

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

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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
Schedule Terms:	08/20/2020	Aug 20, 2020	Oct 16, 2020	<input checked="" type="checkbox"/>
	10/19/2020	Oct 19, 2020	Dec 18, 2020	<input checked="" type="checkbox"/>
	01/04/2021	Jan 04, 2021	Mar 12, 2021	<input checked="" type="checkbox"/>
	03/15/2021	Mar 15, 2021	May 26, 2021	<input checked="" type="checkbox"/>
Is Active:	<input checked="" type="checkbox"/>			

- 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

 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	<input type="checkbox"/>	ACEVEDO, ALVIN	000016124	03	A	1408
2	<input type="checkbox"/>	ALBERT, PHILLIP	000014198	03	A	1408
3	<input type="checkbox"/>	ALEXANDER, GLEN	000014192	03	A	1408
4	<input type="checkbox"/>	ALEXANDER, ROBERTO	000017473	03	A	1408
5	<input type="checkbox"/>	ALFORD, LEO	000015102	03	A	
6	<input type="checkbox"/>	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

- 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 **Students 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	<input checked="" type="checkbox"/>	ALBERT, CLARENCE	000017163	01	A	
2	<input checked="" type="checkbox"/>	ACEVEDO, MARJORIE	000016125	02	A	
3	<input checked="" type="checkbox"/>	ACOSTA, RICARDO	000013485	02	ESMH	
4	<input checked="" type="checkbox"/>	ADKINS, PATSY	000016055	02	A	
5	<input checked="" type="checkbox"/>	ALBERT, PHILLIP	000014198	03	A	1408
6	<input checked="" type="checkbox"/>	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 [Student Information](#) » [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	<input type="checkbox"/>	ACEVEDO, ALVIN	000016124	03	A	1408
2	<input type="checkbox"/>	ALBERT, PHILLIP	000014198	03	A	1408
3	<input type="checkbox"/>	ALEXANDER, GLEN	000014192	03	A	1408
4	<input type="checkbox"/>	ALEXANDER, ROBERTO	000017473	03	A	1408
5	<input type="checkbox"/>	ALFORD, LEO	000015102	03	A	
6	<input type="checkbox"/>	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

- 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 [Student Information](#) » [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	<input checked="" type="checkbox"/>
MCMAHON, RANDALL	000016185		1408	<input checked="" type="checkbox"/>
DEJESUS, BERNICE	000016573		1408	<input checked="" type="checkbox"/>
FLYNN, MAXINE	000015287		1408	<input checked="" type="checkbox"/>
WADE, ROY	000014093		1408	<input checked="" type="checkbox"/>

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 [Student Information](#) » [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	<input checked="" type="checkbox"/>
MCGMAHON, RANDALL	000016185		1408	<input checked="" type="checkbox"/>
DEJESUS, BERNICE	000016573		1408	<input checked="" type="checkbox"/>
FLYNN, MAXINE	000015287		1408	<input checked="" type="checkbox"/>
WADE, ROY	000014093		1408	<input checked="" type="checkbox"/>

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.

- 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.
- Run the R201 to verify homeroom assignments.

14 students matched your search criteria and they were all assigned to homerooms 

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.