendar page and verify the last day of school was updated.
11. Check all sub-calendars to verify the Calendar End Date is correct; update if needed.

EMIS Updates

No EMIS Attributes need to be reported in this scenario, however, if the change results in the extension of the school year by a day or two, the last day of school value on the Master Calendar will change and this change will be reflected on the DL record reported for each sub-calendar. Make sure the EMIS Calendar Stop Date is still correct on Calendar Maintenance.

Only students on a particular sub-calendar attend – How to configure the calendar so day is non-attending for all students but the students assigned to a particular sub-calendar

The Master Calendar no longer has to be marked as an attending day for a sub-calendar to be marked as an attending day. The Master Calendar can have a day marked as a non-attending day, which will trickle down to each sub-calendar. Then if you have one sub-calendar where the students will be attending on that specific day, the sub-calendar can be updated so that it is an attending day. District will be able to take attendance/absences for students on that calendar.

1. At the building level, navigate to: ***StudentInformation > Management > School Administration > Scheduling Administration > Calendar Bulk Exception Management***.
   a. Navigate to the date that will be updated to be an attending day.
2. Next, modify the day on each sub-calendar where students will be attending on this day.
3. In the Sub-calendar Day type box, select School Day from the dropdown. No need to specify times or periods of the day.
4. In the State Reporting Exceptions box, click the ⊙ Remove Exception(s) to remove any exceptions for Planned Full Day.
5. In the Day(s) box, click **⊕ Add Days** to add the date(s) the change will apply to.
6. In the Calendar(s) box, select the calendars in each building the change will apply to. If the day will be applied to all calendars in a building, check the checkbox beside the school name.
7. Click **Save**. The day will become an attending day on all selected calendars with no EMIS Exceptions reported.

Adjusting a sub-calendar whose days have been lengthened for a long period of time

In the event of multiple snow days, it may be necessary to make up some of the missed time. Originally, ODE advised when a calendar was going to have lengthened days for a long period of time, it was best to set up a new calendar and switch students over to a new calendar. This resulted in a new FD record for each student affected. ODE's recommendation now is to enter each DN Lengthened day exception for the time period for the new hours on the existing calendar. This eliminates the need to create a new FD record for each student. This would result in an EMIS exception to be reported for each extended day. Use the Bulk Exception Management page to mass add EMIS exceptions to each day students will attend extended hours.

1. At the building level, navigate to: ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Calendar Bulk Exception***.
   a. In the first box, Select ⊙ No Action. Since we are modifying existing calendar days, no sub calendar day types will be changing.
2. In the State Reporting Exception(s) block, click the ✚ to add an exception. Since we're lengthening days on the calendar to the same length, only one exception needs to be added. Select **Planned Lengthened Day** from the dropdown. Fill in the hours for the total hours each day will meet. The hours should be greater than the hours per day defined on the sub-calendar.
3. Select ⊙ Add / Update Exception(s)
4. In the Day(s) block, click on ✚ Add Days. Click on each day on the calendar that needs to be lengthened. Once you've selected all the days to add the exception to, click Use These Days to add the exception to each day.
5. In the Calendar(s) block, select the schools and/or calendars to apply the attribute to.
6. Once all selections have been made, click Save to apply the exception to all selected calendar days.

Note: Be sure to update the start and ending times on the exception days when entering this exception, so they reflect the correct start and ending times for those days that were extended.

HB410 Truancy Tracking

For HB410 Truancy tracking, it is necessary for us to know the start time and end time for a normal day on the calendar. Start Time and Stop Time fields are located on both the Master Calendar and the Sub-calendar Maintenance pages.

The Start and Stop times are also located on the sub-calendar maintenance page. If Start and/or Stop times are blank on a sub-calendar, the start and stop time used for HB410 processes will default to the start and stop time on the master calendar. In addition,

- If the start time on a sub-calendar is blank but a stop time is specified, HB410 processes will use the start time from the Master Calendar
- If the stop time on a sub-calendar is blank but a start time is specified, HB410 processes will use the stop time from the Master Calendar
- Start and Stop Times were also added on the EMIS Exceptions, and the times should be updated whenever entering an EMIS Exception where the start or stop times are different than the normal school day

Registering Grad Only Students

Change Log

Date	Section Number/Name	Change Description
5/22/20	Entire document	Review and update
3/11/19		Updated screenshots; info regarding DNAC Calendar

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Graduate-Only Processing

Beginning in FY16, the data for Graduate-Only students is reported as an FN – Student Time Period Record. The student Registration Wizard has been modified to register students who are Grad-Only similarly to regularly registered students. A reduced subset of elements is collected during the registration process for these students to satisfy EMIS reporting requirements.

Before you may begin registering Grad-Only students, you will need to ensure the following has been completed in your building:

1. Make sure there is a non-attending calendar defined in the building.
2. The Max Absence Level for the non-attending calendar must be set to Non-Attending. The calendar will not appear during registration if this value is not set.
3. Choose a Student Status code to identify Grad-Only students. This status should be one that never appears on reports or used when running any reports for the general population in the building.

Before registering a student as a Grad-Only student, there are some data elements that you must have to complete the registration process:

1. SSID – the student's SSID must be reported. Because the student is withdrawn at the time of registration, the SSID locator will not be returning a SSID for these students.
2. District IRN where student completed their course requirements towards graduation.
3. Date the student completed their course requirements.

If you have this information, you may proceed to Student Registration and begin registering the student.

Task 1 – Student Registration

The building level should be in context as well as the current graduation reporting Fiscal Year.

1. Navigate to: **StudentInformation > SIS > Registration Wizard**. Complete the required fields on the **Registration Pre-requisites** tab. If the student is new to your district, complete the required fields on the Registration Pre-requisites tab. **Make sure to check the checkbox beside *Student is a Non-Attending Graduate.*** Click **Next** to move to the next tab.

2. If the student was previously enrolled in the district in any prior school year, the **Possible Matches** tab will be displayed. You can either select the **Strict Match** or click **Back** to return to the **Registration Pre-requisites** tab to change some of the values you previously entered.

3. If a new student, clicking **Next** will bring you to the **Non-Attending Graduate Registration** tab.

Fill in the required fields. The data elements are:

*   **Hispanic/Latino:** Select the appropriate value. This information is not reported to EMIS.
*   **Local Ethnic Category:** Local school purposes only.
*   **Racial Group:** Select the appropriate racial groups for the student.
*   **State Student ID (SSID):** Required – the SSID must be entered.
*   **Graduation Date:** Indicates the date of the student's graduation. The graduation date will be used to populate:
    *   Admission History for District and Building Admission Date
    *   Withdrawal date from district and building as well as FS-End date. Withdrawal Reason will be defaulted to '99'.
    *   Reported as Diploma Date
*   **Student Status:** Choose a student status code that indicates the student is an inactive student. You may want to define a special student status code for Grad-Only students.

- **Attendance Calendar:** Select a non-attending calendar from the calendar dropdown. Since Grad-Only students are not attending, no attendance should be calculated for them.
- **Grade:** Local use only, will not be reported.
- **Address:** For local use only.
- **Phone Number:** For local use only.
- **Student Email:** For local use only.
- **County of Residence:** For local use only.
- **Diploma Type:** Required - Select the diploma type that reflects the diploma the student received.
- **Courses Completed IRN:** Required - Enter the district IRN of the district where the student completed their course requirements towards graduation.
- **Courses Completed Date:** Required - Enter the date the student completed all course requirements towards graduation.

Once the record has been completely added, the student's record may be accessed on the Edit Student Profile Maintenance page. The message *This student is a Non-Attending Graduate* will display on select pages of the profile.

6. On the FN-Graduate tab, update any of the Graduate indicators, if applicable.
7. The FS-Standing record for the student was created with a start and end date equal to the graduation date. The student's EMIS Situation will be set as follows:
   a. Traditional District: 600
   b. Community School: 601

Task 2 – Special Education Grad-Only Records

For Grad-Only students, a corresponding Special Education IEP event will not be reported.

An FE record is to be reported for **any** graduating student who is exempt from the Graduation Requirement in period G. This includes students who are taking Alternate Assessments.

This record is reported whenever an IEP determination is made to add, confirm, or cancel an exemption from the consequences of any graduation assessment and/or individual graduation assessment areas. FE records are reported in all Period S data sets.

If the record is being used to report a granting of an exemption in a particular Assessment Type/Area combination, it is reported in the first school year of the IEP determination and every year thereafter, thereby confirming the IEP team has continued the exemption on the IEP. This is true even if there is no change in the granted exemptions from one IEP to the next.

If the record is being used to report removing or cancelling an exemption in a particular Assessment Type/Area combination, removal of the exemption is reported in the initial year of the IEP change and optionally thereafter.

If a student is never exempted from a particular Assessment Type/Area combination, then it is not necessary to report a Student Special Education Graduation Requirement Record for that combination.

Separate records are submitted per graduation Assessment Type/Area. For example, if the student no longer needs to meet the passing requirements of three of the five OGT subjects, then three records must be reported.

Task 3 – Add Assessment Records

The following assessments should be reported during Period G for Grad-Only students:

1. OGT assessments for summer grads
2. American College Testing Assessment (ACT)
3. Scholastic Aptitude Test (SAT)
4. International Baccalaureate (IB)
5. Advanced Placement (AP)
6. Industry Credential Assessment (GW)
7. End of Course (GE)
8. Workkeys (WK)

If the student has any of the assessment results required in the list above, add the records to the Assessment Maintenance pages. All assessment results will be included in the Assessment Transfer in period G.

Task 4 – Add Student Core Summary Records

Student Core Summary records for period G need to be reported for Grad-Only students. There are two ways to have Core Summary records created, but for any student, you must choose only **one** method:

1. If the student has never been enrolled in your district before, you may manually add Core Summary Records in period G under **StudentInformation > EMIS > Graduate Reporting Period (G) > Student Graduate CORE Summary Maint**. Add the detailed Core Summary records for the student. When added manually, since no Course History or Class List records exist for the student, the Core Summary records will not be deleted when the Update Graduate Core Summary records are processed. But if the student has at least one course history record or one class list record, the manual Core Summary records will be deleted when the update is processed.
   OR
2. Add Student Course History records manually for the courses the student took and earned credit towards graduation. If you use this method, then you must enter the course history records for all of the courses to report a complete set of Core Summary records. If you use this method, **do not** add Core Summary records manually on the Maintenance page or they will be deleted when the Core Summary Update is processed.