



## Student Registration Quick Reference

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### Before Registering Students

Verify that all necessary codes and parameters are defined properly before registering a new student. If you are confident that these steps have been properly completed previously, then you may continue to the second checklist, “Registering Students.” See *Student and Registration End User Documentation* for details.

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- ☐ **Define Grade Level Codes** – With the district in context, verify that appropriate Grade Level Codes have been defined and mapped to applicable EMIS code. You do not have to use identical Grade Level Codes and EMIS Codes; you can map any Grade Level Code to any EMIS Code, or even multiple Grade Level Codes to a single EMIS Code.

**Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Grade Level Codes**

- ☐ **Define Building Grade Levels** – With the building in context, verify that appropriate Building Grade Level Codes have been defined and mapped to the appropriate district Grade Level Codes. When editing Building Grade Levels, you can also set default Registration information for each Building Grade Level (Counselor, Included in Honor Roll, Included in Ranking) for use with the Registration Wizard (see below).

**Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Building Grade Levels**

- ☐ **Define Student Status Codes** – Verify that appropriate Status Codes have been defined.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Student Status Codes**

- ☐ **Define Admission Codes** (optional) – Verify that appropriate Admission Codes have been defined.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Admission Codes**

- ☐ **Define Withdraw Codes** (optional) – Verify that appropriate Withdraw Codes have been defined.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Withdraw Codes**

- ☐ **Define Ethnicity Codes** (optional) – Verify that appropriate StudentInformation Ethnicity Codes have been defined. Please note that as of school year 10/11 (functionality in DASL v10.3), StudentInformation Ethnicity Codes and EMIS Race/Ethnicity Code are no longer linked.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Ethnicity Codes**

- ☐ **Define Birthdate Verification Codes** (optional) – Verify that appropriate Birthdate Verification Codes have been defined.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Birthdate Verification Codes**

- ☐ **Define Program Codes** (optional) – Verify that appropriate Program Codes have been defined, if desired.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Program Codes**

- ☐ **Define Counselors** (optional) – Verify that appropriate Counselor has been defined, if desired. Security clearance is required to assign groups and roles to staff. On the staff member's View/Edit Staff Member Schools tab, if you need to add a counselor role, check the "Counselor" box, select the appropriate school and school year from the drop-down menu, and click "Add".

**Navigation: StudentInformation – Management – Security – View Staff Members – Search – select staff member – View/Edit Staff Member Schools tab**

Once a staff member is defined as being a counselor, navigate to the Counselor administration page, and set the grade levels for that Counselor.

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

- ☐ **Define Team Codes** (optional) – Verify that appropriate Team Code has been defined, if desired. These will be used in the Course Request Mass Update Groups process.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Team Codes**

- ☐ **Define Custody Type Codes** (optional) – Verify that appropriate Custody Type Codes have been defined, if desired. These will be used on the Student Contacts page.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Custody Type Codes**

- ☐ **Define Contact Type Codes** (optional) – Verify that appropriate Contact Type Codes have been defined, if desired. These will be used on the Student Contact Summary page.

**Navigation: StudentInformation – Management – School Administration – Student Codes Administration – Contact Type Codes**

- ☐ **Define Membership Group Codes** (optional) – Verify that appropriate Membership Group Codes have been defined, if desired.

**Navigation: StudentInformation – Management – School Administration – Membership Groups**

- ☐ **Add Membership Group Codes** (optional) – Add Membership Group Codes, if desired.

**Navigation: StudentInformation – Management – School Administration – Membership Groups – Add Memberships button**

- ☐ **Miscellaneous Data Groups Maintenance** – To select miscellaneous groups for the Custom Tab, click on the **View Definitions** for the desired group and check the “**On Student Profile**” box by editing the code and field title.

**Navigation: StudentInformation – Management – School Administration – Miscellaneous Data Groups – View Definitions**

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## Set Registration Defaults

When registering students, you can set default information for many registration fields. There are three “levels” of registration defaults: District Defaults, Building Defaults, and Grade Level Defaults. Building Defaults override District Defaults for their building. Grade Level Defaults are building-specific, but are different fields than the Building Defaults. All values inserted by the registration defaults settings can be changed for a student before registering that student.

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- ☐ **Set District Defaults** – First, set the District as the school in context. Navigate to this screen, and enter any information you want defaulted for every building in the district. (Any building defaults set later can override these values, so you can set district defaults for most schools in a district, and set different default values for the school or schools which don’t match these defaults.)

**Note:** The Family Group registration defaults can only be set at the district level.

**Navigation: StudentInformation – Management – School Administration – School Building Administration – Registration Defaults (District in context)**

- ☐ **Set Building Defaults** – Set the school building for which you want to set defaults in context, navigate to this screen, and enter any information you want defaulted for this building. Any District Defaults display to the right of the screen, and you can copy those to the building by clicking the “Use District Defaults” button.

**Navigation: StudentInformation – Management – School Administration – School Building Administration – Registration Defaults (Building in context)**

- ☐ **Set Grade Level Defaults** – On this screen, click the edit icon for the Grade Level for which you want to set defaults.

**Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Building Grade Levels**

Set the defaults for this grade level, and click “Save”.

**Navigation: StudentInformation – Management – School Administration – Grade Level Administration – Building Grade Levels – Edit icon**

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## Registering or Re-enrolling Students – Registration Wizard

Follow these steps to create a new student record or enroll a new or previously attending student to the school. *See Student and Registration End User Documentation for details.*

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- ☐ **Student Registration Wizard – Registration Pre-requisites tab** – Fill out all required fields, and any additional fields desired, and click “Next”. This will check to see if a record already exists for this student after entering only the minimum required information for that verification process. If no student record exists that is a possible match, the Wizard will proceed to the “Complete Registration” tab, and you can skip the next several steps in this checklist.

### **Navigation: StudentInformation – SIS – Registration Wizard**

- ☐ **Student Registration Wizard – Possible Matches tab** – If a student’s required information on the Registration Pre-requisites tab matches any existing student’s, this tab will display. There are two types of Possible Match, each of which will be described below. You can have more than one type of Possible Match on this tab.

StudentInformation will find a Strict Match if the Social Security Number or EMIS ID match an existing student in the district or the school building.

StudentInformation will find a Non-Strict Match if the first initial of the student’s First Name, as well as the student’s Last Name, Birthdate, and Gender all match an existing student in the district or the school building.

Depending on the Possible Match category, follow the steps below to continue to the Complete Registration tab of the Student Registration Wizard.

### **Navigation: Home – SIS – Registration Wizard – Possible Matches tab**

**Strict Match** – If the social security number or EMIS ID number for a student being registered matches an existing student in the school, StudentInformation will not permit registration of a new student. This is an effort to prevent duplication of students. Select a matching student and click “Next” to edit that student’s profile instead of registering a new student. Click “Back” to return to the Registration Pre-requisites tab to edit the entered information.

**Please Note:** StudentInformation does not automatically update the student’s Progression Track when a Strict Match is found and used for Student Registration. The student’s Progression Track will need to be manually updated.

**Non-Strict Match** – If the first initial of the First Name for a student being registered, as well as that student’s Last Name, Gender and Birthdate all match an existing student, StudentInformation will warn you of a Non-Strict possible match. You can either continue registering the new student as a brand new student (not using any information from any matching student’s record), edit a matching student’s profile (if a student is found in the current building and year) or enroll a matching student to the current building and year (if a student is found, but not in the current building and year). A Non-Strict match may contain multiple students, from the same or different schools. Select a matching student and click “Next” to edit that student’s profile instead of registering a new student. Select the “Register New Student” option and click “Next” to register the new student (not using any information from the matching record or records). Select a matching student and click “Next to register this matching student by continuing onto the Complete Registration tab. Click “Back” to return to the Registration Pre-requisites tab



and edit the entered information.

If a Strict or Non-Strict Match is found for the student in another building, the user will be asked to indicate whether this is or is not a change of the student's primary building/EMIS attending building. If Yes is chosen, the primary/EMIS attending building will be changed to the new building. If No is chosen, the primary/EMIS attending building will remain as it is and will not change.

- ☐ **Student Registration Wizard – Complete Registration tab** – Fill out all required fields and any optional fields you may desire on the Registration page. A student must have a master record before any additional elements can be defined for the student.

**Navigation: StudentInformation – SIS – Registration Wizard – Complete Registration tab**

From this point you may either press the “Finish” button to continue to register new students, press the “Next” button to continue on to the EMIS tab for this student (see next step), or press the “Edit Profile” button to continue adding information for this particular student (see the “**Student Profile**” section below).

**Address Standardization** – Address fields in StudentInformation will standardize an entered address to fit USPS standards (removing punctuation, checking to see if the address is within the valid range of house numbers for the street, and changing zip code to the correct zip+4 code). In addition to the mailing benefits, this behavior provides more consistent and correctly-spelled address entries, allowing easier searching by address. Please see the **StudentInformation General Use** End User Guide for more information on Address Standardization. Any screen which uses Address Standardization has a checkbox at the bottom of the screen titled “Bypass

Address Standardization”. Checking this box will prevent the standardization process for this screen only.

**Address Verification** – StudentInformation can also verify that the student’s address is within the district where the student is enrolled. This feature must be enabled at both the District and Building levels. More information about Address Verification can be found in the **Address Verification** Procedural Checklist and in the **StudentInformation General Use** End User Guide.

- ☐ **Student Registration Wizard – Family Group tab** (optional) – Fill out all required fields and any optional fields you may desire on the Registration page. A student must have a master record before any additional elements can be defined for the student.

**Navigation: StudentInformation – SIS – Registration Wizard – Family Group tab**

- ☐ **Student Registration Wizard – EMIS tab** (optional) – Fill out all required fields and any optional fields you may desire on the Registration page. A student must have a master record before any additional elements can be defined for the student.

**Navigation: StudentInformation – SIS – Registration Wizard – EMIS tab**

## Student Profile, Additional Information and Verification

**IMPORTANT!** The auto-save between tabs feature has been removed as this functionality is no longer compatible with Date Effective records. The Save button must be pressed to save the data on each profile tab. If you go to another tab without pressing Save on your existing tab, your data will not be saved. You must press Save on each tab to save your data.

- ☐ **Student Profile – General tab** (optional) – Verify that the registration information you entered is correct, and enter other pertinent information.

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

If you change the Attendance Calendar on this screen, a confirmation screen will be displayed, where you need to enter the date this calendar change becomes effective.

- ☐ **Student Profile – Additional tab** (optional) – Verify information on this tab, and enter any additional information.

**Navigation: StudentInformation – SIS – Student – Edit Profile – Additional tab**

**Note:** For Non-Public schools with a student in context, you can also add or edit a Non-Public SSID. The district SSID prefix displays in the District's Non-Public SSID Prefix field.

- ☐ **Student Profile – Custom tab** (optional) – Click the Custom tab on the Edit Profile page. Fill out the requested information, if desired. The Custom tab will list all of the miscellaneous data definitions that have been specified to be included on the student profile. These fields will be separated by Data Group, then sorted by sort order of the Data Definition within each group. Only active data definitions will be included on the screen.

Users must have proper security access in order to view and/or update the data on the Custom profile tab. A new security node has been added under the “Extra System Permissions” area, specifically for “Custom Profile Data”. If the user does not have access to this node, the Custom tab will be disabled. If the user has read access to this node, the Custom tab will be enabled, but if the user does not have update access to this node, all fields will be disabled.

**Navigation: StudentInformation – SIS – Student – Edit Profile – Custom tab**

- ☐ **Student Profile – Private tab** (optional) – Verify information on this tab, and enter any additional information. It is only necessary to list names if they are different from names listed on General tab. Not all staff will have security clearance to view this information.

**Navigation: StudentInformation – SIS – Student – Edit Profile – Private tab**

- ☐ **Student Profile – FS-Standing tab** (optional) – Verify information on this tab, and edit existing FS-Standing records or add new FS-Standing records.

**NOTE:** StudentInformation does not require each field in the FS-Standing tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

**NOTE:** When enrolling a Match, the Report to EMIS checkbox should be reviewed to make sure it is correctly checked or unchecked.

**Navigation: StudentInformation – SIS – Student – Edit Profile – FS-Standing tab**

To create a new FS record:

- Click on **New Student Standing** button
- The detail are will be filled with the values from the most record record with the exception of Effective Start Date
- Enter an Effective Start Date and modify the fields as necessary
- Click **Save**

Delete and edit FS records by clicking on the icons in the history list.

As of 12.6.0, users can insert a record with an Effective Start Date that falls between the Effective Start Dates of two existing records if the information in the record meets the following criteria:

- At least one value in the inserted record is different than the values in the existing records.
- The inserted record does not have the same Effective Start Date as another record.
- The Effective Start Date in the inserted record is greater than the earliest Effective Start Date for this school year.
- If the record is an FS record, the District Admission Date is greater than or equal to the current District Admission Date.

- ☐ **Student Profile – FS-Attendance tab** (optional) – Verify information on this tab, and edit existing FS-Attendance records or add new FS-Attendance records. NOTE: StudentInformation does not require each field in the FS-Attendance tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

**Navigation: StudentInformation – SIS – Student – Edit Profile – FS-Attendance tab**

Edit FS Attendance records by clicking on the icons in the history list.

- ☐ **Student Profile – FD-Attributes tab** (optional) – Verify information on this tab, and edit existing FD-Attributes records or add new FD-Attributes records.

**NOTE:** StudentInformation does not require each field in the FD-Attributes tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

**Navigation: StudentInformation – SIS – Student – Edit Profile – FD-Attributes tab**

To create a new FD record:

- Click on **New Student Attributes** button
- The detail are will be filled with the values from the most record record with the exception of Effective Start Date
- Enter an Effective Start Date and modify the fields as necessary
- Click **Save**

Delete and edit FD records by clicking on the icons in the history list.

As of 12.6.0, users can insert a record with an Effective Start Date that falls between the Effective Start Dates of two existing records if the information in the record meets the following criteria:

- At least one value in the inserted record is different than the values in the existing records.
- The inserted record does not have the same Effective Start Date as another record.
- The Effective Start Date in the inserted record is greater than the earliest Effective Start Date for this school year.
- If the record is an FS record, the District Admission Date is greater than or equal to the current District Admission Date.

- ☐ **Student Profile – FN-Attributes tab** (optional) – Verify information on this tab, and enter any additional information. **NOTE:** StudentInformation does not require each field in the FN-Attributes tab to be filled in, however, many of these fields may still be required for EMIS reporting purposes.

**Navigation: StudentInformation – SIS – Student – Edit Profile – FN-Attributes tab**

- ☐ **Student Profile – FN-Graduate tab** (optional) – Verify information on this tab that is reported in EMIS Reporting Period G.

**Navigation: StudentInformation – SIS – Student – Edit Profile – FN-Graduate tab**

- ☐ **Student Profile – Transportation tab** (optional) – Enter any additional transportation information.

**Navigation: StudentInformation – SIS – Student – Edit Profile – Transportation tab**



- ☐ **Add, Edit, Delete Student Memberships** – Add, edit, or delete memberships for the student in context.

**Navigation: StudentInformation – SIS – Student – Edit Memberships**

- ☐ **Membership Members** – Memberships can be added through the School Membership Members page.

**Navigation: StudentInformation – SIS – School – Membership Members**

- ☐ **Enter Student Notes** (optional) – Student Notes screen will be used to add, modify or delete notes pertaining to an individual student.

**Navigation: StudentInformation – SIS – Student – Notes – Add Student Notes button**

- ☐ **Enter Student Miscellaneous Data** (optional) – Select a Miscellaneous Group from dropdown menu, to add student Miscellaneous Data. Select a miscellaneous item from the dropdown list to open the screen for data entry.

**Navigation: StudentInformation – SIS – Student – Misc. Data**

- ☐ **Enter Student Community Service Hours** (optional) – Community Service Hours may be entered for individual students as needed. This functionality can be used in conjunction with Graduation Eligibility.

**Navigation: StudentInformation – SIS – Student – Community Service**

- ☐ **Enter Student Contact Info** (optional) – Each contact record displays the data entered for Student Contact. The primary contact can be selected by clicking on a gray star. A gold star indicates the primary contact. The primary contact's name will appear on reports. Those contacts marked with **Copied on Correspondence** will prompt the creation of an additional copy of report cards for the designated contact. It will include the name and address of the designated contact. Those contacts marked as **Legal Guardian** will display on the Student's Home Page (View Profile). Multiple contacts can be checked as Legal Guardian and all will display. Clicking the star of a contact will change the status of that contact to primary contact.

**Navigation: StudentInformation – SIS – Student – Contacts Summary**

Contacts marked as Medical Contacts can also be viewed (but not edited) on the Medical Contacts page.

**Navigation: StudentInformation – SIS – Student – Medical – Medical Contacts**

On the main Contacts page, clicking on the red X icon will delete that contact, and clicking on the pencil will edit that contact's details.

- ☐ **Enter Custody Alert** (optional) – Enter custody alert information, as needed.

**Navigation: StudentInformation – SIS – Student – Custody Alert**

- ☐ **Enter Disability Alert** (optional) – Enter disability alert information, as needed.

**Navigation: StudentInformation – SIS – Student – Disability Alert**

- ☐ **Enter Medical Alert** (optional) – Enter any medical alerts, as needed.

**Navigation: StudentInformation – SIS – Student – Medical Alert**

**See StudentInformation Student Medical documentation for details on setting up a medical alert.**

- ☐ **Enter Miscellaneous Alert** (optional) – Enter miscellaneous alert information, as needed.

**Navigation: StudentInformation – SIS – Student – Miscellaneous Alert**

- ☐ **Enter or Update Family Groups** (optional) – Enter or update a Family Group, as needed.

**Navigation: StudentInformation – Management – District Administration – Family Groups**

- ☐ **Create or Update Family Groups Wizard** (optional) – The Family Groups Wizard has been added to step users through the process of creating all of the family groups for a school or district at once. You can create family groups by matching on address, city, state, zip code, contact last name, contact first name and/or phone number.

**Note:** In order for the Family Groups Wizard to recognize new students, the default school year must be the year in which the new students will start. (For example, if you are registering new Kindergarten students with an admission date of 8/1/14, the default school year must be 2014-2015 when you run the Family Groups Wizard.)

**Navigation: StudentInformation – Management – District Administration – Family Groups Wizard**

- ☐ **Set District Options** (optional) – The District Options screen allows you to set the courier policy at the district level. The Student Registration Wizard uses this policy to assign family couriers. If you withdraw a student who is assigned to be a family courier, StudentInformation assigns a new courier to the family group based on the district policy. There is also an option to exclude students in certain grade levels (for example, preschool) from being selected as the courier. The District Options screen also allows you to control page level security on the Family Groups Contacts tab.

**Navigation: StudentInformation – Management – District Administration – District Options**

- ☐ **Run Reports for Verification** (optional) – Run any or all of the following reports, as needed. More information on each of these reports can be found in the **StudentInformation Student & Registration** End User documentation.

- Administrative Homeroom Detail (R201-A)
- Administrative Homeroom Summary (R201-B)
- Admission/Withdrawals (AWEX)
- Ethnicity Summary Report
- Student Alerts (STD\_ALRT)
- Student Contact List (CONT)
- Student Locker Allocation (LOCK)
- Student Lunch Free/Reduced (LUNCH)
- Student Roster by Membership (R102)
- Student Roster Detail (R101-A)
- Student Roster Summary (R101-B)
- Student Roster Summary by Home School
- Student Roster Summary by Homeroom
- Student Roster Summary by Program
- Student Status/Attendance Code (STAT)
- Student with No SSID (SSID)
- Student with No SSN (SSNO)
- Withdrawal List (WITH)

**Navigation: StudentInformation – SIS – School – Student Reports**

- Civil Rights Reports

**Navigation: StudentInformation – SIS – School – Civil Rights Reporting**