



Elementary Scheduling Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
02/12/18	Entire document	Update dates for 2018/2019, replaced icons with text
04/20/17	Task #27	Added new task
04/10/17	Entire document	Update dates and screenshots for 2017/2018 school year
2/1/16	Course Sections	Add note about course sections with no students
1/29/16	Task #7	Add note about selected Grade Levels
12/4/15	Entire document	Update dates and screenshots for 2016/2017 school year
04/29/15	Entire document	Update dates and screenshots for 2015/2016 school year.
10/30/14	Task #16 Entire document	14.6.4 Updates – Update screenshot Update screenshots and breadcrumb trail
04/15/14	Entire document	Update dates and screenshots for 2014/2015 school year.

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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 18/19 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 18/19, 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 18/19, 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**.

Reminder!

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)

Reminder!

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.

Reminder!

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 **Student Information** » **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
09/04/2018	Sep 04, 2018	Oct 19, 2018	<input checked="" type="checkbox"/>
10/22/2018	Oct 22, 2018	Jan 18, 2019	<input checked="" type="checkbox"/>
01/22/2019	Jan 22, 2019	Mar 22, 2019	<input checked="" type="checkbox"/>
04/01/2019	Apr 01, 2019	Jun 07, 2019	<input checked="" type="checkbox"/>

- 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
		FullYear	Full Year Term	09/04/2018, 10/22/2018, 01/22/2019, 04/01/2019	Sep 04, 2018	Jun 07, 2019	176.00	176.00	1	●
<input checked="" type="checkbox"/> 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 18/19 it will change the capacity of the room/location in 17/18. This is by design. The only item this will affect is if you would print a student's schedule in 17/18 the room numbers might not be correct.

1. Change your context to the building level and the next school year.
2. Navigate to **Student Information** » **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.



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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		152	152		Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		153	153		Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		154	154		Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		155	155		Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		156	156		Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		157	157		Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		157L	157L		Laboratory	40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	●
		CAFE	CAFETERIA		Cafeteria	150	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		CA	Career Academy		Shop	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		CEC	CEC North ESC		Off Campus	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	●
		CH	CHILDREN'S HOME		Off Campus	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		DL	Digital Lab		Shop	150	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●
		GAMA	EXTRACURR/AWAY		Unknown	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●

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.										
Add Homeroom		Filter by HR Term								
		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		



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 [Student Information](#) » [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 determines 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:* **Abbreviation:***

Name:* **Short Name:***

Description:

Hours of Instruction:* **Scheduling Priority:***

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:

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.

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites Next: ART4 >

ART3 - ART 3

Course Weight: 10.0000 In Graduation Count: Is Honors Course:

Level of Difficulty: ▾ Include in Total Credits: Include on Permanent Record:

GPA Add-on Level: ▾ Include in GPA: Print on Report Card:

Credit Units*: 0.000000 In Honor Roll:

Mark Bump: ▾

Rank Weight: ▾

Save Cancel

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 **Grade Levels Selected***

01
02
04
05
06
07

03

Location Types Available **Location Types Selected**

Unknown
Not Specified
Library
Gymnasium
Music room
Cafeteria

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 as 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

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

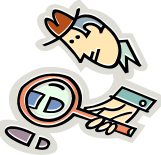


Do not forget to make multiple sections of courses such as gym, art, and music. StudentInformation will only let you assign a section to one course group. Example: If a school only had 8 sections of Art, one section for each grade level, the school could not assign Art-1 to 1st grade group 1A and assign the same section to the other 1st grade group 1B. The school would need two different sections.

Note: Course sections in StudentInformation 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

Section Number: * 1

Capacity: * 30

Course Term: * All

Is Active:

Roll section to next year:

Meeting Time Description: M: 06 (53) Custom

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 **Student Information** » **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

<input type="button" value="Save Course Section"/>	<input type="button" value="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 **Student Information** » **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.

General
Meeting Times
Memberships
Attendance
Teacher History
EMIS Override

i 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 <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
T	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
W	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
R	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
F	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Save Course Section
Cancel

- 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**.

i 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 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
T	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
W	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
R	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
F	01 02 03 04 05 06 07 08 09 10 11 12 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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	<input checked="" type="checkbox"/>

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 **Student Information** » **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: Q

EMIS Subject Code: ▼

Curriculum: ▼

Delivery Method: ▼

Student Population: ▼

Highly Qualified Teacher IRN: Q

EMIS Location IRN: Q

Dual Credit:

Save Course Section Cancel

Course Groups and Course Group Sections



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.



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:*	<input type="text" value="2506"/>	Abbreviation:	<input type="text"/>
Name:*	<input type="text" value="FIFTH"/>	Short Name:*	<input type="text" value="FIFTH"/>
Description:	<input type="text"/>	Capacity:	<input type="text" value="20"/>
		Scheduling Priority:*	<input type="text" value="5"/>
		Is Locked:	<input type="checkbox"/>
		Display Courses Individually:	<input checked="" type="checkbox"/>
		Display on Public Module:	<input checked="" type="checkbox"/>
		Is Active:	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>	<input type="button" value="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								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2">Course Group</th> </tr> <tr> <td>Code:</td> <td>2506</td> </tr> <tr> <td>Name:</td> <td>FIFTH</td> </tr> <tr> <td>Capacity:</td> <td></td> </tr> </table>	Course Group		Code:	2506	Name:	FIFTH	Capacity:		5030 - 5TH GRADE MATH	2501 , 2502 , 2504 , 2505 , 2506		●
	Course Group											
	Code:	2506										
	Name:	FIFTH										
	Capacity:											
	5040 - 5TH GRADE LANGUAGE ARTS	2501 , 2502 , 2504 , 2505 , 2506		●								
5060 - 5TH GRADE SCIENCE	2501 , 2502 , 2504 , 2505 , 2506		●									
5080 - 5TH GRADE SOCIAL STUDIES	2501 , 2502 , 2504 , 2505 , 2506		●									
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 <input style="width: 30px;" type="text"/>	75 <input style="width: 30px;" type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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) ▼			

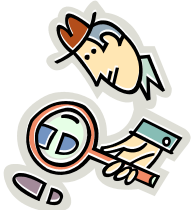
Task #20 - Bulk assign students into homerooms



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 **Student Information** » **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.

<input type="checkbox"/>	Number	Student	Course Code	Course Name	Section
5030 - 5TH GRADE MATH 54					
<input type="checkbox"/>	30554	FERRELL, MARY	5030	5TH GRADE MATH	51
<input type="checkbox"/>	16518	FRENCH, LAWRENCE	5030	5TH GRADE MATH	51
<input type="checkbox"/>	16575	HANSEN, ALLEN	5030	5TH GRADE MATH	51
<input type="checkbox"/>	15085	MORRISON, KELLY	5030	5TH GRADE MATH	51
<input type="checkbox"/>	12224	VELAZQUEZ, JEAN	5030	5TH GRADE MATH	51
5040 - 5TH GRADE LANGUAGE ARTS 54					
<input type="checkbox"/>	30554	FERRELL, MARY	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	16518	FRENCH, LAWRENCE	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	16575	HANSEN, ALLEN	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	15085	MORRISON, KELLY	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	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 **Student Information** » **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.

Schedule: Schedule Result: Status: Assigned Dropped
 Removed

Course: Course Term:

Date: Teacher:

	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.

<input type="checkbox"/>	Number	Student	Course Code	Course Name	Section
5030 - 5TH GRADE MATH 54					
<input type="checkbox"/>	30554	FERRELL, MARY	5030	5TH GRADE MATH	51
<input type="checkbox"/>	16518	FRENCH, LAWRENCE	5030	5TH GRADE MATH	51
<input type="checkbox"/>	16575	HANSEN, ALLEN	5030	5TH GRADE MATH	51
<input type="checkbox"/>	15085	MORRISON, KELLY	5030	5TH GRADE MATH	51
<input type="checkbox"/>	12224	VELAZQUEZ, JEAN	5030	5TH GRADE MATH	51
5040 - 5TH GRADE LANGUAGE ARTS 54					
<input type="checkbox"/>	30554	FERRELL, MARY	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	16518	FRENCH, LAWRENCE	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	16575	HANSEN, ALLEN	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	15085	MORRISON, KELLY	5040	5TH GRADE LANGUAGE ARTS	51
<input type="checkbox"/>	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.

Non-Groups or Groups: Non-Groups Groups

Course Code: x Course Type:

Name:

Department: EMIS Subject Code:

Area of Study: Course Subject Area:

Teacher: Honors Only

Rotation Day: M T W R F S Period of the Day:

Course Code - Name	Department	Course Sections			
EOY - END OF YEAR	NEW DEPARTMENT	Section Term	Teacher(s)	Meeting Time	CapacityFilling
		1	All WENDY TYLER	12 (1209)	30 0.00
		2	All DOUGLAS PHILLIPS	12 (1207)	30 0.00
		3	All AMY SHARP	12 (1210)	30 0.00
		4	All ANNA BOWEN	12 (1206)	30 0.00

- 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. The **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 Course 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 **Student Information » 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	
				2606	61		
				5030	61	8/16/2017	
				5040	61	8/16/2017	
				5060	61	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)

- 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			
	5200	43	08 (GYMA)	All Year	0.00 / 75			
	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



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.

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	Term	All Year
	15075	COFFEY, DAISY	F	Course	5060 - 5TH GRADE SCIENCE
	16463	LEON, LEO	M	Section	51
				Capacity	75
				Meeting Times	04 (2502)
				Start	8/16/2017
Male:2Female:1Total:3					

- 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

ProgressBook

School: Baxter Elementary Home School: Homeroom: 2503 Counselor: MILLER, SAMUEL 15376 / 05 / A

Calendar: 1-5 Program:

StudentInformation > SIS > Student > Homeroom Assignment

Student Homeroom Assignments

From this screen, you can assign students to administrative homerooms.

Term	Homeroom
Full Year Term	2503 OR Auto-Assign

Choose from drop down or click Auto-Assign which will randomly assign an available grade-level appropriate homeroom to the student.

Display grade appropriate homerooms only

Save Cancel Edit Student Profile

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.