

---

# ProgressBook StudentInformation Getting Started Guide



# **ProgressBook StudentInformation Getting Started Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Getting Started Guide* have been made.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.7.0	<i>"Select Students"</i>	5	Updated text and images to show expanded student in context area and additional functionality.
14.5.0	Entire Guide	N/A	Updated screen images to reflect new product masthead and navigation.
14.2.0	Entire Guide	N/A	Rewrote guide to make state independent and improve usability.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Welcome to StudentInformation</b>	<b>1</b>
Find the Information You Need .....	1
Access StudentInformation .....	1
Sign In to StudentInformation .....	2
Sign Out of StudentInformation .....	3
Navigate StudentInformation .....	4
Change Working School and Year .....	4
Select Students .....	5
Search for Screens .....	10
Navigate ProgressBook .....	13
<b>Account Settings</b>	<b>15</b>
Change Your Password .....	15
Select Schools .....	16
<b>Common Functionality</b>	<b>17</b>
Maintain Ad-Hoc Memberships .....	17
Set Up Ad-Hoc Memberships .....	17
Edit Ad-Hoc Memberships .....	19
Reactivate Records .....	21
Run Reports .....	22
Run Batch Jobs .....	26
Understand Address Standardization and Verification .....	28
Enable Address Standardization .....	28
Enable Address Verification .....	29
Validate an Address .....	29

This page intentionally left blank.

# Welcome to StudentInformation

StudentInformation is a database application that lets you collect, store, and manage all “permanent record” information about the students in your district. This includes information about medical alerts, custody, parent/guardian contacts, fees, lockers, homerooms, discipline, attendance, scheduling, assessments, graduation verification and marks. In addition, you can post calendars, links, and announcements for your staff. Finally, StudentInformation helps you comply with your state’s reporting requirements.

You can assign different levels of security to users based on their job requirements. For example, you decide if each role (such as administrative personnel, guidance counselors, teachers and secretaries) can only view data or if they can also add, change and delete data within the entire application or on a specific screen.

***Note:** For a an explanation of the graphics and functionality used throughout the application, see ProgressBook StudentInformation Quick Reference.*

---

## Find the Information You Need

The following sources of information are available to help you use StudentInformation:

- **StudentInformation Help Documentation** – On any screen, in the masthead, click .



- **Knowledge Base** – To access the ProgressBook Suite Knowledge Base, click <http://kb.progressbook.com>. The Knowledge Base contains the following documentation:
  - **StudentInformation Release Notes**
  - **StudentInformation Product Guides**
  - **Knowledge Base Articles**

---

## Access StudentInformation

There are two ways to access StudentInformation:

- If you are already signed in to another ProgressBook application, on the masthead, beside the application’s logo, click the application quick launch icon, and then click **StudentInformation**.

StudentInformation opens in a new window or tab, depending on your browser settings.



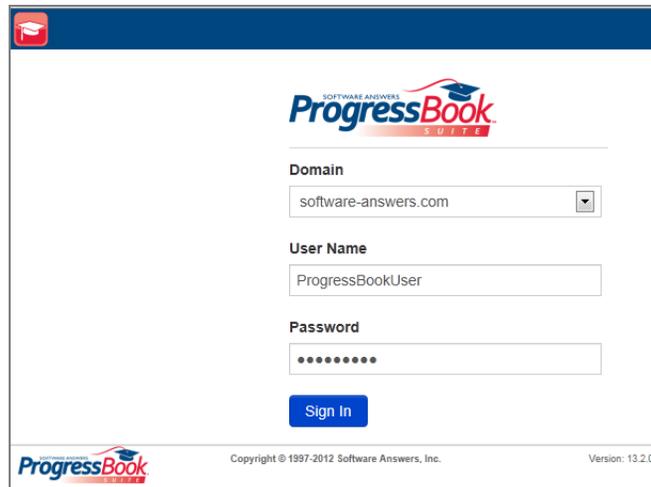
### StudentInformation Logo on GradeBook Masthead Drop-Down List

- If you are not already signed in to ProgressBook, or if your district provides stand-alone access to StudentInformation via a URL, you must sign in. See [“Sign In to StudentInformation.”](#)

## Sign In to StudentInformation

Access StudentInformation by signing in from the ProgressBook CentralAdmin sign in screen.

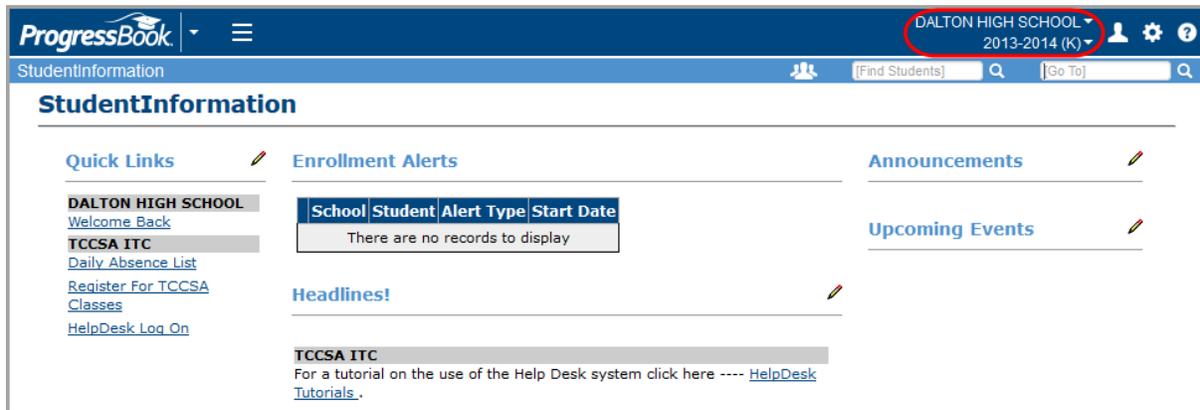
1. In a web browser, enter the URL provided by your district.  
The ProgressBook CentralAdmin sign in screen displays.



### ProgressBook CentralAdmin Sign In Screen

2. Select your **Domain**, and then enter your **User Name** and **Password**.
3. Click **Sign In**.

The main **StudentInformation** screen displays. The working school and year you are viewing display in the masthead. To change the working school and/or year, see “[Change Working School and Year.](#)”



StudentInformation Screen

## Sign Out of StudentInformation

To prevent unauthorized use, ProgressBook automatically signs you out after a period of inactivity, the length of which is defined by your system administrator. The timer calculating inactivity is reset each time you perform an activity anywhere in the ProgressBook suite.

**Note:** *Ensure that you save your changes frequently. If you are signed out due to inactivity, your changes are not saved!*

You should manually sign out of StudentInformation if you plan to leave your computer unattended for any length of time where someone might have access to it. To sign out, in the masthead, click  and select “Sign out.”



Sign Out Option

The CentralAdmin sign out screen displays, confirming that you are signed out of the ProgressBook suite.



ProgressBook CentralAdmin Sign Out Screen

## Navigate StudentInformation

StudentInformation provides navigation options to help you move around in the application. There are several ways to find a screen, report or student. You can also change the working school and school year you want to view.

- To change the working school or school year, see [“Change Working School and Year.”](#)
- To select students, see [“Select Students.”](#)
- To find a screen or report, see [“Search for Screens.”](#)

## Change Working School and Year

The school and school year whose information you are currently viewing display in the masthead on every screen. You can change the working school and/or year.

1. On any screen, in the appropriate drop-down list, select a new working school or school year.

**Note:** If you change the working school year to a year that is not typical for a certain screen (for example, a past or future school year on a screen typically used to enter current year information), a warning message displays beneath the breadcrumb bar.



Working School and Year

2. Optional: To have the working school selected by default each time you sign in to StudentInformation, click  and select “Save As Default School.”



### Save Working School as Default School

## Select Students

Before you can see student-specific information on any screen, you first need to select a student.

1. Search for the student using one of the following methods:
  - **Find Students box** – Lets you search for an individual student record.



### Find Students Box

- i. Enter your search criteria. (For details on valid student search methods, see *ProgressBook StudentInformation Quick Reference Card*.)
  - ii. Click  or press <Enter>.
- **Advanced Student Search** – Lets you perform more complex searches using multiple criteria. You can select a group of students and scroll through their information one by one.
    - i. Click .



### Advanced Student Search

The **Advanced Student Search** screen displays.

**Advanced Student Search Screen**

- ii. Enter your search criteria on any/all of the available tabs:
  - **General Info** – Demographic information search fields. Fields followed by a check box allow a wildcard search (\*) if you select the check box.
  - **Additional Info** – Additional demographic information search fields
  - **Miscellaneous Info** – Additional search fields that vary by state
  - **Course Section Info** – Course section search fields. Click  to browse for the course section.
- iii. Click **Search**.

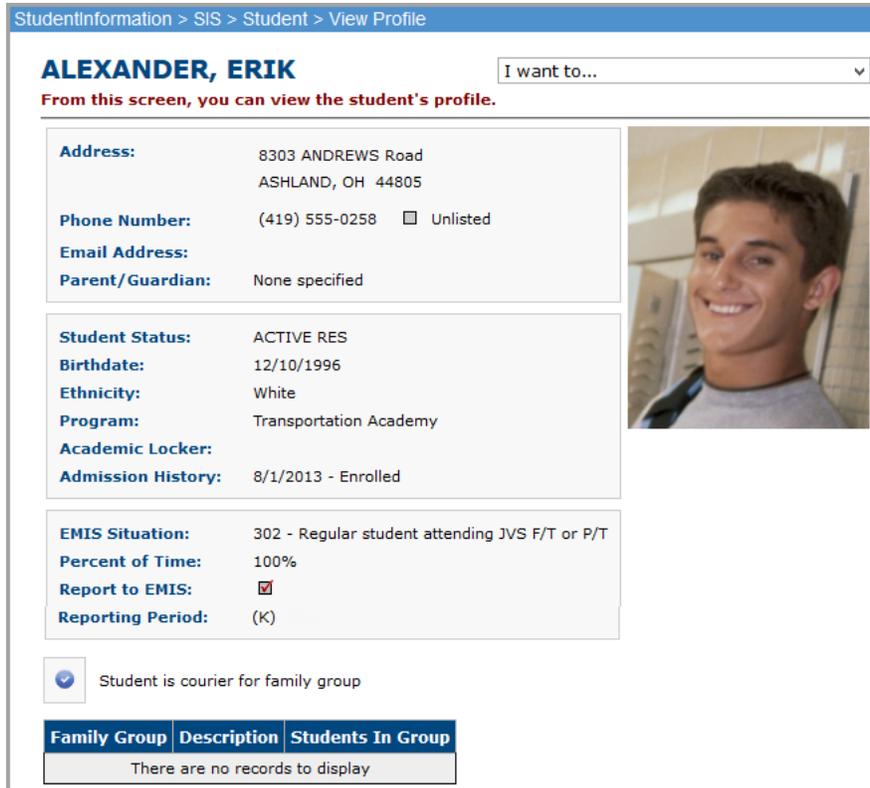
The **Student Search Results** screen displays a listing of all students matching your search criteria.

3 Records Found						
1.	<b>ALEXANDER, BILLIE</b> 	ID: 490203	Counselor: SIMMONS, SETH			
	ASHLAND-WEST HOLMES JVS	Gender: F	Homeroom:			
	Birthdate: Sep 28, 1995	Grade: 12	Status: A  			
2.	<b>ALEXANDER, DARRYL</b> 	ID: 390281	Counselor: SIMMONS, SETH			
	ASHLAND-WEST HOLMES JVS	Gender: M	Homeroom:			
	Birthdate: Jan 28, 1998	Grade: 10	Status: A 			
3.	<b>ALEXANDER, ERIK</b> 	ID: 490316	Counselor: SIMMONS, SETH			
	ASHLAND-WEST HOLMES JVS	Gender: M	Homeroom: 6-127			
	Birthdate: Dec 10, 1996	Grade: 10	Status: A     			
3 Records Found						

**Student Search Results**

2. From this screen, choose one of the following options:

- To open the profile of a student in the list, beside the student's name, click . The student's profile opens.



StudentInformation > SIS > Student > View Profile

**ALEXANDER, ERIK** I want to... ▾

**From this screen, you can view the student's profile.**

<b>Address:</b>	8303 ANDREWS Road ASHLAND, OH 44805	
<b>Phone Number:</b>	(419) 555-0258 <input type="checkbox"/> Unlisted	
<b>Email Address:</b>		
<b>Parent/Guardian:</b>	None specified	

<b>Student Status:</b>	ACTIVE RES
<b>Birthdate:</b>	12/10/1996
<b>Ethnicity:</b>	White
<b>Program:</b>	Transportation Academy
<b>Academic Locker:</b>	
<b>Admission History:</b>	8/1/2013 - Enrolled

<b>EMIS Situation:</b>	302 - Regular student attending JVS F/T or P/T
<b>Percent of Time:</b>	100%
<b>Report to EMIS:</b>	<input checked="" type="checkbox"/>
<b>Reporting Period:</b>	(K)

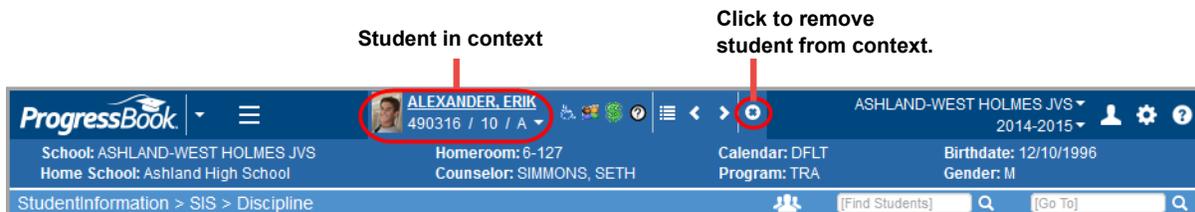
Student is courier for family group

Family Group	Description	Students In Group
There are no records to display		

### Student Profile

- To select a student and return to the screen from which you started the search, click the student's name. The student is now selected in the masthead, and you can navigate to another screen with the selected student.

**Note:** This is also referred to as having the student "in context." To remove a student from context, click .



**Student in context** **Click to remove student from context.**

ProgressBook ASHLAND-WEST HOLMES JVS 2014-2015

**ALEXANDER, ERIK** 490316 / 10 / A

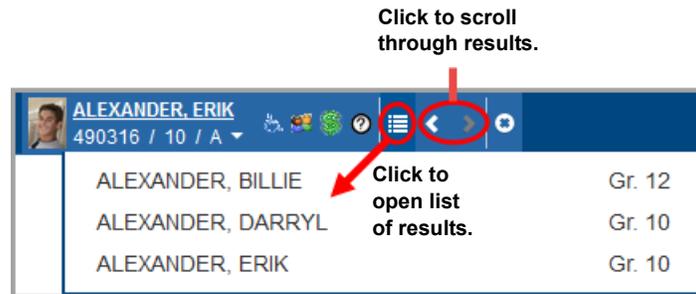
School: ASHLAND-WEST HOLMES JVS Homeroom: 6-127 Calendar: DFLT Birthdate: 12/10/1996

Home School: Ashland High School Counselor: SIMMONS, SETH Program: TRA Gender: M

StudentInformation > SIS > Discipline [Find Students] [Go To]

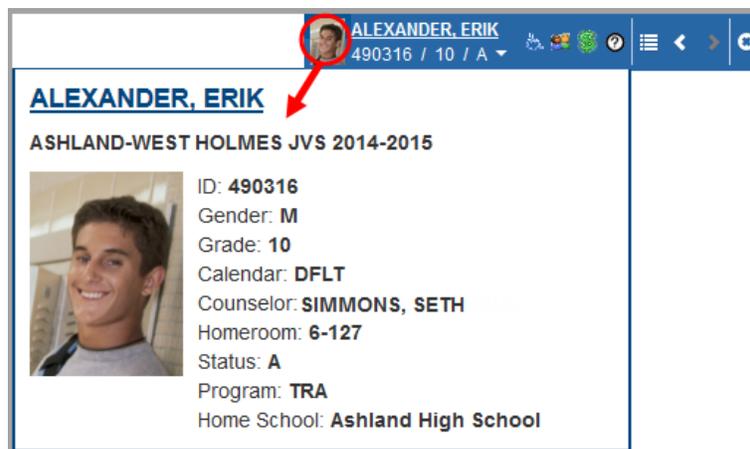
### Student Selected in Masthead

- Optional: From any screen with the student selected, you can view the other students matching your search criteria using the following options:
  - To scroll forward and backward through your search results, use the < > buttons.
  - To open a drop-down list of your search results, click ☰, and click another student's name.



### View Other Students Matching Criteria

- Optional: To view a summary of the student's profile information and a larger photo, in the student in context area, click the thumbnail photo. A drop-down window opens to display the summarized profile information and larger photo.



### Summary Profile Information

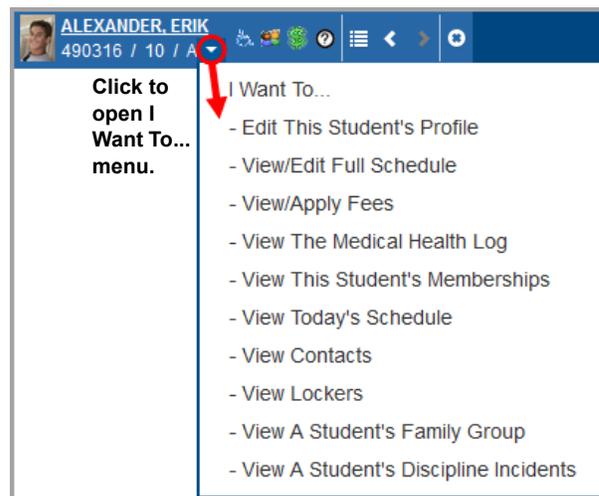
- Optional: To open the full student profile, click the student name link in either the student in context area or the summary profile area.

Click either link to open student's full profile.



Click to Open Full Student Profile

- Optional: To view additional detailed information about the student:
  - Click .The **I Want To...** menu opens.
- Click the desired option to view details for the selected student.



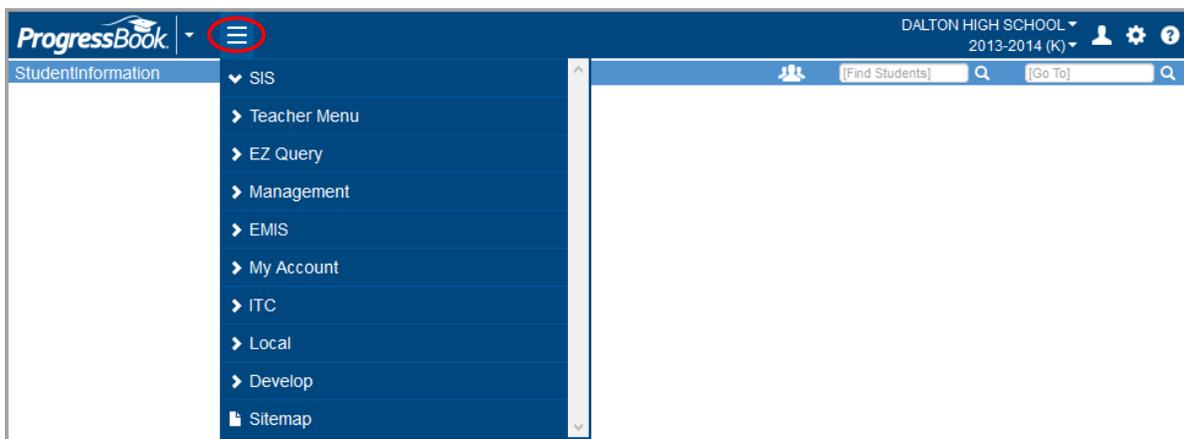
Click to Open I Want To... Menu

## Search for Screens

There are several options to help you navigate to the screen or report you want to access in StudentInformation:

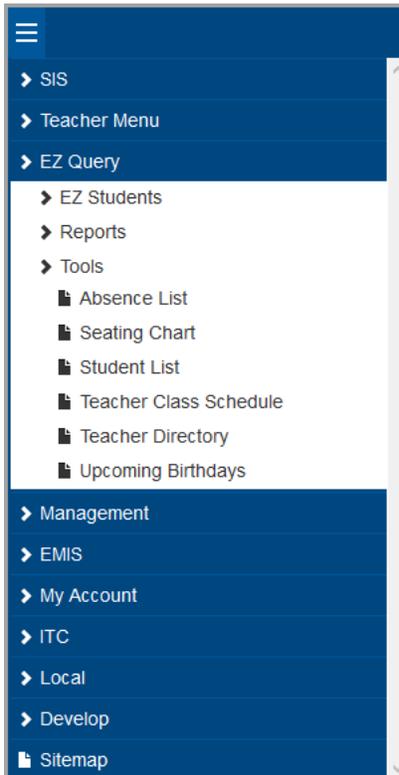
- **Menu** – At the top of every screen, the menu contains several options to help you navigate to a screen.
  - a. To open the menu, click .The menu opens, displaying additional submenu items.

**Note:** The menu options you can see are based on your StudentInformation security permissions.



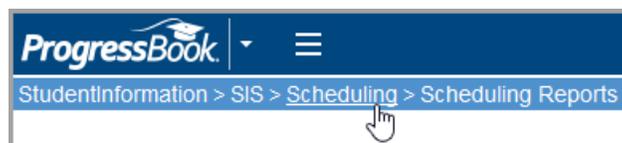
Menu

- b. Click to expand the appropriate section(s) until you reach the correct screen.



**Menu with Submenu Items**

- **Breadcrumb Trail** – A breadcrumb trail displays on every screen to help you track your location within StudentInformation. The breadcrumbs are clickable links. Click any breadcrumb to go directly to that screen.



**Breadcrumb Trail**

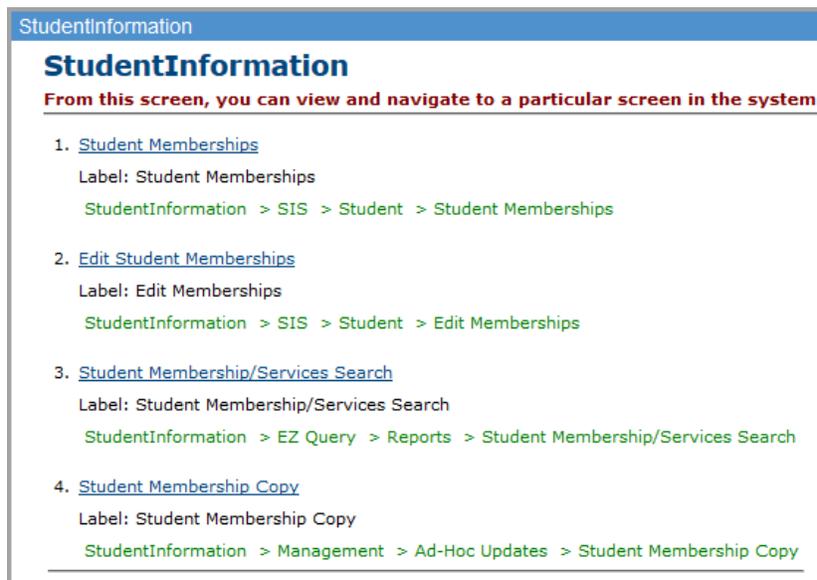
- **Go To box** – When you are unsure of the path to a screen, use the **Go To** box on the right side of the breadcrumb bar to search for the screen.
  - Type in the name of the screen.
  - Click  or press <Enter>.



**Go To Box**

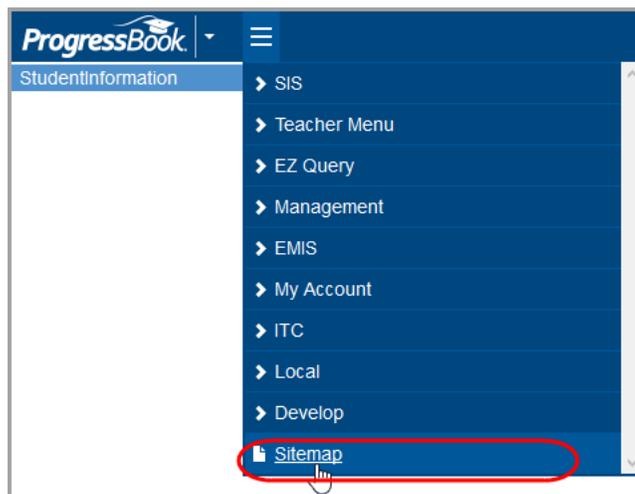
A listing of all of screens and reports matching your search term displays.

- c. Click a link to go directly to that screen.



### Go To Search Results

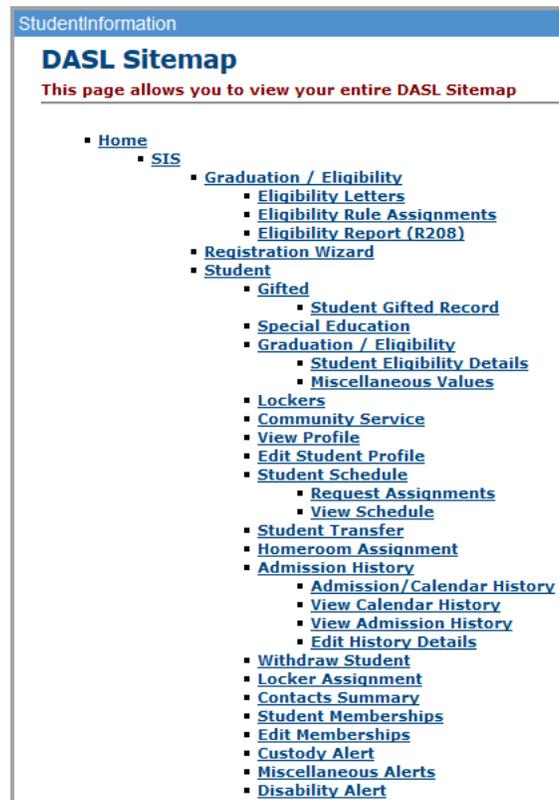
- **Sitemap** – The sitemap lists every screen in the application to which you have access (per your security setup) organized by menu and submenu.
  - a. On the menu, click **Sitemap**.



### Sitemap Menu Option

The **DASL Sitemap** screen displays.

- b. Click a link to go directly to that screen.



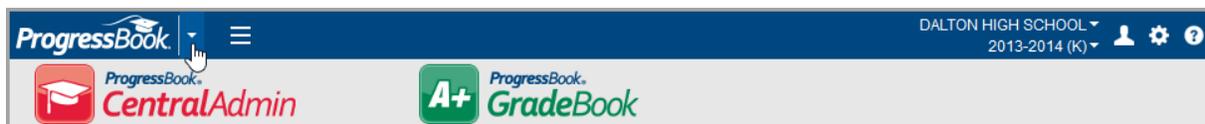
Sitemap

## Navigate ProgressBook

Use the application quick launch to navigate between ProgressBook applications that you are authorized to use.

1. On the masthead, to the right of the ProgressBook logo, click  to open the application quick launch area.

Logos display for all of your other registered ProgressBook applications.



Application Quick Launch

2. Click an application's logo.

The application opens in another window or tab, depending on your browser's settings.

This page intentionally left blank.

# Account Settings

You can maintain your account settings using the options on the **My Account** menu.

- To change your password, see [“Change Your Password.”](#)
- To set up your select schools for the **Portal** and **EZ Query**, see [“Select Schools.”](#)

---

## Change Your Password

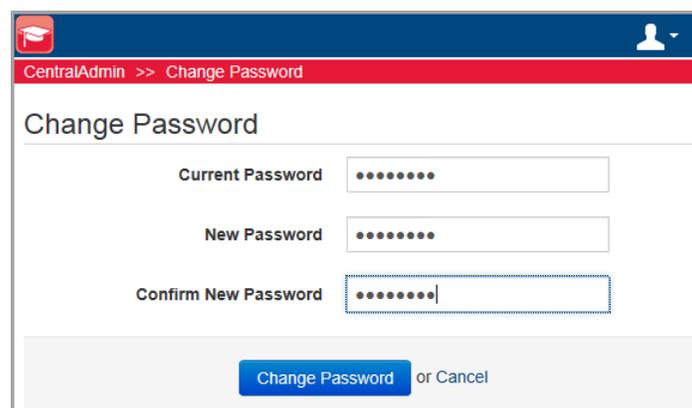
**Note:** Your ProgressBook account credentials are the same for all applications in the suite. If you change your password in StudentInformation, you change it for all ProgressBook applications.

1. On the masthead, click  and select “Change Password.”



### Change Password Option

The CentralAdmin **Change Password** screen displays.

A screenshot of the CentralAdmin Change Password screen. The page has a blue header with the CentralAdmin logo and a user profile icon. Below the header, the breadcrumb 'CentralAdmin >> Change Password' is displayed. The main content area is titled 'Change Password' and contains three password input fields: 'Current Password', 'New Password', and 'Confirm New Password'. Each field is masked with dots. At the bottom of the form, there is a blue button labeled 'Change Password' and a link for 'or Cancel'.

### Change Password

2. Enter your **Current Password** and a **New Password**.
3. In the **Confirm New Password** field, re-enter your new password.
4. Click **Change Password**.

## Select Schools

### Navigation: StudentInformation - My Account - Select Schools

As part of your account settings, you can set one or more “select schools” that you want to see on the StudentInformation **Portal** and in **EZ Query**.

1. On the **Select Schools** screen, select the check box beside each school you want to designate a “select school.” To select all schools in the list, click **Mark All Selected**.

StudentInformation > My Account > Select Schools

### Select Schools

Select the schools you wish to work with during this session

This session only  Save permanently

- TCCSA ITC
- All Buildings
- Ashland Christian School District
- ASHLAND CHRISTIAN SCHOOL
- Ashland City Schools
- ASHLAND HIGH SCHOOL
- ASHLAND MIDDLE SCHOOL
- Edison Primary School North
- Montgomery Intermediate School East
- Osborn Intermediate School Central
- Taft Primary School South
- Dalton Local Schools
- DALTON ELEMENTARY
- DALTON HIGH SCHOOL
- DALTON INTERMEDIATE
- KIDRON ELEMENTARY

### Select Schools

2. Optional: To retain these select schools each time you sign in to StudentInformation, select the “Save permanently” option.
3. Click **Select**.

# Common Functionality

This section explains common functionality found throughout StudentInformation.

- To maintain ad-hoc memberships, see [“Maintain Ad-Hoc Memberships.”](#)
- To reactivate records, see [“Reactivate Records.”](#)
- To run reports, see [“Run Reports.”](#)
- To run batch jobs, see [“Run Batch Jobs.”](#)
- To understand how StudentInformation standardizes and verifies addresses, see [“Understand Address Standardization and Verification.”](#)

---

## Maintain Ad-Hoc Memberships

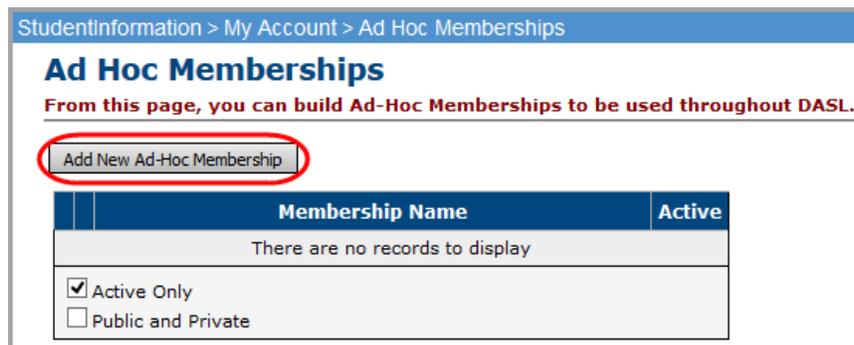
You can define students that you want to process as a single group using ad-hoc memberships. The reasons for grouping students include: reporting and filtering purposes, sports eligibility purposes, to mass update building progress tracks during the student promotion process, if your school is a JVS that wants to group students by home school for reporting purposes or if your district wants to perform school-level updates.

- For information on setting up ad-hoc memberships, see [“Set Up Ad-Hoc Memberships.”](#)
- For information on editing ad-hoc memberships, see [“Edit Ad-Hoc Memberships.”](#)

## Set Up Ad-Hoc Memberships

**Navigation: StudentInformation - My Account - Ad Hoc Memberships**

1. On the **Ad Hoc Memberships** screen, click **Add New Ad-Hoc Membership**.



**Set Up Ad-Hoc Memberships**

The screen displays in add mode.

**Ad-Hoc Memberships Screen (Add Mode)**

2. Enter a name for the membership in the **Membership Name** field. It is recommended that you include the building code or name.
3. Optional: To make the membership you are creating inactive, deselect the **Active** check box.
4. Optional: To make this membership available to other uses, deselect the **Make Private** check box.
5. Search for students to add to this ad-hoc membership:
  - a. Select any or all of the following **Search Mode** options:
    - **Search Criteria** – Use as many fields as necessary on the **General Info**, **Additional Info**, **Miscellaneous Info** and **Course Section Info** tabs to find students.

**Note:** Select the check box after any field to perform a wildcard search on the contents of that field.

- **Student IDs** – Enter student ID numbers separated by a comma.
- **Use Existing Memberships** – Select students from one or more existing memberships to assign to the new membership. Move the appropriate memberships from the **Membership** multi-select list on the left to the one on the right, and then select one of the following **Combine Using Logic** options:

- **Use All Students Belonging to Any Selected Membership** – Includes any student who is a member of any of the memberships listed in the multi-select list on the right (“or” match)
  - **Use Only Students Belonging to All Selected Memberships** – Includes only those students who are members of all memberships listed in the multi-select list on the right (“and” match)
- b. Optional: To change whether students returned in the search are initially selected for inclusion in the membership, select or deselect the **Students Selected by Default** check box.
  - c. Click **Search**.
6. Review the matching students. If necessary, select the check box beside a student to include the student in the membership. Or deselect the check box to exclude the student.
  7. To add the selected students to the membership, select **Add to Membership**. Or, to replace the existing membership group with the selected students, select **Replace Membership**.
  8. Click **Add Selected Students**.  
A confirmation displays the number of students added to the membership.
  9. If this is the only membership you want to add, click **Save**. If you want to add another membership, click **Save and New**, and repeat the procedure.

## Edit Ad-Hoc Memberships

### Navigation: StudentInformation - My Account - Ad Hoc Memberships

1. On the **Ad Hoc Memberships** screen, in the row of the ad-hoc membership you want to edit, click .

StudentInformation > My Account > Ad Hoc Memberships

### Ad Hoc Memberships

From this page, you can build Ad-Hoc Memberships to be used throughout DASL.

		Membership Name	Active
		Dalton High School	
		High School Drama Club	

Active Only  
 Public and Private

### Edit Add-Hoc Memberships

The screen displays in edit mode.

StudentInformation > My Account > Ad Hoc Memberships

## Ad Hoc Memberships

From this page, you can build Ad-Hoc Memberships to be used throughout DASL.

Membership Name:   Active:  Make Private:

[ Hide Existing Students ]

	Student Number	Student Name	Grade	Homeroom	Status	School (IRN)
✗	00140580	ACEVEDO, VANESSA	12		A	DALTON HIGH SCHOOL(008003)
✗	00160178	ALEXANDER, SHELLY	10		A	DALTON HIGH SCHOOL(008003)
✗	00140129	ANDERSON, BENJAMIN	12		A	DALTON HIGH SCHOOL(008003)
✗	00170047	ATKINS, ROSA	09		A	DALTON HIGH SCHOOL(008003)
✗	00140529	BAILEY, RALPH	11		A	DALTON HIGH SCHOOL(008003)
✗	00160110	BAILEY, WALTER	10		A	DALTON HIGH SCHOOL(008003)
✗	00140215	BARNETT, BETTY	12		A	DALTON HIGH SCHOOL(008003)
✗	00150010	BARRON, RAFAEL	11		A	DALTON HIGH SCHOOL(008003)
✗	00170244	BRADY, LOIS	09		A	DALTON HIGH SCHOOL(008003)
✗	00170185	FOSTER, CONSTANCE	09		A	DALTON HIGH SCHOOL(008003)
✗	00130202	FOSTER, LILLIE	13		A	DALTON HIGH SCHOOL(008003)
✗	00150050	JOSEPH, ASHLEY	11		A	DALTON HIGH SCHOOL(008003)
✗	00170083	JOYNER, FREDERICK	09		R	DALTON HIGH SCHOOL(008003)
✗	00150210	OLSON, MELISSA	11		A	DALTON HIGH SCHOOL(008003)
✗	00150128	OSBORNE, RANDALL	11		A	DALTON HIGH SCHOOL(008003)
✗	00170162	PEARSON, DERRICK	09		A	DALTON HIGH SCHOOL(008003)
✗	00140549	SOLIS, CATHERINE	12		J	DALTON HIGH SCHOOL(008003)
✗	00160090	WATERS, TOM	10		A	DALTON HIGH SCHOOL(008003)
✗	00140015	ZAMORA, TRAVIS	12		J	DALTON HIGH SCHOOL(008003)

19 Records Displayed [Back To Top](#)

[ Show Search ]

### Ad Hoc Memberships Screen (Edit Mode)

2. Make any of the following changes to the ad-hoc membership as needed:
  - Edit the **Membership Name** field.
  - Change the active status by selecting or deselecting the **Active** check box.
  - Change the privacy status by selecting on deselecting the **Make Private** check box.
  - Remove a student by clicking ✗ in the row of the student.
  - Add a student:
    - i. Click **[Show Search]**.
    - ii. Select either or both of the following **Search Mode** options:

- **Search Criteria** – Use as many fields as necessary on the **General Info**, **Additional Info**, **Miscellaneous Info** and **Course Section Info** tabs to find students.

**Note:** Select the check box after any field to perform a wildcard search on the contents of that field.

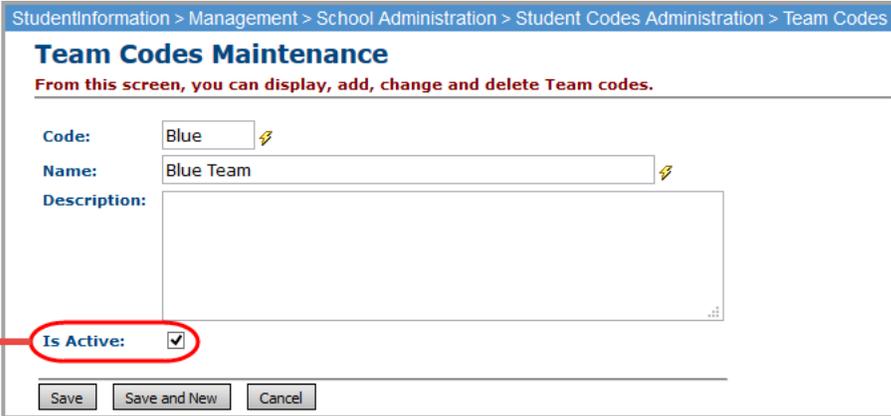
- **Student IDs** – Enter student ID numbers separated by a comma.
- Optional: To change whether students returned in the search are initially selected for inclusion in the membership, select or deselect the **Students Selected by Default** check box.
  - Click **Search**.
  - Review the matching students. If necessary, select the check box beside a student to include the student in the membership. Or deselect the check box to exclude the student.
  - To add the selected students to the membership, select **Add to Membership**. Or, to replace the existing membership group with the selected students, select **Replace Membership**.
  - Click **Add Selected Students**.  
A confirmation displays the number of students added to the membership.
- Click **Save**.

## Reactivate Records

When you delete an active record (denoted by ) in StudentInformation, it becomes inactive (denoted by ) . You can reactivate a record in the following ways:

- Enter the same name/code on a new record.
- Edit the record, select the **Is Active** or **Active** check box and save the record, as shown in the following example.

Click to reactivate the record. Then click Save.



The screenshot shows the 'Team Codes Maintenance' form. The breadcrumb trail is 'StudentInformation > Management > School Administration > Student Codes Administration > Team Codes'. The form title is 'Team Codes Maintenance' with a subtitle 'From this screen, you can display, add, change and delete Team codes.' The form contains the following fields: 'Code:' with the value 'Blue' and a lightbulb icon; 'Name:' with the value 'Blue Team' and a lightbulb icon; and 'Description:' with an empty text area. At the bottom, there is an 'Is Active:' checkbox which is checked and circled in red. Below the checkbox are three buttons: 'Save', 'Save and New', and 'Cancel'.

Reactivate a Record

## Run Reports

1. On the **Selection Criteria** tab of the report, select the information on which you want to filter the report. Typically, the more filters you select, the narrower the search results. Note the following:
  - You must complete all required fields (⚡) to run the report.
  - For open text fields like **Student Numbers**, enter each piece of data separated by a comma.
  - For any multi-select lists, select item(s) by moving them from the left side of the screen to the right.
  - For reports with an **Output** option, select whether to generate a report and/or labels. When printing labels, note the following page settings:
    - For Adobe 9:
      - Page Scaling = None
      - Auto Rotate and Center = Unchecked
    - For Adobe 10:
      - Size Options = Actual Size
      - Orientation = Portrait
2. In the **Delivery Method** drop-down list, select how you want to receive the report:
  - **Pickup** – Retrieve the report on the **Batch/Report Management** window.
  - **Email Notification** – Receive an email with a link to the report when the report is ready to view.
  - **Email Delivery** – Receive an email with the report included as a PDF attachment.
3. Optional: To make the delivery method you selected in [step 2](#) the default selection each time you run reports, click **Set As Default**.
4. Confirm your **Email Address**, which defaults from your StudentInformation user profile. If necessary, make any changes in your profile.
5. In the **Report Format** drop-down list, select the output format in which you want to generate the report: “Adobe PDF,” “Rich text format (RTF),” “Text,” “Excel Spreadsheet” or “HTML.”
6. Optional: Enter a **Description** of the report. This text displays on the **Batch/Report Management** screen.
7. Click **Submit**.

StudentInformation > SIS > School > Student Reports > Administrative Homeroom Summary (R201-B)

### Administrative Homeroom List Summary (R201-B)

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

Selection Criteria | Selection Summary | Load Settings

Homeroom Term: Full Year Term

Homeroom Date: 10/01/2014

**Student Status**

C - CENTRAL STUDENTS	↔	A - ACTIVE RES
D - DELETED	↔	
I - INACTIVE	↔	
J - JVS RES	↔	

**Administrative Homeroom**

5B - BRANCH (Full Year Term)	↔	6B - BRANCH (Full Year Term)
6A - BRANCH (Full Year Term)	↔	5A - BRANCH (Full Year Term)
AUD - BOYER (Full Year Term)	↔	
CAFE - FRAZIER (Full Year Term)	↔	

**Grade Level**

	↔	08 - 08
	↔	09 - 09
	↔	10 - 10
	↔	11 - 11

**Sorting Options**

Teacher Name (DESC)	↔	Teacher Name (ASC)
Homeroom (ASC)	↔	
Homeroom (DESC)	↔	
Grade (ASC)	↔	

Delivery Method: Pickup

Email Address:

Report Format: Adobe PDF

Description: Active Residents Full Year Term

#### Selection Criteria Tab

**Note:** StudentInformation saves your selection criteria and defaults them the next time you run this specific report unless you specify otherwise on the **Load Settings** tab.

The **Batch/Report Management** window opens with your report listed at the top.

DASL		Batch/Report Management		6/26/2014 4:41:27 PM		
Display: All		<input type="button" value="Refresh Display"/>				
<input type="checkbox"/>	Job Type	Job Name	Job Description	Job Status	School Name	Date Added
<input type="checkbox"/>	Report	<a href="#">Administrative Homeroom List Summary (R201-B)</a>	Active Residents Full Year Term	Complete	DALTON HIGH SCHOOL	6/26/2014 4:41:09 PM
<input type="checkbox"/>	Report	<a href="#">Discipline Total Summary</a>		Complete	DALTON HIGH SCHOOL	6/17/2014 12:55:43 PM
<input type="checkbox"/>	Report	<a href="#">Discipline Total Detail</a>		Complete	DALTON HIGH SCHOOL	6/17/2014 12:51:30 PM
<input type="checkbox"/>	Report	<a href="#">Discipline Infraction</a>		Complete	DALTON HIGH SCHOOL	5/22/2014 10:50:38 AM

**Batch/Report Management**

- Click the report link in the **Job Name** column to open the report. (If the link does not display, the report is still generating. Click **Refresh Display** until the link displays.)

10/1/2013	Administrative Homeroom List Summary	2:31 PM
User Name:		Total Report Pages: 0
School:	DALTON HIGH SCHOOL	
School Year:	2013-2014	
Sorting Options:	TeacherNameSort ASC, HomeroomCode ASC	
Criteria		
Homeroom Date	10/1/2013	
Administrative Homeroom	6B - CASE (Full Year Term)	
Sort Parameters	Teacher Name (ASC)	

**Generated Report**

9. Optional: Review the criteria you selected for this report or change the description on the **Selection Summary** tab of the report. You can also submit the report from this tab.

StudentInformation > SIS > School > Student Reports > Administrative Homeroom Summary (R201-B)

### Administrative Homeroom List Summary (R201-B)

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

Selection Criteria | **Selection Summary** | Load Settings

**Homeroom Term:** Full Year Term  
**Homeroom Date:** 10/01/2014  
**Student Status:** A - ACTIVE RES  
**Administrative Homeroom:** 6B - BRANCH (Full Year Term), 5A - BRANCH (Full Year Term)  
**Grade Level:** 08 - 08, 09 - 09, 10 - 10, 11 - 11, 12 - 12, GR - GR, 13 - 13, UG - UG, 23 - 23  
**Sort Parameters:** Teacher Name (ASC)

**Description:**

#### Selection Summary Tab

10. Optional: To save default selection criteria for frequently used reports, do the following:
- On the **Load Settings** tab of the report, enter a **Name** for the current setting of your selection criteria.
  - If you want other users to have access to your load settings, deselect the **Private** check box.
  - Click **Save**.
  - In the **Default Settings On Startup** drop-down list, select the settings you want StudentInformation to use by default the next time you run the report: either "Load Last Parameters" or one of the settings you created, which display in the grid.

**Note:** If you click a hyperlinked **Name** in the grid, those saved settings load on the **Selection Criteria** tab.

StudentInformation > SIS > School > Student Reports > Administrative Homeroom Summary (R201-B)

### Administrative Homeroom List Summary (R201-B)

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

Selection Criteria | **Selection Summary** | Load Settings

	Name	Private	Creator	Date Created
X	Preschool Girls	<input checked="" type="checkbox"/>		Jun 26, 2014
X	Preschool Boys	<input checked="" type="checkbox"/>		Jun 26, 2014

**Default Settings On Startup:**

**Current Settings**

**Name:**

**Private:**

#### Load Settings Tab

## Run Batch Jobs

Batch jobs perform a specific action on a “batch” of students or records.

1. On the screen of the batch job you want to run, proceed through the tabs (using the **Next** button) to select records or options to filter the batch job. Typically, the more filters you select, the narrower the search results. If you do not select any filters, you run the batch job on all records.

**Note:** For any multi-select lists, select item(s) by moving them from the left side of the screen to the right.

The screenshot shows the 'Student Fee Assignment' interface. At the top, there is a breadcrumb trail: 'StudentInformation > Management > Ad-Hoc Updates > Student Fee Assignment'. Below this is the title 'Student Fee Assignment' and a subtitle 'Create and update student fee assignments in bulk'. The interface has several tabs: 'Students', 'Assignments', 'Options', 'Confirmation', and 'Results'. The 'Students' tab is active. Underneath, there are two radio buttons: 'Search Criteria' (selected) and 'Ad-Hoc Membership'. The main area contains four filter sections, each with a list on the left and a selection box on the right, connected by double-headed arrows. The 'Grade Level' section has a list with '08 - 08', '09 - 09', '10 - 10', '11 - 11', and 'GR - GR', and a selection box containing '12 - 12'. The 'Homeroom' section has an empty list and a selection box containing '5A - BRANCH (Full Year Term)', '5B - BRANCH (Full Year Term)', '6A - BRANCH (Full Year Term)', '6B - BRANCH (Full Year Term)', and 'AUD - BOYER (Full Year Term)'. The 'Student Status' section has a list with 'C - CENTRAL STUDENTS', 'D - DELETED', 'I - INACTIVE', 'J - JVS RES', and 'JVHS - PT CAR CENT PT DHS', and a selection box containing 'A - ACTIVE RES'. The 'Gender' section has an empty list and a selection box containing 'F' and 'M'. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Next >' button, which is circled in red.

Batch Job Filters

- On the **Confirmation** tab, review the information and click **Finish** to process the batch job.

StudentInformation > Management > Ad-Hoc Updates > Student Fee Assignment

### Student Fee Assignment

Create and update student fee assignments in bulk

Students Assignments Options Confirmation Results

Fee Date: 6/26/2014  
 Included General Fees: 0  
 Included Course Fees: Not Selected  
 Included Miscellaneous Fees: 17  
 Included Program Fees: 0  
 Included Membership Fees: 0  
 Students to be Processed: 16  
 Existing Fee Assignments: 0  
 Existing Fee Handling: Skip fee assignment if assignment already exists

Cancel < Back **Finish**

#### Batch Confirmation

- On the **Results** tab, review the updated records.
- Optional: To start a new batch job, click **Start Over**, and repeat the procedure.

StudentInformation > Management > Ad-Hoc Updates > Student Fee Assignment

### Student Fee Assignment

Create and update student fee assignments in bulk

Students Assignments Options Confirmation Results

The following assignments could not be made

Student	Fee Type	Fee Code	Fee Amount	Reason for Failure
There are no records to display				

The following fee assignments were made

Student	Grade	Status	Fee Type	Fee Code	Fee Amount	Details
ACEVEDO, VANESSA	12	A			\$100.00	New student fee created
ANDERSON, BENJAMIN	12	A			\$100.00	New student fee created
BAILEY, ANGELA	12	A			\$100.00	New student fee created
BAILEY, CYNTHIA	12	A			\$100.00	New student fee created
BARNETT, BETTY	12	A			\$100.00	New student fee created
BEASLEY, JAMES	12	A			\$100.00	New student fee created
BEST, BRAD	12	A			\$100.00	New student fee created
BOWERS, DUSTIN	12	A			\$100.00	New student fee created
BRIDGES, VIOLA	12	A			\$100.00	New student fee created
BROCK, WARREN	12	A			\$100.00	New student fee created
CAMPOS, JOAN	12	A			\$100.00	New student fee created
CHAN, ANITA	12	A			\$100.00	New student fee created
CHRISTIAN, REBECCA	12	A			\$100.00	New student fee created
COCHRAN, KRISTEN	12	A			\$100.00	New student fee created
COPELAND, SALLY	12	A			\$100.00	New student fee created
CRUZ, ELIZABETH	12	A			\$100.00	New student fee created

16 Records Displayed [Back To Top](#)

Start Over

#### Batch Results

## Understand Address Standardization and Verification

If you have appropriate security access, you can enable address standardization and verification to ensure the accuracy of address data in StudentInformation.

If you enable address standardization, StudentInformation standardizes all addresses to fit USPS standards. This includes removing punctuation, checking to see if the address is within the valid range of house numbers for the street, and changing the 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.

You can use address standardization alone or with address verification. If you enable address verification (which requires you to first enable address standardization), StudentInformation verifies that a student's address is within the district where the student is enrolled.

**Note:** You must first define valid district addresses on the **View/Edit District Addresses** screen. You can determine if an address is within the district on the **Students Failing Address Verification** screen.

- To enable address standardization, see [“Enable Address Standardization.”](#)
- To enable address verification, see [“Enable Address Verification.”](#)
- To validate an address when you have standardization and verification enabled, see [“Validate an Address.”](#)

### Enable Address Standardization

**Navigation:** StudentInformation - Management - School Administration - School Building Administration - School Demographics

1. Ensure you have the district selected as your working school.
2. On the **School Demographics** screen, select the **Use Address Standardization** check box.
3. Click **Save**.

StudentInformation > Management > School Administration > School Building Administration > School Demographics

**School Demographics**

This page is used to manage the demographic information for your school

School Code:	DAHS	School Name:	DALTON HIGH SCHOOL
School Type:	School	School Subtype:	-- Select a School Subtype --
IRN:	008003	Principal:	LARRY CASE
Website URL:	http://www.dalton.k12.oh.us/vnews/display.v/SEC/High%	District:	Dalton Local Schools
ThinkGate School Type:	-- Select a School Type --	Use Address Standardization:	<input checked="" type="checkbox"/>
Use Address Verification:	<input checked="" type="checkbox"/>		

### Enable Address Standardization

4. Change your working school to the building for which you want to enable address standardization.
5. Repeat [step 2](#) through [step 3](#).

StudentInformation enables address standardization for the building.

**Note:** You can bypass address standardization on individual addresses if needed.

## Enable Address Verification

**Navigation: StudentInformation - Management - School Administration - School Building Administration - School Demographics**

1. Ensure you have the district selected as your working school.
2. On the **School Demographics** screen, ensure the **Use Address Standardization** check box is selected.
3. Select the **Use Address Verification** check box.
4. Click **Save**.

StudentInformation > Management > School Administration > School Building Administration > School Demographics

**School Demographics**  
This page is used to manage the demographic information for your school

School Code:	DAHS	School Name:	DALTON HIGH SCHOOL
School Type:	School	School Subtype:	-- Select a School Subtype --
IRN:	008003	Principal:	LARRY CASE
Website URL:	http://www.dalton.k12.oh.us/vnews/display.v/SEC/High%	District:	Dalton Local Schools
ThinkGate School Type:	-- Select a School Type --		
Use Address Standardization:	<input checked="" type="checkbox"/>	Use Address Verification:	<input checked="" type="checkbox"/>

### Enable Address Verification

5. Change your working school to the building for which you want to enable address verification.
6. Repeat [step 2](#) through [step 4](#).  
StudentInformation enables address verification for the building.

**Note:** You can bypass address verification on individual addresses if needed.

## Validate an Address

If you have address standardization and address standardization enabled, any time you enter a new address in StudentInformation, the  icon displays to alert you that you must validate the address.

**Address of Residence (For Address Verification)**

Street: 6770 West Snowville Road 

City, State, Zip: Brecksville OH 44141  **Validate**

Bypass Address Standardization/Verification

Indicates you must validate this address. Click Validate.

### Validate an Address

1. Click **Validate**.  
StudentInformation updates the fields to the correct USPS mailing address and verifies that the address exists in the district.

**Note:** Addresses are standardized according to <http://www.usps.com>.

2. Note the status of the update, which displays as  if successful or  if unsuccessful. If standardization and/or verification is unsuccessful, a message displays indicating the reason.



**Address of Residence (For Address Verification)**

Street: 6770 W Snowville Rd 

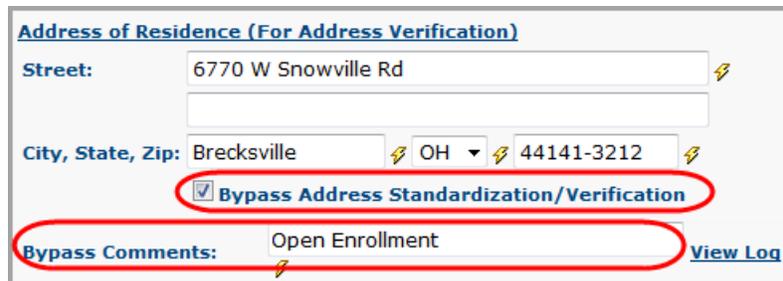
City, State, Zip: Brecksville OH 44141-3212

Bypass Address Standardization/Verification

This address was standardized successfully but is not within the district. You may Bypass Address Verification to allow this address to be saved for the student.

**Standardization or Validation Unsuccessful**

3. Optional: If you know the address cannot be standardized or verified for some reason or if the standardized address contains an error, do the following:
  - a. Select the **Bypass Address Standardization/Verification** check box. The **Bypass Comments** field displays.
  - b. Enter a reason for bypassing address standardization.



**Address of Residence (For Address Verification)**

Street: 6770 W Snowville Rd

City, State, Zip: Brecksville OH 44141-3212

Bypass Address Standardization/Verification

Bypass Comments: Open Enrollment [View Log](#)

**Bypass Address Standardization/Verification**

4. Click **Save**.

# End User Requirements for Version 14.7.0

## End User Requirements

The tables below are a guideline for end users. The ProgressBook Suite has been successfully tested using these product and version configurations. Other configurations may work without issue; however, these are the versions actively tested and supported.

Operating System	Browser Versions	Adobe Reader Versions
<b>Apple</b>		
Mac OS X Mountain Lion (v10.8.5)	Safari 6.1.6	11.0 or later
Mac OS X Mavericks (v10.9.1)	Safari 7.0.6	11.0 or later
<b>Microsoft</b>		
Windows 7 SP1 Windows 8 & 8.1	Internet Explorer 10 or 11 Firefox 35 or later Google Chrome 39 or later	11.0 or later

## Additional Configurations Supported by ParentAccess

Operating System	Browser Versions	Adobe Reader Versions
<b>Apple</b>		
iOS 7 & 8	Safari	11.0 or later

## Pop-up Blockers

The SpecialServices application displays the PDF documents in a pop-up window. You must disable any pop-up blocker in order for the SpecialServices application to function properly. Pop-up blockers vary based on operating system, browser version, and third party tools such as the Google Toolbar, etc. Check your system settings, and be sure to enable pop-ups for the SpecialServices website.

## StudentInformation Masthead

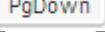
The screenshot shows the ProgressBook StudentInformation interface with the following annotated components:

- ProgressBook Logo:** Labeled "Return to StudentInformation Screen" and "Navigate to Other ProgressBook Applications".
- Navigation Menu:** Labeled "Navigation Menu".
- Student Profile (ALEXANDER, ERIK):**
  - Open larger photo and summary profile info:** Points to the student's profile picture.
  - Open full student profile:** Points to the student's name.
  - Open I want to... menu:** Points to the dropdown menu below the name.
  - Student alerts:** Points to the bell icon.
  - View student search results:** Points to the magnifying glass icon.
  - Scroll through students:** Points to the left and right arrow icons.
  - Clear selected student in context:** Points to the gear icon.
- Working School:** Labeled "Working School" and "Working School Year".
- User Options:** Labeled "User Options" and "Tools".
- Breadcrumb Trail:** Labeled "Breadcrumb Trail".
- Advanced Student Search:** Labeled "Advanced Student Search".
- Tools:** Labeled "Tools", containing:
  - Print
  - Batch Jobs & Reports Management
  - Check Software Version Version
  - Submit Feedback Feedback
- User Options Panel:** Labeled "User Options", containing:
  - ASHLAND HIGH SCHOOL 2014-2015
  - User Name: ProgressBook User
  - Environment: BETA - OH
  - Change Your Password: Change Password
  - Set Current School in Context as Your Default School: Save As Default School
  - Sign Out of ProgressBook: Sign out

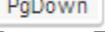
Alerts	
	Student has a medical alert
	Student has a disability alert
	Student has a custody alert
	Student has outstanding fees
	Student has a fee credit balance
	Student has a miscellaneous alert

Records	
	Delete a record
	Edit a record
	View a record
	Locked record
	Active record
	Inactive record

Misc.	
	Calendar date and month/year picker
	Opens a student's profile
	Critical
	Required field

Calendar Date Picker	
 or 	Opens calendar date picker
	Today (current date)
	Previous day
	Next day
	Previous Month
	Next Month

Month/Year Picker	
 or 	Opens month/year picker
	This (current) month/year
	Previous Month
	Next Month

Time Picker	
Click in field	Opens time picker
	Now
	Previous minute
	Next minute
	Previous hour
	Next hour

Student Search Criteria		
Search Method	Enter	Returns Student(s) With...
Last name	smith	Last name of Smith
Partial last name with wildcard (*)	sm*	Last name starting with "Sm"
	*sm*	Letter combination "sm" anywhere in the last name
Partial last name, comma, partial first name	s,d	Last name starting with "S" and first name starting with "D"
Partial last name, comma, partial called name	s,a	Last name starting with "S" and called name (name used in school) starting with "A"
Birth date in format (m)m/(d)d/(yy)yy	01/01/2003 or 1/1/03	January 1, 2003 birth date
Social Security number in format xxx-xx-xxxx	000-00-0000	Matching Social Security number
Student number	00000000	Matching student number
Phone number in format xxx-xxx-xxxx	555-555-0000	Matching phone number

---

# ProgressBook StudentInformation Ad-Hoc Updates Guide



# **ProgressBook StudentInformation Ad-Hoc Updates Guide**

**(This document is current for ProgressBook StudentInformation v14.6.7 or later.)**

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Ad-Hoc Updates Guide* have been made.

Product Version	Heading	Page	Reason
14.6.7	<i>"Bulk Update Student Profiles"</i>	19	Updated image of <b>Annual record</b> tab to show new <b>Distance student was transported from residence to school building</b> drop-down list.
14.6.5	<i>"Bulk Update Course College Credit"</i>	30	Added section.
14.6.5	<i>"Bulk Update Manual Course College Credit"</i>	32	Added section.
14.6.0	<i>"Bulk Update Student Profiles"</i>	19	Updated image of <b>Student record</b> tab to show new <b>Attendance Calendar</b> and <b>Admission History Effective Start Date</b> fields. Updated image of <b>Annual record</b> tab to show new <b>Countweek Transportation Days</b> section.
14.6.0	<i>"Bulk Update Courses"</i>	29	Updated topic name and text to reflect new screen name.
14.6.0	<i>"Bulk Update Manual Courses"</i>	29	Updated topic name and text to reflect new screen name.
14.5.0	<i>"Bulk Update Student Profiles"</i>	19	Updated image of <b>FS-Standing &amp; FD-Attributes-Effective Date</b> tab to show new <b>Reporting Calendar</b> drop-down list.
14.4.3	<i>"Bulk Update Student Profiles"</i>	19	Updated image of <b>FN-Attributes-No Date</b> tab to reflect removal of <b>Reporting Period</b> drop-down list and addition of <b>Attending District IRN Last October</b> field.
14.3.0	Global	N/A	Converted source files to FrameMaker. Updated formatting/structure to match ProgressBook Suite. Rewrote topics using procedural steps.
14.3.0	<i>"Bulk Update Student Profiles"</i>	19	Updated screen shots and added description of new fields on <b>FN-Attributes-No Date</b> tab and <b>FN-Graduate</b> tab.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Ad-Hoc Updates Overview</b>	<b>1</b>
Copy Student Memberships .....	1
Clear Fees.....	3
<b>Bulk Assignments</b>	<b>5</b>
Bulk Assign Counselors .....	5
Assign Counselors by Homeroom.....	5
Assign Counselors Randomly .....	7
Assign Counselors Manually.....	12
Bulk Assign Homerooms.....	16
Bulk Assign Lockers.....	16
Bulk Assign Student Fees .....	16
<b>Bulk Updates</b>	<b>19</b>
Bulk Update Student Profiles .....	19
Business Rules for Student Profile Bulk Update – FS and FD Records .....	25
Bulk Update Diploma Type.....	25
Bulk Update Graduation Date .....	26
Update Graduation Date by Student Status .....	27
Update Graduation Date by Ad-Hoc Membership.....	28
Bulk Update Courses .....	29
Bulk Update Manual Courses .....	29
Bulk Update Fall Initialization Blocks .....	29
Bulk Update Course College Credit .....	30
Bulk Update Manual Course College Credit .....	32

---

This page intentionally left blank.

# Ad-Hoc Updates Overview

Ad-hoc updates update the StudentInformation database and create a report with results for you to verify. You can make the following types of ad-hoc updates:

- “Copy Student Memberships”
- “Clear Fees”
- “Bulk Assign Counselors”
- “Bulk Assign Homerooms”
- “Bulk Assign Lockers”
- “Bulk Assign Student Fees”
- “Bulk Update Student Profiles”
- “Bulk Update Diploma Type”
- “Bulk Update Graduation Date”
- “Bulk Update Courses”
- “Bulk Update Manual Courses”
- “Bulk Update Fall Initialization Blocks”

---

## Copy Student Memberships

**Navigation: Home – Management – Ad-Hoc Updates – Student Membership Copy**

You can copy student membership assignments from the previous year (source) to the current year in context (destination) for students registered in the same building both years. The start date of the copied assignments is the first day of school of the current year.

***Note:** If a student membership assignment already exists in a student’s record for the current year, you cannot copy it in from the previous year.*

1. Place the correct building and destination year in context.
2. On the **Student Membership Copy** screen, on the **Search Criteria** tab, select the student membership assignments you wish to copy by moving items in the **Membership Group** and **Membership** multi-select lists from the left side of the screen to the right side. (If you do not select any item in a list, all items are returned in the search results.)

***Note:** These options function independently of each other. For example, If you select both **Membership Group 15-15** and **Membership 115004**, all students in membership group 15-15 and all students with membership code 115004 are returned in the search results.*

3. Optional: To include student membership assignments that have stop dates in the previous or current year, select the **Include Student Memberships with Stop Dates** check box.

**Student Membership Copy – Search Criteria Tab**

4. Click **Search**.

The search results display on the **Select Student Memberships** tab. The following are excluded from the search results:

- Students not enrolled in both source and destination school years
- Memberships that do not exist in both source and destination school years
- Students already assigned to the membership in the destination school year

<input type="checkbox"/>	<u>Student</u> ^	<u>Code</u>	<u>Membership</u>	<u>Membership Group</u>	<u>Start Date</u>	<u>Stop Date</u>
<input type="checkbox"/>	Student12707, ASHLEY	420019	Cheer - BK	42 - Interscholastic Athletics	Nov 04, 2010	
<input type="checkbox"/>	Student12723, LINDSEY	420017	SC - G	42 - Interscholastic Athletics	Sep 10, 2010	
<input type="checkbox"/>	Student12723, LINDSEY	R SC 1	RES SOCCER 1 YR.	SC - SOCCER	Oct 18, 2010	
<input type="checkbox"/>	Student12732, ALEXANDRIA	420012	Volleyball	42 - Interscholastic Athletics	Sep 10, 2010	
<input type="checkbox"/>	Student12732, ALEXANDRIA	R VB 1	RES VB 1 YR.	VB - VOLLEYBALL	Oct 21, 2010	
<input type="checkbox"/>	Student12745, LAUREN	420011	Swimming and Diving	42 - Interscholastic Athletics	Nov 04, 2010	

**Student Membership Copy – Select Student Memberships Tab**

5. Select the check box beside the student membership assignment(s) you want to copy from the previous year to the year in context.
6. Click **Copy Memberships**.

## Clear Fees

### Navigation: Home – Management – Ad-Hoc Updates – Clear Fees

You can use this batch process to zero out all fees with a credit balance and/or a debit balance.

**Note:** You can only use this batch process if your school is configured to use fee accounting.

- On the **Clear Fees** screen, make your selections in the following fields:
  - Clear Credit Fees** (optional) – Zeroes out fees that have a credit balance. The process applies an unrefunded payment (type U) to fees with a credit balance.
  - Clear Debit Fees** (optional) – Zeroes out fees that have a debit balance. This is performed at the end of the school year in a building that does not wish to carry outstanding fee balances forward for the next school year. Fee payment records with a pay status of A (Amnesty) are posted.
  - Pay reference for credit balance fees** (optional) – Enter a reference description for any credit balance fees applied to each payment record. This field defaults to “Unrefunded.”
  - Pay reference for fees owed** (optional) – Enter a reference description for any debit balance fees applied to each payment record. This field defaults to “Amnesty.”
  - Pay Date** (required) – Enter the date that will be applied to each payment record. This field defaults to today’s date.
  - Fee Types to process** (required) – Choose one or more fee types to clear out. All fee types are selected by default.

||▶ Home » Management » Ad-Hoc Updates » Clear Fees

### Clear Fees

Enter the criteria for the fees to zero. Click Submit to create a batch job which will zero the fees.

<b>Clear Credit Fees</b>	<input checked="" type="checkbox"/>
<b>Clear Debit Fees</b>	<input type="checkbox"/>
<b>Pay reference for credit balance fees</b>	<input type="text" value="Unrefunded"/>
<b>Pay reference for fees owed</b>	<input type="text" value="Amnesty"/>
<b>Pay Date</b>	<input type="text" value="1/8/2005"/>

**Fee Types to process:**

**General Fees:**   
 **Course Fees:**   
 **Misc Fees:**   
 **Program Fees:**   
 **Membership Fees:**

### Clear Fees

2. Click **Submit Job**.

The batch process examines all fees of the types you specified for the current school, school year and schedule and generates a report displaying the grand total of all payments entered by the batch process.

# Bulk Assignments

You can use ad-hoc updates to make several types of bulk assignments in StudentInformation. For detailed instructions, see the appropriate topic:

- [“Bulk Assign Counselors”](#)
- [“Bulk Assign Homerooms”](#)
- [“Bulk Assign Lockers”](#)
- [“Bulk Assign Student Fees”](#)

---

## Bulk Assign Counselors

You can assign groups of students to counselors using the following methods:

- [“Assign Counselors by Homeroom”](#)
- [“Assign Counselors Randomly”](#)
- [“Assign Counselors Manually”](#)

### Assign Counselors by Homeroom

#### Navigation: Home – Management – Ad-Hoc Updates – Counselor Bulk Assignment

This method assigns counselors to students based on the default counselor for each student’s homeroom. To use this method, you must select a homeroom term to use for looking up homeroom assignments for students.

**Note:** *This method does not assign counselors to students who are not assigned to homerooms or to students assigned to homerooms that do not have a defined default counselor.*

1. On the **Counselor Bulk Assignment** screen, on the **Assignment Method** tab, select an **Assignment Method** of “Homeroom.”

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment Advanced Search | Feedback | Mgmt | Help

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method: **Students** | Options | Confirmation | Results

Assignment Method:  **Homeroom**     Random     Manual

This assignment method will assign counselors to students by selecting the counselor that is defined as the default counselor for each student's homeroom. In order to assign counselors based on homeroom, you must select a homeroom term to use for looking up homeroom assignments for students.

Students not assigned to homerooms will not get counselor assignments. Students assigned to homerooms without a counselor definition will not get counselor assignments.

Homeroom Term: -- Select Homeroom Term --

### Assign Counselors by Homeroom

2. In the **Homeroom Term** drop-down list, select the proper homeroom term for which you want to assign counselors.
3. Click **Next**.
4. On the **Options** tab, for each homeroom, in the **Counselor** drop-down list, select the counselor you want to assign to the homeroom.

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment Advanced Search | Feedback | Mgmt | Help

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method: Students | **Options** | Confirmation | Results

Changing the counselor for the homeroom will save the counselor permanently for this homeroom. To edit homeroom details further, see the Homeroom Maintenance page.

Homeroom ^	HR Term	Teacher	Room	Grades	Counselor
A103 - A103	FullYear	BERRY	103 - 103	09	<input type="text"/>
A104 - A104	FullYear	AUSTIN	104 - 104	09	<input type="text"/>
A105 - A105	FullYear	COUSINS	105 - 105	10	ALLEN, MARK
A106 - A106	FullYear	CASTLE	106 - 106	10	<input type="text"/>
A107 - A107	FullYear	WALTERS	107 - 107	11	<input type="text"/>
A108 - A108	FullYear	CLARK	108 - 108	11	<input type="text"/>
A109 - A109	FullYear	WEBBER	109 - 109	12	<input type="text"/>
A110 - A110	FullYear	LAYMAN	110 - 110	12	<input type="text"/>

### Counselor Assignment by Homeroom – Options Tab

5. Click **Next**.

6. On the **Confirmation** tab, confirm the following information:
  - **Counselor** – Name of counselor to assign to the selected students
  - **Previously Assigned** – Number of students previously assigned to the counselor
  - **Assignments to be Removed** – Number of students to remove from the counselor
  - **Assignments to be Made** – Number of students to add to the counselor
  - **Total Students to be Assigned** – Total number of students to assign to this counselor in the current process

The screenshot shows the 'Confirmation' tab of the 'Counselor Bulk Assignment' interface. The breadcrumb trail is 'Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment'. The page title is 'Counselor Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to counselors'. The 'Confirmation' tab is selected, showing a table with the following data:

Counselor	Previously Assigned	Assignments to be Removed	Assignments to be Made	Total Students to be Assigned
ALLEN, MARK	0	0	1	1

Buttons at the bottom include 'Cancel', '< Back', and 'Finish'.

Counselor Bulk Assignment – Confirmation Tab

7. Optional: To make any changes, click **Back**, and modify your criteria.
8. When you are satisfied and want to confirm the counselor assignments, click **Finish**.  
The **Results** tab displays the new counselor assignments.

The screenshot shows the 'Results' tab of the 'Counselor Bulk Assignment' interface. The breadcrumb trail is 'Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment'. The page title is 'Counselor Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to counselors'. The 'Results' tab is selected, showing a table with the following data:

Student	Student Number	Grade	Status	Counselor
CONTRARY, MARY M.	00005001	10	A	ALLEN, MARK

A 'Start Over' button is located at the bottom left.

Counselor Bulk Assignment – Results Tab

9. Optional: To continue assigning counselors, click **Start Over**.

## Assign Counselors Randomly

### Navigation: Home – Management – Ad-Hoc Updates – Counselor Bulk Assignment

This method assigns counselors to students in a random fashion, although you may choose whether or not to respect grade level assignments.

1. On the **Counselor Bulk Assignment** screen, on the **Assignment Method** tab, select an **Assignment Method** of “Random.”

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment Advanced Search | Feedback | Mgmt | Help

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method **Students** Options Confirmation Results

Assignment Method:  Homeroom  Random  Manual

This assignment method will assign counselors to students in a random fashion. You may choose whether or not to respect grade level assignments with the random assignments.

Respect Grade Level Assignments:

### Assign Counselors Randomly

2. Optional: If you do not want to limit the assignment of counselors to only those counselors assigned to the student's grade level, deselect the **Respect Grade Level Assignments** check box.
3. Click **Next**.
4. On the **Students** tab, in the **Select Students By** option, choose a method of selecting the students to whom you want to assign counselors:
  - To search using various search criteria, select "Search Criteria." Then choose any of the following criteria:
    - **Last Name** (If you enter a partial last name, select the check box to use the wildcard filter.)
    - **First Name** (If you enter a partial first name, select the check box to use the wildcard filter.)
    - **Team**
    - **Gender**
    - **Program**
    - **Student Status**
    - **Grade Level**

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method | **Students** | Options | Confirmation | Results

Select Students By:  Search Criteria  Student IDs  Ad-Hoc Membership

Last Name:   First Name:

Team:  Gender:

**Program**

JAB - Jr Auto Body	<input type="checkbox"/> ← → <input type="checkbox"/>	<input type="text"/>
JAG - Jr AG Mechanics		
JCOS - Jr Cosmetology		
SAB - Sr Auto Body		
SAG - Sr AG Mechanics		
SCOS - Sr Cosmetology		

**Student Status**

A - ACTIVE RES	<input type="checkbox"/> ← → <input type="checkbox"/>	<input type="text"/>
D - DELETED		
I - INACTIVE		
JVS - Student Attending JVS		
O - OTH NONRES		
Open - Open Enrolled Student		

**Grade Level**

09 - 09	<input type="checkbox"/> ← → <input type="checkbox"/>	<input type="text"/>
10 - 10		
11 - 11		
12 - 12		
GR - GR		
23 - 23		

Counselor Bulk Assignment – Select Students by Search Criteria

- To select students by student ID, select “Student IDs.” Then enter the student IDs separated by a comma.

The screenshot shows the 'Counselor Bulk Assignment' web interface. At the top, there is a breadcrumb trail: Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment. Below this is the title 'Counselor Bulk Assignment' and a subtitle 'Here you can assign a bulk group of students to counselors'. There are five tabs: 'Assignment Method', 'Students', 'Options', 'Confirmation', and 'Results'. Under 'Assignment Method', there are three radio buttons: 'Search Criteria', 'Student IDs' (which is selected), and 'Ad-Hoc Membership'. Below the radio buttons is a large empty text area for entering student IDs. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

### Counselor Bulk Assignment – Select Students by Student IDs

- To select students by ad-hoc membership, select “Ad-Hoc Membership.” Then in the **Ad-Hoc Membership** drop-down list, select the predefined membership.

**Note:** To find or build an ad-hoc membership, click . (For more information on setting up ad-hoc memberships, see *ProgressBook StudentInformation Getting Started Guide*.)

The screenshot shows the 'Counselor Bulk Assignment' web interface. At the top, there is a breadcrumb trail: Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment. Below this is the title 'Counselor Bulk Assignment' and a subtitle 'Here you can assign a bulk group of students to counselors'. There are five tabs: 'Assignment Method', 'Students', 'Options', 'Confirmation', and 'Results'. Under 'Assignment Method', there are three radio buttons: 'Search Criteria', 'Student IDs', and 'Ad-Hoc Membership' (which is selected). Below the radio buttons is a dropdown menu labeled 'Ad-Hoc Membership:' with a three dots icon and a lightning bolt icon to its right. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

### Counselor Bulk Assignment – Select Students by Ad-Hoc Membership

5. Click **Next**.
6. On the **Options** tab, select one or more counselors to randomly assign to the selected students by moving them from the left to the right side of the screen.
7. Optional: If you want this process to override any existing counselor assignments, in the **Students to Include** option, select “All students (override assignments).”

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | Confirmation | Results

**Counselors**

ALLEN, MARK

**Students to Include:**

Students without a counselor assignment

All students (override assignments)

Cancel < Back Next >

### Random Counselor Assignment – Options Tab

8. Click **Next**.
9. On the **Confirmation** tab, confirm the following information:
  - **Counselor** – Name of counselor to assign to the selected students
  - **Previously Assigned** – Number of students previously assigned to the counselor
  - **Assignments to be Removed** – Number of students to remove from the counselor
  - **Assignments to be Made** – Number of students to add to the counselor
  - **Total Students to be Assigned** – Total number of students to assign to this counselor in the current process

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment Advanced Search | Feedback | Mgmt | Help

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | Confirmation | Results

Counselor	Previously Assigned	Assignments to be Removed	Assignments to be Made	Total Students to be Assigned
ALLEN, MARK	0	0	1	1

Cancel < Back Finish

### Counselor Bulk Assignment – Confirmation Tab

10. Optional: To make any changes, click **Back**, and modify your criteria.
11. When you are satisfied and want to confirm the counselor assignments, click **Finish**.  
The **Results** tab displays the new counselor assignments.

Student	Student Number	Grade	Status	Counselor
CONTRARY, MARY M.	00005001	10	A	ALLEN, MARK

Counselor Bulk Assignment – Results Tab

- Optional: To continue assigning counselors, click **Start Over**.

## Assign Counselors Manually

**Navigation:** Home – Management – Ad-Hoc Updates – Counselor Bulk Assignment

This method lets you select a single counselor to assign to selected students. All students matching your search criteria are assigned to the counselor, regardless of grade level assignments.

- On the **Counselor Bulk Assignment** screen, on the **Assignment Method** tab, select an **Assignment Method** of “Manual.”

Assignment Method:  Homeroom  Random  Manual

Manually assigning counselors allows you to select a single counselor for assignment to the selected students. All students matching the search criteria entered will be assigned to the counselor selected, regardless of grade level assignments.

Assign Counselors Manually

- Click **Next**.
- On the **Students** tab, in the **Select Students By** option, choose a method of selecting the students to whom you want to assign the counselor:

- To search using various search criteria, select “Search Criteria.” Then choose any of the following criteria:
  - Last Name** (To use the wildcard filter, select the check box.)
  - First Name** (To use the wildcard filter, select the check box.)
  - Team**
  - Gender**
  - Program**
  - Student Status**
  - Grade Level**

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | Confirmation | Results

Select Students By:  Search Criteria  Student IDs  Ad-Hoc Membership

Last Name:   First Name:

Team:  Gender:

**Program**

JAB - Jr Auto Body	↕	
JAG - Jr AG Mechanics	↕	
JCOS - Jr Cosmetology	↕	
SAB - Sr Auto Body	↕	
SAG - Sr AG Mechanics	↕	
SCOS - Sr Cosmetology	↕	

**Student Status**

A - ACTIVE RES	↕	
D - DELETED	↕	
I - INACTIVE	↕	
JVS - Student Attending JVS	↕	
O - OTH NONRES	↕	
Open - Open Enrolled Student	↕	

**Grade Level**

09 - 09	↕	
10 - 10	↕	
11 - 11	↕	
12 - 12	↕	
GR - GR	↕	
23 - 23	↕	

Cancel

### Counselor Bulk Assignment – Select Students by Search Criteria

- To select students by student ID, select “Student IDs.” Then enter the student IDs separated by a comma.

The screenshot shows the 'Counselor Bulk Assignment' web application. The breadcrumb trail is 'Home > Management > Ad-Hoc Updates > Counselor Bulk Assignment'. The page title is 'Counselor Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to counselors'. There are five tabs: 'Assignment Method', 'Students', 'Options', 'Confirmation', and 'Results'. Under 'Select Students By:', three radio buttons are present: 'Search Criteria' (unselected), 'Student IDs' (selected), and 'Ad-Hoc Membership' (unselected). Below the radio buttons is a large, empty text input field for entering student IDs. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

#### Counselor Bulk Assignment – Select Students by Student IDs

- To select students by ad-hoc membership, select “Ad-Hoc Membership.” Then in the **Ad-Hoc Membership** drop-down list, select the predefined membership.

**Note:** To find or build an ad-hoc membership, click . (For more information on setting up ad-hoc memberships, see *ProgressBook StudentInformation Getting Started Guide*.)

The screenshot shows the 'Counselor Bulk Assignment' web application. The breadcrumb trail is 'Home > Management > Ad-Hoc Updates > Counselor Bulk Assignment'. The page title is 'Counselor Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to counselors'. There are five tabs: 'Assignment Method', 'Students', 'Options', 'Confirmation', and 'Results'. Under 'Select Students By:', three radio buttons are present: 'Search Criteria' (unselected), 'Student IDs' (unselected), and 'Ad-Hoc Membership' (selected). Below the radio buttons is a dropdown menu labeled 'Ad-Hoc Membership:' with a three-dot icon and a lightning bolt icon to its right. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

#### Counselor Bulk Assignment – Select Students by Ad-Hoc Membership

4. Click **Next**.
5. On the **Options** tab, in the **Counselor** drop-down list, select the counselor to assign to the selected students.
6. Optional: If you want this process to override any existing counselor assignments, in the **Students to Include** option, select “All students (override assignments).”

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method   Students   Options   Confirmation   Results

**Counselors**

ALLEN, MARK

**Students to Include:**

Students without a counselor assignment  
 All students (override assignments)

Cancel   < Back   Next >

### Manual Counselor Assignment – Options Tab

- Click **Next**.
- On the **Confirmation** tab, confirm that you want to assign the counselor to all of the selected students. If needed, deselect any individual student. (You can also select or deselect all students in the list using the **Students selected by default** check box).

Home » Management » Ad-Hoc Updates » Counselor Bulk Assignment

## Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method   Students   Options   Confirmation   Results

**Students selected by default**

		Student Name	Student Number	Grade	Status	Counselor
1	<input checked="" type="checkbox"/>	Banana, Hannah	48652258	10	A	ALLEN, MARK
2	<input checked="" type="checkbox"/>	Contrary, Jesse	48652281	10	A	ALLEN, MARK
3	<input checked="" type="checkbox"/>	EYE, CORY ROBERT	00006001	10	A	ALLEN, MARK
4	<input checked="" type="checkbox"/>	EYE, PRIVA	00122445	10	A	ALLEN, MARK

Cancel   < Back   Finish

### Manual Counselor Assignment – Confirmation Tab

- Click **Finish**.  
The **Results** tab displays the new counselor assignments.

Student	Student Number	Grade	Status	Counselor
Banana, Hannah	48652258	10	A	ALLEN, MARK
Contrary, Jesse	48652281	10	A	ALLEN, MARK
EYE, CORY ROBERT	00006001	10	A	ALLEN, MARK
EYE, PRIVA	00122445	10	A	ALLEN, MARK

**Manual Counselor Assignment – Results Tab**

10. Optional: To continue assigning counselors, click **Start Over**.

---

## Bulk Assign Homerooms

**Navigation: Home – Management – Ad-Hoc Updates – Homeroom Bulk Assignment**

You can assign and/or mass update homerooms by grade level and/or terms using several different options.

For detailed information on bulk assigning homerooms, see *ProgressBook StudentInformation Student Homeroom Guide*.

---

## Bulk Assign Lockers

**Navigation: Home – Management – Ad-Hoc Updates – Locker Bulk Assignment**

You can assign lockers to students and/or mass update locker assignments using several different options.

For detailed information on bulk assigning lockers, see *ProgressBook StudentInformation Student Lockers Guide*.

---

## Bulk Assign Student Fees

**Navigation: Home – Management – Ad-Hoc Updates – Student Fee Assignment**

This batch process generates fee entries for students based on defined general fees, course fees based on each student's course schedule, membership fees for students belonging to specific membership groups and program fees for students enrolled in specific programs. You can select the fee types to assign in any combination. Fees are assigned only to students who are enrolled in the working school for the current school year in context.

**Note:** You can only run this process if the *Finalize School Year* process is complete.

For detailed information on bulk assigning student fees, see *ProgressBook StudentInformation Fees Guide*.

This page intentionally left blank.

# Bulk Updates

You can use ad-hoc updates to make several types of bulk updates in StudentInformation. For detailed instructions, see the appropriate topic:

- [“Bulk Update Student Profiles”](#)
- [“Bulk Update Diploma Type”](#)
- [“Bulk Update Graduation Date”](#)
- [“Bulk Update Courses”](#)
- [“Bulk Update Manual Courses”](#)
- [“Bulk Update Fall Initialization Blocks”](#)
- [“Bulk Update Course College Credit”](#)
- [“Bulk Update Manual Course College Credit”](#)

---

## Bulk Update Student Profiles

### Navigation: StudentInformation – Management – Ad-Hoc Updates – Student Profile Bulk Update

This process lets you mass update specific field values on the student profile for a collection of students using ad-hoc membership groups.

1. On the **Student Profile Bulk Update** screen, on the **Select Ad-Hoc** tab, in the **Ad Hoc** drop-down list, select the ad-hoc group to which your bulk updates should apply.

**Note:** To find or build an ad-hoc membership, click . (For more information on setting up ad-hoc memberships, see *ProgressBook StudentInformation Getting Started Guide*.)

2. Optional: To expand the available ad-hoc membership groups to include both public and private groups, select the **Public And Private** check box.
3. Click **Next**.



The screenshot shows the 'Student Profile Bulk Update' interface. At the top, a breadcrumb trail reads: Home » Management » Ad-Hoc Updates » Student Profile Bulk Update. Below this, the title 'Student Profile Bulk Update' is displayed, followed by the subtitle 'Make bulk updates to students' profiles'. A section titled 'Number of Students in selected Ad Hoc:' contains a row of tabs: 'Select Ad-Hoc', 'Student record', 'Annual record', 'FS-Standing & FD-Attributes-Effective Date', 'FN-Attributes-No Date', 'FN-Graduate', and 'Review updates'. The 'Select Ad-Hoc' tab is active. Below the tabs, there is a form with an 'Ad Hoc:' label, a dropdown menu showing '-- Select an Ad-Hoc Membership --', and a help icon. Below the dropdown is a 'Public And Private' checkbox, which is currently unchecked. A 'Next >' button is located to the right of the form.

### Student Profile Bulk Update – Select Ad Hoc Tab

- Optional: If you need to change any fields on the **Student record**, **Annual record**, **FS-Standing & FD-Attributes-Effective Date**, **FN-Attributes-No Date** or **FN-Graduate** tabs, make those changes.

**Note:** These available/visible fields may vary based on the school year and your security rights.

**Note:** To clear a student profile field for all members of the selected ad-hoc group, select the check box beside the field, and ensure the field has no value selected in the drop-down list.

- When you are finished making changes on each tab, click **Next**.

StudentInformation > Management > Ad-Hoc Updates > Student Profile Bulk Update

### Student Profile Bulk Update

Make bulk updates to students' profiles

Number of Students in selected Ad Hoc: 0

Select Ad-Hoc: **Student record** | Annual record | FS-Standing & FD-Attributes-Effective Date | FN-Attributes-No Date | FN-Graduate | Review updates

Mark the check box next to field(s) you wish to edit.  
If the value is left blank and the check box is checked any value in the field(s) will be cleared, unless otherwise noted as required.

[< Back](#) [Next >](#)

<b>Citizenship:</b> <input type="checkbox"/> <input type="text"/>	<b>Pri. Graduation Rule:</b> <input type="checkbox"/> <input type="text"/>
<b>Country of Origin:</b> <input type="checkbox"/> <input type="text"/>	<b>Alt. Graduation Rule:</b> <input type="checkbox"/> <input type="text"/>
<b>Native Language:</b> <input type="checkbox"/> <input type="text"/>	<b>Building Progression Track:</b> <input type="checkbox"/> <input type="text"/>
<b>Home Language:</b> <input type="checkbox"/> <input type="text"/>	<b>Birthdate Verified With:</b> <input type="checkbox"/> <input type="text"/>
<b>Local Ethnic Category:</b> <input type="checkbox"/> <input type="text"/>	

Hispanic/Latino and Racial Group(s) can only be bulk updated as a group, not individually.

**Ethnicity / Race:**

**Hispanic/Latino:**

**Racial Group(s):**  
 A-Asian  
 B-Black or African American  
 I-American Indian or Alaska Native  
 P-Native Hawaiian or Other Pacific Islander  
 W-White

<b>Attendance Calendar:</b> <input type="checkbox"/> <input type="text"/>	<b>Admission History Effective Start Date:</b> <input type="checkbox"/> <input type="text"/>
--	---

**Student Profile Bulk Update – Student Record Tab**

StudentInformation > Management > Ad-Hoc Updates > Student Profile Bulk Update

### Student Profile Bulk Update

Make bulk updates to students' profiles

Number of Students in selected Ad Hoc: 0

Select Ad-Hoc Student record Annual record FS-Standing & FD-Attributes-Effective Date FN-Attributes-No Date FN-Graduate Review updates

Mark the check box next to field(s) you wish to edit.  
If the value is left blank and the check box is checked any value in the field(s) will be cleared, unless otherwise noted as required.

< Back Next >

<p><b>Graduation Year:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Grade Next Year:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Special Ed:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Scheduling Priority:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Include in Honor Roll:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Include in Ranking:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Include in GPA:</b> <input type="checkbox"/> <input type="text"/></p>	<p><b>Team:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Student Status:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Program:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Primary Building:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>New School:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Counselor:</b> <input type="checkbox"/> <input type="text"/></p> <p><b>Home School IRN:</b> <input type="checkbox"/> <input type="text"/></p>
---	--

**Flags:**

1:   2:   3:   4:   5:

**Distance student was transported from residence to school building:**

**Countweek Transportation Days:**  
  Monday  Tuesday  Wednesday  Thursday  Friday

Student Profile Bulk Update – Annual Record Tab

StudentInformation > Management > Ad-Hoc Updates > Student Profile Bulk Update

### Student Profile Bulk Update

Make bulk updates to students' profiles

Number of Students in selected Ad Hoc: 0

Select Ad-Hoc Student record Annual record FS-Standing & FD-Attributes-Effective Date FN-Attributes-No Date FN-Graduate Review updates

Mark the check box next to field(s) you wish to edit.  
If the value is left blank and the check box is checked any value in the field(s) will be cleared, unless otherwise noted as required.

< Back Next >

Effective Start Date: 7/28/2014

#### FS - Student Standing

**Admission Reason:**  
 [ ]

**Admitted From IRN:**  
 [ ] - [ ]

**EMIS Situation:**  
 [ ]

**Withdrawn To IRN:**  
 [ ] - [ ]

**District Relationship:**  
 [ ]

**District of Residence:**  
 [ ] - [ ]

**How Received:**  
 [ ]

**How Received IRN:**  
 [ ] - [ ]

**Percent of Time:**  
 [ ]

**Tuition Type:**  
 [ ]

**Attending Building IRN:**  
 [ ]

**Assigned Building IRN:**  
 [ ]

**County of Residence:**  
 [ ]

**Sent To 1**

**Reason:**  
 [ ]

**IRN:**  
 [ ] - [ ]

**Percent of Time:**  
 [ ]

**Sent To 2**

**Reason:**  
 [ ]

**IRN:**  
 [ ] - [ ]

**Percent of Time:**  
 [ ]

#### FD - Attributes - Effective Date

**EMIS Grade Level**  
 [ ]

**State Equivalent Grade**  
 [ ]

**Disability Condition:**  
 [ ]

**Section 504 Plan:**  
 [ ]

**Disadvantagemet:**  
 [ ]

**Free/Reduced Lunch Status:**  
 [ ]

**Reporting Calendar:**  
 [ ]

**Attendance Pattern:**  
 [ ]

**Preschool Poverty Level:**  
 [ ]

Student Profile Bulk Update – FS-Standing & FD-Attributes-Effective Date Tab

**Note:** Your selection in the Reporting Calendar drop-down list updates the Attendance Pattern.

**Note:** For information on how StudentInformation updates FS and FD records, see “[Business Rules for Student Profile Bulk Update – FS and FD Records.](#)”

Home >> Management >> Ad-Hoc Updates >> Student Profile Bulk Update

## Student Profile Bulk Update

Make bulk updates to students' profiles

Number of Students in selected Ad Hoc: 0

Select Ad-Hoc Student record Annual record FS-Standing & FD-Attributes-Effective Date **FN-Attributes-No Date** FN-Graduate Review updates

Mark the check box next to field(s) you wish to edit.  
If the value is left blank and the check box is checked any value in the field(s) will be cleared, unless otherwise noted as required.

< Back Next >

**Grade Next Year:**

**Fiscal Year Began 9th:**

**CTE Program**

**CTE Program Area:**   **CTE Program of Concentration:**  \*\* - Student is not a concentrator in any CTE Program

**Tech Prep Completer:**  
 N

**Accountability IRN:**

**Admission to Current High School Date:**

**Attending Building IRN Next Year:**

**Attending District IRN Last October:**  
  -

**Third Grade Reading Guarantee**

**Math Diagnostic Result Code:**

**Reading Diagnostic Result Code:**

**Writing Diagnostic Result Code:**

Student Profile Bulk Update – FN-Attributes-No Date Tab

**Student Profile Bulk Update – FN-Graduate Tab**

The **Review updates** tab displays the changes you have selected on the previous tabs so you can review them before committing them to the database.

6. Optional: To return to previous tabs, click **Back**, and make any needed changes.
7. When you are ready to submit the changes, click **Submit**.

A confirmation message displays.

Profile Item	New Values
Citizenship:	Clear Values
Ethnicity:	W - WHITE
Include in Ranking:	Yes

**Student Profile Bulk Update – Review Updates Tab**

## Business Rules for Student Profile Bulk Update – FS and FD Records

StudentInformation processes the student profile bulk update using the following logic:

1. Determines how to update FS and FD records for each student from the bulk update based on how the effective date relates to existing FS and FD records:
  - a. Withdrawal record with effective date immediately before the bulk update effective date – does not apply the bulk update
  - b. Nonwithdrawal record with effective date immediately before the bulk update effective date – inserts a new record with the bulk update effective date, applies the bulk updates and copies any other field values from the prior record
  - c. Withdrawal or nonwithdrawal record with effective date equal to the bulk update effective date – applies the bulk updates
  - d. Admission record with effective date immediately after the bulk update effective date – does not apply the bulk update
2. Propagates the bulk update for each student within the school year by applying the bulk update field values to each subsequent record (which does not change the records' effective date) until the end of the school year. However, if StudentInformation finds a withdrawal record for the school year, it applies the bulk update values to the record and stops updating any following records.
3. Removes any duplicate records resulting from the updates:
  - a. Sequence of two or more withdrawal records that are the same except for the effective start date – does not change these records since they are not duplicates
  - b. Sequence of two or more nonwithdrawal records that are the same except for the effective start date – removes all but the earliest record
  - c. Two records back-to-back that are the same except for the effective start date and the second record is a withdrawal – updates the earlier record with the **Withdraw Date** and **Reason** (FS records) or **Effective End Date** (FD records) and removes the later record

**Note:** StudentInformation updates the following FS fields when a student's pre-existing field values are blank: DistrictAdmissionReason, DistrictRelationship, IRNDistrictofResidence, HowReceived, HowReceivedIRN, AttendancePercentage, TuitionType, IRNAttendingBuilding, IRNAssignedBuildingArea, SentToReason, and SentToReasonIRN.

---

## Bulk Update Diploma Type

### Navigation: Home – Management – Ad-Hoc Updates – Update Diploma Type

You can mass update students' diploma type for EMIS reporting. This process updates the **Diploma Type** field on the **FN-Graduate** tab of the selected students' profile. You can then modify the **Diploma Type** field for any exception students.

1. On the **Bulk Update of Student Diploma Type** screen, select the graduation date(s) of students for whom you want to update the diploma type by moving them from the **All Graduation Dates** multi-select list to the **Assigned Graduation Dates** list.

2. In the **Set diploma type to** drop-down list, select the diploma type to assign to the students.
3. Optional: To only update the diploma type of those students that pass a certain graduation/eligibility rule, in the **for students passing rule** drop-down list, select the rule.
4. Optional: To use a mark type in the current year total credit calculations, in the **Mark Type** drop-down list, select the mark type.
5. Optional: If you want the update process to recalculate the student data for the graduation/eligibility rule you selected in [step 3](#), select the **Recalculate student rule data** check box.
6. Optional: If you want to override any existing selected diploma types with the diploma type you selected in [step 2](#), select the **Override current diploma type** check box.

Home » Management » Ad-Hoc Updates » Update Diploma Type

### Bulk Update of Student Diploma Type

From this screen, you can submit a job to update the student EMIS diploma type.

All Graduation Dates      Assigned Graduation Dates

Set diploma type to: [dropdown] ⚡

for students passing rule: [dropdown]

Mark Type: [dropdown]

Recalculate student rule data:

Override current diploma type:

- Select the diploma type to assign to the students.
- Optional. If selected, only those students that pass the rule will be assigned the selected diploma type.
- Optional. Select the mark type to be used in current year total credit calculations.
- Optional. If checked, the system will recalculate the student data for the selected rule.

Submit    Cancel

#### Bulk Update Diploma Type

7. Click **Save**.  
A confirmation message displays.

## Bulk Update Graduation Date

You can update selected grade 12 students (seniors) with a specific graduation date. You then need to modify the graduation date on any exception students that should not have this graduation date.

You can select students to update using the following methods:

- To update the graduation date based on student status, see [“Update Graduation Date by Student Status.”](#)
- To update the graduation date based on ad-hoc membership groups, see [“Update Graduation Date by Ad-Hoc Membership.”](#)

## Update Graduation Date by Student Status

Navigation: Home – Management – Ad-Hoc Updates – Update Graduation Date

1. On the **Bulk Update of Student Graduation Date** screen, on the **Status Search** tab, in the **Select the Student Statuses to be included** area, select one or more statuses of students to include on the bulk update by moving them from the left side of the screen to the right side, noting the following guidelines:
  - You probably want to update your active status students, as well as some other statuses of students to whom you will give diplomas.
  - You probably want to include non-residents if they are coming into your district and will graduate from your school.
  - You probably do not want to include residents going elsewhere, because they most likely are not going to get a diploma from your district. (However, JVS and contract vocational schools must report the graduation information even though they will not issue the diploma. Both the home schools and the vocational schools must report the information.)

**Note:** This process includes only grade 12 students with the status(es) you select.

**Bulk Update Graduation Date – Status Search Tab**

2. In the **File Download Options** area, use the drop-down lists to select a file type and a download method.
3. In the **Graduation Date** field, enter the graduation date for this year's seniors, or select it from the calendar date picker.
4. Optional: If you do not want the new graduation date to override any existing graduation dates for the selected students, deselect the **Override Existing** check box.

5. In the **Run Type** field, select either to “Verify” the list of possible updates without actually making the updates or to “Update” the selected students with the graduation date.

**Note:** Please run in “Verify” mode first. There is no un-do!

6. Click **Submit**.

If you selected to run in “Update” mode, a confirmation message displays, stating how many records updated.

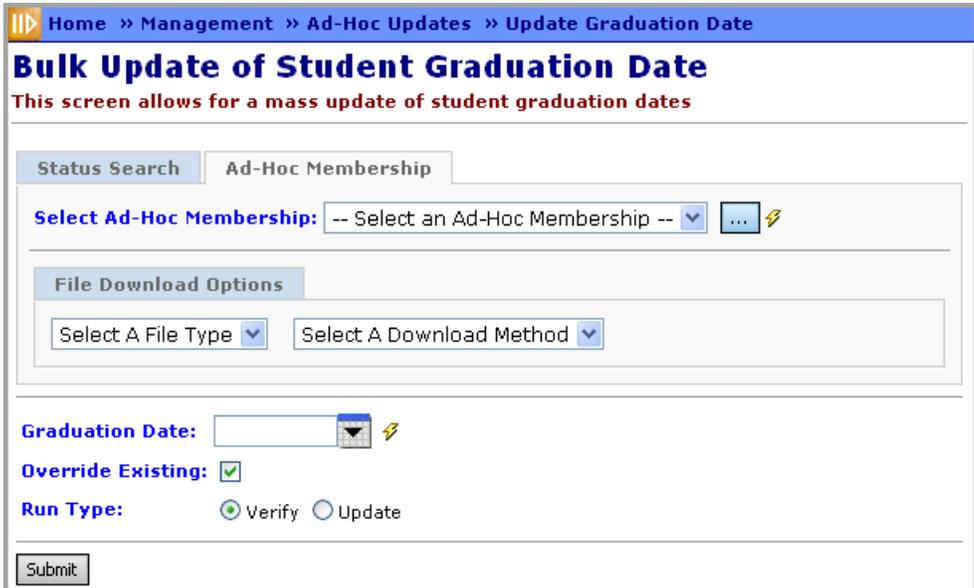
7. Optional: If there are exception students in this group whose graduation date you did not want to update, enter the correct graduation date for these students on the **FN-Graduate** tab of their student profile.

## Update Graduation Date by Ad-Hoc Membership

Navigation: Home – Management – Ad-Hoc Updates – Update Graduation Date

1. On the **Bulk Update of Student Graduation Date** screen, on the **Ad-Hoc Membership** tab, in the **Select Ad-Hoc Membership** drop-down list, select the ad-hoc group to which your bulk update should apply.

**Note:** To find or build an ad-hoc membership, click . (For more information on setting up ad-hoc memberships, see *ProgressBook StudentInformation Getting Started Guide*.)



The screenshot shows a web interface for updating graduation dates. At the top, a breadcrumb trail reads "Home » Management » Ad-Hoc Updates » Update Graduation Date". The main heading is "Bulk Update of Student Graduation Date" with a sub-note: "This screen allows for a mass update of student graduation dates". Below this, there are two tabs: "Status Search" and "Ad-Hoc Membership", with the latter being active. A "Select Ad-Hoc Membership:" label is followed by a dropdown menu showing "-- Select an Ad-Hoc Membership --" and a help icon. Underneath is a "File Download Options" section with two dropdown menus: "Select A File Type" and "Select A Download Method". The "Graduation Date:" field includes a text input, a calendar icon, and a help icon. The "Override Existing:" checkbox is checked. The "Run Type:" section has two radio buttons: "Verify" (selected) and "Update". A "Submit" button is located at the bottom left of the form area.

### Bulk Update Graduation Date – Ad-Hoc Membership Tab

2. In the **File Download Options** area, use the drop-down lists to select a file type and a download method.
3. In the **Graduation Date** field, enter the graduation date for this year’s seniors, or select it from the calendar date picker.

4. Optional: If you do not want the new graduation date to override any existing graduation dates for the selected students, deselect the **Override Existing** check box.
5. In the **Run Type** field, select either to “Verify” the list of possible updates without actually making the updates or to “Update” the selected students with the graduation date.

**Note:** Please run in “Verify” mode first. There is no un-do!

6. Click **Submit**.

If you selected to run in “Update” mode, a confirmation message displays, stating how many records updated.

7. Optional: If there are exception students in this group whose graduation date you did not want to update, enter the correct graduation date for these students on the **FN-Graduate** tab of their student profile.

---

## Bulk Update Courses

**Navigation:** StudentInformation – Management – Ad-Hoc Updates – Bulk Course Update

You can bulk update selected courses with a core subject area or dual credit indicator.

For detailed information on bulk updating courses, see *ProgressBook StudentInformation EMIS Guide*.

---

## Bulk Update Manual Courses

**Navigation:** StudentInformation – Management – Ad-Hoc Updates – Bulk Manual Course Update

You can bulk update selected manually entered courses with a core subject area or dual credit indicator.

For detailed information on bulk updating manual courses, see *ProgressBook StudentInformation EMIS Guide*.

---

## Bulk Update Fall Initialization Blocks

**Navigation:** Home – Management – Ad-Hoc Updates – Bulk Update Fall Initialization Blocks

You can perform a bulk update to set/unset the options on the student profile to exclude FS, FD, and FN records from fall initialization updates.

For detailed information on bulk updating fall initialization blocks, see *ProgressBook StudentInformation EMIS Guide*.

## Bulk Update Course College Credit

### Navigation: StudentInformation – Management – Ad-Hoc Updates – College Credit Management

This process lets you mass update the college credit value of regular (not manually entered) dual credit courses for students enrolled in dual credit courses during the school year in context. (To update manually entered course college credit, see [“Bulk Update Manual Course College Credit.”](#))

1. Open the **College Credit Management** screen with the building and school year in context that you want to update.
2. On the **EMIS Student** tab, select the dual credit **Course** whose college credit value you want to update for any student.
3. In the **Course Sections** drop-down list, select the appropriate course section for which you want to perform the update.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

EMIS Student **Manually Entered Courses**

Course: 765 - SPANISH V Course Sections: (765) SPANISH V - 1

#### College Credit Management – Select Course Section

A list of students assigned to the selected course section displays in a grid.

4. Select the check box in the row of each student whose college credit you want to update for the selected course section. (You can also select **Check All** to select all students.)

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

EMIS Student **Manually Entered Courses**

Course: 765 - SPANISH V Course Sections: (765) SPANISH V - 1

Save Selected CORE Subject Area: FLR Bulk Assign & Save Selected

<input type="checkbox"/> Check All	Student Number	Student	Grade	College Credit
<input checked="" type="checkbox"/>			12	
<input checked="" type="checkbox"/>			12	
<input type="checkbox"/>			12	
<input checked="" type="checkbox"/>			12	
<input checked="" type="checkbox"/>			12	
<input type="checkbox"/>			12	
<input checked="" type="checkbox"/>			12	
<input type="checkbox"/>			12	

#### College Credit Management – Select Students

5. Enter the college credit for the selected students using one of the following methods:
  - Update selected students individually:
    - i. In the row of each student, in the **College Credit** column, enter the college credit the student earned in the course section.
    - ii. Click **Save Selected**.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

EMIS Student **Manually Entered Courses**

Course: 765 - SPANISH V Course Sections: (765) SPANISH V - 1

**Save Selected** CORE Subject Area: FLR **Bulk Assign & Save Selected**

<input type="checkbox"/> Check All	Student Number	Student	Grade	College Credit
<input checked="" type="checkbox"/>			12	0.5
<input checked="" type="checkbox"/>			12	0.8
<input type="checkbox"/>			12	
<input checked="" type="checkbox"/>			12	0.8
<input checked="" type="checkbox"/>			12	0.8
<input type="checkbox"/>			12	
<input checked="" type="checkbox"/>			12	0.5
<input type="checkbox"/>			12	

#### Enter College Credit – Update Selected Students Individually

- Bulk update selected students:
  - i. In the text box above the grid, enter the amount of college credit earned by all of the selected students.
  - ii. Click **Bulk Assign & Save Selected**.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

EMIS Student **Manually Entered Courses**

Course: 765 - SPANISH V Course Sections: (765) SPANISH V - 1

Save Selected CORE Subject Area: FLR **Bulk Assign & Save Selected** 0.8

<input type="checkbox"/> Check All	Student Number	Student	Grade	College Credit
<input checked="" type="checkbox"/>			12	<input type="text"/>
<input checked="" type="checkbox"/>			12	<input type="text"/>
<input type="checkbox"/>			12	<input type="text"/>
<input checked="" type="checkbox"/>			12	<input type="text"/>
<input checked="" type="checkbox"/>			12	<input type="text"/>
<input type="checkbox"/>			12	<input type="text"/>
<input checked="" type="checkbox"/>			12	<input type="text"/>
<input type="checkbox"/>			12	<input type="text"/>

#### Enter College Credit – Bulk Update Selected Students

A confirmation message displays, and the students' college credit for the course is updated and included in the Period G GC transfer.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

The Student College Credit records were saved

#### Confirmation of Updated College Credit

## Bulk Update Manual Course College Credit

### Navigation: StudentInformation – Management – Ad-Hoc Updates – College Credit Management

This process lets you mass update the college credit value of manually entered dual credit courses for students enrolled in dual credit courses during the school year in context. (To update regular course college credit, see [“Bulk Update Course College Credit.”](#))

1. Open the **College Credit Management** screen with the building and school year in context that you want to update.
2. On the **Manually Entered Courses** tab, select the check box in the row of each student whose college credit you want to update for the indicated course. (You can also select **Check All** to select all students/courses.)

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

EMIS Student | Manually Entered Courses

Save Selected | Bulk Assign & Save Selected

<input type="checkbox"/> Check All	Student Number	Student	Grade	School Year	Course	CORE Subject Area	College Credit
<input type="checkbox"/>			12	2013-2014	20500 - BUSINESS MATH	MTO	
<input checked="" type="checkbox"/>			12	2013-2014	10200 - ENGLISH 12	ENG	
<input checked="" type="checkbox"/>			12	2013-2014	20500 - BUSINESS MATH	MTO	
<input type="checkbox"/>			12	2013-2014	10200 - ENGLISH 12	ENG	

#### College Credit Management – Select Students

- Enter the college credit for the selected student(s) using one of the following methods:
  - Update selected students individually:
    - In the row of each student, in the **College Credit** column, enter or update the college credit the student earned in the course.
    - Click **Save Selected**.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

EMIS Student | Manually Entered Courses

Save Selected | Bulk Assign & Save Selected

<input type="checkbox"/> Check All	Student Number	Student	Grade	School Year	Course	CORE Subject Area	College Credit
<input type="checkbox"/>			12	2013-2014	20500 - BUSINESS MATH	MTO	
<input checked="" type="checkbox"/>			12	2013-2014	10200 - ENGLISH 12	ENG	0.5
<input checked="" type="checkbox"/>			12	2013-2014	20500 - BUSINESS MATH	MTO	0.8
<input type="checkbox"/>			12	2013-2014	10200 - ENGLISH 12	ENG	

#### Enter College Credit – Update Selected Students Individually

- Bulk update selected students:
  - In the text box above the grid, enter the amount of college credit you want to assign to all of the selected students for each indicated course.
  - Click **Bulk Assign & Save Selected**.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

EMIS Student | Manually Entered Courses

Save Selected Bulk Assign & Save Selected 0.8

Check All	Student Number	Student	Grade	School Year	Course	CORE Subject Area	College Credit
<input type="checkbox"/>			12	2013-2014	20500 - BUSINESS MATH	MTO	
<input checked="" type="checkbox"/>			12	2013-2014	10200 - ENGLISH 12	ENG	
<input checked="" type="checkbox"/>			12	2013-2014	20500 - BUSINESS MATH	MTO	
<input type="checkbox"/>			12	2013-2014	10200 - ENGLISH 12	ENG	

#### Enter College Credit – Bulk Update Selected Students

A confirmation message displays, and the students' college credit for the course is updated and included in the Period G GC transfer.

StudentInformation > Management > Ad-Hoc Updates > College Credit Management

### College Credit Management

From this screen, you can update college credit values for courses that are marked dual credit.

The Manually Entered Course College Credit records were saved

#### Confirmation of Updated College Credit

---

# ProgressBook Student Information Portal Guide



# **ProgressBook StudentInformation Portal Guide**

(This document is current for ProgressBook StudentInformation v14.4.0 or later.)

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Portal Guide* have been made.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.4.0	Global	N/A	Converted source files to FrameMaker. Updated formatting/structure to match ProgressBook Suite. Rewrote topics using procedural steps.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>StudentInformation Portal</b>	<b>1</b>
Understand the Home Screen.....	1
Manage Quick Links.....	2
Add Quick Links .....	2
Edit Quick Links .....	5
Delete Quick Links .....	7
Manage Enrollment Alerts.....	9
Manage Pending Enrollments .....	9
Manage Pending Withdrawals .....	10
Manage Headlines .....	11
Add Headlines.....	11
Edit Headlines .....	14
Delete Headlines.....	16
Manage Documents .....	17
Add Documents.....	18
Edit Documents.....	21
Delete Documents.....	23
Manage Announcements .....	26
Add Announcements.....	26
Edit Announcements .....	29
Delete Announcements.....	31
Manage Events .....	32
Add Events.....	32
Edit Events .....	35
Delete Events .....	37

---

This page intentionally left blank.

# StudentInformation Portal

StudentInformation provides a portal (known in the application as the **Home** screen) where you can manage information you want to deliver to your users. This is the first screen users see when they sign in to the application. You can customize the content users see based on their specific school and/or district and their security settings.

## Understand the Home Screen

You can manage content on the following areas of the **Home** screen:

- **Quick Links** – See [“Manage Quick Links.”](#)
- **Enrollment Alerts** – See [“Manage Enrollment Alerts.”](#)
- **Headlines** – See [“Manage Headlines.”](#)
- **Documents** – See [“Manage Documents.”](#)
- **Announcements** – See [“Manage Announcements.”](#)
- **Upcoming Events** – See [“Manage Events.”](#)

**Note:** You can determine the best location for the information you post. For example, a school bake sale could be an announcement or an upcoming event, while the results of the bake sale could be a headline.

The screenshot shows the StudentInformation Home Screen with the following sections:

- Quick Links:** DALTON HIGH SCHOOL (Welcome Back), TCCSA ITC (Daily Absence List, Register For TCCSA Classes, HelpDesk Log On).
- Enrollment Alerts:** A table with columns: School, Student, Alert Type, Start Date.
 

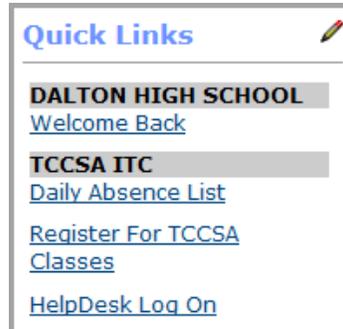
School	Student	Alert Type	Start Date
ASHLAND MIDDLE SCHOOL	COOK, PHYLLIS	Pending Enrollment	Feb 01, 2012
MONTGOMERY ELEMENTARY SCHOOL	BENNETT, ANDREW	Pending Enrollment	Mar 22, 2012
- Headlines!**: TCCSA ITC. For a tutorial on the use of the Help Desk system click here ---- [HelpDesk Tutorials](#).
- Documents:** A table with columns: Title, School, Area, Last Updated.
 

Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011
- Announcements:** DALTON HIGH SCHOOL. **NEW! High School Sports Update**. See what's happening in area athletics, and check out the write-up on our own students! [read more...](#)
- Upcoming Events:** DALTON HIGH SCHOOL. **NEW! Book Sale**. Dec 10; 8:00-Noon; Library. Sale of old books, magazines and DVDs.

StudentInformation Home Screen

## Manage Quick Links

The **Quick Links** section lets you enter web links to help your users perform their daily tasks.

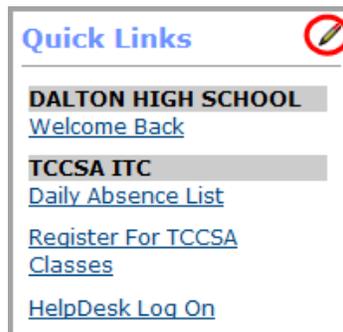


**Quick Links Section of Home Screen**

- To add a quick link, see [“Add Quick Links.”](#)
- To edit a quick link, see [“Edit Quick Links.”](#)
- To delete a quick link, see [“Delete Quick Links.”](#)

## Add Quick Links

1. In the **Quick Links** area of the **Home** screen, click .



**Add Quick Link**

The **Manage Portal Links** screen displays.

2. Click **Add Link**.

Home						
Manage Portal Links						
From this screen, you can display, add, change and delete data pertaining to portal link records.						
<input type="button" value="Add Link"/> <input type="button" value="View Portal Page"/>						
		Title	Url	Mobile Url	Description	View Order
X	/	Welcome Back	Have a Great Fall			1
X	/	Daily Absence List	https://dasl.tccsa.net/DASL-Live/SIS/Attendance/DailyAbsenceList.aspx			1
X	/	Register For TCCSA Classes	http://event.tccsa.net/			2
X	/	HelpDesk Log On	https://helpdesk.usd.oecn.k12.oh.us/CAISD/PDMWEB.EXE	Hughett 8/16	Send Questions/Concerns	3

### Manage Portal Links Screen

The add-edit version of the screen displays.

- In the **Title** field, enter a title for the link as you want it to appear in the **Quick Links** area.
- In the **Url** field, enter the URL (website address) of the web page to which you are linking, using the full http:// format, such as <http://www.ode.state.oh.us>

**Note:** If you are creating a link to another StudentInformation screen, you can use a relative link, replacing the location of the StudentInformation application with a tilde (~), as shown in the following example. This ensures the link remains valid, even if the StudentInformation application's location changes.

Full link:

<http://dasl.noacsc.org/StudentInformation/SIS/Attendance/DailyAbsenceByHomeroom.aspx>

Relative link:

<~/SIS/Attendance/DailyAbsenceByHomeroom.aspx>

**Note:** The **Mobile Url** field is not functional at this time.

- Optional: To display a tool tip when you hover over the quick link, in the **Description** field, enter more detailed information about the site.
- In the **View Order** field, enter a number to indicate the display order of this specific link relative to the other quick links.
- In the **Administrative School** drop-down list, select which school building (or district) should have administrative rights to maintain and update the quick link.
- In the **Intended Audience** drop-down lists, select which school and user group can view the quick link, or select the whole district and all groups.
- Click **Add Combination**.

The school/group combination displays in a table.

- Optional: To add another school/user group combination, repeat [step 8](#) through [step 9](#).
- Click **Save**. Or, to continue adding links, click **Save and New**.

**Manage Portal Links**  
From this screen, you can display, add, change and delete data pertaining to portal link records.

Title: Ohio Department of Education

Url: http://www.ode.state.oh.us

Mobile Url:

Description:

View Order: 4

Administrative School: TCCSA ITC

Intended Audience: TCCSA ITC All Add Combination

School	Group
X TCCSA ITC	All

Save Save and New Cancel

### Set Up New Quick Link

A confirmation message displays, and the new link displays in the list.

12. Optional: To preview the link on the **Home** screen, click **View Portal Page**.

**Manage Portal Links**  
From this screen, you can display, add, change and delete data pertaining to portal link records.

The Link was saved successfully

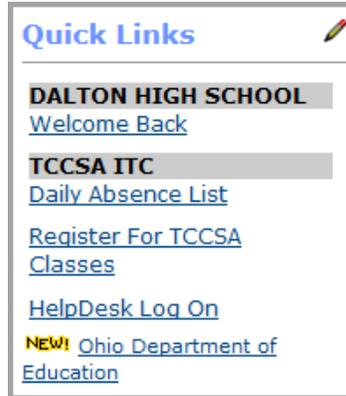
Add Link View Portal Page

	Title	Url	Mobile Url	Description	View Order
X	Welcome Back	Have a Great Fall			1
X	Daily Absence List	https://dasl.tccsa.net/DASL-Live/SIS/Attendance/DailyAbsenceList.aspx			1
X	Ohio Department of Education	http://www.ode.state.oh.us			4
X	Register For TCCSA Classes	http://event.tccsa.net/			2
X	HelpDesk Log On	https://helpdesk.usd.oecn.k12.oh.us/CAISD/PDMWEB.EXE	Hughett 8/16	Send Questions/Concerns	3

### Confirmation of Added Link

The link displays in the **Quick Links** area in the order you selected with a **NEW!** icon.

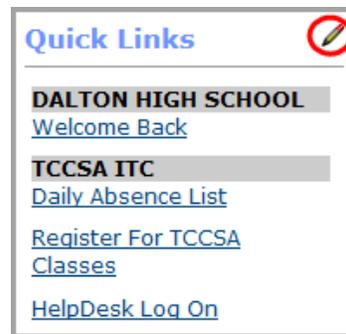
**Note:** The **NEW!** icon continues to display for three days.



### New Quick Link

## Edit Quick Links

1. In the **Quick Links** area of the **Home** screen, click .



### Edit Quick Link

The **Manage Portal Links** screen displays.

2. In the row of the link you want to edit, click .

Home						
<b>Manage Portal Links</b>						
From this screen, you can display, add, change and delete data pertaining to portal link records.						
<input type="button" value="Add Link"/>		<input type="button" value="View Portal Page"/>				
		Title	Url	Mobile Url	Description	View Order
		Welcome Back	Have a Great Fall			1
		Daily Absence List	<a href="https://dasl.tccsa.net/DASL-Live/SIS/Attendance/DailyAbsenceList.aspx">https://dasl.tccsa.net/DASL-Live/SIS/Attendance/DailyAbsenceList.aspx</a>			1
		Ohio Department of Education	<a href="http://www.ode.state.oh.us">http://www.ode.state.oh.us</a>			4
		Register For TCCSA Classes	<a href="http://event.tccsa.net/">http://event.tccsa.net/</a>			2
		HelpDesk Log On	<a href="https://helpdesk.usd.oecn.k12.oh.us/CAISD/PDMWEB.EXE">https://helpdesk.usd.oecn.k12.oh.us/CAISD/PDMWEB.EXE</a>	Hughett 8/16	Send Questions/Concerns	3

### Manage Portal Links Screen

The add-edit version of the screen displays.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see “Add Quick Links.”

**Manage Portal Links**  
From this screen, you can display, add, change and delete data pertaining to portal link records.

Title: Ohio Department of Education

Url: http://www.ode.state.oh.us

Mobile Url:

Description:

View Order: 4

Administrative School: TCCSA ITC

Intended Audience: TCCSA ITC All Add Combination

School	Group
X TCCSA ITC	All

Save Cancel

**Edit Link**

A confirmation message displays.

- Optional: To preview the link on the **Home** screen, click **View Portal Page**.

**Manage Portal Links**  
From this screen, you can display, add, change and delete data pertaining to portal link records.

The Link was saved successfully

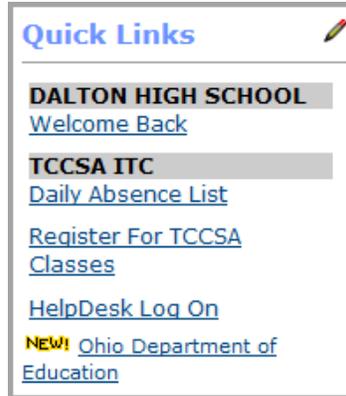
Add Link View Portal Page

		Title	Url	Mobile Url	Description	View Order
X	/	Welcome Back	Have a Great Fall			1
X	/	Daily Absence List	https://dasl.tccsa.net/DASL-Live/SIS/Attendance/DailyAbsenceList.aspx			1
X	/	Ohio Department of Education	http://www.ode.state.oh.us			4
X	/	Register For TCCSA Classes	http://event.tccsa.net/			2
X	/	HelpDesk Log On	https://helpdesk.usd.oecn.k12.oh.us/CAISD/PDMWEB.EXE	Hughett 8/16	Send Questions/Concerns	3

**Confirmation of Updated Link**

The updated link displays in the **Quick Links** area in the order you selected with a **NEW!** icon.

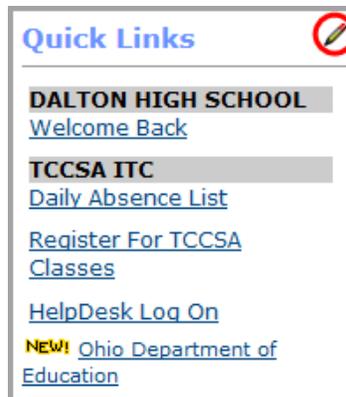
**Note:** The **NEW!** icon continues to display for three days.



Updated Quick Link

## Delete Quick Links

1. In the **Quick Links** area of the **Home** screen, click .



Delete Quick Link

The **Manage Portal Links** screen displays.

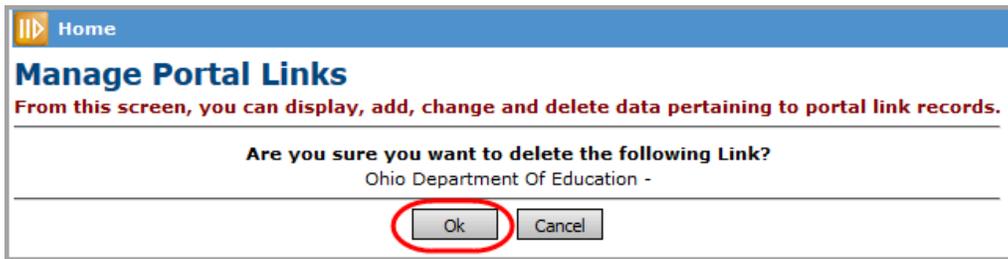
2. In the row of the link you want to delete, click .

Home						
Manage Portal Links						
From this screen, you can display, add, change and delete data pertaining to portal link records.						
Add Link		View Portal Page				
		Title	Url	Mobile Url	Description	View Order
		Welcome Back	Have a Great Fall			1
		Daily Absence List	https://dasl.tccsa.net/DASL-Live/SIS/Attendance/DailyAbsenceList.aspx			1
		Ohio Department of Education	http://www.ode.state.oh.us			4
		Register For TCCSA Classes	http://event.tccsa.net/			2
		HelpDesk Log On	https://helpdesk.usd.oecn.k12.oh.us/CAISD/PDMWEB.EXE	Hughett 8/16	Send Questions/Concerns	3

Manage Portal Links Screen

A message displays, asking if you are sure you want to delete the link.

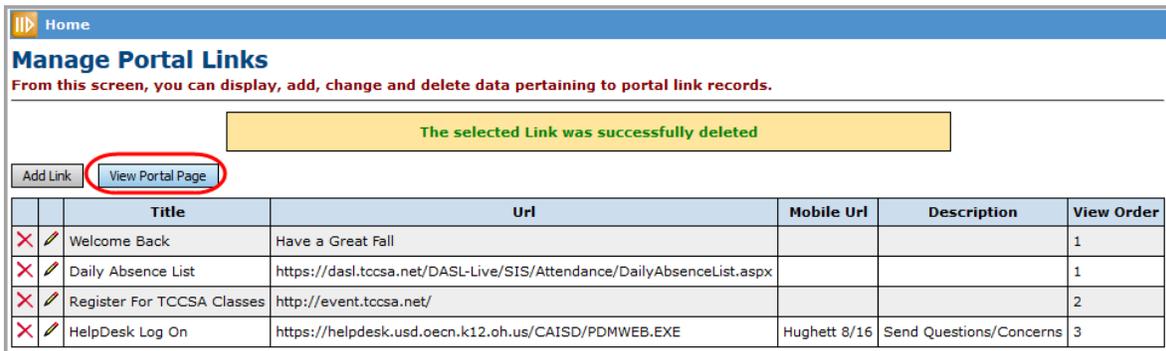
3. Click **Ok**.



**Confirm Delete**

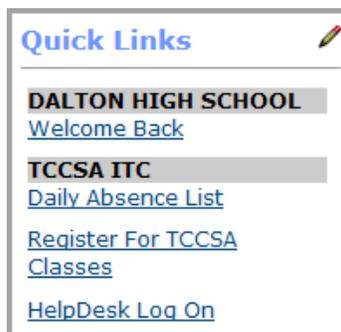
A confirmation message displays, and the link no longer appears in the list.

4. Optional: To see that the link no longer displays on the **Home** screen, click **View Portal Page**.



**Confirmation of Deleted Link**

The link no longer displays in the **Quick Links** area.



**Quick Link Deleted**

## Manage Enrollment Alerts

The **Enrollment Alerts** area of the **Home** screen displays any pending enrollments or withdrawals that require your attention.

- To handle alerts related to pending enrollments, see [“Manage Pending Enrollments.”](#)
- To handle alerts related to pending withdrawals, see [“Manage Pending Withdrawals.”](#)

## Manage Pending Enrollments

Pending enrollment alerts only display for students who withdrew from another building in your school district and are enrolling in your building. They do not display for students transferring from another district. The following events trigger pending enrollment alerts:

- A student already enrolled in the district has an enrollment track assignment to attend your building this year.
- Another school in your district withdrew the student and set your building as the “withdraw to” school.

You can choose to enroll the student or remove the student from the list as follows:

1. In the **Enrollment Alerts** area of the **Home** screen, in the row of the student you want to enroll or remove, click .

Enrollment Alerts				
	School	Student	Alert Type	Start Date
	ASHLAND MIDDLE SCHOOL	COOK, PHYLLIS	Pending Enrollment	Feb 01, 2012
<b>NEW</b> 	MONTGOMERY ELEMENTARY SCHOOL	BENNETT, ANDREW	Pending Enrollment	Mar 22, 2012

### Enrollment Alerts

The **Manage Portal Enrollment Alerts** screen displays.

2. Review the information, and perform one of the following actions:
  - To accept this pending enrollment, click **Enroll**. The **Student Registration Wizard** opens, and you can proceed to enroll the student.
  - To decline this pending enrollment and remove this enrollment alert, click **Remove**. (To return to the portal, click **View Portal Page**.)

Home » Extra System Permissions » SIS » Enrollment Alerts

### Manage Portal Enrollment Alerts

From this screen, you can display, add, change and delete data pertaining to portal enrollment alert records.

Alert Type: Pending Enrollment

Student: BENNETT, ANDREW

Student Number: 800047

Acting School: EDISON ELEMENTARY SCHOOL

Start Date: 3/22/2012

Comments:

Enroll Remove View Portal Page

#### Manage Pending Enrollments

### Manage Pending Withdrawals

The following events trigger pending withdrawal alerts:

- The previous school (within your district) withdrew the student and set a future withdrawal date.
- A student was cross-enrolled in multiple buildings within your district for the same school year, and one of the other buildings withdrew the student.
- A student was enrolled in the previous school year and the current school year, and you (or another school) withdrew the student from the previous school year.

You can choose to withdraw the student or remove the student from the list as follows:

1. In the **Enrollment Alerts** area of the **Home** screen, in the row of the student you want to withdraw or remove, click .

Enrollment Alerts				
	School	Student	Alert Type	Start Date
NEW! 	ASHLAND HIGH SCHOOL	AGUIRRE, PEARL	Pending Withdraw	Apr 18, 2012

#### Withdrawal Alerts

The **Manage Portal Enrollment Alerts** screen displays.

2. Review the information, and perform one of the following actions:
  - To accept this pending withdrawal, click **Withdraw**. The **Withdraw Student** screen opens, and you can proceed to withdraw the student.
  - To decline this pending withdrawal and remove this withdrawal alert, click **Remove**. (To return to the portal, click **View Portal Page**.)

Home » Extra System Permissions » SIS » Enrollment Alerts

## Manage Portal Enrollment Alerts

From this screen, you can display, add, change and delete data pertaining to portal enrollment alert records.

Alert Type: Pending Withdraw

Student: AGUIRRE, PEARL

Student Number: 590173

Acting School: ASHLAND HIGH SCHOOL

Start Date: 4/18/2012

Comments:

Withdraw Remove View Portal Page

### Manage Pending Withdrawals

## Manage Headlines

In the **Headlines** section of the **Home** screen, you can enter important headlines and messages for your users.

Headlines!

TCCSA ITC  
For a tutorial on the use of the Help Desk system click here ---- [HelpDesk Tutorials](#).

### Headlines Section of Home Screen

- To add a headline, see [“Add Headlines.”](#)
- To edit a headline, see [“Edit Headlines.”](#)
- To delete a headline, see [“Delete Headlines.”](#)

## Add Headlines

1. In the **Headlines** area of the **Home** screen, click .

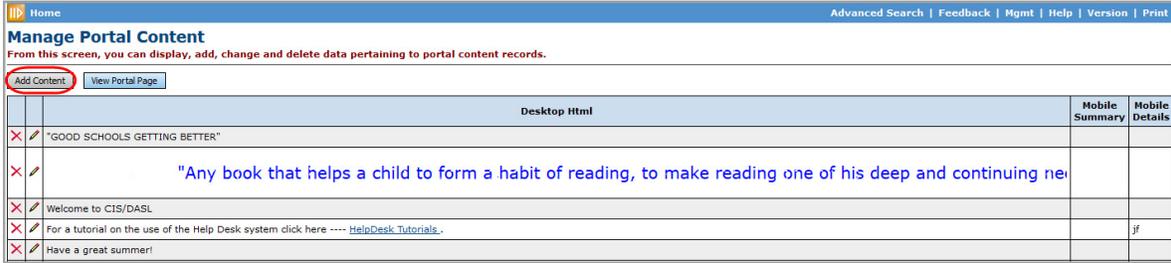
Headlines!

TCCSA ITC  
For a tutorial on the use of the Help Desk system click here ---- [HelpDesk Tutorials](#).

### Add Headline

The **Manage Portal Content** screen displays.

2. Click **Add Content**.



**Manage Portal Content Screen**

The add-edit version of the screen displays.

- In the **Desktop Html Content** field, enter the text that you want to display in the headline. You can use plain text and/or HTML (Hypertext Markup Language) to display the headline in different colors and sizes.

**Note:** Following are a few helpful HTML tags. To learn more about HTML, go to: <http://www.w3schools.com/html/default.asp>

HTML Tag	Purpose
<h1>your text here</h1>	Heading1 – enlarges text
 	Line break
<hr>	Create horizontal line
<center>your text here</center>	Center text
<style="color:blue">	Color

**Note:** The **Mobile Summary** and **Mobile Details** fields are not functional at this time.

- In the **Administrative School** drop-down list, select which school building (or district) should have administrative rights to maintain and update the headline.
- In the **Intended Audience** drop-down lists, select which school and user group can view the headline, or select the whole district and all groups.
- Click **Add Combination**.  
The school/group combination displays in a table.
- Optional: To add another school/user group combination, repeat [step 5](#) through [step 6](#).
- Click **Save**. Or, to continue adding headlines, click **Save and New**.

**Manage Portal Content**  
From this screen, you can display, add, change and delete data pertaining to portal content records.

**Desktop Html Content:** Welcome to Dalton Elementary

**Mobile Summary:**

**Mobile Details:**

**Administrative School:** DALTON ELEMENTARY

**Intended Audience:** TCCSA ITC Secretary

	School	Group
X	TCCSA ITC	Principal
X	TCCSA ITC	Secretary

### Set Up New Headline

A confirmation message displays, and the new headline displays in the list.

- Optional: To preview the headline on the **Home** screen, click **View Portal Page**.

**Manage Portal Content**  
From this screen, you can display, add, change and delete data pertaining to portal content records.

The Content was saved successfully

	Desktop Html	Mobile Summary	Mobile Details
X	"GOOD SCHOOLS GETTING BETTER"		
X	"Any book that helps a child to form a habit of reading, to make reading one		
X	Welcome to CIS/DASL		
X	For a tutorial on the use of the Help Desk system click here ---- <a href="#">HelpDesk Tutorials</a> .		jf
X	Have a great summer!		
X	Welcome to Dalton Elementary		

### Confirmation of Added Headline

The headline displays in the **Headlines** area with a **NEW!** icon.

**Note:** The **NEW!** icon continues to display for three days.

**Headlines!**

---

**DALTON ELEMENTARY**  
**NEW!** Welcome to Dalton Elementary

**TCCSA ITC**  
 For a tutorial on the use of the Help Desk system click here ---- [HelpDesk Tutorials](#) .

**New Headline**

## Edit Headlines

1. In the **Headlines** area of the **Home** screen, click .

**Headlines!**

---

**DALTON ELEMENTARY**  
**NEW!** Welcome to Dalton Elementary

**TCCSA ITC**  
 For a tutorial on the use of the Help Desk system click here ---- [HelpDesk Tutorials](#) .

**Edit Headline**

The **Manage Portal Content** screen displays.

2. In the row of the headline you want to edit, click .

Home		Advanced Search   Feedback   Mgmt   Help   Version   Print		
Manage Portal Content				
From this screen, you can display, add, change and delete data pertaining to portal content records.				
Add Content		View Portal Page		
		Desktop Html	Mobile Summary	Mobile Details
		"GOOD SCHOOLS GETTING BETTER"		
		"Any book that helps a child to form a habit of reading, to mak		
		Welcome to CIS/DASL		
		For a tutorial on the use of the Help Desk system click here ---- <a href="#">HelpDesk Tutorials</a> .		jf
		Have a great summer!		
		Welcome to Dalton Elementary		

**Manage Portal Content Screen**

The add-edit version of the screen displays.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see ["Add Headlines."](#)

**Manage Portal Content**  
From this screen, you can display, add, change and delete data pertaining to portal content records.

**Desktop Html Content:** Welcome to Dalton Elementary

**Mobile Summary:**

**Mobile Details:**

**Administrative School:** DALTON ELEMENTARY

**Intended Audience:** TCCSA ITC Secretary

	School	Group
X	TCCSA ITC	Principal
X	TCCSA ITC	Secretary

**Edit Headline**

A confirmation message displays.

- Optional: To preview the headline on the **Home** screen, click **View Portal Page**.

**Manage Portal Content**  
From this screen, you can display, add, change and delete data pertaining to portal content records.

The Content was saved successfully

	Desktop Html	Mobile Summary	Mobile Details
X	"GOOD SCHOOLS GETTING BETTER"		
X	"Any book that helps a child to form a habit of reading, to make reading one		
X	Welcome to CIS/DASL		
X	For a tutorial on the use of the Help Desk system click here ---- <a href="#">HelpDesk Tutorials</a> .		jf
X	Have a great summer!		
X	Welcome to Dalton Elementary		

**Confirmation of Updated Headline**

The updated headline displays in the **Headlines** area with a **NEW!** icon.

**Note:** The **NEW!** icon continues to display for three days.

**Headlines!**

---

**DALTON ELEMENTARY**  
**NEW!** Welcome to Dalton Elementary

**TCCSA ITC**  
 For a tutorial on the use of the Help Desk system click here ---- [HelpDesk Tutorials](#) .

**Updated Headline**

## Delete Headlines

1. In the **Headlines** area of the **Home** screen, click .

**Headlines!**

---

**DALTON ELEMENTARY**  
**NEW!** Welcome to Dalton Elementary

**TCCSA ITC**  
 For a tutorial on the use of the Help Desk system click here ---- [HelpDesk Tutorials](#) .

**Edit Headline**

The **Manage Portal Content** screen displays.

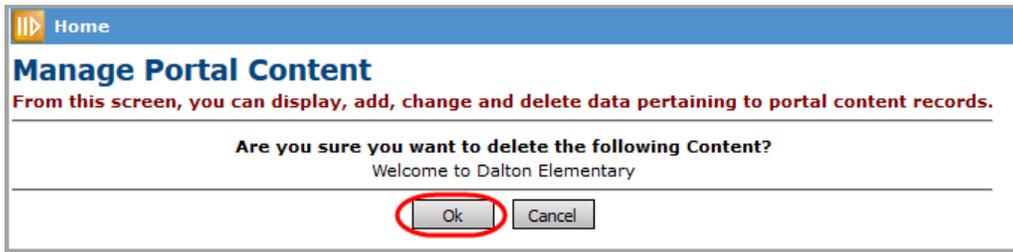
2. In the row of the headline you want to delete, click .

Home		Advanced Search   Feedback   Mgmt   Help   Version   Print
<b>Manage Portal Content</b> <small>From this screen, you can display, add, change and delete data pertaining to portal content records.</small>		
<input type="button" value="Add Content"/> <input type="button" value="View Portal Page"/>		
	Desktop Html	Mobile Summary
✗	"GOOD SCHOOLS GETTING BETTER"	
✗	"Any book that helps a child to form a habit of reading, to mak	
✗	Welcome to CIS/DASL	
✗	For a tutorial on the use of the Help Desk system click here ---- <a href="#">HelpDesk Tutorials</a> .	jf
✗	Have a great summer!	
✗	Welcome to Dalton Elementary	

**Manage Portal Content Screen**

A message displays, asking if you are sure you want to delete the headline.

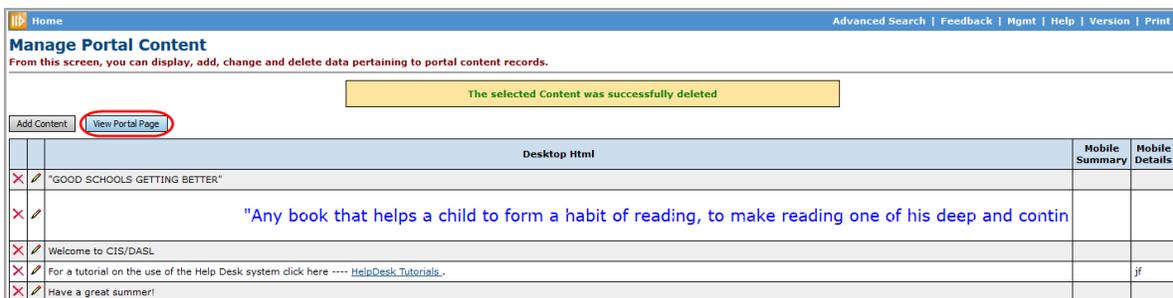
3. Click **Ok**.



### Confirm Delete

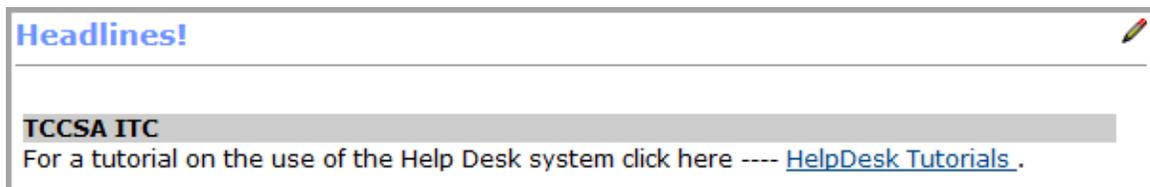
A confirmation message displays, and the headline no longer appears in the list.

- Optional: To see that the headline no longer displays on the **Home** screen, click **View Portal Page**.



### Confirmation of Deleted Headline

The headline no longer displays in the **Headlines** area.



### Headline Deleted

## Manage Documents

In the **Documents** section of the **Home** screen, you can upload or link documents for your users.

Documents 			
Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011

**Documents Section of Home Screen**

- To add a document, see [“Add Documents.”](#)
- To edit a document, see [“Edit Documents.”](#)
- To delete a document, see [“Delete Documents.”](#)

**Add Documents**

1. In the **Documents** area of the **Home** screen, click .

Documents 			
Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011

**Add Document**

The **Manage Portal Documents** screen displays.

2. Click **Add Document**.

		Name	Category	Date Added	School
X	/	How to Finalize Your Schedule for the 13/14 School Year		Jun 12, 2013	TCCSA ITC
X	/	Manual Course History		Feb 02, 2010	TCCSA ITC
X	/	13/14 - Scheduling Check List - High and Middle School		Jan 07, 2013	TCCSA ITC
X	/	Year-End Checklist - High and Middle Schools		Apr 25, 2011	TCCSA ITC
X	/	Year End Checklist - Elementary schools		Apr 25, 2011	TCCSA ITC
X	/	Transfer JVS Students for new year of 13/14		Apr 01, 2013	TCCSA ITC
X	/	Testing Data - how to retrieve and load into DASL		Aug 01, 2011	TCCSA ITC

### Manage Portal Documents Screen

The add-edit version of the screen displays.

- In the **Name** field, enter a name for the document.
- Optional: In the **Category** field, enter a category for this document.

**Note:** You can use categories to separate documents by subject area, user, etc.

- Decide whether you want to provide a link to a document on the web or physically upload the document to the StudentInformation website:
  - To link to the web, in the **URL to Browse** field, enter the full URL (web address) of the document, including **http://**
  - To upload a document, in the **Upload to Web Server** area, click **Browse**, and navigate to and select the file.

**Note:** For security reasons, there is a maximum document upload size for StudentInformation and the .NET framework. If your document exceeds that size, an error occurs. Your ITC can adjust this size but only after hours. This is because changing the size limit requires a config file change and server reboot. As a workaround, you can upload a small placeholder document that the ITC staff can replace with the larger document per the location in the DASL.config file.

**Note:** To remove the file, click **Clear**.

- In the **Administrative School** drop-down list, select which school building (or district) should have administrative rights to maintain and update the document.
- In the **Intended Audience** drop-down lists, select which school and user group can view the document, or select the whole district and all groups.
- Click **Add Combination**.

The school/group combination displays in a table.

- Optional: To add another school/user group combination, repeat [step 7](#) through [step 8](#).

10. Click **Save**. Or, to continue adding documents, click **Save and New**.

**Manage Portal Documents**  
From this screen, you can display, add, change and delete data pertaining to portal document records.

Name: Student Activity Form ✎

Category:

URL to Browse:

- or -

Upload to Web Server:  No file selected.  Student Activity Purpose.xls is uploaded

Administrative School: TCCSA ITC

Intended Audience: TCCSA ITC All

	School	Group
X	TCCSA ITC	All

**Add New Document**

A confirmation message displays, and the new document displays in the list.

11. Optional: To preview the document link on the **Home** screen, click **View Portal Page**.

**Manage Portal Documents**  
From this screen, you can display, add, change and delete data pertaining to portal document records.

The Document was saved successfully

		Name	Category	Date Added	School
X	✎	Student Activity Form		Mar 11, 2014	TCCSA ITC
X	✎	How to Finalize Your Schedule for the 13/14 School Year		Jun 12, 2013	TCCSA ITC
X	✎	Manual Course History		Feb 02, 2010	TCCSA ITC
X	✎	13/14 - Scheduling Check List - High and Middle School		Jan 07, 2013	TCCSA ITC
X	✎	Year-End Checklist - High and Middle Schools		Apr 25, 2011	TCCSA ITC
X	✎	Year End Checklist - Elementary schools		Apr 25, 2011	TCCSA ITC
X	✎	Transfer JVS Students for new year of 13/14		Apr 01, 2013	TCCSA ITC
X	✎	Testing Data - how to retrieve and load into DASL		Aug 01, 2011	TCCSA ITC

**Confirmation of Added Document**

The document link displays in the **Documents** area with a **NEW!** icon. Documents display sorted by administrative school and then by document name.

**Note:** The **NEW!** icon continues to display for three days.

Documents 			
Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<b>NEW!</b> <a href="#">Student Activity Form</a>	TCCSA ITC		Mar 11, 2014
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011

### New Document

## Edit Documents

1. In the **Documents** area of the **Home** screen, click .

Documents 			
Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<b>NEW!</b> <a href="#">Student Activity Form</a>	TCCSA ITC		Mar 11, 2014
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011

### Edit Document

The **Manage Portal Documents** screen displays.

2. In the row of the document you want to edit, click .

The screenshot shows the 'Manage Portal Documents' interface. At the top, there is a 'Home' button and a title 'Manage Portal Documents'. Below the title is a red instruction: 'From this screen, you can display, add, change and delete data pertaining to portal document records.' There are two buttons: 'Add Document' and 'View Portal Page'. Below these is a table with columns: Name, Category, Date Added, and School. The table contains eight rows of document records. The first row, 'Student Activity Form', has a red circle around its edit icon (a pencil).

	Name	Category	Date Added	School
X	Student Activity Form		Mar 11, 2014	TCCSA ITC
X	How to Finalize Your Schedule for the 13/14 School Year		Jun 12, 2013	TCCSA ITC
X	Manual Course History		Feb 02, 2010	TCCSA ITC
X	13/14 - Scheduling Check List - High and Middle School		Jan 07, 2013	TCCSA ITC
X	Year-End Checklist - High and Middle Schools		Apr 25, 2011	TCCSA ITC
X	Year End Checklist - Elementary schools		Apr 25, 2011	TCCSA ITC
X	Transfer JVS Students for new year of 13/14		Apr 01, 2013	TCCSA ITC
X	Testing Data - how to retrieve and load into DASL		Aug 01, 2011	TCCSA ITC

**Manage Portal Documents Screen**

The add-edit version of the screen displays.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Documents.”](#)

The screenshot shows the 'Edit Document' form. It has a 'Home' button and the title 'Manage Portal Documents'. Below the title is the same red instruction as the previous screen. The form fields are: 'Name' (text box with 'Student Activity Form'), 'Category' (text box), 'URL to Browse' (text box), '- or -', 'Upload to Web Server' (with 'Browse...' button, 'No file selected.', 'Clear' button, and 'Student Activity Purpose.xls is uploaded'), 'Administrative School' (dropdown menu with 'TCCSA ITC'), 'Intended Audience' (dropdown menu with 'TCCSA ITC' and 'All', and an 'Add Combination' button). Below these is a table with columns 'School' and 'Group', containing one row: 'TCCSA ITC' and 'All'. At the bottom, there are 'Save' and 'Cancel' buttons. The 'Save' button is circled in red.

**Edit Document**

A confirmation message displays.

4. Optional: To preview the document link on the **Home** screen, click **View Portal Page**.

Home

## Manage Portal Documents

From this screen, you can display, add, change and delete data pertaining to portal document records.

The Document was saved successfully

Add Document **View Portal Page**

		Name	Category	Date Added	School
X		Student Activity Form		Mar 11, 2014	TCCSA ITC
X		How to Finalize Your Schedule for the 13/14 School Year		Jun 12, 2013	TCCSA ITC
X		Manual Course History		Feb 02, 2010	TCCSA ITC
X		13/14 - Scheduling Check List - High and Middle School		Jan 07, 2013	TCCSA ITC
X		Year-End Checklist - High and Middle Schools		Apr 25, 2011	TCCSA ITC
X		Year End Checklist - Elementary schools		Apr 25, 2011	TCCSA ITC
X		Transfer JVS Students for new year of 13/14		Apr 01, 2013	TCCSA ITC
X		Testing Data - how to retrieve and load into DASL		Aug 01, 2011	TCCSA ITC

### Confirmation of Updated Document

The link to the updated document displays in the **Documents** area with a **NEW!** icon.

**Note:** The **NEW!** icon continues to display for three days.

Documents

Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<b>NEW!</b> <a href="#">Student Activity Form</a>	TCCSA ITC		Mar 11, 2014
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011

### Updated Document

## Delete Documents

1. In the **Documents** area of the **Home** screen, click .

**Documents** 

Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<b>NEW!</b> <a href="#">Student Activity Form</a>	TCCSA ITC		Mar 11, 2014
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011

**Delete Document**

The **Manage Portal Documents** screen displays.

- In the row of the document you want to delete, click .

 Home

**Manage Portal Documents**

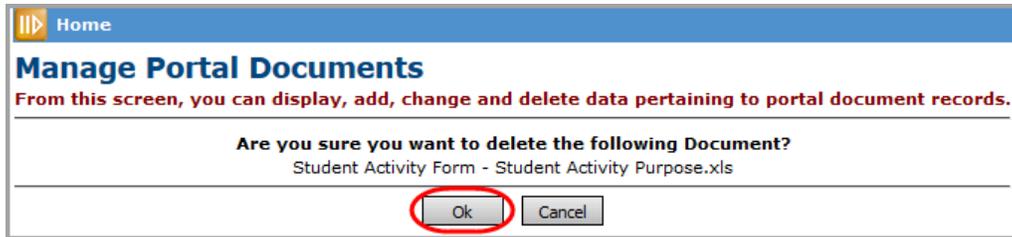
From this screen, you can display, add, change and delete data pertaining to portal document records.

		Name	Category	Date Added	School
		Student Activity Form		Mar 11, 2014	TCCSA ITC
		How to Finalize Your Schedule for the 13/14 School Year		Jun 12, 2013	TCCSA ITC
		Manual Course History		Feb 02, 2010	TCCSA ITC
		13/14 - Scheduling Check List - High and Middle School		Jan 07, 2013	TCCSA ITC
		Year-End Checklist - High and Middle Schools		Apr 25, 2011	TCCSA ITC
		Year End Checklist - Elementary schools		Apr 25, 2011	TCCSA ITC
		Transfer JVS Students for new year of 13/14		Apr 01, 2013	TCCSA ITC
		Testing Data - how to retrieve and load into DASL		Aug 01, 2011	TCCSA ITC

**Manage Portal Documents Screen**

A message displays, asking if you are sure you want to delete the document.

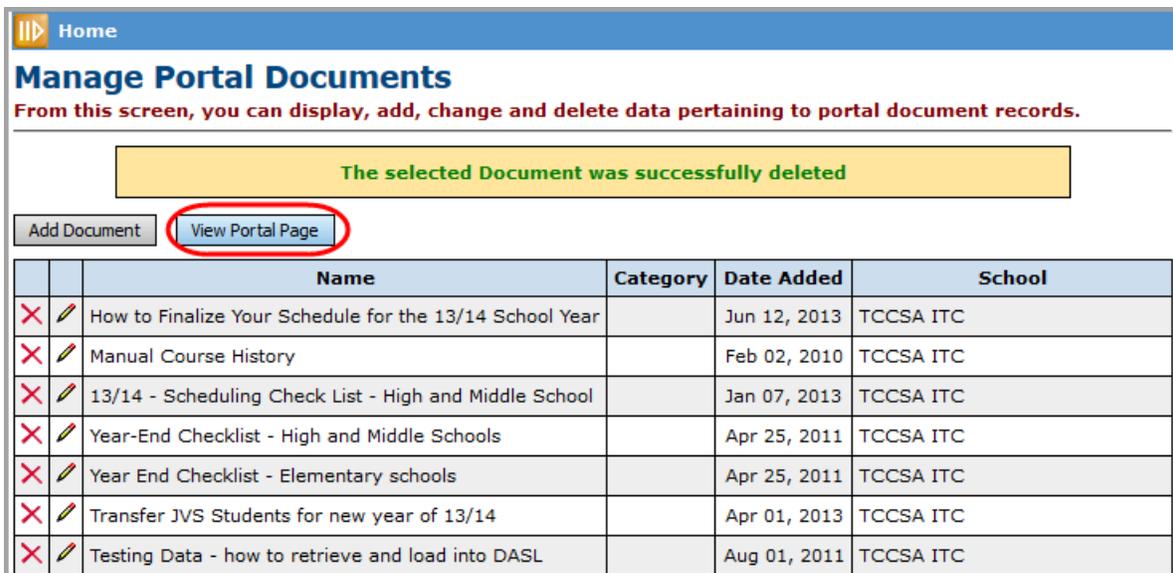
- Click **Ok**.



### Confirm Delete

A confirmation message displays, and the document no longer appears in the list.

- Optional: To see that the document no longer displays on the **Home** screen, click **View Portal Page**.



### Confirmation of Deleted Document

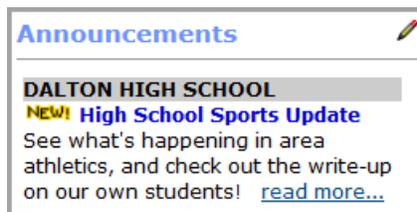
The document link no longer displays in the **Document** area.

Documents 			
Title	School	Area	Last Updated
<a href="#">13/14 - Scheduling Check List - High and Middle School</a>	TCCSA ITC		Jan 07, 2013
<a href="#">13/14 School Year Initialization Survey</a>	TCCSA ITC		Nov 16, 2012
<a href="#">How to Finalize Your Schedule for the 13/14 School Year</a>	TCCSA ITC		Jun 12, 2013
<a href="#">Manual Course History</a>	TCCSA ITC		Feb 02, 2010
<a href="#">Testing Data - how to retrieve and load into DASL</a>	TCCSA ITC		Aug 01, 2011
<a href="#">Transfer JVS Students for new year of 13/14</a>	TCCSA ITC		Apr 01, 2013
<a href="#">Year End Checklist - Elementary schools</a>	TCCSA ITC		Apr 25, 2011
<a href="#">Year-End Checklist - High and Middle Schools</a>	TCCSA ITC		Apr 25, 2011

Document Deleted

## Manage Announcements

In the **Announcements** section of the **Home** screen, you can post time-sensitive announcements for your users.

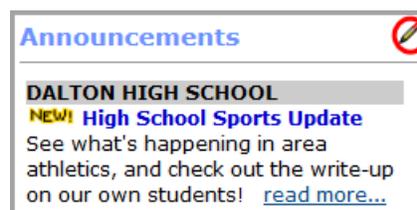


Announcements Section of Home Screen

- To add an announcement, see [“Add Announcements.”](#)
- To edit an announcement, see [“Edit Announcements.”](#)
- To delete an announcement, see [“Delete Announcements.”](#)

## Add Announcements

1. In the **Announcements** area of the **Home** screen, click  .



Add Announcement

The **Manage Portal Announcements** screen displays.

- Click **Add Announcement**.



### Manage Portal Announcements Screen

The add-edit version of the screen displays.

- In the **Title** field, enter a title for the announcement.
- Optional: To add a link to a corresponding web page, enter the full URL (web address) of the page, including **http://**

**Note:** The **Read More (Mobile)** option is not currently functional.

- In the **Description** field, enter any details related to the announcement.
- In the **Expires** field, enter the date when the announcement should stop displaying, or select a date from the calendar date picker. This field defaults to eight days from the current date.
- In the **Administrative School** drop-down list, select which school building (or district) should have administrative rights to maintain and update the announcement.
- In the **Intended Audience** drop-down lists, select which school and user group can view the announcement, or select the whole district and all groups.
- Click **Add Combination**.

The school/group combination displays in a table.

- Optional: To add another school/user group combination, repeat [step 8](#) through [step 9](#).
- Click **Save**. Or, to continue adding announcements, click **Save and New**.

**Home**

### Manage Portal Announcements

From this screen, you can display, add, change and delete data pertaining to portal announcement records.

**Title:** Parent Volunteers This Week

**Read More Link:**

**Read More (Mobile):**

**Description:**  
Mon - Mrs. Smith  
Tue - Mr. Jones  
Thu - Miss Dell

**Expires:** 3/19/2014

**Administrative School:** TCCSA ITC

**Intended Audience:** TCCSA ITC All

School	Group
X TCCSA ITC	All

**Save** | Save and New | Cancel

#### Add New Announcement

A confirmation message displays, and the new announcement displays in the list.

12. Optional: To preview the announcement on the **Home** screen, click **View Portal Page**.

**Home**

### Manage Portal Announcements

From this screen, you can display, add, change and delete data pertaining to portal announcement records.

The Announcement was saved successfully

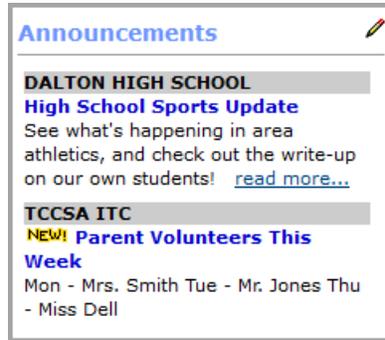
Add Announcement | **View Portal Page**

	Title	Read More Link	Read More Mobile	Description	School Name
X	High School Sports Update	read-more...	read-more...	See what's happening in area athletics, and check out the write-up on our own students!	DALTON HIGH SCHOOL
X	Parent Volunteers This Week			Mon - Mrs. Smith Tue - Mr. Jones Thu - Miss Dell	TCCSA ITC

#### Confirmation of Added Announcement

The announcement displays in the **Announcements** area with a **NEW!** icon. Announcements display sorted by administrative school and then by date created.

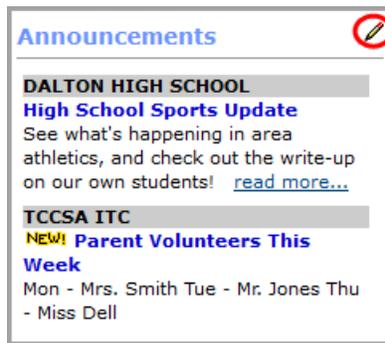
**Note:** The **NEW!** icon continues to display for three days.



**New Announcement**

## Edit Announcements

1. In the **Announcements** area of the **Home** screen, click  .



**Edit Announcement**

The **Manage Portal Announcements** screen displays.

2. In the row of the announcement you want to edit, click  .

Home					
Manage Portal Announcements					
From this screen, you can display, add, change and delete data pertaining to portal announcement records.					
Add Announcement		View Portal Page			
	Title	Read More Link	Read More Mobile	Description	School Name
	High School Sports Update	read-more...	read-more...	See what's happening in area athletics, and check out the write-up on our own students!	DALTON HIGH SCHOOL
	Parent Volunteers This Week			Mon - Mrs. Smith Tue - Mr. Jones Thu - Miss Dell	TCCSA ITC

### Manage Portal Announcements Screen

The add-edit version of the screen displays.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Announcements.”](#)

**Home**

### Manage Portal Announcements

From this screen, you can display, add, change and delete data pertaining to portal announcement records.

**Title:** Parent Volunteers This Week

**Read More Link:**

**Read More (Mobile):**

**Description:** Mon - Mrs. Smith  
Tue - Mr. Jones  
Thu - Miss Dell

**Expires:** 3/19/2014

**Administrative School:** TCCSA ITC

**Intended Audience:** TCCSA ITC All

School	Group
X TCCSA ITC	All

#### Edit Announcement

A confirmation message displays.

- Optional: To preview the announcement on the **Home** screen, click **View Portal Page**.

**Home**

### Manage Portal Announcements

From this screen, you can display, add, change and delete data pertaining to portal announcement records.

The Announcement was saved successfully

	Title	Read More Link	Read More Mobile	Description	School Name
X	High School Sports Update	read-more...	read-more...	See what's happening in area athletics, and check out the write-up on our own students!	DALTON HIGH SCHOOL
X	Parent Volunteers This Week			Mon - Mrs. Smith Tue - Mr. Jones Thu - Miss Dell	TCCSA ITC

#### Confirmation of Updated Announcement

The updated announcement displays in the **Announcements** area with a **NEW!** icon.

**Note:** The **NEW!** icon continues to display for three days.

**Announcements**

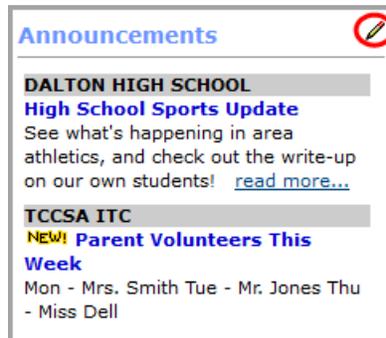
**DALTON HIGH SCHOOL**  
**High School Sports Update**  
 See what's happening in area athletics, and check out the write-up on our own students! [read more...](#)

**TCCSA ITC**  
**NEW! Parent Volunteers This Week**  
 Mon - Mrs. Smith Tue - Mr. Jones Thu - Miss Dell

#### Updated Announcement

## Delete Announcements

1. In the **Announcements** area of the **Home** screen, click .



### Delete Announcement

The **Manage Portal Announcements** screen displays.

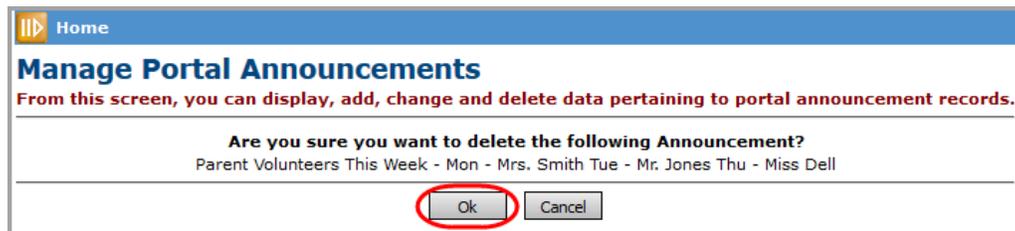
2. In the row of the announcement you want to delete, click .

Home					
Manage Portal Announcements					
From this screen, you can display, add, change and delete data pertaining to portal announcement records.					
Add Announcement		View Portal Page			
	Title	Read More Link	Read More Mobile	Description	School Name
	High School Sports Update	read-more...	read-more...	See what's happening in area athletics, and check out the write-up on our own students!	DALTON HIGH SCHOOL
	Parent Volunteers This Week			Mon - Mrs. Smith Tue - Mr. Jones Thu - Miss Dell	TCCSA ITC

### Manage Portal Announcements Screen

A message displays, asking if you are sure you want to delete the announcement.

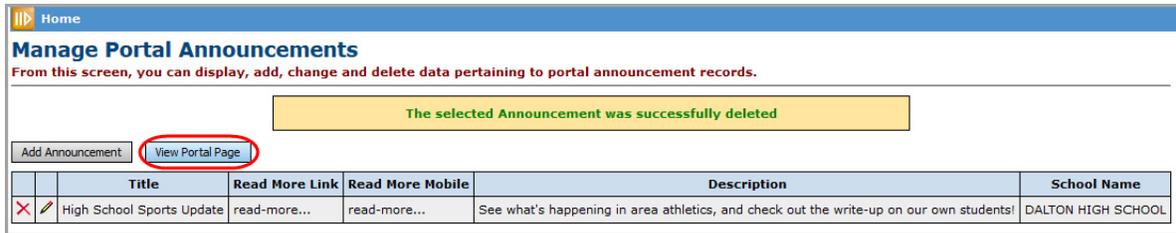
3. Click **Ok**.



### Confirm Delete

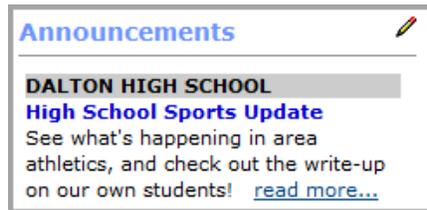
A confirmation message displays, and the announcement no longer appears in the list.

4. Optional: To see that the announcement no longer displays on the **Home** screen, click **View Portal Page**.



### Confirmation of Deleted Announcement

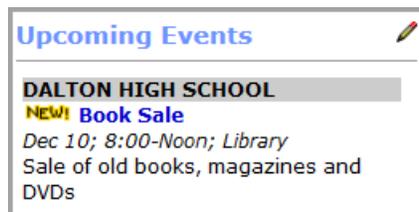
The announcement no longer displays in the **Announcements** area.



### Announcement Deleted

## Manage Events

In the **Upcoming Events** section of the **Home** screen, you can post information about scheduled events such as concerts, bake sales, meetings and sporting events.



### Upcoming Events Section of Home Screen

- To add an event, see [“Add Events.”](#)
- To edit an event, see [“Edit Events.”](#)
- To delete an event, see [“Delete Events.”](#)

## Add Events

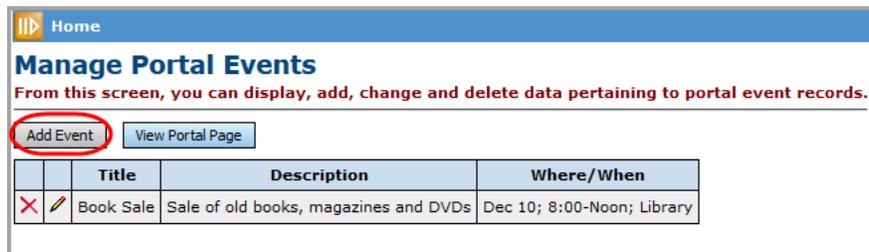
1. In the **Upcoming Events** area of the **Home** screen, click .



### Add Event

The **Manage Portal Events** screen displays.

2. Click **Add Event**.



### Manage Portal Events Screen

The add-edit version of the screen displays.

3. In the **Title** field, enter a title for the event.
4. In the **Description** field, enter any details related to the event. You can use plain text and/or HTML (Hypertext Markup Language) to display the event in different colors and sizes.

**Note:** Following are a few helpful HTML tags. To learn more about HTML, go to: <http://www.w3schools.com/html/default.asp>

HTML Tag	Purpose
<h1>your text here</h1>	Heading1 – enlarges text
 	Line break
<hr>	Create horizontal line
<center>your text here</center>	Center text
<style="color:blue">	Color

5. In the **Where/When** field, enter the date, time and/or location of the event.
6. In the **Expires** field, enter the date when the event should stop displaying, or select a date from the calendar date picker. This field defaults to eight days from the current date.
7. In the **Administrative School** drop-down list, select which school building (or district) should have administrative rights to maintain and update the event.
8. In the **Intended Audience** drop-down lists, select which school and user group can view the event, or select the whole district and all groups.

9. Click **Add Combination**.

The school/group combination displays in a table.

10. Optional: To add another school/user group combination, repeat [step 8](#) through [step 9](#).
11. Click **Save**. Or, to continue adding events, click **Save and New**.

**Manage Portal Events**  
From this screen, you can display, add, change and delete data pertaining to portal event records.

**Title:** Christmas Concert

**Description:** MS/HS Bands

**Where/When:** Dec 5; 3:00; Auditoria

**Expires:** 3/19/2014

**Administrative School:** All Buildings

**Intended Audience:** TCCSA ITC All

School	Group
X TCCSA ITC	All

### Add New Event

A confirmation message displays, and the new event displays in the list.

12. Optional: To preview the event on the **Home** screen, click **View Portal Page**.

**Manage Portal Events**  
From this screen, you can display, add, change and delete data pertaining to portal event records.

The Event was saved successfully

	Title	Description	Where/When
X	Book Sale	Sale of old books, magazines and DVDs	Dec 10; 8:00-Noon; Library
X	Christmas Concert	MS/HS Bands	Dec 5; 3:00; Auditoria

### Confirmation of Added Event

The event displays in the **Upcoming Events** area with a **NEW!** icon. Events display sorted by administrative school and then by expiration date.

**Note:** The **NEW!** icon continues to display for three days.

### New Event

## Edit Events

1. In the **Upcoming Events** area of the **Home** screen, click .

### Edit Event

The **Manage Portal Events** screen displays.

2. In the row of the event you want to edit, click .

		Title	Description	Where/When
		Book Sale	Sale of old books, magazines and DVDs	Dec 10; 8:00-Noon; Library
		Christmas Concert	MS/HS Bands	Dec 5; 3:00; Auditoria

### Manage Portal Events Screen

The add-edit version of the screen displays.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Events.”](#)

**Home**

### Manage Portal Events

From this screen, you can display, add, change and delete data pertaining to portal event records.

**Title:** Christmas Concert

**Description:** MS/HS Bands

**Where/When:** Dec 5; 3:00; Auditoria

**Expires:** 3/19/2014

**Administrative School:** All Buildings

**Intended Audience:** TCCSA ITC All

School	Group
X TCCSA ITC	All

**Save** **Cancel**

**Edit Event**

A confirmation message displays.

- Optional: To preview the event on the **Home** screen, click **View Portal Page**.

**Home**

### Manage Portal Events

From this screen, you can display, add, change and delete data pertaining to portal event records.

The Event was saved successfully

**Add Event** **View Portal Page**

	Title	Description	Where/When
X	Book Sale	Sale of old books, magazines and DVDs	Dec 10; 8:00-Noon; Library
X	Christmas Concert	MS/HS Bands	Dec 5; 3:00; Auditoria

**Confirmation of Updated Event**

The link to the updated event displays in the **Upcoming Events** area with a **NEW!** icon.

**Note:** The **NEW!** icon continues to display for three days.

### Updated Event

## Delete Events

1. In the **Upcoming Events** area of the **Home** screen, click .

### Edit Event

The **Manage Portal Events** screen displays.

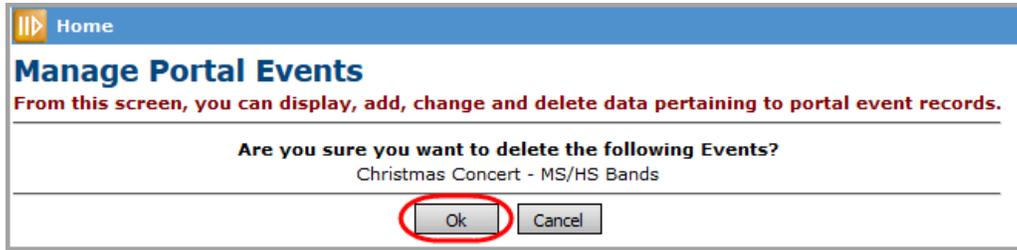
2. In the row of the event you want to delete, click .

	Title	Description	Where/When
	Book Sale	Sale of old books, magazines and DVDs	Dec 10; 8:00-Noon; Library
	Christmas Concert	MS/HS Bands	Dec 5; 3:00; Auditoria

### Manage Portal Events Screen

A message displays, asking if you are sure you want to delete the event.

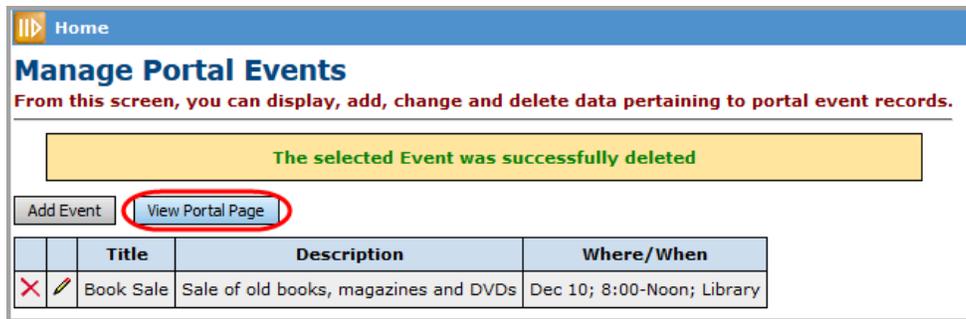
3. Click **Ok**.



**Confirm Delete**

A confirmation message displays, and the event no longer appears in the list.

- Optional: To see that the event no longer displays on the **Home** screen, click **View Portal Page**.



**Confirmation of Deleted Event**

The event no longer displays in the **Upcoming Events** area.



**Event Deleted**

---

# ProgressBook StudentInformation School Year Setup and Configuration Guide



# **ProgressBook StudentInformation School Year Setup and Configuration Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation School Year Setup and Configuration Guide* document have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.7.0	<a href="#">“Scheduling Configuration Tab”</a>	1	Added note about the new <b>Unfinalize</b> button.
14.7.0	<a href="#">“Set Up JVS Integration”</a>	58	Updated image of <b>JVS CourseSection Map</b> screen to show new navigation path.
14.6.0	<a href="#">“Add Master Calendar Days”</a>	41	Updated section to reflect added <b>EMIS Exception Type</b> and <b>EMIS Exception Hours</b> fields.
14.6.0	<a href="#">“School Demographics”</a>	47	Updated images and added field descriptions for new JVS fields.
14.6.0	<a href="#">“Set Up JVS Integration”</a>	58	Added section.
14.5.0	<a href="#">“Edit Master Calendar Days”</a>	43	Updated section to include new <b>EMIS</b> section information.
14.4.3	<a href="#">“School Year Configuration – DASL Options”</a>	1	Added note indicating the <b>EMIS Options</b> tab does not display in FY15 and beyond.
14.4.3	<a href="#">“EMIS Options Tab”</a>	15	Added note indicating the <b>EMIS Options</b> tab does not display in FY15 and beyond.
14.2.0	Global	N/A	Updated Heading 1, 2 and 3 formats to match ProgressBook Suite formatting.  Removed outline numbers to conform to heading format of the ProgressBook Suite.  Removed icons to match ProgressBook Suite formatting.
14.2.0	“School Setup Outline and Flow”	N/A	Removed section because the icons are no longer included in the guide.
14.2.0	“School Setup & Configuration Documentation Key”	N/A	Removed section to match ProgressBook Suite formatting.
14.2.0	<a href="#">“EMIS Options Tab”</a>	15	Deleted outdated reporting period information.

14.1.0	<i>“Building Grade Level Codes”</i>	19	Added description of new <b>Expected Graduation Date</b> field, rewrote add/edit section as procedural steps and updated screen shot.
14.1.0	<i>“School Demographics”</i>	47	Updated description of <b>Principal</b> field and added note about <b>Superintendent</b> field at the district level.
14.0.0	<i>“School Demographics”</i>	47	Added description of new ThinkGate School Type field and updated screen shot.

# Table of Contents

Change Log .....	i
Table of Contents.....	iii
School Setup and Configuration Overview .....	1
School Year Configuration – DASL Options .....	1
Scheduling Configuration Tab .....	1
Marks Configuration Tab .....	3
Marks Configuration – Alpha Marks.....	3
Marks Configuration – Numeric Marks.....	4
Fees Configuration Tab .....	4
Attendance Configuration Tab .....	6
Daily Attendance – Once Per Day .....	7
Daily Attendance – Twice per Day.....	9
Period Attendance Configuration .....	11
Prog Track Tab.....	13
INFOhio Export Tab.....	13
EMIS Options Tab .....	15
System Table Maintenance .....	16
Grade Level Codes.....	16
Add/Edit Grade Level Codes .....	18
Building Grade Level Codes.....	19
Add Building Grade Levels .....	19
Edit Building Grade Levels .....	21
Grade Level Progression Table .....	22
Add/Edit Grade Level Progressions.....	23
Room/Location Table .....	24
Add/Edit Room/Location .....	25
District Addresses.....	26
Add District Address .....	29
View/Edit District Address Information.....	32
Edit District Address .....	34

Delete District Address .....	36
Master Calendar .....	37
Create Master Calendar – Calendar Wizard.....	39
Master Calendar Summary.....	40
Add Master Calendar Days .....	41
Edit Master Calendar Days.....	43
General Section .....	44
EMIS Section .....	46
School Demographics.....	47
Registration Defaults.....	51
District Registration Defaults .....	51
Building Registration Defaults.....	54
Set Up JVS Integration .....	58
System Maintenance Reference .....	66
Appendix A: .....	70

---

## School Setup and Configuration Overview

Before using School Setup and Configuration, make sure you have run School Year Initialization in the appropriate school building and school year. Please see the *ProgressBook StudentInformation School Year Initialization Guide*.

A school year configuration is a set of properties that define the school/school year. A school will have one school year configuration record for each school year. Each school has tables, which are school year specific and in order to prevent the school from having to redefine these tables each year, StudentInformation will have a process which will create the necessary tables for the next school year based on the previous school year and schedule.

This document concentrates on preparing the school scheduling year, and setting up and correcting the appropriate tables used in the day to day functions of a school.

Various code tables are defined throughout StudentInformation for applications such as Attendance, Discipline, and Student Registration to name a few. Each of the applicable code tables will be discussed in those appropriate chapters. Included in this chapter are the remaining System Tables, which are applicable to several modules and not one module specifically.

---

## School Year Configuration – DASL Options

**Navigation: Home – Management – School Administration – DASL Options**

The school year configuration maintenance screen must be completed for each building in the district. This screen has a tab for each functional area that must be configured. These areas include Scheduling, Marks, Fees, Attendance, Prog Track, INFOhio Export, and EMIS Options.

**Note:** *The **EMIS Options** tab does not display for school year 2014-2015 and beyond.*

### Scheduling Configuration Tab

**Navigation: Home – Management – School Administration – DASL Options**

The Scheduling Configuration Tab in StudentInformation has several fields that must be defined or completed, as applicable to that building.

Home » Management » School Administration » DASL Options Advanced S

## DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling | Marks | Fees | Attendance | Prog Track | INFOhio Export | EMIS Options

Uses Enroll Weight:

Number of Digits for Student Numbers:   

Automatic Homeroom Assignment Method:

Automatic Homeroom Assignment Group by Grade Level:

Default Calendar:  

Default JVS IRN:

Final Schedule Result:

A Final Schedule Result has been selected, and cannot be changed.

**Uses Enroll Weight** – This should be checked if the Weight designation for Programs (see Program Codes Maintenance Table) is being used during the scheduling process. The Class Master Schedule (R407) takes the Uses Enroll Weight value into consideration when calculating filling counts.

**Number of Digits for Student Numbers** – This value is the minimum number of digits that will display when the student ID appears on any report or user interface. This can be any number from 4 to 9. If the actual student number is fewer digits than this minimum number of digits, the student ID will be padded with leading zeros. Student numbers with more digits than this minimum number of digits will be displayed normally.

Example: If DASL Options is set to 8 and a student's ID is 1047, the ID will display as 00001047. If DASL Options is set to 6 and a student's ID is 1047, the ID will display as 001047.

**NOTE:** This does **NOT** determine the number of digits for auto-assigned student numbers. Auto-assigned student numbers are determined in a different way. See the *Student Information Student and Registration Guide* for more information.

 – The up and down arrows allow the user to increase or decrease the number displayed in the textbox. The number may also be entered manually.

**Automatic Homeroom Assignment Method** – If automatic homeroom assignment is used, by what method should the students be assigned? Options are: Random, Alphabetical and Student Number. Choose one option for use with automatic homeroom assignment.

**Automatic Homeroom Assignment Group by Grade Level** – If this box is checked, the automatic homeroom assignment process will assign students to homerooms only with other students in the same grade level. If not selected, the process will assign students to homerooms without regard for the student's grade level.

**Note:** For more information on the Automatic Homeroom Assignment process, see the *Student Registration Documentation*.

**Default Calendar** (required) – Select the sub calendar to be used as the “Default calendar” when students are registered, if no calendar is specified.

**Default JVS IRN** – The default IRN to be used with the EMIS Situation Wizard, when a JVS situation is selected.

**Final Schedule Result** – Once the final Master Schedule is selected for the school year, this will show as the default. If the school year has not been finalized, then the available Master Schedules will be listed in the drop-down list, and a warning message will explain that selecting a Final Schedule Result cannot be undone.

***Note:** If you are an ITC user with “Is Privileged” status, when a finalized schedule displays in this drop-down list, an **Unfinalize** button displays beside it. Click **Unfinalize** to unfinalize the schedule.*

**Save** – Will save changes made to the Scheduling Configuration information, or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Scheduling tab.

## Marks Configuration Tab

**Navigation: Home – Management – School Administration – DASL Options**

Configuration of marks recording and averaging for a school will involve multiple options to control how marks are used within the school for overall GPA calculation and Honor Roll Inclusion. Configuration will be based on which Marks Type option is selected from the drop-down menu.

For more information on Marks, see the *ProgressBook StudentInformation Marks Guide*.

## Marks Configuration – Alpha Marks

**Navigation: Home – Management – School Administration – DASL Options**

Home » Management » School Administration » DASL Options

### DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling Marks Fees Attendance Prog Track INFOhio Export EMIS Options

Mark Type Used: Alpha Marks ⚡

Save

**Mark Type Used** – Select Alpha Marks or Numeric Marks.

**Save** – Will save changes made to the Marks Configuration information, or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Marks tab.

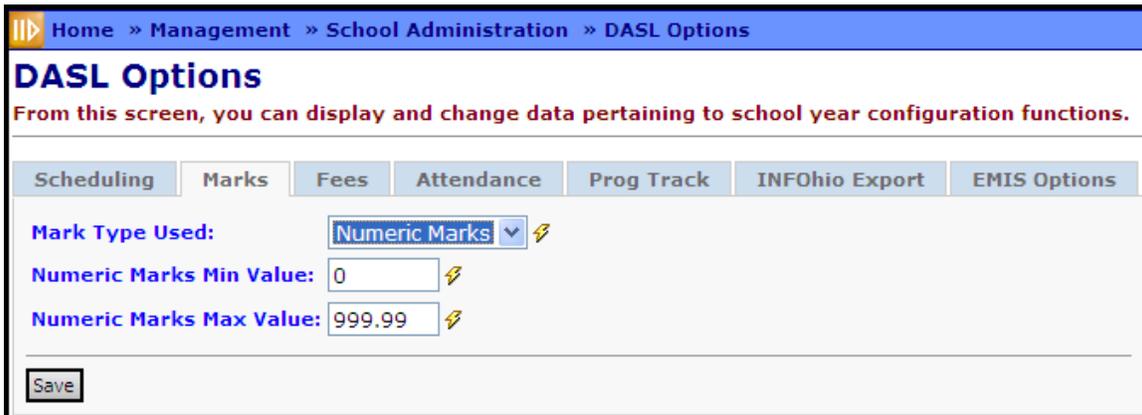
For more information on Alpha Marks reporting, see the *ProgressBook StudentInformation Marks Guide*.

## Marks Configuration – Numeric Marks

**Navigation: Home – Management – School Administration – DASL Options**

If numeric marks are used as the primary source of grade reporting and GPA calculations, then numeric marks must be selected from the drop-down menu on the Marks Configuration Tab.

Selecting numeric marks from the drop-down menu refreshes the screen, and new fields will be displayed for configuring numeric marks.



The screenshot shows the 'DASL Options' interface. At the top, a breadcrumb trail reads 'Home » Management » School Administration » DASL Options'. Below this is the title 'DASL Options' and a red instruction: 'From this screen, you can display and change data pertaining to school year configuration functions.' A horizontal menu contains tabs for 'Scheduling', 'Marks', 'Fees', 'Attendance', 'Prog Track', 'INFOhio Export', and 'EMIS Options'. The 'Marks' tab is active. Underneath, the 'Mark Type Used' dropdown menu is set to 'Numeric Marks'. Below that are two input fields: 'Numeric Marks Min Value' with the value '0' and 'Numeric Marks Max Value' with the value '999.99'. A 'Save' button is located at the bottom left of the form area.

**Mark Type Used** – Numeric Marks is selected.

**Numeric Marks Min Value** (required) – Minimum value of numeric marks to be used.

**Numeric Marks Max Value** (required) – Maximum value of numeric marks to be used (includes 2 decimal places).

**Save** – Will save changes made to the Marks Configuration information, or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Marks tab.

For more information on Numeric Marks reporting, see the *ProgressBook StudentInformation Marks Guide*.

## Fees Configuration Tab

**Navigation: Home – Management – School Administration – DASL Options**

The Fees Configuration Tab defines if the school is using the fees accounting module of StudentInformation.

Home » Management » School Administration » DASL Options

## DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling	Marks	Fees	Attendance	Prog Track	INFOhio Export	EMIS Options
<b>Uses Fees:</b>			<input checked="" type="checkbox"/>			
<b>Has Fees Assigned:</b>			<input checked="" type="checkbox"/>			
<b>Reduced Fee - Fraction Reduced from Fee:</b>			<input type="text" value="0.50"/>			
<b>Use General Fee Waivers:</b>			<input checked="" type="checkbox"/>			
<b>Use Course Fee Waivers:</b>			<input checked="" type="checkbox"/>			
<b>Use Program Fee Waivers:</b>			<input type="checkbox"/>			
<b>Use Membership Fee Waivers:</b>			<input type="checkbox"/>			
<b>Show Fees from Past School Years:</b>			<input checked="" type="checkbox"/>			
<b>Show Fees from Future School Years:</b>			<input checked="" type="checkbox"/>			
<b>Show Fees from All Buildings:</b>			<input checked="" type="checkbox"/>			
<input type="button" value="Save"/>						

**Uses Fees** – Box should be checked if the building is using fees accounting, then fees will automatically be assessed as per the defined fee code tables. Unchecked and the fees will not be automatically assessed, but may be manually assigned.

**Has Fees Assigned** – Box should be checked if the fees have been assigned by the Fees Batch Creation application.

**Reduced Fee** – Fraction Reduced from Fee – Input the percentage that fees should be reduced for students marked with a reduced lunch status (on private info tab of student profile).

**Use General Fee Waivers** – Box should be checked if Free/Reduced Waivers are used for General Fees.

**Use Course Fee Waivers** – Box should be checked if Free/Reduced Waivers are used for Course Fees.

**Use Program Fee Waivers** – Box should be checked if Free/Reduced Waivers are used for Program Fees.

**Use Membership Fee Waivers** – Box should be checked if Free/Reduced Waivers are used for Membership Fees.

**Show Fees from Past School Years** – Box should be checked if past fees are to display on all fees screens and reports.

**Show Fees from Future School Years** – Box should be checked if future fees are to display on all fees screens and reports.

**Show Fees from All Buildings** – Box should be checked if other buildings are to display on all fees screens and reports.

**Save** – Will save changes made to the Fees Configuration tab, or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Fees Tab.

## Attendance Configuration Tab

### Navigation: Home – Management – School Administration – DASL Options

The Attendance Configuration Tab will be used to define the attendance method as well as the default values to be used on the attendance collection screens in StudentInformation.

There are two attendance methods, period and daily. The building must define which method is to be used for the official attendance collection. Once that has been defined the screen will be refreshed and appropriate fields shown to go along with the attendance method selected.

**Attendance Officer** (optional) – Currently not functioning.

**Absence Cut-Off Time** – – This time will determine whether an absence is considered a half day AM absence or a half day PM absence for period attendance conversion. If a student is absent 3 periods in the morning and 2 periods in the afternoon, the period attendance conversion process will look at the Absence Cut-Off Time field on DASL Options and the Start and End times entered on the Period Maintenance screen to determine if the periods should be converted to a half day AM or half day PM absence. If the student has more absent periods before the cutoff than they do after, then that student will get an “AM Absence”. A tie will go to PM.

**Disable Late Option** – Selecting this checkbox will remove the “Late” option from Teacher Daily Attendance entry.

**Allow Teacher to Override** – Check this box to allow a teacher to change attendance records for students in their classes, even after the teacher has submitted those records. If you check this box, an additional field displays:

**Max. Override Days** (required) – If “Allow Teacher Override” is checked, set how many days teachers are permitted during which to override already-submitted attendance records. You can enter a number or use the up and down arrows to adjust this value. If zero is chosen teachers can’t change attendance once it is entered. If one day is chosen in the Max. Override Days field then teachers can update attendance for the current day. If three days is chosen, teachers can update attendance for the current day, previous 2 days, and 2 days in the future.

**Method** (required) – There are two attendance methods, period or daily. One must be selected, and once selected, the screen will change to show the appropriate options for that method of attendance.

The rest of the fields for the attendance tab are discussed under the applicable method of attendance.

For more information on attendance collection and reporting, see the Attendance and Sub Calendars Documentation.

### Daily Attendance – Once Per Day

**Navigation: Home – Management – School Administration – DASL Options**

**DASL Options**  
From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling | Marks | Fees | Attendance | Prog Track | INFOhio Export | EMIS Options

**Attendance Officer:** -- None -- You can control how attendance collection appears to teachers here.

**Absence Cut-Off Time:** 12:00 PM **Disable Late Option:**

**Method:** Daily Attendance ⚡ **Frequency:** Once per day ⚡

**Allow Teacher to Override:**

Select the Periods during which Attendance is collected.

Rotation Day	First Collection
M	Administrative Homeroom
T	Administrative Homeroom
W	Administrative Homeroom
R	Administrative Homeroom
F	Administrative Homeroom

**Default Settings:**

	Partial	Absence
Default Absence Type:	TARDY ⚡	EXCUSED ⚡

Save

**Attendance Officer** (optional) – Currently not functioning.

**Absence Cut-Off Time** (optional) – – This time will determine whether an absence is considered a half day AM absence or a half day PM absence for period attendance conversion. If a student is absent 3 periods in the morning and 2 periods in the afternoon, the period attendance conversion process will look at the Absence Cut-Off Time field on DASL Options and the Start and End times

entered on the Period Maintenance screen to determine if the periods should be converted to a half day AM or half day PM absence. If the student has more absent periods before the cutoff than they do after, then that student will get an “AM Absence”. A tie will go to PM.

**Disable Late Option** – Selecting this checkbox will remove the “Late” option from Teacher Daily Attendance entry.

**Method** (required) – Select Daily Attendance from drop-down menu.

**Frequency** (required) – Options are Once or Twice per day. Select Once per day if this is how often you collect daily attendance.

**Allow Teacher to Override** – Check this box to allow a teacher to change attendance records for students in their classes, even after the teacher has submitted those records. If you check this box, an additional field displays:

<b>Allow Teacher to Override:</b> <input checked="" type="checkbox"/>	<b>Max. Override Days:</b>	<input type="text" value="1"/>	  
---	----------------------------	--------------------------------	---

**Max. Override Days** (required) – If “Allow Teacher Override” is checked, set how many days teachers are permitted during which to override already-submitted attendance records. You can enter a number or use the up and down arrows to adjust this value. If zero is chosen teachers can’t change attendance once it is entered. If one day is chosen in the Max. Override Days field then teachers can update attendance for the current day. If three days is chosen, teachers can update attendance for the current day, previous 2 days, and 2 days in the future.

**Select the Periods during which Attendance is collected** (required) – For each rotation day (day of the week) an option must be specified from those available in the drop-down menus for each day. You may collect attendance in different periods for each day or the same period (or the Administrative Homeroom) every day, but each must be defined separately.

**Default Settings** (required) – Default settings must be defined for Partial and Absence Types. The defaults specified here will then populate those fields on attendance collection screens. The drop-down menus will be populated with those Absence Type Codes that have been defined as “used for daily attendance” in the Absence Type Code table. See the complete Attendance Chapter of documentation for further details.

**Save** – Will save current Attendance Configuration information or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Attendance tab.

## Daily Attendance – Twice per Day

Navigation: Home – Management – School Administration – DASL Options

Home » Management » School Administration » DASL Options
Advanced Se

### DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling
Marks
Fees
Attendance
Prog Track
INFOhio Export
EMIS Options

**Attendance Officer:** -- None -- You can control how attendance collection appears to teachers here.

**Absence Cut-Off Time:** 12:00 PM      **Disable Late Option:**

**Method:** Daily Attendance ⚡      **Frequency:** Twice per day ⚡

**Allow Teacher to Override:**

Select the Periods during which Attendance is collected.

Rotation Day	First Collection	Second Collection
M	<span style="border: 1px solid #ccc; padding: 2px;">1 - 1</span> ⚡	<span style="border: 1px solid #ccc; padding: 2px;">5 - 5</span> ⚡
T	<span style="border: 1px solid #ccc; padding: 2px;">1 - 1</span> ⚡	<span style="border: 1px solid #ccc; padding: 2px;">5 - 5</span> ⚡
W	<span style="border: 1px solid #ccc; padding: 2px;">1 - 1</span> ⚡	<span style="border: 1px solid #ccc; padding: 2px;">5 - 5</span> ⚡
R	<span style="border: 1px solid #ccc; padding: 2px;">1 - 1</span> ⚡	<span style="border: 1px solid #ccc; padding: 2px;">5 - 5</span> ⚡
F	<span style="border: 1px solid #ccc; padding: 2px;">1 - 1</span> ⚡	<span style="border: 1px solid #ccc; padding: 2px;">5 - 5</span> ⚡

**Default Settings:**      **Partial**      **Absence**

Default Absence Type: TARDY ⚡      EXCUSED ⚡

Save

**Attendance Officer** (optional) – Currently not functioning.

**Absence Cut-Off Time** (optional) – This time will determine whether an absence is considered a half day AM absence or a half day PM absence for period attendance conversion. If a student is absent 3 periods in the morning and 2 periods in the afternoon, the period attendance conversion process will look at the Absence Cut-Off Time field on DASL Options and the Start and End times entered on the Period Maintenance screen to determine if the periods should be converted to a half day AM or half day PM absence. If the student has more absent periods before the cutoff than they do after, then that student will get an “AM Absence”. A tie will go to PM.

**Disable Late Option** – Selecting this checkbox will remove the “Late” option from Teacher Daily Attendance entry.

**Method** (required) – Select Daily Attendance from drop-down menu.

**Frequency** (required) – Options are Once or Twice per day. Select Twice per day if this is how often you collect daily attendance.

**Allow Teacher to Override** – Check this box to allow a teacher to change attendance records for students in their classes, even after the teacher has submitted those records. If you check this box, an additional field displays:

Allow Teacher to Override: <input checked="" type="checkbox"/>	Max. Override Days:	1	  
--	---------------------	---	---

**Max. Override Days** (required) – If “Allow Teacher Override” is checked, set how many days teachers are permitted during which to override already-submitted attendance records. You can enter a number or use the up and down arrows to adjust this value. If zero is chosen teachers can’t change attendance once it is entered. If one day is chosen in the Max. Override Days field then teachers can update attendance for the current day. If three days is chosen, teachers can update attendance for the current day, previous 2 days, and 2 days in the future.

**Select the Periods during which Attendance is collected** (required) – For each rotation day (day of the week) an option must be specified from those available in the drop-down menus for each day. You may collect attendance in different periods for each day or the same period every day, but each rotation day must be defined separately.

**First Collection** – Define the period of the day where the first collection of attendance will be taken.

**Second Collection** – Define the period of the day where the second collection of attendance will be taken.

**Default Settings** (required) – Default settings must be defined for Partial and Absence Types. The defaults specified here will then populate those fields on attendance collection screens. The drop-down menus will be populated with those Absence Type Codes that have been defined as “used for daily attendance” in the Absence Type Code table. See the complete Attendance Chapter of documentation for further details.

**Save** – Will save current Attendance Configuration information or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Attendance tab.

## Period Attendance Configuration

Navigation: Home – Management – School Administration – DASL Options

Home » Management » School Administration » DASL Options

### DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling Marks Fees Attendance Prog Track INFOhio Export EMIS Options

**Attendance Officer:** -- None -- You can control how attendance collection appears to teachers here.

**Absence Cut-Off Time:** 12:00 PM

**Method:** Period Attendance

**Allow Teacher to Override:**

**Disable Late Option:**

**Collect Reasons:**  **Collect Notes:**

Default Types:	Partial	Absence
Default Absence Type:	TARDY	UNEXCUSED
Default Thresholds:	Half-Day Absence	Full-Day Absence
Period Threshold:	0	0
Unexcused Period Threshold:	0	0
Period to Daily Conversions:	Half-Day Absence	Full-Day Absence
Default Daily Absence Type:	EXCUSED	EXCUSED
Default Daily Absence Type (Unexcused):	UNEXCUSED	UNEXCUSED
Default Absence Reason:		
Default Absence Note:		

Save

**Attendance Officer** (optional) – Currently not functioning.

**Absence Cut-Off Time** (required) – This time will determine whether an absence is considered a half day AM absence or a half day PM absence for period attendance conversion. If a student is absent 3 periods in the morning and 2 periods in the afternoon, the period attendance conversion process will look at the Absence Cut-Off Time field on DASL Options and the Start and End times entered on the Period Maintenance screen to determine if the periods should be converted to a half day AM or half day PM absence. If the student has more absent periods before the cutoff than they do after, then that student will get an “AM Absence”. A tie will go to PM.

**Method** (required) – Select Period Attendance from drop-down menu.

**Disable Late Option** – Selecting this checkbox will remove the “Late” option from Teacher Daily Attendance entry.

**Collect Reasons** – Selecting this checkbox will add an “Absence Reason” entry to Teacher Attendance screens. The Absence Reason always shows on the Student’s School Absences (Period Attendance) and Absence Event Maintenance screens, regardless of whether Collect Reasons is checked or not.

**Collect Notes** – Selecting this checkbox will add an “Absence Note” entry to Teacher Attendance screens. The Absence Note always shows on the Student’s School Absences (Period Attendance) and Absence Event Maintenance screens, regardless of whether Collect Notes is checked on or not.

**Allow Teacher to Override** – Check this box to allow a teacher to change attendance records for students in their classes, even after the teacher has submitted those records. If you check this box, an additional field displays:

Allow Teacher to Override: <input checked="" type="checkbox"/>	Max. Override Days:	1	 
--	---------------------	---	---

**Max. Override Days** (required) – If “Allow Teacher Override” is checked, set how many days teachers are permitted during which to override already-submitted attendance records. You can enter a number or use the up and down arrows to adjust this value. If zero is chosen teachers can’t change attendance once it is entered. If one day is chosen in the Max. Override Days field then teachers can update attendance for the current day. If three days is chosen, teachers can update attendance for the current day, previous 2 days, and 2 days in the future.

**Default Types** (required) – Make a selection from each drop-down, to define which defaults will be used for Partial and Absence codes on the attendance screens used for Period Attendance. The drop-down menus will be populated with those Absence Type Codes that have been defined as “used for period attendance” in the Absence Type Code table. See the complete Attendance Chapter of documentation for further details.

 – The up and down arrows allow the user to increase or decrease the number displayed in the textbox. The number may also be entered manually.

**Default Threshold** (required) – How many periods of the day (excused and unexcused absences) will be used to determine if the absence is considered half-day and how many will have to be missed to be considered a full-day absence.

For example, if the half-day Period Threshold is set to 4, and the full-day threshold is set to 7, after the 4th period absence, the student will be given a half-day absence. If the student misses 5 or 6 periods they will still be given a half day absence. After the 7th period absence, the student will be updated to have a full-day absence.

With this example, the Unexcused Period Thresholds could be set to 3 and 5. When the 4th period is missed, and the system is creating a half-day absence record, if 3 of the 4 periods missed are unexcused, then the half-day absence would be unexcused, otherwise it would be excused. When the 7th period is missed, the system will determine if at least 5 of the period absences are unexcused, and set the unexcused/excused setting appropriately for the full-day absence.

**Period to Daily Conversions** (required) – Define default values from the drop-down list for Half-Day and Full-Day Absences, which will be used to convert period attendance, to daily attendance for EMIS reporting purposes (both excused and unexcused).

**Please see Appendix A for period to daily conversion examples.**

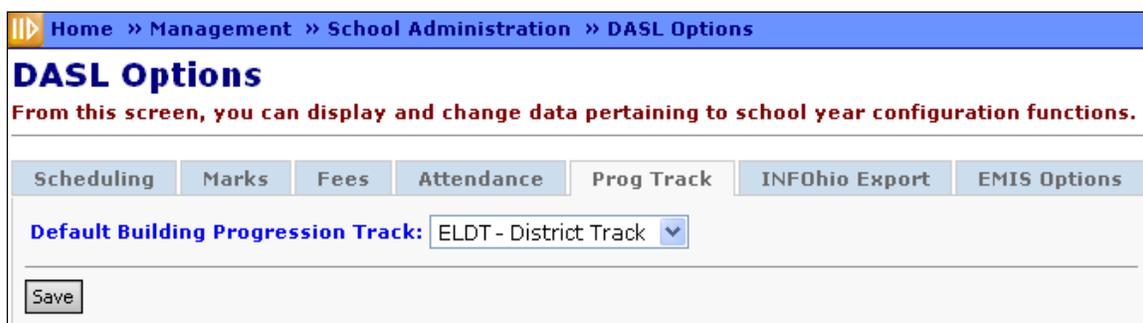
**Default Absence Reason** (optional) – define a default absence reason to be used when entering period attendance.

**Default Absence Note** (optional) – define a default absence note to be used when entering period attendance.

**Save** – Will save current Attendance Configuration information or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Attendance tab.

## Prog Track Tab

**Navigation: Home – Management – School Administration – DASL Options**



The screenshot shows the 'DASL Options' screen. At the top, there is a breadcrumb trail: 'Home >> Management >> School Administration >> DASL Options'. Below this is the title 'DASL Options' and a subtitle: 'From this screen, you can display and change data pertaining to school year configuration functions.' There are seven tabs: 'Scheduling', 'Marks', 'Fees', 'Attendance', 'Prog Track', 'INFOhio Export', and 'EMIS Options'. The 'Prog Track' tab is currently selected. Below the tabs, there is a label 'Default Building Progression Track:' followed by a drop-down menu showing 'ELDT - District Track'. At the bottom left, there is a 'Save' button.

**Default Building Progression Track** – Select from the drop-down box a default building progression track. This field is populated by entries made into the Building Progression Tracks screen at the district level.

This Progression Track will be pre-selected for any students without progression tracks during the Student Promotion process. If you leave this drop-down blank, no progression track will be pre-selected during the Student Promotion process, and you will have to manually select a progression track for all students who do not have one. Students without a Progression Track do not get promoted.

**Save** – Will save current Progression Track Configuration information or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Prog Track tab.

## INFOhio Export Tab

**Navigation: Home – Management – School Administration – DASL Options**

**Homeroom Method** – Select from the drop-down box a default method for exporting Homeroom in the INFOhio Export. Valid choices are Administrative Homeroom, Period Homeroom and Department Homeroom. The Default choice is Administrative Homeroom.

Home » Management » School Administration » DASL Options

## DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling Marks Fees Attendance Prog Track INFOhio Export EMIS Options

Homeroom Method: Administrative Homeroom

Save

If “Administrative Homeroom” is selected as the Homeroom Method, the student’s administrative homeroom as assigned on the Student Profile Edit screen will be used. If a student has no administrative homeroom, the homeroom information will be empty on the student’s record in the export file.

Home » Management » School Administration » DASL Options

## DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling Marks Fees Attendance Prog Track INFOhio Export EMIS Options

Homeroom Method: Period Homeroom

Period: 00 - Period 00

Save

If “Period Homeroom” is selected as the Homeroom Method, you must select the Period to use as homeroom for the Export. Any course section the student is assigned to that meets the selected period will be used as the homeroom. The teacher and location from the course section will be used as the homeroom teacher and room in the export record.

If the student has no course section assignments which meet the criteria for period, the student will have no homeroom information in the records in the export file.

Home » Management » School Administration » DASL Options

## DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling Marks Fees Attendance Prog Track INFOhio Export EMIS Options

Homeroom Method: Department Homeroom

Department: LA - LANGUAGE ARTS

Save

If “Department Homeroom” is selected as the Homeroom Method, you must select the department code of the courses you wish to use as the homeroom period. Any course section the student is assigned to that has the selected department assigned to the course will be used as the homeroom. The teacher and location from the course matching the selected department will be used as homeroom teacher and room in the export record.

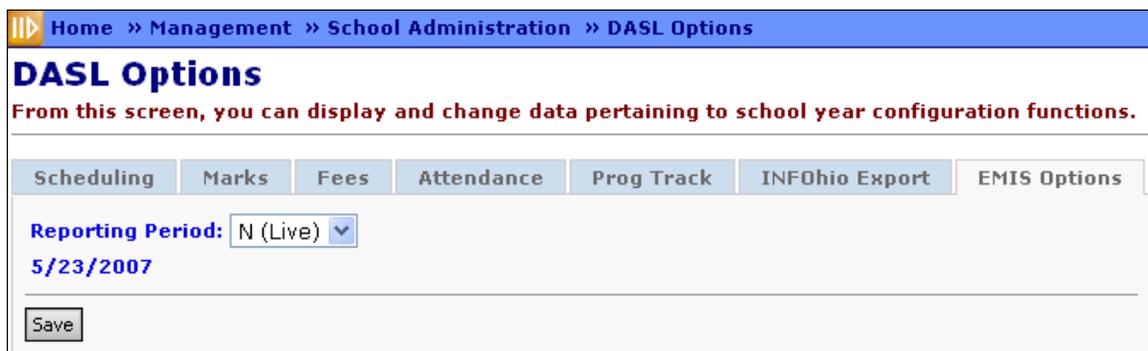
If the student has no course section assignments which meet the criteria for department, the student will have no homeroom information in the records in the export file.

**Save** – Will save current INFOhio Export Configuration information or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the INFOhio Export tab.

## EMIS Options Tab

**Navigation: Home – Management – School Administration – DASL Options**

*Note: The **EMIS Options** tab does not display for school year 2014-2015 and beyond.*



The screenshot shows the 'DASL Options' tab selected in a navigation menu. The page title is 'DASL Options' and a red instruction reads: 'From this screen, you can display and change data pertaining to school year configuration functions.' Below this, there are several tabs: 'Scheduling', 'Marks', 'Fees', 'Attendance', 'Prog Track', 'INFOhio Export', and 'EMIS Options'. The 'EMIS Options' tab is active. Underneath, there is a 'Reporting Period' dropdown menu set to 'N (Live)' with a date of '5/23/2007' displayed below it. A 'Save' button is located at the bottom left of the form area.

This tab is used to specify alternate count week Friday dates for EMIS Reporting Period K. During EMIS Reporting Period N, the date listed is not editable.

*Note: This screen determines the alternate count week Friday only for the current building.*

**Reporting Period** – Select the EMIS Reporting Period from the drop-down menu for which you wish to set a count week Friday date.

Home » Management » School Administration » DASL Options

## DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling Marks Fees Attendance Prog Track INFOhio Export EMIS Options

Reporting Period: K

Reporting Date: 10/6/2006

Save

**Reporting Date** – If you select EMIS Reporting Period K, select a date to use as count week Friday for that EMIS Reporting Period.

**Save** – Will save current EMIS Options Configuration information or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the EMIS Options tab.

## System Table Maintenance

### Grade Level Codes

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

Grade Level Codes are defined in the Grade Level Codes Maintenance screen. Grade Levels may be defined at the district level only. If the user is trying to modify or view the grade level code table, and they have not changed their working school to the District, then they would receive the following error message when trying to access that screen.

**This page can only be accessed for Districts**

After selecting the District as the working school, the Grade Level Codes may be viewed, added, edited or deleted. The grade level codes defined in this table would then be available to all buildings in the district for use with their Building Grade Level Code Table.

Home » Management » School Administration » Grade Level Administration » Grade Level Codes

## Grade level Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to grade level codes.

Add Grade Level Code

		Code	Name	Emis Code	Description	Sort Order ^	Active
		PS	PS	PS	PS	1	
		KG	KG	KG	KG	2	
		01	01	01	01	3	
		02	02	02	02	4	
		03	03	03	03	5	
		04	04	04	04	6	
		05	05	05	05	7	
		06	06	06	06	8	
		07	07	07	07	9	
		08	08	08	08	10	
		09	09	09	09	11	
		10	10	10	10	12	
		11	11	11	11	13	
		12	12	12	12	14	
		UG	UG	UG	UG	16	
		DR	DR	DR	DR	20	
		13	13	13		21	
		GR	GR	GR	GR	22	
		23	23	23	23	23	
		IN	IN	IN	IN	99	
		**	**	**		100	

Show Active Only

21 Records Displayed [Back To Top](#)

This screen has standard add record, edit record and delete record controls.

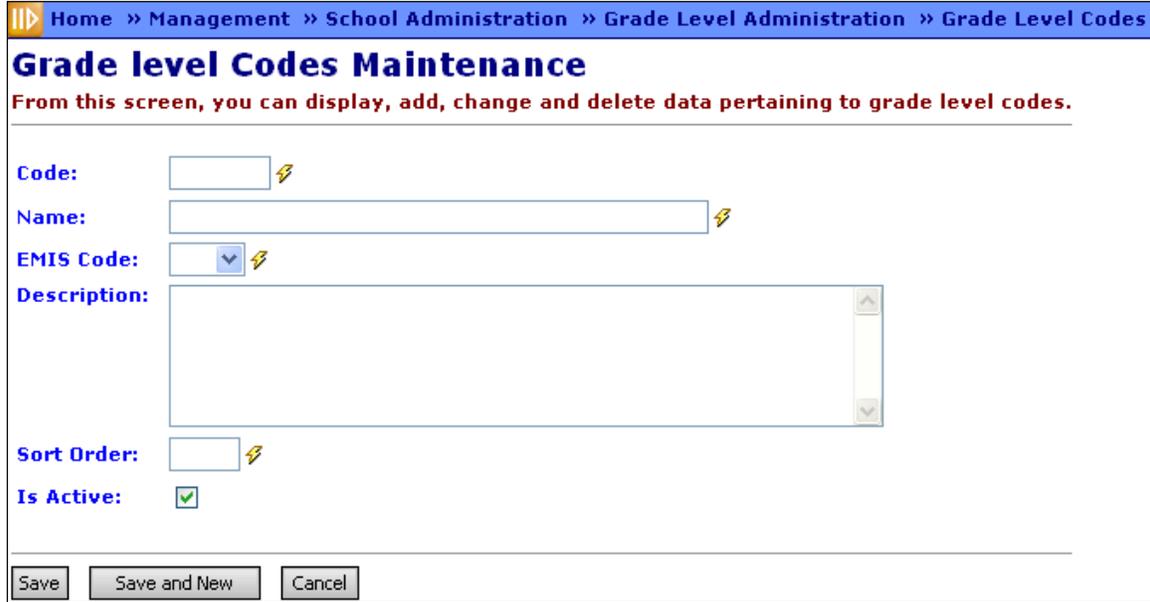
Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, EMIS, Description, Sort Order, Active) in ascending or descending order by clicking on the column header.

 – Active Grade Level Code – can be used on new Student Records.

 – Inactive Grade Level Code – cannot be used on new Student Records.

## Add/Edit Grade Level Codes



Home >> Management >> School Administration >> Grade Level Administration >> Grade Level Codes

### Grade level Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to grade level codes.

Code:

Name:

EMIS Code:

Description:

Sort Order:

Is Active:

Save Save and New Cancel

**Code** (required) – Enter up to 4 alphanumeric characters for Grade Level Code. If you try to use an existing inactive Grade Level Code, you will be prompted to reactivate this inactive Code if you wish.

Grade Level Codes must be defined at the district level per the chart below. The Grade Level Code table is only visible at district level as well. But the grade levels display in drop-downs throughout the StudentInformation application.

	Visibility and Use	Editable
<b>Global Level</b>	District	District
<b>District Level</b>	District	District
<b>School Level</b>	District	District

**Name** (required) – Name of the Grade Level.

**EMIS Code** (required) – EMIS applicable grade level code to be mapped to the grade level code for correct EMIS reporting purposes. This is mapped to FN 080 Grade Level Next Year. Choose from drop-down menu.

**Description** (optional) – Description of Grade Level Code.

**Sort Order** (required) – sort order number used to determine in what order the Grade Level Codes will appear in drop-down menus.

**Is Active** – Yes or No; Grade Level Code must be Active to use on new Student Records and is active by default.

## Building Grade Level Codes

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

You can define building grade level codes at the building level only. If you do not have a building selected as the working school, you cannot modify or view the building grade level codes. Active codes are the only codes you can use on new student records.

Home » Management » School Administration » Grade Level Administration » Building Grade Levels

### Building Grade Levels Maintenance

From this screen, you can display, add, change and delete data pertaining to building grade levels.

Add Grade Level

		Code	Name	EMIS	Description	Sort Order ^	Active
		09	09	09	09	13	
		10	10	10	10	14	
		11	11	11	11	15	
		12	12	12	12	16	
		GR	GR	GR	GR	18	
		23	23	23	23	26	
		UG	UG	UG	UG	55	
		30	30	30	30	57	

Show Active Only

### Add Building Grade Levels

1. On the **Building Grade Levels Maintenance** screen, click **Add Grade Level**.

The screen displays in add mode.

Home » Management » School Administration » Grade Level Administration » Building Grade Levels

## Building Grade Levels Maintenance

From this screen, you can display, add, change and delete data pertaining to building grade levels.

Grade Level:

Grade Specific Registration Default Data

Counselor: -- Select Counselor --

Scheduling Priority: 5

Include in Honor Roll: Yes

Include in Ranking: Yes

Include in GPA: Yes

Pri. Graduation Rule:

Alt. Graduation Rule:

Expected Graduation Date:

Save Save and New Cancel

### Add Building Grade Levels

2. Enter information in the following fields.

- **Grade Level** – Select the appropriate grade level to add to the building grade level codes. The options listed in the drop-down list are defined in the District Grade Level Code table.
- **Grade Specific Registration Default Data** (optional fields) – The values in these fields are automatically populated when you register a student into this grade level using the Registration Wizard:
  - **Counselor** – Select a default counselor for students registering in this grade level.
  - **Scheduling Priority** – Select a default scheduling priority for students registering in this grade level.
  - **Include in Honor Roll** – Select “Yes” or “No” to indicate whether the **Include in Honor Roll** check box should be selected by default for students registering in this grade level.
  - **Include in Ranking** – Select “Yes” or “No” to indicate whether the **Include in Ranking** check box should be selected by default for students registering in this grade level.
  - **Include in GPA** – Select “Yes” or “No” to indicate whether the **Include in GPA** check box should be selected by default for students registering in this grade level.
  - **Pri. Graduation Rule** – Select a primary graduation rule to apply to new students; used in the graduation/eligibility module.
  - **Alt. Graduation Rule** – Select a secondary graduation rule to apply to new students; used in the graduation/eligibility module.

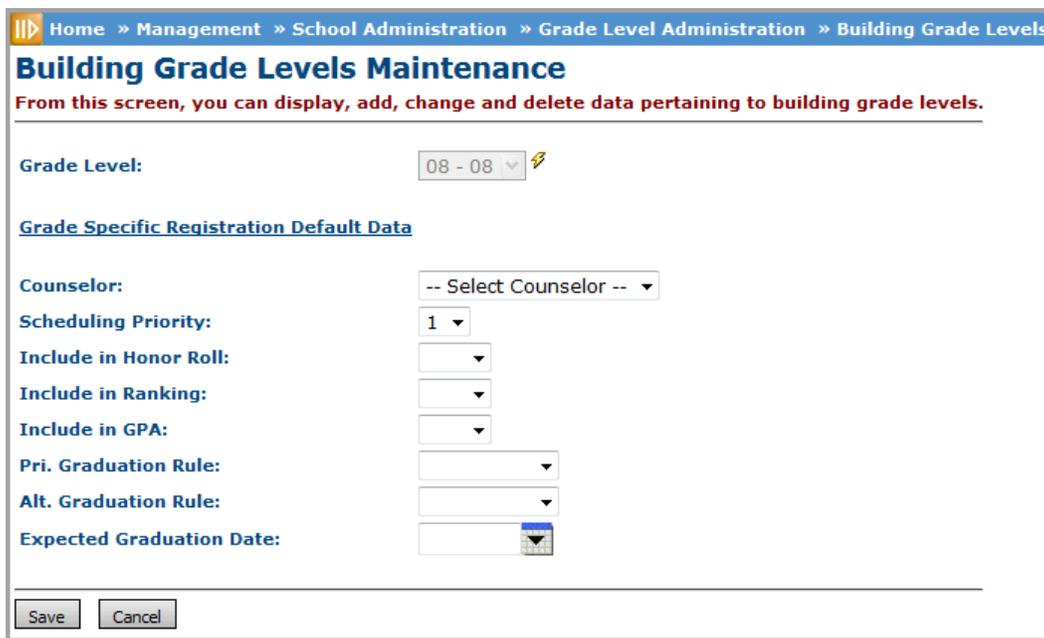
- **Expected Graduation Date** – Enter or select the date on which students in this grade level are expected to graduate.
3. Click **Save** to save the record or **Save and New** to save and continue adding records.

### Edit Building Grade Levels

**Note:** You cannot modify the **Code** field of an existing grade level, as the codes come from the district-defined Grade Level Codes table.

1. On the **Building Grade Levels Maintenance** screen, in the row of the building grade level you want to edit, click .

The screen displays in edit mode.



### Edit Building Grade Levels

2. Edit any information in the following fields:
- **Counselor** – Default counselor for students registering in this grade level
  - **Scheduling Priority** – Default scheduling priority for students registering in this grade level
  - **Include in Honor Roll** – Indicates whether the **Include in Honor Roll** check box should be selected by default for students registering in this grade level
  - **Include in Ranking** – Indicates whether the **Include in Ranking** check box should be selected by default for students registering in this grade level

- **Include in GPA** – Indicates whether the **Include in GPA** check box should be selected by default for students registering in this grade level
- **Pri. Graduation Rule** – Primary graduation rule to apply to new students; used in the graduation/eligibility module
- **Alt. Graduation Rule** – Secondary graduation rule to apply to new students; used in the graduation/eligibility module
- **Expected Graduation Date** – Date on which students in this grade level are expected to graduate

3. Click **Save**.

## Grade Level Progression Table

**Navigation: Home – Management – School Administration – Grade Level Administration – Grade Level Progressions**

Grade Level Progressions are defined in the Grade Level Progressions Maintenance screen. Grade Level Progressions must be defined at the district level only. If the user is trying to modify or view the grade level progressions table, and they have not changed their working school to the District, then they would receive the following error message when trying to access that screen.

This page can only be accessed for Districts

After selecting the District as the working school, the Grade Level Progressions may be viewed, added, edited or deleted. The grade level progressions defined in this table are used to determine the next logical grade for students.

Home » Management » School Administration » Grade Level Administration » Grade Level Progressions

### Grade Level Progressions Maintenance

From this screen, you can display, add, change and delete data pertaining to grade level progressions.

Add Progression

		Current Grade ^	Forecasted Grade
X		01 - 01	02 - 02
X		02 - 02	03 - 03
X		03 - 03	04 - 04
X		04 - 04	05 - 05
X		05 - 05	06 - 06
X		06 - 06	07 - 07
X		07 - 07	08 - 08
X		08 - 08	09 - 09
X		09 - 09	10 - 10
X		10 - 10	11 - 11
X		11 - 11	12 - 12
X		12 - 12	GR - GR
X		IN - IN	IN - IN
X		KG - KG	01 - 01
X		UG - UG	UG - UG

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Current Grade, Forecasted Grade) in ascending or descending order by clicking on the column header.

**Note:** School districts may have multiple grade level progressions for a single grade level. Example: PS may progress to PS, PS may progress to KG, etc.

The StudentInformation system cannot distinguish which is the appropriate progression. To solve this problem additional grade levels may need to be added to the Grade Level Codes and the Grade Level Progressions. For example:

PS0 (Preschool 0-1 years) may progress to PS1 (Preschool 1-2 years)

PS1 (Preschool 1-2 years) may progress to PS2 (Preschool 2-3 years)

PS2 (Preschool 2-3 years) may progress to PS3 (Preschool 3-4 years)

PS3 (Preschool 3-4 years) may progress to PS4 (Preschool 4-5 years)

PS4 (Preschool 4-5 years) may progress to KG

### Add/Edit Grade Level Progressions

Home » Management » School Administration » Grade Level Administration » Grade Level Progressions

### Grade Level Progressions Maintenance

From this screen, you can display, add, change and delete data pertaining to grade level progressions.

Current Grade:  ⚡

Forecasted Grade:  ⚡

Save Save and New Cancel

**Current Grade Drop-down List** (required) – Select Current Student Grade level from valid grade levels listed.

**Forecasted Grade Drop-down List** (required) – Selected the forecasted grade level to which students would normally advance from the Current Grade Level.

Grade Level Progressions may only be defined at the district level as per the chart below.

	Visibility and Use	Editable
<b>Global Level</b>	District	District
<b>District Level</b>	District	District
<b>School Level</b>	District	District

**Note:** School districts may have multiple grade level progressions for a single grade level. Example: PS may progress to PS. PS may progress to KG, etc.

The StudentInformation system cannot distinguish which is the appropriate progression. To solve this problem additional grade levels may need to be added to the Grade Level Codes and the Grade Level Progressions. For example:

- PS0 (Preschool 0-1 years) may progress to PS1 (Preschool 1-2 years)
- PS1 (Preschool 1-2 years) may progress to PS2 (Preschool 2-3 years)
- PS2 (Preschool 2-3 years) may progress to PS3 (Preschool 3-4 years)
- PS3 (Preschool 3-4 years) may progress to PS4 (Preschool 4-5 years)
- PS4 (Preschool 4-5 years) may progress to KG

## Room/Location Table

**Navigation: Home – Management – School Administration – School Building Administration – Rooms/Location**

The Rooms/Location table allows the building to define all locations within the school building where a course could potentially be scheduled. In addition to the physical rooms, this table may include locations where discipline incidents may take place such as a bus, restrooms, etc. Rooms/Locations are building-specific, but are **NOT** school year specific. If you change Rooms/Locations in one school year, it changes Room/Locations in all school years.

Home » Management » School Administration » School Building Administration » Rooms/Locations

### 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
 	103	103	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	104	104	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	105	105	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	106	106	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	107	107	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	108	108	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	109	109	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	110	110	classroom	Regular Classroom	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	111	111		Laboratory	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

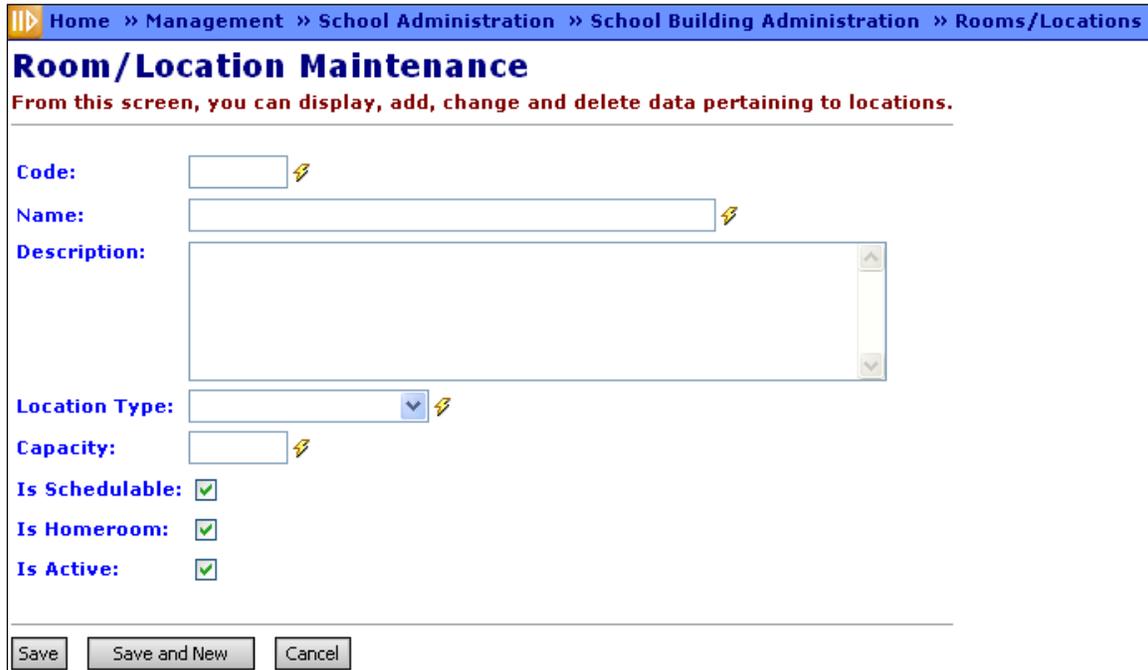
**Sorting** – You may sort by any column (Code, Name, Description, Location Type, Capacity, Schedulable, Homeroom, Active) in ascending or descending order by clicking on the column header.

 – This Room/Location Code has been entered at the Global Level or District Level and cannot be changed at the Building Level.

 – Active Room/Location Code – can be used on Student Records.

 – Inactive Room/Location Code – cannot be used on Student Records.

## Add/Edit Room/Location



**Code** (required) – Enter up to 5 characters – alphanumeric – to define the Room/Location Code. If you try to use an existing inactive Code, you will be prompted to reactivate this inactive Code if you wish.

Room/Location Codes may be defined globally (by the DA Site), at the district level, or at the school level per the chart below.

	Visibility and Use	Editable
<b>Global Level</b>	DA Site, District, School	DA Site
<b>District Level</b>	DA Site, District, School	DA Site, District
<b>School Level</b>	DA Site, District, School	DA Site, District, School

**Name** (required) – Enter Name of Room/Location.

**Description** (optional) – Enter Description of Room/Location Code.

**Location Type** (required) Predefined list of location types, such as “regular classroom, auditorium, art room, etc.”. Location type will be used for scheduling purposes.

**Capacity** (required) – Enter total capacity of Room/Location. Capacity will be used for scheduling and homeroom.

**Is Schedulable** – Yes or No; must be marked as schedulable for use with scheduling courses and students.

**Is Homeroom** – Yes or No; must be marked as a homeroom to be used as a homeroom and appear in the applicable drop-down menus.

**Is Active** – Yes or No; must be Active to use on Student Records or for scheduling purposes.

## District Addresses

**Navigation: Home – SIS – School – Address Verification – District Addresses**

Address Verification determines whether students live within the district bounds or not. This process uses this screen to define which addresses are within the district, and these addresses must be defined at the district level only. If the user is trying to modify or view district addresses, and they have not changed their working school to the District, then they would receive the following error message when trying to access that screen.

**This page can only be accessed for Districts**

After selecting the District as the working school, the District Addresses may be viewed, added, edited or deleted.

Home » SIS » School » Address Verification » District Addresses Advanced Search

### View/Edit District Addresses - List

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

Local/State Search Criteria

Start Number:  Stop Number:

Pattern: Every Number ▼

Pre-Direction: ▼ Street Name:  Post-Direction: ▼

Zip Code:  ⚡ Street Type: ▼

Voting Area/Place: ▼ Progression Track: ▼

The top section of this screen has several fields which act as search criteria for the Local Search and State Search buttons.

**Start Number** (optional) – Enter a starting address number for searching.

**Stop Number** (optional) – Enter an ending address number for searching.

**Pattern** (optional) – Select from the drop-down list: Every, Even, Odd, or Other. If you select Other, an additional field will display:

**Pattern:**  **Every:**

**Every** (optional) – Enter a number for a non-standard address pattern (such as Every 4), or use the arrows to change the pattern number.

**Pre-Direction** (optional) – Select a street direction (N, S, E, W, NE, NW, SE or SW). Only results with this street direction will be displayed (e.g. N Main St).

**Street Name** (optional) – Enter a street name. Only results with this street name will be displayed.

**Post-Direction** (optional) – Select a street direction (N, S, E, W, NE, NW, SE or SW). Only results with this street direction will be displayed (e.g. Portage River Road SW).

**Zip Code** (required) – Enter a zip code. Only results with this zip code will be displayed. You must enter a zip code to search, and you can only enter one at a time.

**Street Type** (optional) – Select a street type (Ave, Blvd, Cir, Ct, Cv, Dr, Hwy, Ln, Loop, Pike, Pkwy, Pl, Rd, St, Sta, Trl, Way and Xing). Only results with this street type will be displayed.

**Voting Area/Place** (optional) – Select a Voting Area/Place from the drop-down list. Only results with this Voting Area/Place will be displayed.

**Progression Track** (optional) – Select a Progression Track from the drop-down list. Only results with this Progression Track will be displayed.

**Local Search** – Once the desired search criteria are entered, click this button to display all addresses entered in the local database that match those criteria.

**State Search** – Once the desired search criteria are entered, click this button to display all non-local addresses in the database that match those criteria.

Once you enter search criteria and click a Search button, the screen also displays a list of addresses that match those criteria, along with several buttons to control those addresses.

**Note:** *If over 5000 records are returned when searching, a message will display that advises the user to use additional search criteria to narrow down the results.*

---

<input type="checkbox"/>		<b>Address ^</b>	<b>City</b>	<b>State</b>	<b>Zip Code</b>
<input type="checkbox"/>		100 N Main St	Lima	OH	45804
<input type="checkbox"/>		101 N Main St	Lima	OH	45804
<input type="checkbox"/>		102 N Main St	Lima	OH	45804
<input type="checkbox"/>		103 N Main St	Lima	OH	45804
<input type="checkbox"/>		104 N Main St	Lima	OH	45804
<input type="checkbox"/>		105 N Main St	Lima	OH	45804

Show Active Only

**Add New Address Range** – Click to add a range of addresses to the district. Once entered, these will be saved as separate single addresses.

**Add New Single Address** – Click to add an address to the district.

– Check this box to select all displayed addresses.

– View and Edit Information about this Address entry (this does not allow you to edit the Address entry itself).

– Delete this Address entry.

**Show Active Only** – If checked, will show only active Address entries; if not checked, will show both active and inactive Address entries.

**Edit Selected** – View and Edit this Address entry (unlike the icon, this does allow you to edit the Address entry itself).

**Delete Selected** – Delete this Address entry. Deleted entries are not actually deleted – they are made Inactive as notated by the “dim” Active code. Show both Active and Inactive Address entries by un-checking the Show Active Only checkbox.

## Add District Address

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

Home >> SIS >> School >> Address Verification >> District Addresses

### View/Edit District Addresses - List

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

**Local/State Search Criteria**

Start Number:  Stop Number:

Pattern: Every Number

Pre-Direction:  Street Name:  Post-Direction:

Zip Code: 45804  Street Type:

Voting Area/Place:  Progression Track:

Enter search criteria, click a Search button, and then click Add New Single Address to enter an address into the database.

Home >> SIS >> School >> Address Verification >> District Addresses

### View/Edit District Addresses - Add

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

Street Number:

Street Pre-Direction:

Street Name:

Street Type:  Street Post-Direction:

City:

State:

Zip Code:

Building Progression Track:

Voting Area/Place:

Date Added to District:

Date Removed from District:

Comments:

**Street Number** (optional) – Enter the address number.

**Street Pre-Direction** (optional) – Select a street direction (N, S, E, W, NE, NW, SE or SW) printed before the street name (e.g. N Main Street).

**Street Name** (required) – Enter the street name.

**Street Type** (optional) – Select a street type (Ave, Blvd, Cir, Ct, Cv, Dr, Hwy, Ln, Loop, Pike, Pkwy, Pl, Rd, St, Sta, Trl, Way and Xing). Only results with this street type will be displayed.

**Street Post-Direction** (optional) – Select a street direction (N, S, E, W, NE, NW, SE or SW) printed after the street name (e.g. Portage River Road SW).

**City** (required) – Enter the city name.

**State** (optional) – Select a state from the drop-down list.

**Zip Code** (required) – Enter a zip code. Only results with this zip code will be displayed. You must enter a zip code to search, and you can only enter one at a time.

**Building Progression Track** (optional) – Select a Progression Track from the drop-down list. This progression track will be associated with this address.

**Voting Area/Place** (optional) – Select a Voting Area/Place from the drop-down list. This voting area/place will be associated with this address.

**Date Added to District** (optional) – Enter the date this address was added to the district, or type **T** to select today's date.

**Date Removed from District** (optional) – Enter the date this address was removed from the district, or type **T** to select today's date.

**Comments** (optional) – Enter any comments associated with this address.

### **Add Address Range:**

You can also click Add New Address Range to enter a set of addresses into the database. Once entered, all addresses in this Address Range will be saved as separate single addresses.

Home » SIS » School » Address Verification » District Addresses

## View/Edit District Addresses - Add Range

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

**Start Number:**  **Stop Number:**   
**Pattern:**    
**Street Pre-Direction:**   
**Street Name:**    
**Street Type:**  **Street Post-Direction:**   
**City:**    
**State:**   
**Zip Code:**

---

**Building Progression Track:**   
**Voting Area/Place:**   
**Date Added to District:**    
**Date Removed from District:**    
**Comments:**

**Start Number** (optional) – Enter the starting address number to add.

**Stop Number** (optional) – Enter the ending address number to add.

**Pattern** (optional) – Select from the drop-down: Every, Even, Odd, or Other. If you select Other, an additional field will display.

**Street Pre-Direction** – Select a street direction from the drop-down list (i.e. N, NE, NW etc.).

**Street Name** – Enter a street name for your range.

**Street Type** – Select a street type from the drop-down list (i.e. Ave, Rd, etc.).

**Street Post-Direction** – Select a direction from the drop-down list (i.e. N, NE, NW).

**City** - Enter a city for your range.

**State** – Select a state for your range from the drop-down list.

**Zip Code** – Enter a zip code for your range.

**Building Progression Track** – Select a district track from the drop-down list for your range.

**Voting Area/Place** – Select a voting area or designated place from the drop-down list.

**Date Added to District** – Select the date added for your range from the calendar picker.

**Date Removed from District** – Select the date removed for your range from the calendar picker.

**Comments** – Enter comments regarding your range as necessary.

**Every** (optional) – Enter a number for a non-standard address pattern (such as Every 4), or use the arrows to change the pattern number.

**Save** – Will save current Address or Address Range and return to View/Edit District Addresses, where you will see the updated information.

**Save and New** – Will save current Address or Address Range and return to View/Edit District Addresses – Add or Add Range.

**Cancel** – Will clear out data already entered.

### View/Edit District Address Information

**Navigation: Home – SIS – School – Address Verification – District Addresses**

Home » SIS » School » Address Verification » District Addresses

#### View/Edit District Addresses - List

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

Local/State Search Criteria

Start Number:  Stop Number:

Pattern: Every Number

Pre-Direction:  Street Name:  Post-Direction:

Zip Code: 45804  Street Type:

Voting Area/Place:  Progression Track:

Local Search State Search

Add New Address Range Add New Single Address

<input type="checkbox"/>		Address ^	City	State	Zip Code
<input type="checkbox"/>		100 N Main St	Lima	OH	45804
<input type="checkbox"/>		101 N Main St	Lima	OH	45804
<input type="checkbox"/>		102 N Main St	Lima	OH	45804

Show Active Only

Edit Selected Delete Selected

Click to View and Edit Information about this Address entry.

Home » SIS » School » Address Verification » District Addresses

### View/Edit District Addresses - Edit

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

---

101 N Main St  
Lima, OH 45804

---

**Building Progression Track:** EL to HS - EL to HS ▼

**Voting Area/Place:** ▼

**Date Added:**  ▼

**Date Removed:**  ▼

**Comments:**

---

The address will display at the top, and cannot be edited from this screen. To edit an address, you must use the address checkbox and the Edit Selected button (see section 2E-3. Edit District Address).

**Building Progression Track** (optional) – Select a Progression Track from the drop-down list. This progression track will be associated with this address.

**Voting Area/Place** (optional) – Select a Voting Area/Place from the drop-down list. This voting area/place will be associated with this address.

**Date Added to District** (optional) – Enter the date this address was added to the district, or type **T** to select today's date.

**Date Removed from District** (optional) – Enter the date this address was removed from the district, or type **T** to select today's date.

**Comments** (optional) – Enter any comments associated with this address.

**Save** – Will save current Address Information and return to View/Edit District Addresses.

**Cancel** – Will clear out data already entered.

## Edit District Address

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

Home » SIS » School » Address Verification » District Addresses

### View/Edit District Addresses - List

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

**Local/State Search Criteria**

Start Number:  Stop Number:

Pattern:

Pre-Direction:  Street Name:  Post-Direction:

Zip Code:  Street Type:

Voting Area/Place:  Progression Track:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Address ^</b>	<b>City</b>	<b>State</b>	<b>Zip Code</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	101 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	102 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	103 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	104 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	105 N Main St	Lima	OH	45804

Show Active Only

Use the checkboxes to select one or more addresses, then click the Edit Selected button to Edit the address entry or entries (note that this is not the same as using the  icon to View/Edit Address Information, though using this button also allows you to edit anything that icon would allow you to edit).

Home » SIS » School » Address Verification » District Addresses

### View/Edit District Addresses - Edit All

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

---

**Number of Records Affected:** 1

**Street Number:**  ⚡

**Street Pre-Direction:**  ▾

**Street Name:**  ⚡

**Street Type:**  ▾ **Street Post-Direction:**  ▾

**City:**  ⚡

**State:**  ▾

**Zip Code:**  ⚡

---

**Building Progression Track:**  ▾

**Voting Area/Place:**  ▾

**Date Added:**  ▾

**Date Removed:**  ▾

**Comments:**  ▴ ▾

---

**Number of Records Affected** – This shows how many address records are being edited. If you have multiple addresses selected, any fields which are different between addresses will display as “Multiple” and not be editable.

Home » SIS » School » Address Verification » District Addresses

### View/Edit District Addresses - Edit All

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

---

**Number of Records Affected:** 2

**Street Number:**

**Street Number** (optional) – Enter the address number.

**Street Pre-Direction** (optional) – Select a street direction (N, S, E, W, NE, NW, SE or SW) printed before the street name (e.g. N Main Street).

**Street Name** (required) – Enter the street name.

**Street Type** (optional) – Select a street type (Ave, Blvd, Cir, Ct, Cv, Dr, Hwy, Ln, Loop, Pike, Pkwy, Pl, Rd, St, Sta, Trl, Way and Xing). Only results with this street type will be displayed.

**Street Post-Direction** (optional) – Select a street direction (N, S, E, W, NE, NW, SE or SW) printed after the street name (e.g. Portage River Road SW).

**City** (required) – Enter the city name.

**State** (optional) – Select a state from the drop-down list.

**Zip Code** (required) – Enter a zip code. Only results with this zip code will be displayed. You must enter a zip code to search, and you can only enter one at a time.

**Building Progression Track** (optional) – Select a Progression Track from the drop-down list. This progression track will be associated with this address.

**Voting Area/Place** (optional) – Select a Voting Area/Place from the drop-down list. This voting area/place will be associated with this address.

**Date Added to District** (optional) – Enter the date this address was added to the district, or type **T** to select today's date.

**Date Removed from District** (optional) – Enter the date this address was removed from the district, or type **T** to select today's date.

**Comments** (optional) – Enter any comments associated with this address.

**Save** – Will save current Address or set of Addresses and return to View/Edit District Addresses, where you will see the updated information.

**Cancel** – Will clear out data already entered.

## Delete District Address

**Navigation: Home – SIS – School – Address Verification – District Addresses**

Home » SIS » School » Address Verification » District Addresses

### View/Edit District Addresses - List

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

**Local/State Search Criteria**

Start Number:  Stop Number:

Pattern:

Pre-Direction:  Street Name:  Post-Direction:

Zip Code:  Street Type:

Voting Area/Place:  Progression Track:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Address ^	City	State	Zip Code
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	101 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	102 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	103 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	104 N Main St	Lima	OH	45804
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	105 N Main St	Lima	OH	45804

Show Active Only

Click  to Delete an Address entry, or check one or more entries and click the Delete Selected button.

Home » SIS » School » Address Verification » District Addresses

### View/Edit District Addresses - Delete

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

---

If you are sure you want to Delete the valid district address, enter the date for deletion.

205 N Main St  
Lima, OH 45804

Date for Deletion:  

---

Ok Cancel

**Date for Deletion** – Enter the date this address will be deleted from the district, or type **T** for today’s date.

**Ok** – Delete the selected address or addresses and return to the View/Edit District Addresses screen.

**Cancel** – Do not delete the address or addresses.

***Note:** A District Address is not actually deleted – it is made Inactive as notated by the “dim” Active code. Show both Active and Inactive District Addresses by un-checking the Show Active Only checkbox.*

## Master Calendar

**Navigation: Home – Management – School Administration – Scheduling Administration – Master Calendar**

The Master Calendar details each day a school is in session or not in session. The Master Calendar is created when Calendar Wizard is run at the building level. If a district has five buildings, each building can have its own unique Master Calendar. Master Calendars are defined and viewed at the school building level only.

Home » Management » School Administration » Scheduling Administration » Master Calendar

## Master Calendar

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

Code:  ⚡ Start Date:  Planned Days:   
 Name:  ⚡ Stop Date:  ... Actual Days:

<b>Default Calendar</b>	Default	<a href="#">View Calendars</a>
<b>Default Job Parameter Set</b>	Default Schedule	<a href="#">View Schedule Job Parameter Sets</a>
<b>Final Schedule Result Set</b>	Default Schedule Result	<a href="#">View Schedule Result Sets</a>

**Master Calendar Days** September ▾

	Date	Planned Day Type	Actual Day Type	Planned Rotation Day	Actual Rotation Day
✎	Sep 01, 2010	School Day	School Day	Wednesday	Wednesday
✎	Sep 02, 2010	School Day	School Day	Thursday	Thursday
✎	Sep 03, 2010	School Day	School Day	Friday	Friday
✎	Sep 04, 2010	Non Attending Day	Non Attending Day		
✎	Sep 05, 2010	Non Attending Day	Non Attending Day		
✎	Sep 06, 2010	Holiday	Holiday		
✎	Sep 07, 2010	School Day	School Day	Tuesday	Tuesday
✎	Sep 08, 2010	School Day	School Day	Wednesday	Wednesday
✎	Sep 09, 2010	School Day	School Day	Thursday	Thursday
✎	Sep 10, 2010	School Day	School Day	Friday	Friday

**Code** (required) – This can be alphanumeric – to define Master Calendar Code.

**Name** (required) – Displays the Name of the Master Calendar.

**Start Date** – Displays the first day or start date of the current Master Calendar.

**Stop Date** – Displays the last day or stop date of the current Master Calendar.

If the schedule has been finalized for the year in context, Start Date and Stop Date will not be editable, and an ellipsis button will display beside Stop Date.

Code:  ⚡ Start Date:  Planned Days:   
 Name:  ⚡ Stop Date:  ... Actual Days:

... – By clicking on the ellipse button beside the stop date, the last day or stop date may be extended if needed (due to calamity days, etc.).

**Planned Days** (required) – The total number of Planned days that were defined in the master calendar.

**Actual Days** (required) – The total number of Actual days that were defined in the master calendar.



**Non-Attending Days** – Non-attending days are when schools are not in session. Any day students aren't physically in the building is considered a non-attending day.

**Default Calendar** – Displays the sub calendar that is the default calendar to be used when enrolling students for attendance purposes.

**Default Job Parameter Set** – Displays the Job Parameter Set that has been defined as the Default Job Parameter Set used for scheduling purposes. (See scheduling documentation for further details on this item).

**Final Schedule Result Set** – Displays the final Schedule Result Set (Master Schedule) that has been designated as the final schedule to be used in scheduling. (See scheduling documentation for further details on this item).

**View Calendars** – By clicking on this link, the user may view a screen listing all sub calendars.

**View Schedule Job Parameter Sets** – By clicking on this link, the user may view a screen listing all Schedule Job Parameter Sets.

**View Schedule Result Sets** – By clicking on this link, the user may view a screen listing all Schedule Results Sets.

**Master Calendar Days** – Listing of all the days defined for the Master Calendar. The information displayed for each day is Date, Planned Day Type, Actual Day Type, Planned Rotation Day and Actual Rotation Day.

The default information shown is for the current month. User may choose a different month or may choose all months to display from the drop-down menu.

## **Create Master Calendar – Calendar Wizard**

**Navigation: Home – Management – School Administration – School Building Administration – Calendar Wizard**

The Master Calendar defines the start and end dates of a school/school year calendar and is building specific. A school can have only one Master Calendar per school, per school year. The master calendar can, and most likely will have many sub-calendars. A sub-calendar is specific to the attendance module and is further defined in the Attendance Documentation.

To create the master calendar, there is a Calendar Wizard that will walk the user through the entire setup of the Master Calendar. This wizard can only be used before the school year has been finalized. For more information, and a detailed step-by-step walkthrough of the Calendar Wizard, see the *ProgressBook StudentInformation School Year Initialization Guide* documentation.

# Master Calendar Summary

Navigation: Home – Management – School Administration – Scheduling Administration – Master Calendar Summary

Home » Management » School Administration » Scheduling Administration » Master Calendar Summary [Advanced Search](#) | [Feedback](#)

## Master Calendar Summary

This screen displays significant days, reporting terms, days that deviate from the planned days and teacher days for the master calendar.

### Significant Days

Rotation Day	Date	Event
Monday	Aug 23, 2010	First Day
Monday	Aug 23, 2010	Quarter 1 - First Day
	Sep 06, 2010	Holiday - Labor Day
Friday	Oct 22, 2010	Quarter 1 - Last Day
	Oct 25, 2010	Vacation Day - Quarter Break
Tuesday	Oct 26, 2010	Quarter 2 - First Day
	Nov 24, 2010	Parent - Teacher Day
	Nov 25, 2010	Vacation Day - Thanksgiving Break
	Nov 26, 2010	Vacation Day - Thanksgiving Break
	Dec 20, 2010	Vacation Day - Christmas Break
	Dec 21, 2010	Vacation Day - Christmas Break
	Dec 22, 2010	Vacation Day - Christmas Break
	Dec 23, 2010	Vacation Day - Christmas Break
	Dec 24, 2010	Vacation Day - Christmas Break
	Dec 25, 2010	Vacation Day - Christmas Break
	Dec 26, 2010	Vacation Day - Christmas Break
	Dec 27, 2010	Vacation Day - Christmas Break
	Dec 28, 2010	Vacation Day - Christmas Break
	Dec 29, 2010	Vacation Day - Christmas Break
	Dec 30, 2010	Vacation Day - Christmas Break
	Dec 31, 2010	Vacation Day - Christmas Break
	Jan 14, 2011	Parent - Teacher Day
	Jan 17, 2011	Holiday - Martin Luther King Day
Friday	Jan 21, 2011	Quarter 2 - Last Day
Monday	Jan 24, 2011	Quarter 3 - First Day
	Feb 21, 2011	Holiday - President's Day
Thursday	Mar 24, 2011	Quarter 3 - Last Day
	Mar 25, 2011	Vacation Day - Quarter Break
Monday	Mar 28, 2011	Quarter 4 - First Day
	Apr 21, 2011	Vacation Day - Easter Break
	Apr 22, 2011	Vacation Day - Easter Break
	Apr 25, 2011	Vacation Day - Easter Break
Friday	May 27, 2011	Quarter 4 - Last Day

### Reporting Term Summary

Code	Name	Start Date	End Date	Planned Days	Actual Days
Qtr1	Quarter 1	Aug 23, 2010	Oct 22, 2010	44.00	44.00
1Int	1st Quarter Interim			0	0
Qtr2	Quarter 2	Oct 26, 2010	Jan 21, 2011	49.00	49.00
2Int	2nd Quarter Interim			0	0
1Ex	1st Semester Exam			0	0
1Avg	1st Semester Average			0	0
Qtr3	Quarter 3	Jan 24, 2011	Mar 24, 2011	43.00	43.00
3Int	3rd Quarter Interim			0	0
Qtr4	Quarter 4	Mar 28, 2011	May 27, 2011	42.00	42.00
4Int	4th Quarter Interim			0	0
2Ex	2nd Semester Exam			0	0
2Avg	2nd Semester Average			0	0
Fin	Final Grade			0	0

This is a view-only screen listing Master Calendar information for significant days on the calendar (end of grading periods, Holidays, etc.), Reporting Terms summary, Calamity Days summary and Teacher Days summary.

## Add Master Calendar Days

Navigation: Home – Management – School Administration – Scheduling Administration – Master Calendar

### If Schedule is Not Yet Finalized:

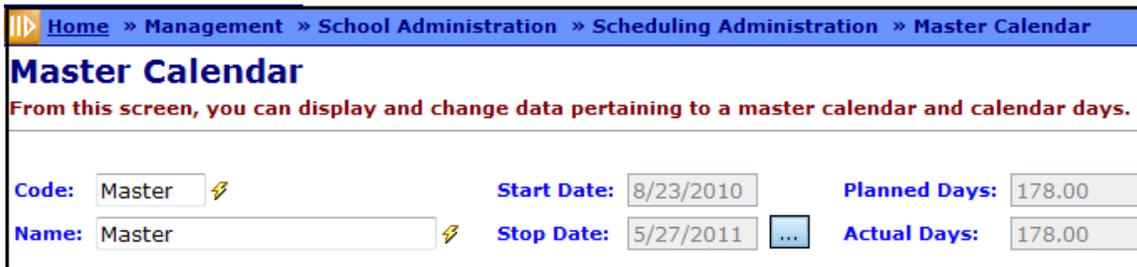


The screenshot shows the 'Master Calendar' page with the following fields:

Code:	Master	Start Date:	8/23/2005	Planned Days:	178.00
Name:	Master	Stop Date:	5/25/2006	Actual Days:	178.00

Click  to Change the calendar stop date (add day/days to the end of the master calendar). This just adds days on to the end of the school year.

### If Schedule is Finalized:

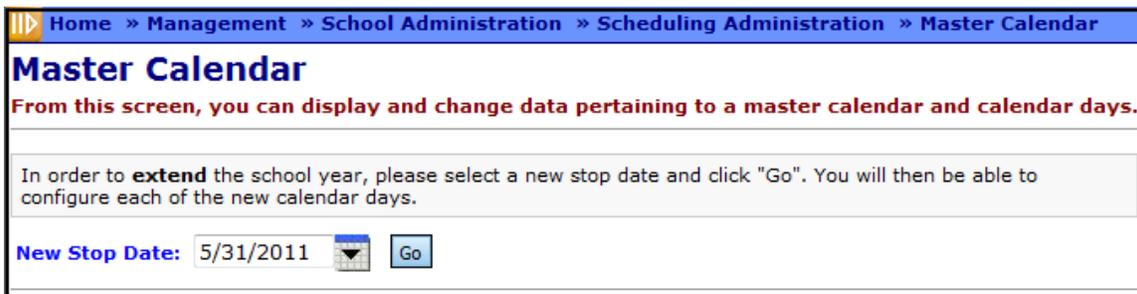


The screenshot shows the 'Master Calendar' page with the following fields:

Code:	Master	Start Date:	8/23/2010	Planned Days:	178.00
Name:	Master	Stop Date:	5/27/2011	Actual Days:	178.00

Click  to Change the calendar stop date (add day/days to the end of the master calendar).

**Note:** Changes made to the Master Calendar days affect ALL students in the building, regardless of which sub-calendar the student has been assigned.



The screenshot shows the 'Master Calendar' page with the following fields:

In order to **extend** the school year, please select a new stop date and click "Go". You will then be able to configure each of the new calendar days.

New Stop Date:	5/31/2011	Go
----------------	-----------	----

**New Stop Date** – Type in the new stop date for the master calendar.

**Go** – Click the Go button after inputting new stop date.

All additional calendar days will then be displayed for configuration.

StudentInformation > Management > School Administration > Scheduling Administration > Master Calendar

### Master Calendar

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

In order to **extend** the school year, please select a new stop date and click "Go". You will then be able to configure each of the new calendar days.

New Stop Date:

Calendar Date	Rotation Day Type	School Day Type	EMIS Exception Type	EMIS Exception Hours	Student Att. Day Count	Staff Att. Day Count
6/4/2015	Standard Day	Teacher In-Service Day	Staff Professional Day	8.0	0.00	1.00

**Calendar Date** – The date of the new calendar day.

**Rotation Day Type** – Select the appropriate rotation day type from the drop-down menu to be used with the new date.

**School Day Type** (required) – Displays the School Day Type for which the additional day is to be marked. Each day type has an attendance day count associated with that type. For instance, a School Day Type has an attendance day count of 1.00 associated and a Snow Day has an attendance day count of 0.00 associated.

**EMIS Exception Type** – Select the appropriate exception type for this day for EMIS reporting purposes.

**EMIS Exception Hours** – If you selected an **EMIS Exception Type**, indicate the number of hours that apply to this exception type.

**Student Attendance Day Count** (required) – Displays the attendance day count for students for the actual date being added. This will be auto populated with default values after the School Day Type is selected, but may be changed.

**Staff Attendance Day Count** (required) – Displays the attendance day count for staff for the actual date being added. This will be auto populated with default values after the School Day Type is selected, but may be changed.

**Save** – Will save the information for the newly added calendar days.

**Cancel** – Will clear out data already entered and cancel the application.

Once the information has been saved, the Master Calendar will display these additional days as Actual days, not Planned days.

If the Calendar days that are added fall between Schedule Terms, then the application will add the day using these rules:

- First add the day to the schedule term with the fewest number of days.
- If the two schedule terms have equal number of days, the new day will be added to the earlier term.
- If the new day falls within a schedule terms, the day will be added to that schedule term.

- Users will be able to change the Start and End Date of Reporting Terms by editing the Master Calendar Days.
- If already past the start or stop date, then the field will not be editable.

## Edit Master Calendar Days

Navigation: Home – Management – School Administration – Scheduling Administration – Master Calendar

Home » Management » School Administration » Scheduling Administration » Master Calendar

### Master Calendar

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

Code:  ⚡      Start Date:       Planned Days:

Name:  ⚡      Stop Date:  ...      Actual Days:

<b>Default Calendar</b>	Default	<a href="#">View Calendars</a>
<b>Default Job Parameter Set</b>	Default Schedule	<a href="#">View Schedule Job Parameter Sets</a>
<b>Final Schedule Result Set</b>	Default Schedule Result	<a href="#">View Schedule Result Sets</a>

**Master Calendar Days** September ▾

	Date	Planned Day Type	Actual Day Type	Planned Rotation Day	Actual Rotation Day
✍	Sep 01, 2010	School Day	School Day	Wednesday	Wednesday
✍	Sep 02, 2010	School Day	School Day	Thursday	Thursday
✍	Sep 03, 2010	School Day	School Day	Friday	Friday
✍	Sep 04, 2010	Non Attending Day	Non Attending Day		
✍	Sep 05, 2010	Non Attending Day	Non Attending Day		
✍	Sep 06, 2010	Holiday	Holiday		
✍	Sep 07, 2010	School Day	School Day	Tuesday	Tuesday
✍	Sep 08, 2010	School Day	School Day	Wednesday	Wednesday
✍	Sep 09, 2010	School Day	School Day	Thursday	Thursday
✍	Sep 10, 2010	School Day	School Day	Friday	Friday

Click ✍ to edit a specific day of the Master Calendar.

**Note:** Changes made to the Master Calendar days affect ALL students in the building, regardless of which sub-calendar the student has been assigned.

## General Section

StudentInformation > Management > School Administration > Scheduling Administration > Master Calendar

### Master Calendar

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

#### General

Date: Dec 08, 2014

Planned School Day Type: School Day

Planned Rotation Day: Standard Day

Planned Student Attendance Day Count: 1.00

Planned Staff Attendance Day Count: 1.00

Actual School Day Type: School Day

Actual Rotation Day: Standard Day

Actual Student Attendance Day Count: 1.00

Actual Staff Attendance Day Count: 1.00

Is Fixed:

#### EMIS

Add New

Exception Type	Hours
There are no records to display	

Save Cancel

**Date** (non-modifiable) – The date selected for editing purposes.

**Planned School Day Type** (required) – Displays the School Day Type for which the original planned day was selected. Each day type has an attendance day count associated with that type. For instance, a School Day Type has an attendance day count of 1.00 associated and a Snow Day has an attendance day count of 0.00 associated.

**Note:** If you already had pre-entered absences (examples include field trips, vacations, and students on medical leave) for a school day that is changed to a non-attending day (i.e. snow day), you will need to delete the student absences on the Daily Absence List.

**Planned Rotation Day** (required) – Displays the planned rotation day (from Rotation Days table) associated with the date being edited.

**Planned Student Attendance Day Count** (required) – Displays the attendance day count for students for the planned date being edited.

**Planned Staff Attendance Day Count** (required) – Displays the attendance day count for staff for the planned date being edited.

**Actual School Day Type** (required) – Displays the Actual School Day Type for which the original planned day is being edited. Please Note: Only the total number of days the students are physically in the building get reported to EMIS when the ATTUPEMIS program is run. Actual days and day types aren't reported to EMIS.

**Actual Rotation Day** (required) – Displays the actual rotation day (from Rotation Days table) associated with the date being edited. (Note – the blank option for Rotation Day is only valid if the Actual Student Attendance Day Count is 0).

**Actual Student Attendance Day Count** (required) – Displays the actual attendance day count for students for the date being edited.

**Actual Staff Attendance Day Count** (required) – Displays the actual attendance day count for staff for the date being edited.

**Is Fixed** (optional) – Ignore and leave unchecked; this checkbox is not functional at this time.

If Actual Rotation Day is changed or updated, then the Rotation Day tumbling section will become visible.

**Is Fixed:**

---

**Tumble Rotation Day Duration:**  None  
 End of School Year (5/27/2011)  
 End of Current Reporting Term (10/22/2010)  
    
 Override Fixed Days

**Add Additional Day To:**  Current Reporting Term  
 Final Natural Reporting Term

### **Tumble Rotation Day Duration:**

**None** – Select this option if no change in rotation days is to be made after the day being modified. This is marked by default.

**End Of School year** – Select this option to modify all school days (rotation) after the date being modified, through the end of the school year.

**End of Current Reporting Period Term** – Select this option to modify all the school days (rotation) that are after the date being modified, through the end of the current reporting period.

**Specific Date** – Select this option and define a date, then all the days after the date being modified through to the specified date will be changed.

**Override Fixed Days** – When modifying rotation days, there may be days marked as fixed on the calendar. These will only be updated if this box has been checked.

## Add Additional Day To:

**Current Reporting Term** – This option will modify the current reporting term and the next reporting term, so that the current reporting term “takes over” the first day of the next reporting term.

**Add Additional Day to Final** – This will allow the user to extend the school year. The user will be prompted for the new End Date for the school year, and the user can configure all of the new school days created.

**Save** – Will save changes made to the Master Calendar Day and Master Calendar Days listing where you will see the updated information.

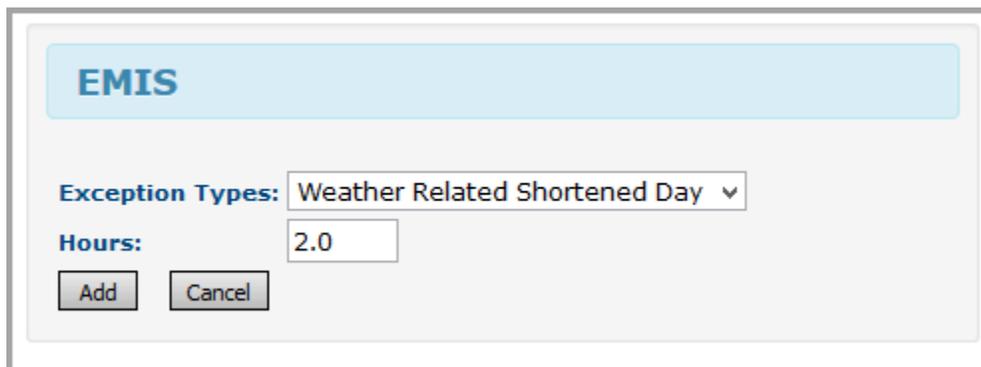
**Cancel** – Will clear out data already entered.

## EMIS Section



The screenshot shows the EMIS section of a software interface. At the top, there is a light blue header with the text "EMIS". Below the header is a button labeled "Add New". Underneath the button is a table with two columns: "Exception Type" and "Hours". The table is currently empty, and a message below it states "There are no records to display".

**Add New** – Add a new EMIS exception type.



The screenshot shows the "Add New" form in the EMIS section. At the top, there is a light blue header with the text "EMIS". Below the header, there is a label "Exception Types:" followed by a dropdown menu with the selected option "Weather Related Shortened Day". Below this, there is a label "Hours:" followed by a text input field containing the value "2.0". At the bottom of the form, there are two buttons: "Add" and "Cancel".

**Exception Types** – Select the EMIS-defined exception type category.

**Hours** – Indicate the number of hours attributed to the exception on the indicated day.

**Add** – Saves the EMIS exception type.

# School Demographics

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

This screen displays information about the current school building or district and allows you to edit some information. The school demographics information is not school year specific, so if you change it in one school year, you change it in all school years.

StudentInformation > Management > School Administration > School Building Administration > School Demographics

### School Demographics

This page is used to manage the demographic information for your school

School Code:	DLTN	School Name:	Dalton Local Schools
School Type:	District	School Subtype:	-- Select a School Subtype --
IRN:	050542	Superintendent:	
Website URL:		District:	Dalton Local Schools
ThinkGate School Type:	-- Select a School Type --	Use Address Verification:	<input checked="" type="checkbox"/>
Use Address Standardization:	<input checked="" type="checkbox"/>	Telephone:	(330) 828-2267
Address:	PO Box 514	Fax:	
State:	OH	City:	Dalton
Feedback Email:		Zip:	44618-0514
Comment:			
Progress Book On:	<input checked="" type="checkbox"/>		
JVS Integration On:	<input type="checkbox"/>	Select JVS Satellite School:	Select ...
EZ Query Display Options:	<input type="checkbox"/> Hide Absence Reasons <input type="checkbox"/> Hide Absence Notes <input type="checkbox"/> Hide Absence Comments		
District Student Number Seed:			
Maximum Increment from Seed:			
District EMIS Seed:	970538840		
Previous EMISId:	289042680		
EMIS Maximum Increment from Seed:	1		
<input type="button" value="Reset Emis Seed"/>			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

School Demographics Screen – District Level

StudentInformation > Management > School Administration > School Building Administration > School Demographics

### School Demographics

This page is used to manage the demographic information for your school

School Code:	DAHS	School Name:	DALTON HIGH SCHOOL
School Type:	School	School Subtype:	-- Select a School Subtype --
IRN:	008003	Principal:	LARRY CASE
Website URL:	http://www.dalton.k12.oh.us/vnews/display.v/SEC/High%	District:	Dalton Local Schools
ThinkGate School Type:	-- Select a School Type --	Use Address Verification:	<input checked="" type="checkbox"/>
Use Address Standardization:	<input checked="" type="checkbox"/>	Telephone:	(330) 828-2261
Address:	177 N MILL ST	Fax:	(330) 828-2904
State:	OH	City:	DALTON
Feedback Email:		Zip:	44618
Comment:			
Progress Book On:	<input checked="" type="checkbox"/>	JVS Integration On:	<input type="checkbox"/>
		Select JVS Satellite School:	Select ...
EZ Query Display Options:	<input type="checkbox"/> Hide Absence Reasons <input type="checkbox"/> Hide Absence Notes <input type="checkbox"/> Hide Absence Comments		
Save	Cancel		

### School Demographics Screen – Building Level

**School Code** (un-modifiable or required) – This is a view-only field (editable by ITC personnel) that displays the current school building’s School Code.

***Note:** The DASL Load process requires exactly matching school codes, so do not change this code prior to a school going live on StudentInformation.*

**School Name** (un-modifiable or required) – This is a view-only field (editable by ITC personnel) that displays the current school building’s School Name.

**School Type** (un-modifiable or required) – This is a view-only field (selectable by ITC personnel) that displays the current school building’s School Type (School, District, and ITC).

**School Subtype** (un-modifiable or optional) – This is a view-only field (selectable by ITC personnel) that displays the current school building’s School Subtype (JVS, ESC, and Community).

**IRN** (un-modifiable or optional) – This is a view-only field (editable by ITC personnel) that displays the current school building’s IRN. The  icon links to the Ohio Department of Education’s Organization Search screen.

**Superintendent** (optional) – The name of the current district superintendent (only available when the district is in context)

**Principal** (optional) – The name of the current school building’s principal (only available when the building is in context)

**Website URL** (optional) – The web address of the current school building’s website.

**ThinkGate School Type** (required for ThinkGate extract) – Select the type of school (Elementary, Middle, High School, Multi-Types or Other).

**District** (un-modifiable) – This is a view-only field that displays the current school building’s associated school district.

**Use Address Standardization** – This checkbox turns Address Standardization on or off for the entire Building. See the *ProgressBook StudentInformation Getting Started Guide* for details.

**Use Address Verification** – This checkbox turns Address Verification on or off for the entire Building. See District Addresses, and the *ProgressBook StudentInformation School Setup and Configuration Guide* for details. You must have Address Standardization turned on to be able to use Address Verification, and if you turn Address Standardization off, this check-box will turn off and become non-modifiable.

**Telephone** (optional) – The current school building’s telephone number.

**Fax** (optional) – The current school building’s fax number.

**Address** (optional) – The current school building’s street address; see Zip, below.

**City** (optional) – The current school building’s city; see Zip, below.

**State** (optional) – The current school building’s state; see Zip, below.

**Zip** (optional) – The current school building’s zip code. Note that the address fields on this screen are informational fields only, so Address Standardization is not performed on these fields.

**Note:** *The school address information from this screen will appear on report cards, transcripts, and any other report that prints the school's address.*

**Feedback Email** (optional) – Entering an email address here will enable schools and districts to receive carbon copies of the emails sent by StudentInformation Users via the Feedback link.

**Comment** (optional) – Any additional information can be entered here.

**Progress Book On** (optional) – As of Release 9.0.1, StudentInformation still processes Progress Book extracts as district-level extracts, but the user now has the ability to specify which buildings to include. When the flag is checked, all data from that school will be extracted. When the flag is unchecked, all data from that school will be excluded from the Progress Book extraction.

**JVS Integration On** – Select this check box with a JVS in context to turn on integration with a satellite building. (See [“Set Up JVS Integration.”](#))

**Select JVS Satellite School** – Select the satellite building integrated with the JVS. (See [“Set Up JVS Integration.”](#))

**EZ Query Display Options** (optional) – Three options are available; Hide Absence Reasons, Hide Absence Notes and Hide Absence Comments. By checking any of these EZ Query Display Options controls what is displayed in EZ Query – Tools – Absence List.

**District Student Number Seed** (optional) – This is only available on the School Demographics screen when the District is in context. This is the number to begin with when creating new student numbers using Auto-Assign.

**Maximum Increment from Seed** (optional) – This is only available on the School Demographics screen when the District is in context. This is the **maximum** number the Student Number Auto-Assign will use when incrementing to find an unused student number. It is essentially a range for the Student Number Auto-Assign to use when searching for the next unused student number.

**Note on Auto-Assign Student Numbers:** If District Student Number Seed (as defined above) is not used, StudentInformation will start from the largest student number currently in the district when auto-assigning student numbers. If the Maximum Increment from Seed (as defined above) is not set, StudentInformation will increment by 1 to find the next unused student number. If the maximum student number allowable has been used, StudentInformation will begin searching for unused student numbers beginning with the smallest student number in the district.

**District EMIS Seed** (optional) – This is only available on the School Demographics screen when the District is in context. This is the number to begin with when automatically creating EMIS ID numbers for newly registered students not already having one specified on the Student Registration Wizard or Student Registration screens. Automatically created EMIS IDs, unique to the district, are independent of the student's social security number. Enter a nine digit alphanumeric in this field. The first digit can be any alphabetic character A through Z, upper or lower case or numerals 0 through 9. The following eight digits must be numerals 0 through 9. If left blank, a randomly-generated nine-digit numeral value is assigned.

**Previous EMISId** – This is only available on the School Demographics screen when the District is in context. The first time the District EMIS Seed value is assigned (manually or automatically), the District EMIS Seed and Previous EMISId fields contain the same value. After that, the most recently generated EMIS ID is displayed in this field.

**EMIS Maximum Increment from Seed** (optional) – This is only available on the School Demographics screen when the District is in context. This is the **maximum** number the EMIS ID auto-generation feature will use when incrementing to find an unused EMIS ID number. Enter a value of 1 through 9. If left blank, a value of 1 is assigned.

**Reset Emis Seed** – Clears values from the District EMIS Seed, Previous EMISId and EMIS Maximum Increment from Seed fields.

**Note on Automatically Generated EMIS IDs:** An EMIS ID is generated by adding the EMIS Maximum Increment from Seed value to the Previous EMISId value and checking the resulting EMIS ID for uniqueness within the district. If unique, the EMIS ID is assigned to the student and can be seen in the EMIS ID field on the FS-Standing tab on the Edit Student Profile screen. If not unique, the

EMIS ID auto-generation feature continues adding the EMIS Maximum Increment from Seed value to the non-unique EMIS ID and checking for uniqueness until a unique EMIS ID is found.

**Save** – Saves any changes and displays a message describing whether the saving process was successful:

**The school demographics information was saved successfully**

**Cancel** – Discards any changes and returns to the School Building Administration screen.

---

## Registration Defaults

**Navigation: Home – Management – School Administration – School Building Administration – Registration Defaults**

On this screen, you can set default registration information for new students being registered at the current building. You can also set default registration information for new students being registered at the current district, which will be used for any field that does not have a building-specific registration default.

**Example:** EX Example District has district-level Ethnicity codes. EX defines "W" as the Registration Default for Ethnicity. Middle school building EXMS leaves the Ethnicity field blank for their Registration Defaults. High school building EXHS specifies "M" as the Registration Default for Ethnicity. New students registered at EXMS will have "W" as their ethnicity code unless changed, and new students registered at EXHS will have "M" as their ethnicity code unless changed.

In FY09 (08-09) starting with DASL v9.0, Registration Defaults are required for Student Registration and the Registration Wizard. These defaults are also used by bulk student transfer to determine default values when enrolling students in bulk.

### District Registration Defaults

**Navigation: Home – Management – School Administration – School Building Administration – Registration Defaults**

Please make sure your **district** is in context when setting **District Registration Defaults**.

Home » Management » School Administration » School Building Administration » Registration Defaults

## Registration Defaults

From this screen, you can set default values for the Student Registration Screen.

Registration Information

Hispanic/Latino:  Local Ethnic Category:

Racial Group(s):

A-Asian  B-Black or African American  I-American Indian or Alaska Native  P-Native Hawaiian or Other Pacific Islander  W-White

Citizenship:  Admission Code:

Native Language:  Home Language:

Student Status:  Free/Reduced Lunch:

Building Prog Track:  Grade:

City:  State: OH

Zip:  Flags: 1 2 3 4 5

Country of Origin:

EMIS Situation: 5 - Resident attending Full Time

Admission Reason:

District Relationship: 1 - Stud. rcvg instr. in whole/part frc District of Residence: 050542 - Dalton Local SD

How Received: \* - Not Applicable How Received IRN: \*\*\*\*\*

Percent of Time: 100 Tuition Type: N - Non-tuition student (default)

Attending Building IRN:  Assigned Building IRN:

County of Residence: 22 - Erie

Sent To 1: Reason: NA - Not sent to another district Sent To 2: Reason:

IRN: \*\*\*\*\* -  IRN:  -

Percent of Time:  Percent of Time:

Family Group Defaults:

Matching Criteria:

Address  City  State

Zip Code  Student Last Name  Phone Number

Save Cancel

**Note:** The Ethnicity, Admission Code and Student Status fields will only have values if those codes are defined at the district level. You can leave these fields blank, and the fields will remain blank for newly-registered students unless selected each time a student is registered.

**Note:** For explanations on the fields below, see “2C. Student Profile” in the ProgressBook StudentInformation Student and Registration Guide or the latest ODE EMIS Manual.

**Hispanic/Latino** (required) – This drop-down list is populated with values from EMIS field GI580. From 2010-2011 onwards, only the Y and N options are shown.

**Local Ethnicity Category** (optional) – This is the 2009-2010 Ethnicity field renamed to avoid confusion. Changing the value of this field in 2010-2011 no longer sets the EMIS Ethnicity.

**Racial Group(s)** (required) – These fields are enabled if the user selects Y or N in the Hispanic/Latino field.

**Citizenship** – Specify default Citizenship for newly-registered students.

**Admission Code** – Specify default Admission Code for newly-registered students. This field is populated from the Admission Code Maintenance screen.

**Native Language** – Specify default Native Language for newly-registered students. This is the language spoke at the onset of speech.

**Home Language** – Specify default Home Language for newly-registered students. This is the language spoken at home.

**Student Status** – Specify default Student Status for newly-registered students. This field is populated from the Student Status Codes Maintenance screen.

**Free/Reduced Lunch Status** – Specify default Free/Reduced Lunch Status for newly-registered students.

**Building Prog Track** – Specify default Building Progression Track for newly-registered students. This field is populated from the Building Progression Tracks screen.

**Grade** – Specify default Grade for newly-registered students. This field is populated from the Grade Level Codes Maintenance screen.

**City** – Specify default City for newly-registered students.

**State** – Specify default State for newly-registered students. This field defaults to “OH.”

**Zip** – Specify default Zip Code for newly-registered students.

**Flags** – Specify default values for the five Data Flag fields for newly-registered students.

**Country of Origin** – Specify default Country of Origin for newly-registered students.

**EMIS Situation** – Specify default EMIS Situation for newly-registered students, or click the  button to use the EMIS Situation Wizard to select a Situation. A default EMIS Situation must be set at the district or building level before students can be registered.

**Admission Reason** – Specify default Admission Reason for newly-registered students. A default Admission Reason must be set at the district or building level before students before students can be registered.

**District Relationship** – Specify default District Relationship for newly-registered students. SMART logic will be invoked to help determine the correct value.

**District of Residence** – Specify default District of Residence for newly-registered students. Click  to open the ODE IRN Search screen. SMART logic will be invoked to help determine the correct value.

**How Received** – Specify default How Received for newly-registered students. SMART logic will be invoked to help determine the correct value.

**How Received IRN** - Specify default How Received IRN for newly-registered students. Click  to open the ODE IRN Search screen. SMART logic will be invoked to help determine the correct value.

**Percent of Time** – Specify default Percent of Time for newly-registered students.

**Tuition Type** – Specify default Tuition Type for newly-registered students. SMART logic will be invoked to help determine the correct value.

**Attending Building IRN** – Specify default Attending Building IRN for newly-registered students.

**County of Residence** – Select the default county of residence for newly-registered students.

**Assigned Building IRN** – Specify default Assigned Building IRN for newly-registered students.

#### **Sent To 1 and 2:**

**Reason** – Specify default Sent To Reason for newly-registered students. SMART logic will be invoked to help determine the correct value.

**IRN** – Specify default Sent To IRN for newly-registered students. Click  to open the ODE IRN Search screen. SMART logic will be invoked to help determine the correct value.

**Percent of Time** – Specify default Sent To Percent of Time for newly-registered students.

**Family Group Defaults: Matching Criteria** – Specify default search criteria to use when searching for family groups on the **Family Group** tab of the **Student Registration Wizard** screen.

**Save** – Save these Registration Default values. You receive this message:

**The registration defaults have been saved successfully.**

**Cancel** – Clear changes made to the Registration Default values and return to the School Building Administration screen.

## **Building Registration Defaults**

**Navigation: Home – Management – School Administration – School Building Administration – Registration Defaults**

Please make sure your **building** is in context when setting **Building Registration Defaults**.

Home » Management » School Administration » School Building Administration » Registration Defaults

## Registration Defaults

From this screen, you can set default values for the Student Registration Screen.

Registration Information

Hispanic/Latino:  Local Ethnic Category: W - White

Racial Group(s):  
 A-Asian  B-Black or African American  I-American Indian or Alaska Native  P-Native Hawaiian or Other Pacific Islander  W-White

Citizenship: 04 - United States citizen Admission Code:

Native Language: ENG Home Language:

Student Status:  Free/Reduced Lunch:

Building Prog Track:  Grade:

City: DALTON State: OH

Zip: 44618 Flags:  1  2  3  4  5

Country of Origin:

EMIS Situation: 5 - Resident attending Full Time

Admission Reason: 6 - Transferred from other Ohio public district/community school

District Relationship: 1 - Stud. rcvg instr. in whole/part frc District of Residence: 050542 - Dalton Local SD

How Received: \* - Not Applicable How Received IRN: \*\*\*\*\* -

Percent of Time: 100 Tuition Type: N - Non-tuition student (default)

Attending Building IRN:  Assigned Building IRN:

County of Residence: 22 - Erie

Sent To 1: Reason: NA - Not sent to another district Sent To 2: Reason:

IRN: \*\*\*\*\* -  IRN:

Percent of Time: 0 Percent of Time:

Family Group Defaults:  
 Matching Criteria:  
 Address  City  State  
 Zip Code  Student Last Name  Phone Number

Save Cancel Use District Defaults

District Defaults

African American : No  
 Asian : No  
 County of Residence : 22 - Erie  
 District Of Residence IRN : 050542  
 District Relationship : 1  
 FG Address : No  
 FG City : No  
 FG Phone Number : No  
 FG State : No  
 FG Student Last Name : No  
 FG Zip Code : No  
 How Received : \*  
 How Received IRN : \*\*\*\*\*  
 IRN 1 : \*\*\*\*\*  
 Native American : No  
 Pacific Islander : No  
 Percent Of Time : 100  
 Reason 1 : NA  
 State : OH  
 Tuition Type : N  
 White : No

**Note:** Any registration defaults entered on this screen will override the District Defaults listed to the right side of the screen for the fields selected on this screen only. **Example:** A building can leave one field blank and use the district default for that field, but specify a different field and use their own default instead of the district default for the second field.

**Note:** For explanations on the following fields, see “2C. Student Profile” in the ProgressBook StudentInformation Student and Registration Guide or the latest ODE EMIS Manual.

**Hispanic/Latino** (required) – This drop-down list is populated with values from EMIS field GI580. From 2010-2011 onwards, only the Y and N options are shown.

**Local Ethnicity Category** (optional) – This is the 2009-2010 Ethnicity field renamed to avoid confusion. Changing the value of this field in 2010-2011 no longer sets the EMIS Ethnicity.

**Racial Group(s)** (required) – These fields are enabled if the user selects Y or N in the Hispanic/Latino field.

**Citizenship** – Specify default Citizenship for newly-registered students.

**Admission Code** – Specify default Admission Code for newly-registered students. This field is populated from the Admission Code Maintenance screen.

**Native Language** – Specify default Native Language for newly-registered students. This is the language spoke at the onset of speech.

**Home Language** – Specify default Home Language for newly-registered students. This is the language spoken at home.

**Student Status** – Specify default Student Status for newly-registered students. This field is populated from the Student Status Codes Maintenance screen.

**Free/Reduced Lunch Status** – Specify default Free/Reduced Lunch Status for newly-registered students.

**Building Prog Track** – Specify default Building Progression Track for newly-registered students. This field is populated from the Building Progression Tracks screen.

**Grade** – Specify default Grade for newly-registered students. This field is populated from the Grade Level Codes Maintenance screen.

**City** – Specify default City for newly-registered students.

**State** – Specify default State for newly-registered students. This field defaults to “OH.”

**Zip** – Specify default Zip Code for newly-registered students.

**Flags** – Specify default values for the five Data Flag fields for newly-registered students.

**Country of Origin** – Specify default Country of Origin for newly-registered students.

**EMIS Situation** – Specify default EMIS Situation for newly-registered students, or click the  button to use the EMIS Situation Wizard to select a Situation.

**Admission Reason** – Specify default Admission Reason for newly-registered students.

**District Relationship** – Specify default District Relationship for newly-registered students. SMART logic will be invoked to help determine the correct value.

**District of Residence** – Specify default District of Residence for newly-registered students. Click  to open the ODE IRN Search screen. SMART logic will be invoked to help determine the correct value.

**How Received** – Specify default How Received for newly-registered students. SMART logic will be invoked to help determine the correct value.

**How Received IRN** - Specify default How Received IRN for newly-registered students. Click  to open the ODE IRN Search screen. SMART logic will be invoked to help determine the correct value.

**Percent of Time** – Specify default Percent of Time for newly-registered students.

**Tuition Type** – Specify default Tuition Type for newly-registered students. SMART logic will be invoked to help determine the correct value.

**Attending Building IRN** – Specify default Attending Building IRN for newly-registered students.

**County of Residence** – Select the default county of residence for newly-registered students.

**Assigned Building IRN** – Specify default Assigned Building IRN for newly-registered students.

**Sent To 1 and 2:**

**Reason** – Specify default Sent To Reason for newly-registered students. SMART logic will be invoked to help determine the correct value.

**IRN** – Specify default Sent To IRN for newly-registered students. Click  to open the ODE IRN Search screen. SMART logic will be invoked to help determine the correct value.

**Percent of Time** – Specify default Sent To Percent of Time for newly-registered students.

**Family Group Defaults: Matching Criteria** – Specify default search criteria to use when searching for family groups on the **Family Group** tab of the **Student Registration Wizard** screen.

**Save** – Save these Registration Default values. You receive this message:

**The registration defaults have been saved successfully.**

**Cancel** – Clear changes made to the Registration Default values and return to the School Building Administration screen.

**Use District Defaults** – Clear all building-level registration defaults and use district-level defaults instead.

**The School registration defaults have been removed successfully. District registration defaults will be used.**

## Set Up JVS Integration

This section explains how to set up integration between a joint vocational school (JVS) and a home school where students are taking JVS satellite courses (such as a traditional high school). For purposes of this procedure, these buildings in StudentInformation are defined as:

- **Home school** – Outside building where the JVS satellite course is taught (such as a traditional high school)
- **JVS satellite building** – “Building” created in StudentInformation to contain the JVS satellite courses taught at the home school and to report student information to EMIS

Setting up this integration gives the JVS the following additional capabilities:

- Track and report attendance in the JVS satellite classes taught at the home school building
- Update student demographic information for students in the JVS satellite classes
- Auto-generate course section assignments in the JVS satellite building

### Prerequisites

In order for the integration to work, the following prerequisites must be met:

1. Contact the StudentInformation State Support Team (SSST) to create a JVS satellite building in StudentInformation for each home school that offers JVS satellite courses:

***Note:** A one-to-one (1:1) relationship is required. (For example, if both the middle school and high school within a district offer JVS satellite courses, you need to create a separate satellite building for each.)*

2. Perform the setup shown on the following screens:
  - **Calendar Wizard** – Run at the JVS satellite building with the same master calendar start and stop dates and reporting term start and stop dates as the home school. Also create at least one period to tie to the course section meeting times.
  - **Courses** – Manually enter (they do not have to match the course code at the home school), or ask the SSST DBA to copy the course catalog from the home school to the JVS satellite building.
  - **View Staff Members** – Manually enter teachers teaching JVS satellite courses at the home school into the JVS satellite building.
  - **Course Sections** – Create course sections that correspond to the course sections in which the students are enrolled at the home school.
  - **Rooms/Location Maintenance** – Create a room to be used on all of the satellite course section meeting times.

- **Building Grade Levels Maintenance** – Add applicable grade levels for the JVS satellite building.
- **Ethnicity Codes Maintenance** – Manually enter local ethnicity codes that mirror the home school, or ask the SSST DBA to copy the home school's local ethnicity codes to the JVS satellite building.
- **Course Terms Maintenance** – Create course terms for the corresponding satellite sections.
- **Sub-Calendar Maintenance** – Create a sub-calendar.
- **Student Status Codes Maintenance** – Create student status code(s).
- **Master Schedule Maintenance and Schedule Result Set Maintenance** – Add a master schedule and result set.
- **Period Attendance by Course Section** – Create period attendance absence types for unexcused, excused, non-absence, and partial absence.
- **DASL Options (Scheduling tab)**– Select a **Default Calendar** and **Final Schedule Result**.
- **Registration Defaults** – Configure registration defaults at the JVS Satellite building.

***Note:** For information on these screens and procedures, refer to the appropriate StudentInformation guide.*

3. The home school must transfer the students to the JVS satellite building. (Students will be simultaneously enrolled at the home school and JVS satellite building.)

In addition, the following prerequisites must be met for each applicable student:

- Must be enrolled in both the JVS satellite building and the home school
- State Student ID (SSID) must be the same for both schools
- Home School IRN (JVS satellite building) must match the Attending Building IRN (home school)

## **Process**

There are several components to setting up the integration. Complete each step in order, noting which building must be in context for each step:

1. Turn on integration (JVS satellite building in context):
  - a. On the **School Demographics** screen, select the **JVS Integration On** check box.

- b. In the **Select JVS Satellite School** drop-down list, select the home school where students will be taking JVS satellite classes. (This is the school from which the JVS satellite building will be accepting demographic changes and course section assignments.)
- c. Click **Save**.

StudentInformation > Management > School Administration > School Building Administration > School Demographics

### School Demographics

This page is used to manage the demographic information for your school

School Code:	BJFA	School Name:	Fairfield Satellite Building
School Type:	School	School Subtype:	JVS
IRN:	050898	Principal:	
Website URL:		District:	Butler Co JVSD
ThinkGate School Type:	-- Select a School Type --	Use Address Standardization:	<input type="checkbox"/>
Use Address Standardization:	<input type="checkbox"/>	Use Address Verification:	<input type="checkbox"/>
Telephone:		Fax:	
Address:		City:	
State:	OH	Zip:	
Feedback Email:			
Comment:			

Progress Book On:

JVS Integration On:  Select JVS Satellite School: - FAIRFIELD HIGH SCHOOL

EZ Query Display Options:  Hide Absence Reasons  Hide Absence Notes  Hide Absence Comments

2. Set attendance options (JVS satellite building in context):
  - a. On the **DASL Options** screen **Attendance** tab, in the **Method** drop-down list, select "Period Attendance."
  - b. Select the second "Default Thresholds" option (percentage-based system).
  - c. Set up your desired **Period Threshold** and **Unexcused Period Threshold** with both a **Half-Day Absence Percentage** and a **Full-Day Absence Percentage**. This is to indicate what percentage of JVS satellite courses in a day the student must miss in order to be marked as a half-day or full-day absence. (See examples.)

**Note:** For fractions of a course, the system rounds down, and the minimum threshold is 1 course. (The system does not round down below 1.)

- d. Click **Save**.

StudentInformation > Management > School Administration > DASL Options

## DASL Options

From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling Marks Fees Attendance Prog Track INFOhio Export EMIS Options

**Attendance Officer:** -- None -- You can control how attendance collection appears to teachers here.

**Absence Cut-Off Time:** 12:00 PM **Disable Late Option:**

**Method:** Period Attendance **Collect Reasons:**  **Collect Notes:**

**Allow Teacher to Override:**

Default Types:	Partial	Absence
Default Absence Type:	TARDY	UNEXCUSED
<input type="radio"/> Default Thresholds:	Half-Day Absence	Full-Day Absence
Period Threshold:	0	0
Unexcused Period Threshold:	0	0
<input checked="" type="radio"/> <b>Default Thresholds:</b>	<b>Half-Day Absence Percentage</b>	<b>Full-Day Absence Percentage</b>
Period Threshold:	50 %	75 %
Unexcused Period Threshold:	50 %	75 %
<b>Period to Daily Conversions:</b>	<b>Half-Day Absence</b>	<b>Full-Day Absence</b>
Default Daily Absence Type:	ABS	ABS
Default Daily Absence Type (Unexcused):	TRUANT	TRUANT
Default Absence Reason:		
Default Absence Note:		

**Save**

### Example 1 – Student with even number of JVS satellite courses

- **Full-Day Absence Percentage** set at 75%
- Student has 4 JVS satellite courses in a day
- Full-day absence threshold:  
 $.75 \times 4 = 3$  courses
- If student is absent for 3 courses, student is marked as full-day absence

### Example 2 – Student with odd number of JVS satellite courses

- **Full-Day Absence** set at 75%
- Student has 5 JVS satellite courses in a day
- Full-day absence threshold:  
 $.75 \times 5 = 3.75$  courses
- System rounds down to 3 courses
- If student is absent for 3 courses, student is marked as full-day absence

3. (Optional): Check a student's scheduled courses in both buildings:
  - a. (Home school building in context) On the **Course Section Assignments** screen, note any JVS satellite courses.

StudentInformation > SIS > Scheduling > Course Section Assignments

### Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule: 13-14 Master Schedule ⚡ Schedule Result: 13-14 Result Set ⚡ Status:  Assigned  Dropped  
 Removed ⚡

Course:  ... Course Term:  Teacher:  Search

Date:  Teacher:

Add Course Assignment Drop All Assignments Schedule Study Halls Save Changes Cancel Changes

	Course	Course Name	Section	Meeting ^	Teacher	Term	Type	Status	Start Date	End Date
<input checked="" type="checkbox"/>	7650	ENGINEERING & MFG DESIGN II	1	M,T,W,R,F: 1,2 (1504)	MILLARD LATIMER	Year	Data Load	Assigned	Aug 21, 2013	
<input checked="" type="checkbox"/>	1225	ENG12 for 21st CENTURY WRLD	2	M,T,W,R,F: 3 (3206)	MELANIE RIEDEL	Year	Data Load	Assigned	Aug 21, 2013	
<input checked="" type="checkbox"/>	3141	COSMETOLOGY	3	4A,4B (2410)	TRISHA LUTTERBIE	Year	Manual	Assigned	Aug 21, 2013	
<input checked="" type="checkbox"/>	2211	CP AMERICAN GOVERNMENT	11	5A,5B (3413)	MICHAEL CHACKSFIELD	Year	Data Load	Assigned	Aug 21, 2013	
<input checked="" type="checkbox"/>	LUN1	LUNCH - SEM I	3	M,T,W,R,F: 5C (CAFE)	STAFF STAFF	Semester 1	Data Load	Assigned	Aug 21, 2013	
<input checked="" type="checkbox"/>	LUN2	LUNCH - SEM II	3	M,T,W,R,F: 5C (CAFE)	STAFF STAFF	Semester 2	Data Load	Assigned	Jan 13, 2014	
<input checked="" type="checkbox"/>	1121	CP ENGLISH 11	17	M,T,W,R,F: 6 (3208)	CAINE GRIMES	Year	Manual	Assigned	Aug 21, 2013	
<input checked="" type="checkbox"/>	ER17	EARLY RELEASE	1	7 (XXX)	STAFF STAFF	Semester 1	Data Load	Assigned	Aug 21, 2013	
<input checked="" type="checkbox"/>	ER27	EARLY RELEASE	1	7 (XXX)	STAFF STAFF	Semester 2	Data Load	Assigned	Jan 13, 2014	

- a.
  - b. (JVS satellite building in context) On the **Course Section Assignments** screen, note the student's scheduled courses before the integration is run.

StudentInformation > SIS > Scheduling > Course Section Assignments

### Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule: 13-14 Master Schedule ⚡ Schedule Result: 13-14 Master Schedule ⚡ Status:  Assigned  Dropped  
 Removed ⚡

Course:  ... Course Term:  Teacher:  Search

Date:  Teacher:

Add Course Assignment Drop All Assignments Schedule Study Halls Save Changes Cancel Changes

	Course	Course Name	Section	Meeting ^	Teacher	Term	Type	Status	Start Date	End Date
<input checked="" type="checkbox"/>	Z1205Y	FF ENGINEER DESIGN LZY	1	1,2 (BJFA)	MILLARD LATIMER	Year	Manual	Assigned	Aug 21, 2013	

4. Map JVS courses in the JVS satellite building to the home school satellite course (JVS satellite building in context):
  - a. On the **JVS CourseSection Map** screen, review the course information for JVS satellite courses being offered at the JVS satellite building (which displays in all columns except the **Satellite School Course Section** column).

StudentInformation > Management > School Administration > JVS CourseSection Map

### JVS CourseSection Map

From this screen, you can map home school and JVS course sections together

Satellite School Course Section	Code	Name	Section	Term	Details
Teacher: <input type="text"/> Course: <input type="text"/> Section: <input type="text"/>	ZPRSR	PROJECT SEARCH RELATED Y	2	Year	Capacity 25 Filling 1.00 Teacher(s) MOLLIE MCINTOSH Meeting Time Description 9 (BJFA)
Teacher: <input type="text"/> Course: <input type="text"/> Section: <input type="text"/>	ZPRSR	PROJECT SEARCH RELATED Y	3	Year	Capacity 25 Filling 1.00 Teacher(s) ROSI WOOD Meeting Time Description 9 (BJFA)
Teacher: <input type="text"/> Course: <input type="text"/> Section: <input type="text"/>	ZPRSL	PROJECT SEARCH LAB Y	2	Year	Capacity 25 Filling 1.00 Teacher(s) MOLLIE MCINTOSH Meeting Time Description 9 (BJFA)
Teacher: <input type="text"/> Course: <input type="text"/> Section: <input type="text"/>	ZPRSL	PROJECT SEARCH LAB Y	3	Year	Capacity 25 Filling 1.00 Teacher(s) ROSI WOOD Meeting Time Description 9 (BJFA)

Select the home school course section to map to the JVS satellite course section.

JVS satellite course section information

- b. For each satellite course at the home school, in the **Satellite School Course Section** column, select the appropriate **Teacher**, **Course** and **Section** of the satellite building course that you want to map to the JVS satellite course.

Teacher: TRISHA LUTTERBIE Course: 3141 - COSMETOLOGY Section: Year - 3	ZCOSMET	COSMETOLOGY	3	Year	Capacity 25 Filling 39.00 Teacher(s) TRISHA LUTTERBIE Meeting Time Description 3 (BJFA)
--	---------	-------------	---	------	--

5. Contact your technology center to create a JAMS job to run the SoftwareAnswers.JVSIntegration console application. (This application is deployed with the ProgressBook Suite. You can find it in the folder with the other deployed StudentInformation applications.)

*Note: You can set the job to run once nightly or at any other time interval you choose.*

6. Optional: To turn off the ethnicity sync (**Hispanic/Latino**, **Racial Group(s)** and **Summative Race** values), pass an optional command argument as shown below:
  - a. Open a command prompt.
  - b. Enter the following:  
 "C:\JVS\SoftwareAnswers.JVSIntegration.exe -SKIPETHNICITYUPDATE"

**Note:** The folder “JVS” represents the root folder of the JVS Integration program. In production, this is probably located on the DASL APP server where the rest of the console applications that are deployed with StudentInformation are located.

```

Command Prompt
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.
c:\JVS>SoftwareAnswers.JVSIntegration.exe -SKIPETHNICITYUPDATE
  
```

**Note:** When the system skips the ethnicity update, the message “Skipping Ethnicity Update...” displays near the top of the console window:

```

Command Prompt - SoftwareAnswers.JVSIntegration.exe -SKIPETHNICITYUPDA...
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.

C:\Users\>cd c:\jvs
C:\JVS>SoftwareAnswers.JVSIntegration.exe -SKIPETHNICITYUPDATE
Skipping Ethnicity Update..
Performing Student JVS Update:
  Truncating tables.
  Loading students that need to be updated.
  Loading demographic data for each student.
  Updating records with new StudentId's.
  Updating student's demographic data.
  Updating student's course assignments.
  1 School(s) have 'IsJVSIntegration' turned on.
  1492 Student(s) Processed.
  Truncating tables.
Update Complete!

Application closing in 10 seconds!
  
```

After the integration job runs, the following occurs:

- Satellite courses the student is taking at the home school display on the JVS satellite building’s **Course Section Assignments** screen for the student.

StudentInformation > SIS > Scheduling > Course Section Assignments

### Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule: 13-14 Master Schedule    Schedule Result: 13-14 Master Schedule    Status:  Assigned  Dropped  Removed

Course:    Course Term:    Teacher:    Search

Date:    Add Course Assignment    Drop All Assignments    Schedule Study Halls    Save Changes    Cancel Changes

	Course	Course Name	Section	Meeting	Teacher	Term	Type	Status	Start Date	End Date
X	Z1205Y	FF ENGINEER DESIGN L2Y	1	1,2 (BJFA)	MILLARD LATIMER	Year	Manual	Assigned	Aug 21, 2013	
X	ZCOSMET	COSMETOLOGY	3	3 (BJFA)	TRISHA LUTTERBIE	Year	Manual	Assigned	Aug 21, 2013	

- Course additions, drops and removals in the home school display automatically in the JVS satellite building.

**Note:** For transfers, you must manually drop the old course and add the new one (issue the transfer manually).

- JVS teachers can take attendance at the JVS satellite building.
- Changes to any of the following demographic information in the home school update in the JVS satellite building:
  - First Name
  - Middle Name
  - Last Name
  - Gender
  - Birthdate
  - Local Ethnic Category
  - Hispanic/Latino (unless you have set the integration job to skip the ethnicity update)
  - Racial Group(s) (unless you have set the integration job to skip the ethnicity update)
  - Summative Race (unless you have set the integration job to skip the ethnicity update)
  - Native Language
  - Home Language
  - Address of Residence
  - Mailing Address

---

## System Maintenance Reference

The following system tables need to be populated and reviewed before using StudentInformation.

<b>Code Table or Maintenance Screen</b>
Batch/Report Management
Queues
Batch Settings
Batch Management
Management - Security
Users
Groups
Roles
Staff Members
Staff Member Associations
Management - School Administration - Grade Level Administration
Grade Level Codes
Grade Level progressions
Building Grade Levels
Management - School Administration - Attendance Administration
Absence Notes
Absence Reasons
Absence Types
Management – School Administration – Scheduling Administration – Initialization
Daily Pattern Rules
Periods of the Day
Rotation Days
Reporting Terms Maintenance
Master Calendar Periods

<b>Code Table or Maintenance Screen</b>
Schedule Terms
Course Terms
Homeroom Terms
Master Schedule
<b>Management - School Administration - DASL Options</b>
Scheduling tab
Marks tab
Fees tab
Attendance tab
Prog Track tab
INFOhio Export tab
EMIS Options tab
<b>Management – School Administration – Student Codes Administration</b>
Admission Codes
Birthdate Verification Codes
Contact Type Codes
Custody Types Codes
Ethnicity Codes
Program Codes
Student Status Codes
Team Codes
Withdraw Codes
<b>Management – School Administration – Scheduling Administration – Course Maintenance</b>
Course Rank Weight
Course Department
Course Language
Course Difficulty
Course Area of Study

<b>Code Table or Maintenance Screen</b>
Course Subject Area
Courses
Course Sections
Course Groups
If using Attendance Letters.... Management - School Administration - Attendance Administration
Attendance Letter Rules
If using Daily Attendance Lunch Counts.... Management - School Administration - Attendance Administration
Lunch Type
If using the Discipline module.... Management - School Administration - Discipline Administration
Action Codes
Infraction Codes
Policy Codes
Type of Contact Maintenance
If using the Fees module.... Management - School Administration - Fees Administration
Accounting Codes
Prorated Fee Schedules
Course Fees
General Fees
Program Fees
Membership Fees
Miscellaneous Fees
If using the Graduation / Eligibility module... Management - School Administration - Graduation / Eligibility
Miscellaneous Items
Rules Maintenance

<b>Code Table or Maintenance Screen</b>
If using the Medical module... Management - School Administration - Medical Office Administration
Care Type Codes
Common Medications
Common Immunizations Code Table
Disposition Codes
Health Log Reason Codes
If using Miscellaneous Data Groups... Management - School Administration - Miscellaneous Data Groups
Miscellaneous Data Groups
Miscellaneous Data Definitions
If using the Public Administration module for Student Course Requests.... Management - School Administration - Public Administration
Application Configuration

## Appendix A:

<b>Default Types:</b>	<b>Partial</b>	<b>Absence</b>
Default Absence Type:	Tardy	Absent
<b>Default Thresholds:</b>	<b>Half-Day Absence</b>	<b>Full-Day Absence</b>
Period Threshold:	4	7
Unexcused Period Threshold:	6	7
<b>Period to Daily Conversions:</b>	<b>Half-Day Absence</b>	<b>Full-Day Absence</b>
Default Daily Absence Type:	Excused	Excused
Default Daily Absence Type (Unexcused):	Unexcused	Unexcused
Default Absence Reason:		
Default Absence Note:		

The only time a student will receive an unexcused daily absence is if all periods the student missed were unexcused.

	0 excused	1 excused	2 excused	3 excused	4 excused	5 excused	6 excused	7 excused	8 excused	9 excused	10 excused	11 excused
0 unexcused	No record created	No record created	No record created	No record created	Half day excused	Half day excused	Full day excused					
1 unexcused	No record created	No record created	No record created	Half day excused	Half day excused	Half day excused	Full day excused	n/a				
2 unexcused	No record created	No record created	Half day excused	Half day excused	Half day excused	Full day excused	n/a	n/a				
3 unexcused	No record created	Half day excused	Half day excused	Half day excused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a
4 unexcused	No record created	Half day excused	Half day excused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a	n/a
5 unexcused	No record created	Half day excused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a	n/a	n/a
6 unexcused	Half day unexcused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a
7 unexcused	Full day unexcused	Full day excused	Full day excused	Full day excused	Full day excused	n/a						
8 unexcused	Full day unexcused	Full day excused	Full day excused	Full day excused	n/a							
9 unexcused	Full day unexcused	Full day excused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
10 unexcused	Full day unexcused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
11 unexcused	Full day unexcused	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

<b>Default Types:</b>	<b>Partial</b>	<b>Absence</b>
Default Absence Type:	Tardy	Absent
<b>Default Thresholds:</b>	<b>Half-Day Absence</b>	<b>Full-Day Absence</b>
Period Threshold:	6	7
Unexcused Period Threshold:	4	7
<b>Period to Daily Conversions:</b>	<b>Half-Day Absence</b>	<b>Full-Day Absence</b>
Default Daily Absence Type:	Excused	Excused
Default Daily Absence Type (Unexcused):	Unexcused	Unexcused
Default Absence Reason:		
Default Absence Note:		

	0 excused	1 excused	2 excused	3 excused	4 excused	5 excused	6 excused	7 excused	8 excused	9 excused	10 excused	11 excused
0 unexcused	No record created	No record created	No record created	No record created	No record created	No record created	Half day excused	Full day excused				
1 unexcused	No record created	No record created	No record created	No record created	No record created	Half day excused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a
2 unexcused	No record created	No record created	No record created	No record created	Half day excused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a
3 unexcused	No record created	No record created	No record created	Half day excused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a
4 unexcused	No record created	No record created	Half day excused	Full day excused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a	n/a
5 unexcused	No record created	Half day excused	Full day excused	n/a	n/a	n/a	n/a	n/a				
6 unexcused	Half day unexcused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a				
7 unexcused	Full day unexcused	Full day excused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a	n/a
8 unexcused	Full day unexcused	Full day excused	Full day excused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
9 unexcused	Full day unexcused	Full day excused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
10 unexcused	Full day unexcused	Full day excused	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
11 unexcused	Full day unexcused	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

The only time a student will receive an unexcused daily absence is if all periods the student missed were unexcused.

This page intentionally left blank.

---

# ProgressBook StudentInformation School Year Initialization Guide



# **ProgressBook StudentInformation School Year Initialization Guide**

(This document is current for ProgressBook StudentInformation v14.6.0 or later.)

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44114

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation School Year Initialization Guide* document have been made.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.6.0	<i>“School Year Initialization Outline and Flow”</i>	2	Corrected Calendar Wizard step to show it should be run at the building level.

This page intentionally left blank.

# Table of Contents

Change Log .....	i
Table of Contents.....	iii
School Year Initialization Overview.....	1
Understanding the School Year Initialization Module.....	1
School Year Initialization Outline and Flow.....	2
School Year Initialization Tasks (ITC Level) .....	4
Manage School Status – Activate School Year.....	4
Execute Tasks – Module Task List Tab .....	5
Execute Tasks – Required Information Tab.....	6
Execute Tasks – Results Tab .....	8
School Year Initialization Tasks (District Level) .....	9
Execute Tasks – Module Task List Tab .....	9
Execute Tasks – Required Information Tab.....	11
Execute Tasks – Confirmation Tab.....	11
Execute Tasks – Results Tab .....	13
Calendar Wizard (Building Level).....	14
Calendar Wizard – General Tab .....	16
Calendar Wizard – Reporting Terms Tab .....	17
Calendar Wizard – Virtual Terms Tab.....	18
Calendar Wizard – Non-Attending Days Tab.....	20
Calendar Wizard – Periods Tab.....	21
Calendar Wizard – Calendar Type Tab.....	22
Fixed Day Calendar Type.....	22
Fixed Rotation Days Calendar Type .....	23
Alternating Rotation Days Calendar Type .....	24
Calendar Wizard – Calendar Type Tab – Edit Periods .....	25
Calendar Wizard – Projected Calendar Tab .....	26
Complete Initialization Follow-up Checklist.....	27
School Year Initialization Tasks (Building Level – First Pass).....	28
Execute Tasks – Module Task List Tab .....	29

Execute Tasks – Required Information Tab.....	31
Execute Tasks – Confirmation Tab.....	32
Execute Tasks – Results Tab .....	33
Review Job History .....	34
Complete Initialization Follow-up Checklist.....	36
School Year Initialization Tasks (Building Level – Second Pass) .....	37
Execute Tasks – Module Task List Tab .....	38
Execute Tasks – Required Information Tab.....	39
Execute Tasks – Results Tab .....	42
Review Job History .....	42
Complete Initialization Follow-up Checklist.....	45
School Year Initialization Tasks (Building Level – Third Pass) .....	46
Execute Tasks – Module Task List Tab .....	46
Execute Tasks – Required Information Tab.....	48
Execute Tasks – Confirmation Tab.....	49
Execute Tasks – Results Tab .....	50
Review Job History .....	51
Complete Initialization Follow-up Checklist.....	53
Create Default Schedule Results (Building Level) .....	55

---

## School Year Initialization Overview

The School Year Initialization (SYI) process is typically performed in January or February in order to configure the following school year.

Please refer to the *School Year Initialization Step by Step Checklist* for a detailed outline of the SYI process.

---

## Understanding the School Year Initialization Module

The School Year Initialization (SYI) Tasks must be executed by the ITC, by the District, and by the Building in that order. Initialization tasks are dependent on each other and you will not be able to proceed if the dependencies are not met. Some ITCs wish to initialize all of their buildings. Other ITCs allow their districts to run the SYI tasks at the district and building level. Please consult your ITC to determine how initializations are handled.

Job History allows you to view the School Year Initialization Tasks processes and view details and errors.

The Follow-up Checklist gives descriptions and instructions for School Year Initialization Tasks not yet completed.

**Note:** *The SYI process does not add students to the new school year. Consult the Student Promotion End User Guide and the Student Promotion Step by Checklist for more information on student promotion. SYI tasks must be completed at all three levels (ITC, district, building) before students can be promoted and bulk enrolled into the new school year.*

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

**Note:** The following items are not school year specific. This means that changing them in one school year will change them in all school years.

- Rooms/Locations (Management – School Administration – School Building Administration – Rooms/Locations)
  - School Demographics (Management – School Administration – School Building Administration – School Demographics)
  - Student Demographics – i.e. student address (SIS – Student – Edit Profile)
  - Student Pictures (upload process via ITC and displayed on the Student Profile)
  - Prorated Fee Schedule Maintenance (Management – School Administration – Fees Administration – Prorated Fee Schedules)
- 

## **School Year Initialization Outline and Flow**

### **1. School Year Initialization Tasks (ITC Level)**

- a. **Manage School Status – Activate School Year**
- b. **Execute Tasks – Module Task List**
- c. **Execute Tasks – Required Information**
- d. **Execute Tasks – Confirmation**
- e. **Execute Tasks – Results**

### **2. School Year Initialization Tasks (District Level)**

- a. **Execute Tasks – Module Task List**
- b. **Execute Tasks – Required Information**
- c. **Execute Tasks – Confirmation**
- d. **Execute Tasks – Results**

### **3. Calendar Wizard (Building Level)**

- a. **Execute Tasks – General**
- b. **Execute Tasks – Reporting Terms**
- c. **Execute Tasks – Virtual Terms**
- d. **Execute Tasks – Non-Attending Days**
- e. **Execute Tasks – Periods**
- f. **Execute Tasks – Calendar Type**
- g. **Execute Tasks – Projected Calendar**

- 4. Complete Initialization Follow-up Checklist**
- 5. School Year Initialization Tasks (Building Level – First Pass)**
  - a. Execute Tasks – Module Task List**
  - b. Execute Tasks – Required Information**
  - c. Execute Tasks – Confirmation**
  - d. Execute Tasks – Results**
- 6. Review Job History**
- 7. Complete Initialization Follow-up Checklist**
- 8. School Year Initialization Tasks (Building Level – Second Pass)**
  - a. Execute Tasks – Module Task List**
  - b. Execute Tasks – Required Information**
  - c. Execute Tasks – Confirmation**
  - d. Execute Tasks – Results**
- 9. Review Job History**
- 10. Complete Initialization Follow-up Checklist**
- 11. School Year Initialization Tasks (Building Level – Third Pass)**
  - a. Execute Tasks – Module Task List**
  - b. Execute Tasks – Required Information**
  - c. Execute Tasks – Confirmation**
  - d. Execute Tasks – Results**
- 12. Review Job History**
- 13. Complete Initialization Follow-up Checklist**
- 14. Create Default Schedule Results**

---

## School Year Initialization Tasks (ITC Level)

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks**

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before Initialization tasks are completed by any district or building, they must first be completed at the ITC level because many tasks are dependent upon the data setup when completing the tasks at the ITC level. You will only need to run the ITC level tasks once for the entire ITC.

**Important: Change your current working school to the ITC and select the year you wish to initialize. Only ITC personnel have the security permissions to initialize at the ITC level.**

### Manage School Status – Activate School Year

**Navigation: Home – ITC – Manage School Status**

**Manage School Status**  
From this screen, you can manage school status settings.

School Year: 2011-2012

School Name	Status	Active
TCCSA ITC	Deactivate	
All Buildings	Deactivate	
Ashland Christian School District	Deactivate	
- ASHLAND CHRISTIAN SCHOOL	Deactivate	
Ashland City Schools	Deactivate	
- ASHLAND ALTERNATIVE SCHOOL	Activate	
- ASHLAND HIGH SCHOOL	Deactivate	
- ASHLAND MIDDLE SCHOOL	Deactivate	
- EDISON ELEMENTARY SCHOOL	Deactivate	

**Manage School Status Screen**

A script will insert the new school year to the tblSchoolYear table. Once the new school year exists in this table, ITCs can use the Manage School Status screen to activate/deactivate the school year for each building, a district or the entire ITC. The new school year needs to be activated before School Year Initialization can proceed.

## Execute Tasks – Module Task List Tab

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Module Task List Tab**

Home » Management » School Administration » School Year Initialization » Execute Tasks

### Execute School Year Initialization Tasks

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

Module Task List   Required Information   Confirmation   Results

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

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

### Module Task List (ITC Level) Tab

**Do Not Execute** – Temporarily skip this task.

**Skip** – Skip the task entirely.

**Execute Now** – Perform this task now.

**Important: Please see the School Year Initialization Step by Step Checklist for the order in which to execute ITC level tasks.**

**Completed** – If the task has already been completed at this level, the Completed checkbox will automatically be filled in with a red checkmark.

**Student: Profile** – This task will copy the code values used by the student profile. No student specific data is copied.

**Student: Admission** – This task will copy code values for Student Admission and create Sub Calendar Entries.

**Student: Memberships** – This task will copy special education services, memberships, and membership groups.

**Discipline** – This task will copy code values for Discipline.

**Fees** – This task will copy basic fee configuration, excluding Course and Course Section fees.

**Attendance: Absence Events** – This task will copy configuration and code values used by attendance.

**Attendance: Absence Letters** – This task will copy configuration used to generate absence letters.

**Scheduling: Course Configuration** – This task will copy setup tables used by the course catalog.

**Marks: Mark Configuration** – This task will copy configuration to support Marks.

**Course History** – This task will copy code values for Transfer Status.

Click **Next>** to proceed to the Required Information Tab.

## Execute Tasks – Required Information Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Required Information Tab

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

Module Task List   Required Information   Confirmation   Results

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

Source School Year: 2011-2012

< Back   Next >

### Required Information Tab (ITC Level) on the Execute School Year Initialization Tasks Screen

**Source School Year** – Select the school year you wish to copy values **from** - for use in the new school year.

Click **<Back** to return to the Module Task List tab.

Click **Next>** to proceed to the Confirmation tab.

# Execute Tasks – Confirmation Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Confirmation Tab

### Execute School Year Initialization Tasks

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

Module Task List   Required Information   **Confirmation**   Results

**Step 3: Confirmation**  
Listed below are the tasks you have selected to execute now.  
Please review this list and click 'Back' to make any changes. Click 'Execute' to begin executing these tasks.

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

< Back   Execute

## Confirmation Tab (ITC Level) on the Execute School Year Initialization Tasks Screen

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the current status of each specific module: Pending, a processing icon, Complete or Failed.

If any of the tasks Failed, report them to StudentInformation State Support in a Help Desk ticket and discontinue SYI until you hear back from StudentInformation State Support.

Click **<Back** to return to the Required Information Screen.

Click **Execute** to perform the specified tasks and proceed to the Results tab.

## Execute Tasks – Results Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Results Tab

### Execute School Year Initialization Tasks

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

Module Task List
Required Information
Confirmation
Results

**Step 4: Results**

Listed below are the tasks you had selected to execute, and the status of each task. Click 'View Log' to see a detailed list of results, with log messages for each task that was executed.

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

View Log
Execute More Tasks

### Results Tab (ITC Level) on the Execute School Year Initialization Tasks

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the results status of each specific module (Completed or Failed).

Click **View Log** to see a more detailed listing of errors on the Initialization Job History (View Details) screen. If you have set up any ITC level codes, you'll want to View Log and view any informational messages to make sure the codes copied properly. If all the tasks completed and you don't have any codes set up at the ITC level, you can skip View Log.

Click **Execute More Tasks** to return to the Module Task List Tab and perform additional tasks. Once all ITC SYI tasks are complete, you can proceed to District Level SYI.

# School Year Initialization Tasks (District Level)

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks**

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before Initialization tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup when completing the tasks at the District Level.



**Important: Change your current working school to the District and select the year you wish to initialize.**

## Execute Tasks – Module Task List Tab

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Module Task List Tab**

Home » Management » School Administration » School Year Initialization » Execute Tasks

### Execute School Year Initialization Tasks

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

Module Task List | Required Information | Confirmation | Results

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

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

Next >

**Module Task List Table (District Level) on the Execute School Year Initialization Tasks Screen**

**Do Not Execute** – Temporarily skip this task.

**Skip** – Skip the task entirely.

**Execute Now** – Perform this task now.

**Important: Please see the School Year Initialization Step by Step Checklist for the order in which to execute ITC level tasks.**

**Completed** – If the task has already been completed at this level, the Completed checkbox will automatically be filled in with a red checkmark.

**School: Configuration** – This task will copy basic school configuration including registration defaults.

**School: Staff Members** – This task will copy staff record configuration, including teacher and counselors.

**Student: Profile** – This task will copy the code values used by the student profile. No student specific data is copied.

**Student: Admission** – This task will copy code values for Student Admission and create Sub Calendar Entries.

**Student: Memberships** – This task will copy special education services, memberships, and membership groups.

**Discipline** – This task will copy code values for Discipline.

**Fees** – This task will copy basic fee configuration, excluding Course and Course Section fees.

**Attendance: Absence Events** – This task will copy configuration and code values used by attendance.

**Attendance: Absence Letters** – This task will copy configuration used to generate absence letters.

**Scheduling: Course Configuration** – This task will copy setup tables used by the course catalog. You cannot select to execute this task until the Marks: Mark Configuration task has been completed.

**Marks: Mark Configuration** – This task will copy configuration to support Marks. This task must be executed before you can select to execute the Scheduling: Course Configuration task.

**Course History** – This task will copy code values for Transfer Status.

Click **Next>** to proceed to the Required Information Tab.

## Execute Tasks – Required Information Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Required Information Tab

### Execute School Year Initialization Tasks

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

Module Task List   Required Information   Confirmation   Results

**Step 2: Required Information**

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

Source School Year: 2011-2012 ▼

< Back   Next >

### Required Information Tab (District Level) on the Execute School Year Initialization Tasks Screen

**Source School Year** – Select the school year you wish to copy values **from** - for use in the new school year.

**New Locker Combination Series** (optional) – Enter a new locker combination series to be defined at the District level. Leave blank if you plan to define a new series at the Building level or retain any combination series from prior years.

Click **<Back** to return to the Module Task List tab.

Click **Next>** to proceed to the Confirmation tab.

## Execute Tasks – Confirmation Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Confirmation Tab

Home » Management » School Administration » School Year Initialization » Execute Tasks Advanced S

## Execute School Year Initialization Tasks

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

Module Task List   Required Information   **Confirmation**   Results

**Step 3: Confirmation**

Listed below are the tasks you have selected to execute now.  
Please review this list and click 'Back' to make any changes. Click 'Execute' to begin executing these tasks.

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

### Confirmation Tab (District Level) on the Execute School Year Initialization Tasks Screen

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the current status of each specific module: Pending, a processing icon, Completed or Failed.

**Note:** *The Student: Memberships Task may take a long period of time.*

If any of the tasks Failed, submit a Help Desk Ticket. Discontinue with SYI until you've heard back from your ITC or StudentInformation State Support.

Click **<Back** to return to the Required Information tab.

Click **Execute** to perform the specified tasks and proceed to the Results tab.

## Execute Tasks – Results Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Results Tab

Home » Management » School Administration » School Year Initialization » Execute Tasks Advanced S

### Execute School Year Initialization Tasks

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

Module Task List   Required Information   Confirmation   **Results**

**Step 4: Results**  
Listed below are the tasks you had selected to execute, and the status of each task.  
Click 'View Log' to see a detailed list of results, with log messages for each task that was executed.

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

View Log   Execute More Tasks

### Results Tab (District Level) on the Execute School Year Initialization Tasks Screen

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the results status of each specific module (Completed or Failed).

Click **View Log** to see a more detailed listing of errors on the Initialization Job History (View Details) screen.

Click **Execute More Tasks** to return to the Module Task List Tab and perform additional tasks. Once all District SYI tasks are complete, you can proceed to Building Level SYI. If any codes have been set up at the district level, you will want to complete the appropriate follow-up checklist tasks. See Section 7. Complete Initialization Checklist tasks for more information.

---

## Calendar Wizard (Building Level)

**Navigation:** Home – Management – School Administration – School Building Administration – Calendar Wizard

Before completing initialization tasks at the Building level, you must first process the Calendar Wizard for each building. The Calendar Wizard creates the school building's master calendar, course terms, periods of the day, rotation days and reporting terms. You must process the Calendar Wizard before the first day of the Master Schedule and before a final Schedule Result is chosen. If you need to run the Calendar Wizard again after you have run Building-Level Initialization tasks, you will need to re-initialize at the Building Level, since the Calendar Wizard resets many initialization tasks at the Building level.

Before running the Calendar Wizard, you will need the following information available for entry:

- Starting and Ending Dates of the School Year
- Starting and Ending Dates of each Reporting Period (Semester, Quarter, Trimester, etc.)
- All Course Lengths your school intends to use (9 week, 3 week, 36 week, etc.)
- Date of each School Holiday
- Date of each Parent-Teacher Conference Day
- Date of each Teacher In-Service Day or Teacher Work Day
- Date of any other day school will not be in session
- Total number of planned attendance days



### **IMPORTANT!**

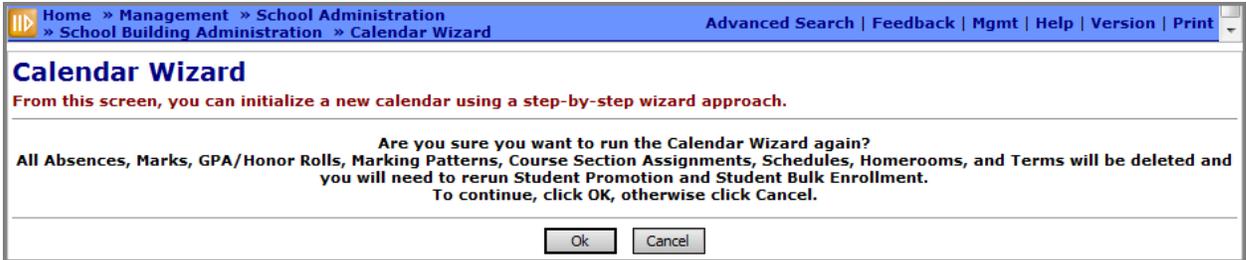
**Effective for the 08/09 school year, schools are no longer required to have definitive reporting term start and stop dates, non-attending days or even the first or last day of school before running Calendar Wizard. New functionality allows schools the ability to start scheduling before a district's school calendar has been approved. However, it is still preferred to have the district's calendar in hand when you do SYI. If fictitious dates are used to complete the Calendar Wizard, there will be additional steps to correct the dates. Please see the *Calendar Step by Step Checklist*.**



**WARNING WHEN RE-RUNNING CALENDAR WIZARD!** Use extreme caution when re-running Calendar Wizard. Rerunning Calendar Wizard wipes out course section assignments – this cannot be restored. One of the tasks undone by rerunning Calendar Wizard is Student: Admission. All admission history and annual records will be deleted. Student Promotion/Bulk Enrollment will need to be rerun. Students will be searchable after Student Promotion/Bulk Enrollment is

rerun. Please refer to the *School Year Initialization Step by Step Checklist – Appendix* section for more information on rerunning Cal Wizard.

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



### Calendar Wizard Confirmation Message

If you hit Cancel, the following message will appear:



### Calendar Wizard Cancellation Message

The Calendar Wizard cannot be re-run once the schedule has been finalized.



### Finalized Calendar Message

In certain unique cases, when the Calendar Wizard is re-run for the same school and school year AND course sections associated with a particular calendar master are tied to terms or schedules that belong to a different calendar master, the Calendar Wizard will error. The following message displays:

'Some Course Sections for Courses for the current Calendar Master are tied to Terms or Schedules that belong to other Calendar Masters. The Calendar Wizard cannot be run until the bad data has been cleaned up. Please contact StudentInformation State Support to report the problem.'



**Next>** – Proceed to the next tab, Reporting Terms.

**Cancel** – Exit the Calendar Wizard and discard changes.

## Calendar Wizard – Reporting Terms Tab

**Navigation: Home – Management – School Administration – School Building Administration – Calendar Wizard – Reporting Terms Tab**

Home » Management » School Administration » School Building Administration » Calendar Wizard

### Calendar Wizard

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

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

Report Card Frequency: -- Select Reporting Term Option --

Select Course Lengths Used

- 0.5 Weeks
- 1.0 Weeks
- 1.5 Weeks
- 2.0 Weeks
- 2.5 Weeks
- 3.0 Weeks
- 3.5 Weeks
- 4.0 Weeks
- 4.5 Weeks
- 5.0 Weeks
- 5.5 Weeks
- 6.0 Weeks
- 6.5 Weeks
- 7.0 Weeks
- 7.5 Weeks
- 8.0 Weeks
- 8.5 Weeks
- 9.0 Weeks

< Back Next > Cancel

**Reporting Terms Tab on the Calendar Wizard Screen**

**Report Card Frequency** (required) – Select your report card frequency from the pull-down menu. This will determine how many reporting periods the Calendar Result will have. Options are: 1 Full-Year Term (36 weeks), 2 Semesters (18 weeks each), 3 Trimesters (12 weeks each), 4 Quarters (9 weeks each), 6 Heximesters (6 weeks each), or 8 Octimesters (4.5 weeks each).

**Select Course Lengths Used** (required) – Add **all** Course Lengths you will be using in the forthcoming year to the selected box. Only course lengths that have a common factor with the Reporting Term length greater than 1 are shown. The smallest fraction of a week allowed for a Reporting Term is .5. For instance, if most of your courses are 9 week courses, but you have a few 3 week courses, and one 4.5 week course, add 9 weeks, 3 weeks and 4.5 weeks to the select box. These are used to generate your Schedule Terms. For more information on Schedule Terms, see *ProgressBook StudentInformation Scheduling Guide*.

Once you have selected a Report Card Frequency, more options will display below the Course Lengths dual-select box. Each Reporting Period (of the number you selected from the pull-down menu) will have three fields.

Code:

Name:

Stop Date:

### Options That Display When You Select Report Card Frequency

**Code** (required) – Enter a code, up to four characters, for each reporting term. If you want the Initialization Tasks to automatically update between years, you will need to use the exact same Code for each Reporting Term (you can also manually map between different codes).

**Name** (required) – Enter a name, up to thirty characters, for each reporting term.

**Stop Date** (required) – The final Reporting Term will have this filled in by default as the Ending Date of the school year.

**<Back** – Return to the previous tab, General.

**Next>** – Proceed to the next tab, Non-Attending Days.

**Cancel** – Exit the Calendar Wizard and discard changes.

## Calendar Wizard – Virtual Terms Tab

**Navigation: Home – Management – School Administration – School Building Administration – Calendar Wizard – Virtual Terms Tab**

On this tab, choose the Virtual Reporting Terms you would like to copy over from a previous year. You can also manually add Virtual Reporting Terms.

Home » Management » School Administration » School Building Administration » Calendar Wizard Advanced Search | Feedback | Mgmt | Help | Print

### Calendar Wizard

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

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

If you would like the system to copy Virtual Reporting Terms from a previous year, select a school year and select the 'Go' button. If you would like to manually add Virtual Reporting Terms, select the 'Add Virtual Term' button. To skip this step, select 'Next'.

Copy Virtual Terms From: 2007-2008

	Code	Name	Start Date	Stop Date	Sort Order
✖	<input type="text" value="Trm1"/>	<input type="text" value="Term 1"/>	Jun 16, 2008	Jul 31, 2008	1

### Virtual Terms Tab on the Calendar Wizard Screen

**Add Virtual Term** – Click this button to add a virtual term manually.

Home » Management » School Administration » School Building Administration » Calendar Wizard Advanced Search | Feedback | Mgmt | Help | Print

### Calendar Wizard

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

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

If you would like the system to copy Virtual Reporting Terms from a previous year, select a school year and select the 'Go' button. If you would like to manually add Virtual Reporting Terms, select the 'Add Virtual Term' button. To skip this step, select 'Next'.

Add Virtual Term Copy Virtual Terms From: 2007-2008

	Code	Name	Start Date	Stop Date	Sort Order
<input type="checkbox"/>	<input type="text" value="Trm1"/>	<input type="text" value="Term 1"/>	Jun 16, 2008	Jul 31, 2008	1
<input type="checkbox"/>	<input type="text" value="Ter2"/>	<input type="text" value="Term 2"/>			2

### Adding Virtual Terms

**Code** – Enter a code for the new Virtual Reporting Term.

**Name** – Enter a name for the new Virtual Reporting Term.

**Start Date** – Displays the Start Date determined on the General tab.

**Stop Date** – Displays the Stop Date determined on the Reporting Terms tab.

**Sort Order** – Displays the order the Virtual Terms are sorted.



- Click the appropriate up/down arrow to rearrange the order of reporting terms.



- Click here to delete the appropriate virtual term.

**Copy Virtual Terms From:** – Select a school year to copy Virtual Terms from the drop down list and click the **Go** button.

Home » Management » School Administration » School Building Administration » Calendar Wizard Advanced Search | Feedback | Mgmt | Help | Print

### Calendar Wizard

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

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

If you would like the system to copy Virtual Reporting Terms from a previous year, select a school year and select the 'Go' button. If you would like to manually add Virtual Reporting Terms, select the 'Add Virtual Term' button. To skip this step, select 'Next'.

Add Virtual Term Copy Virtual Terms From: 2006-2007

	Code	Name	Start Date	Stop Date	Sort Order
<input type="checkbox"/>	<input type="text" value="Trm1"/>	<input type="text" value="Term 1"/>	Jun 16, 2008	Jul 31, 2008	1
<input type="checkbox"/>	<input type="text" value="Ter2"/>	<input type="text" value="Term 2"/>			2
<input type="checkbox"/>	<input type="text" value="Fin"/>	<input type="text" value="Final"/>			3

### Copying Virtual Terms

The terms for the selected school year will appear and will follow Start and Stop Dates predetermined on the General and Reporting Terms tabs.

## Calendar Wizard – Non-Attending Days Tab

**Navigation: Home – Management – School Administration – School Building Administration – Calendar Wizard – Non-Attending Days Tab**

On this tab, enter any Holidays, Parent-Teacher Days, Teacher In-Service Days, Teacher Work Days and any other days school will not be in session.

Date	Thru	Non-Attending Type	Note
Jul 04, 2008	Jul 04, 2008	Holiday	

**Non-Attending Days Tab on the Calendar Wizard Screen**

**Date** (required) – Enter the date of the Non-Attending Day.

**Thru** (optional) – Use this field to enter a range of Non-Attending Days (such as a Winter Break, or Thanksgiving).

**Day Type** (required) – Select the Day Type for the Non-Attending Day from the pull-down menu.

**Note** (optional) – Enter any note you wish to add for the Non-Attending Day, up to thirty characters.

**Add** – Add the Non-Attending Day to the grid. The grid will automatically sort by date.

**X** – Remove the Non-Attending Day.

**<Back** – Return to the previous tab, Reporting Terms.

**Next>** – Proceed to the next tab, Reporting Terms.

**Cancel** – Exit the Calendar Wizard and discard changes.

## Calendar Wizard – Periods Tab

**Navigation: Home – Management – School Administration – School Building Administration – Calendar Wizard – Periods Tab**

### Periods Tab on the Calendar Wizard Screen

**Generate Periods** – Enter a number, or adjust with the arrow buttons, to display an automatically-generated Period grid.

**Go** – Automatically generate a Period grid using the number of periods entered in the Periods field.

**Copy Periods From** – Select another school year to copy the Periods, Period Codes and Period Names from that school year.

**Go** – Generate a Period grid using the data from the selected school year.

**Add Period** – Add a period to the Grid.

	Code	Name
	1	Period 1
	2	Period 2
	3	Period 3

### Adding Periods

**Code** (required) – Enter a code, up to four characters, for the Period. If you want the Initialization Tasks to automatically update between years, you will need to use the exact same Code for each Period (you can also manually map between different codes).

**Name** (required) – Enter a name for the Period, up to thirty characters.

 – Remove this Period.

 – Shift this Period up or down in the list of Periods.

**<Back** – Return to the previous tab, Non-Attending Days.

**Next>** – Proceed to the next tab, Calendar Type.

**Cancel** – Exit the Calendar Wizard and discard changes.

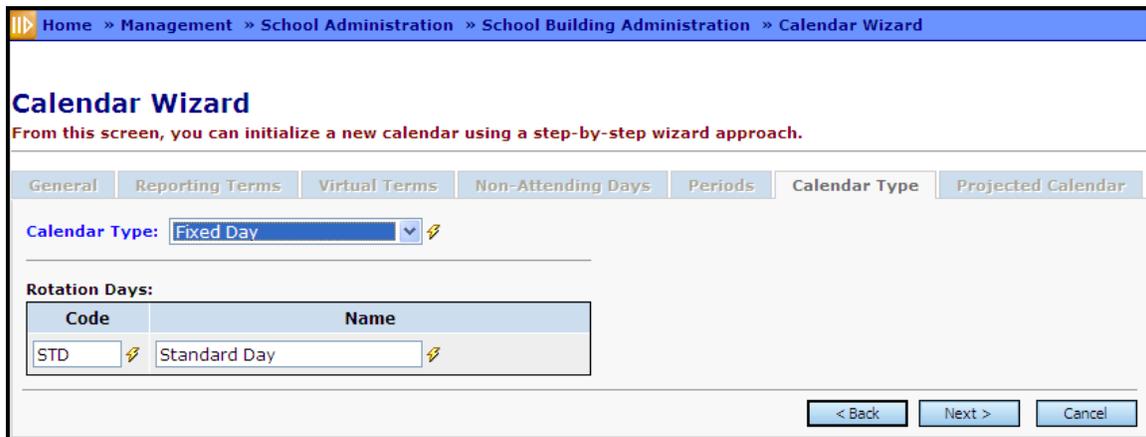
## Calendar Wizard – Calendar Type Tab

**Navigation:** Home – Management – School Administration – School Building Administration – Calendar Wizard – Calendar Type Tab

**Calendar Type** (required) – Select the type of Calendar you wish to use: Fixed Day (all school days have the same schedule), Fixed Rotation Days (repeating sequence of days by week or weeks), or Alternating Rotation Days (repeating sequence of days, regardless of day of the week).

### Fixed Day Calendar Type

Fixed Day is a standard calendar, with every day's schedule being the same. For instance, a class that meets the same time each day, Monday through Friday.



Code	Name
STD	Standard Day

### Fixed Day Calendar Type

**Code** (required) – Enter a code, up to four characters, for this Day. If you want the Initialization Tasks to automatically update between years, you will need to use the exact same Code for each Day (you can also manually map between different codes).

**Name** (required) – Enter a name for this Day, up to thirty characters.

 – Edit the individual Periods of this day.

**<Back** – Return to the previous tab, Periods.

**Next>** – Proceed to the next tab, Projected Calendar.

**Cancel** – Exit the Calendar Wizard and discard changes.

## Fixed Rotation Days Calendar Type

Fixed Rotation Days is a calendar with a repeating sequence of days with different schedules, arranged by week or weeks. For instance, a class that meets only Monday, Wednesday and Friday. You can also create rotations for more than one week, such as classes that meet Monday, Wednesday and Friday one week, then Tuesday and Thursday the next week.

The screenshot shows the 'Calendar Wizard' interface with the following elements:

- Navigation tabs: General, Reporting Terms, Virtual Terms, Non-Attending Days, Periods, **Calendar Type**, Projected Calendar.
- Calendar Type: Fixed Rotation Days (selected in a dropdown menu).
- # of Rotation Weeks: 1 Week (selected in a dropdown menu) with a 'Go' button.
- Rotation Days table:

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

At the bottom of the wizard are buttons for '< Back', 'Next >', and 'Cancel'.

### Fixed Rotation Days Calendar Type

**# of Rotation Weeks** (required) – Select the number of Rotation Weeks from the pull-down menu. Options are 1 Week, 2 Weeks or 3 Weeks.

**Go** – Automatically generate a Rotation Days grid using the number of weeks selected in the # of Rotation Weeks field.

**Code** (required) – Enter a code, up to four characters, for this Day. If you want the Initialization Tasks to automatically update between years, you will need to use the exact same Code for each Day (you can also manually map between different codes).

**Name** (required) – Enter a name for this Day, up to thirty characters.

 – Edit the individual Periods of this day.

**<Back** – Return to the previous tab, Periods.

**Next>** – Proceed to the next tab, Projected Calendar.

**Cancel** – Exit the Calendar Wizard and discard changes.

## Alternating Rotation Days Calendar Type

Alternating Rotation Days is a calendar with a repeating sequence of days, independent of the days of the week. For instance, you could have Blue Days and Gold Days, alternating each attending day, regardless of week length or the day of the week.

The screenshot shows the 'Calendar Wizard' interface with the following elements:

- Navigation bar: Home » Management » School Administration » School Building Administration » Calendar Wizard
- Section Header: **Calendar Wizard**
- Subtext: From this screen, you can initialize a new calendar using a step-by-step wizard approach.
- Tabbed interface with the following tabs: General, Reporting Terms, Virtual Terms, Non-Attending Days, Periods, **Calendar Type**, Projected Calendar.
- Calendar Type: Alternating Rotation Days (dropdown menu)
- # of Alternating Days: 2 (input field with up/down arrow buttons and a 'Go' button)
- Rotation Days table:

	Code	Name
↓	R1	Rotation Day 1
↑	R2	Rotation Day 2

Buttons at the bottom: < Back, Next >, Cancel

### Alternating Rotation Days Calendar Type

**# of Alternating Days** (required) – Enter a number, or adjust with the arrow buttons, to display an automatically-generated Rotation Days grid.

**Go** – Automatically generate a Rotation Days grid using the number of days entered in the # of Alternating Days field.

**Code** (required) – Enter a code, up to four characters, for this Day. If you want the Initialization Tasks to automatically update between years, you will need to use the exact same Code for each Day (you can also manually map between different codes).

**Name** (required) – Enter a name for this Day, up to thirty characters.

– Edit the individual Periods of this day.

**<Back** – Return to the previous tab, Periods.

**Next>** – Proceed to the next tab, Projected Calendar.

**Cancel** – Exit the Calendar Wizard and discard changes.

## Calendar Wizard – Calendar Type Tab – Edit Periods

Navigation: Home – Management – School Administration – School Building Administration – Calendar Wizard – Calendar Type Tab – Edit Record icon (✎)

On this sub-screen, you can edit the Periods of each individual Rotation Day.

Calendar Type: Fixed Rotation Days

Rotation Day Periods:

Code	Include	Start Time	End Time
1	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
2	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
3	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

Save Cancel

< Back Next > Cancel

### Editing Periods of Each Rotation Day

**Include** – If this box is checked, this Period will be included in this Rotation Day. Uncheck to create Partial days.

**Start Time** – If a given Rotation Day has different times for Periods, enter the changed Start Time in this box.

**End Time** – If a given Rotation Day has different times for Periods, enter the changed End Time in this box.

**Save** – Save changes to the Periods of this Rotation Day and return to the standard Calendar Type tab.

**Cancel**– Discard changes to the Periods of this Rotation Day and return to the standard Calendar Type tab.

## Calendar Wizard – Projected Calendar Tab

**Navigation: Home – Management – School Administration – School Building Administration – Calendar Wizard – Projected Calendar Tab**

This tab displays the Calendar that your options in the previous tabs will create.

Calendar	Non-Attending/Attending
6/16/2008 Start of School Year	1/33
6/16/2008 Start of Term 1	1/33
7/4/2008	
7/31/2008 Last Day of Term 1	
7/31/2008 Last Day of School Year	

### Projected Calendar Tab on the Calendar Wizard Screen

**Non-Attending/Attending** (view-only) – This column lists total days for each Reporting Term and for the School Year (listed to the right of the Start Date of each Reporting Term and the School Year). The number before the slash is total Non-Attending Days, and the number after the slash is total Attending Days.

The number of days students attend school may differ from the Attending Days total, since Attending Days includes Parent-Teacher Days, Teacher In-Service Days and Teacher Work Days.

**<Back** – Return to the previous tab, Calendar Type.

**Finish** – Complete the Calendar Wizard and create a Master Calendar.

**Cancel** – Exit the Calendar Wizard and discard changes.

# Complete Initialization Follow-up Checklist

**Navigation: Home – Management – School Administration – School Year Initialization – Follow-up Checklist**

After running tasks at each **Building Level of Initialization**, navigate to “Review Initialization Follow-up Checklist” for a list of tasks yet to be completed.

Home » Management » School Administration » School Year Initialization » Follow-up Checklist	
<b>Review Initialization Follow-up Checklist</b> <input checked="" type="checkbox"/> Incomplete Tasks Only	
This screen provides a working checklist of follow-up tasks for school year initialization	
<b>Initialization Task:</b> Student: Profile	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Student Codes	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Review student code definitions	
<b>Instructions:</b>	<a href="#">Go to: Student Codes Administration</a>
<b>Initialization Task:</b> Student: Admission	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Sub-Calendar Exception Days	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Add exception days to the sub-calendars after running calendar wizard	
<b>Instructions:</b>	<a href="#">Go to: Sub-Calendars</a>
<b>Initialization Task:</b> Student: Admission	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Admission/Withdrawal Codes	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Review admission and withdrawal code definitions	
<b>Instructions:</b>	<a href="#">Go to: Student Codes Administration</a>
<b>Initialization Task:</b> Attendance: Absence Events	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Update Attendance Configuration	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Use DASL Options screen to configure attendance options and defaults	
<b>Instructions:</b>	<a href="#">Go to: DASL Options</a>
<b>Initialization Task:</b> Scheduling: Course Configuration	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Course Terms	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Create and update Course Terms	
<b>Instructions:</b>	<a href="#">Go to: Course Terms</a>
<b>Initialization Task:</b> Marks: Mark Configuration	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Review Marks Options	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Review the Marks options on the DASL Options screen, making any necessary changes	
<b>Instructions:</b>	<a href="#">Go to: DASL Options</a>
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

## Review Initialization Follow-up Checklist

**Incomplete Tasks Only** – Select to display only incomplete tasks or uncheck it to show all tasks, regardless of completion status.

**Initialization Task** – Displays the name of the task.

**Follow-up Task** – Displays the name of the task that is yet to be completed.

**Description** – Displays a brief explanation of the follow-up task.

**Instructions** – Displays instructions on how to complete follow-up tasks.

**Run By/On** – Displays the name, date, and time of when the initialization task was run.

**Completed** – Displays a checkbox that displays if the task has been completed or not.

**“Go to” Link** – Provides a link to the relevant page to complete the follow-up task.

***Note:** Not all tasks will apply to all levels of context.*

---

## **School Year Initialization Tasks (Building Level – First Pass)**

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks**

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before Initialization tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup when completing the tasks at the Building Level. In your first pass on Building-Level Initialization, only run the specified Initialization Tasks. Building-level initialization tasks also require the Calendar Wizard to have been run.



**Important: Change your current working school to the Building and select the year you wish to initialize.**

## Execute Tasks – Module Task List Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Module Task List Tab

Home » Management » School Administration » School Year Initialization » Execute Tasks

### Execute School Year Initialization Tasks

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

Module Task List
Required Information
Confirmation
Results

Step 1: Module Task List

For each module on the task list, select the desired action and click 'Next'.

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

Next >

### Module Task List Tab (Building Level) on the Execute School Year Initialization Tasks Screen

In the first pass, only run the following tasks: School: Configuration, School: Staff Members, Student: Profile, Student: Admission, Student: Homerooms, Student: Memberships, Discipline, Fees, Fee Proration, Attendance: Absence Events, Attendance: Absence Letters and Marks: Mark Configuration.

**Do Not Execute** – Temporarily skip this task.

**Skip** – Skip the task entirely.

**Execute Now** – Perform this task now.

**Completed** – If the task has already been completed at this level, the Completed checkbox will automatically be filled in.

**School: Configuration** – This task will copy basic school configuration including registration defaults.

**School: Staff Members** – This task will copy staff record configuration, including teacher and counselors.

**Student: Profile** – This task will copy the code values used by the student profile. No student specific data is copied.

**Student: Admission** – This task will copy code values for Student Admission and create Sub Calendar Entries.

**Student: Homerooms** – This task will copy Homeroom Configuration.

**Student: Memberships** – This task will copy special education services, memberships, and membership groups.

**Discipline** – This task will copy code values for Discipline.

**Fees** – This task will copy basic fee configuration, excluding Course and Course Section fees.

**Fee Proration** – This task will copy fee prorations and proration details.

**Attendance: Absence Events** – This task will copy configuration and code values used by attendance.

**Attendance: Absence Letters** – This task will copy configuration used to generate absence letters.

**Marks: Mark Configuration** – This task will copy configuration to support Marks.

For information on the remainder of the Module Names, see sections 8. School Year Initialization Tasks (Building Level – Second Pass) and 11. School Year Initialization Tasks (Building Level – Third Pass).

Click **Next>** to proceed to the Required Information Tab.

## Execute Tasks – Required Information Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Required Information Tab

### Execute School Year Initialization Tasks

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

Module Task List   Required Information   Confirmation   Results

**Step 2: Required Information**

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

Source School Year: 2011-2012 ▼

< Back   Next >

### Required Information Tab (Building Level) on the Execute School Year Initialization Tasks Screen

**Source School Year** – Select the school year you wish to copy values from for the new school year.

**New Locker Combination Series** (optional) – Enter a new locker combination series to be defined at the District level. Leave blank if you plan to define a new series at the Building level or retain any combination series from prior years.

Click **<Back** to return to the Module Task List tab.

Click **Next>** to proceed to the Confirmation tab.

## Execute Tasks – Confirmation Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Confirmation Tab

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

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

**Step 3: Confirmation**  
Listed below are the tasks you have selected to execute now.  
Please review this list and click 'Back' to make any changes. Click 'Execute' to begin executing these tasks.

Module Name	Module Description	Status
School: Configuration	Copies basic school configuration settings to the new school year	Pending
School: Staff Members	Copies the roles and settings for staff members	Pending
Student: Profile	Copies code values to support student profiles but no student specific data	Pending
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	Pending
Student: Homerooms	Copies homeroom configuration	Pending
Student: Memberships	Copies membership groups and memberships	Pending
Discipline	Copies code values for discipline	Pending
Fees	Copies basic fee configuration excluding course and course section fees	Pending
Fee Proration	Copies fee prorations and proration details.	Pending
Attendance: Absence Events	Copies configuration and code values used by attendance	Pending
Attendance: Absence Letters	Copies configuration used to generate absence letters	Pending
Marks: Mark Configuration	Builds marking patterns and automatic marks.	Pending

< Back   Execute

**Confirmation Tab (Building Level) on the Execute School Year Initialization Tasks Screen**

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the current status of each specific module: Pending, a processing icon, or Completed.

**Note:** *The Student: Memberships Task may take a long period of time.*

Click **<Back** to return to the Required Information tab.

Click **Execute** to perform the specified tasks and proceed to the Results tab.

## Execute Tasks – Results Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Results Tab

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

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

**Step 4: Results**  
Listed below are the tasks you had selected to execute, and the status of each task.  
Click 'View Log' to see a detailed list of results, with log messages for each task that was executed.

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

View Log | Execute More Tasks

### Results Tab (Building Level) on the Execute School Year Initialization Tasks Screen

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the results status of each specific module (Completed or Failed).

Click **View Log** to see a more detailed listing of errors on the Initialization Job History (View Details) screen.

Click **Execute More Tasks** to return to the Module Task List Tab and perform additional tasks.

## Review Job History

**Navigation: Home – Management – School Administration – School Year Initialization – Job History**

Use the Initialization Job History screen to review the School Year Initialization job details and error messages.



**Important: This Job History information, and that on the View Details page, is different for each Level of Initialization.**

Home » Management » School Administration » School Year Initialization » Job History						
<b>Initialization Job History</b>						
This page allows you to review previous executions of School Year Initialization tasks.						
	Date Run	Run By	Tasks Completed	Tasks Skipped	Tasks Incomplete	Tasks Failed
	12/12/2005 02:38 PM	User, DASL	10	0	0	0
	12/08/2005 02:55 PM	User, DASL	1	0	0	0

**Initialization Job History Screen**

**Date Run** – Displays the date the job was submitted on.

**Run By** – Displays the name of the user who submitted the job in “Lastname, Firstname” format.

**Tasks Completed** – Displays the total of all tasks successfully completed.

**Tasks Skipped** – Displays the total of all tasks skipped for the specified job.

**Tasks Incomplete** – Displays the total of all tasks yet to be completed for the specified job.

**Tasks Failed** – Displays the total of all tasks that failed to complete successfully for the specified job.

Click to view the Initialization Job History Details page for the specific job.

Home » Management » School Administration » School Year Initialization » Job History				Advanced Search   Feedback   Mgmt   Help   Print			
<b>Initialization Job History</b>							
This page allows you to review previous executions of School Year Initialization tasks.							
<b>Execution Date/Time:</b>	12/12/2005 2:38:00 PM			<b>Executed By:</b>	User, DASL		
<b># of Tasks Completed:</b>	10			<b># of Tasks Skipped:</b>	0		
<b># of Tasks Incomplete:</b>	0			<b># of Tasks Failed:</b>	0		
<b>Include Message Types:</b>	<input checked="" type="checkbox"/> Fatal Errors	<input checked="" type="checkbox"/> Non-Fatal Errors	<input type="checkbox"/> Informational Messages	<input type="button" value="Refresh"/>	<input type="button" value="View Jobs"/>		
<b>Task Name:</b>	Student: Profile						
<b>Task Status:</b>	Completed						
<b>Source Year:</b>	2004						
<b>Task Description:</b>	Copies code values to support student profiles but no student specific data						
<b>Follow-Up Actions:</b>	<input type="checkbox"/> Student Codes						
	<b>Message Type</b>	<b>Table Name</b>	<b>Message</b>				
	There are no records to display						

**Job History Details**

**Include Message Types** – Check the appropriate box to display Fatal Errors, Non-Fatal Errors and/or Informational Messages.

**Fatal Errors** are represented when an entire record is not inserted because not all required elements were available. For example, when a schedule is copied and course sections are created, if a course section could not be matched to an existing course, that record would not be inserted.

**Non-Fatal Errors** occur when an optional field within a record could not be “translated.” The example with Fees and Memberships, given above, could generate these types of errors. The new fee record could still be inserted without the membership filter value populated.

<p><b>Task Name:</b> Fees</p> <p><b>Task Status:</b> Failed</p> <p><b>Source Year:</b> 2004</p> <p><b>Task Description:</b> Copies basic fee configuration excluding course and course section fees</p>	<table border="1"> <thead> <tr> <th>Message Type</th> <th>Table Name</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Fatal Error</td> <td>Unhandled Exception</td> <td>Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. The statement has been terminated. The statement has been terminated.</td> </tr> </tbody> </table>	Message Type	Table Name	Message	Non-Fatal Error	tblFee	2627 Update could not complete	Non-Fatal Error	tblFee	2627 Update could not complete	Non-Fatal Error	tblFee	2627 Update could not complete	Non-Fatal Error	tblFee	2627 Update could not complete	Fatal Error	Unhandled Exception	Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. The statement has been terminated. The statement has been terminated.
Message Type	Table Name	Message																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Fatal Error	Unhandled Exception	Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. The statement has been terminated. The statement has been terminated.																	

### Non-Fatal Errors in the Job History Details

**Informational Messages** are simply that: messages providing optional information, such as how many codes were copied, which database tables were affected, and so on.

<p><b>Task Name:</b> Student: Profile</p> <p><b>Task Status:</b> Completed</p> <p><b>Source Year:</b> 2004</p> <p><b>Task Description:</b> Copies code values to support student profiles but no student specific data</p> <p><b>Follow-Up Actions:</b> <input type="checkbox"/> Student Codes</p>	<table border="1"> <thead> <tr> <th>Message Type</th> <th>Table Name</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 6 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 6 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 7 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 7 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 15 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 15 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 19 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 19 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 25 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 25 updated.</td> </tr> </tbody> </table>	Message Type	Table Name	Message	Informational Message	tblCode	0 record(s) of codetypeid 6 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 6 updated.	Informational Message	tblCode	0 record(s) of codetypeid 7 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 7 updated.	Informational Message	tblCode	0 record(s) of codetypeid 15 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 15 updated.	Informational Message	tblCode	0 record(s) of codetypeid 19 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 19 updated.	Informational Message	tblCode	0 record(s) of codetypeid 25 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 25 updated.
Message Type	Table Name	Message																																
Informational Message	tblCode	0 record(s) of codetypeid 6 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 6 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 7 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 7 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 15 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 15 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 19 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 19 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 25 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 25 updated.																																

### Informational Messages in the Job History Details

**Follow-Up Actions** – Each task may have one or more Follow-Up Actions listed at the lower-left of the task detail.



**Important:** These actions are vital to School Year Initialization, but must be done manually for each Level of Initialization. For more information on Follow-Up Actions, see section 7. Complete Initialization Follow-up Checklist.

Click **Refresh** to update the information on the screen. Use this option if you have changed the “Include Message Types” options.

Click **View Jobs** to return to the main Job History summary page.

## Complete Initialization Follow-up Checklist

**Navigation: Home – Management – School Administration – School Year Initialization – Follow-up Checklist**

After running tasks at each **Building Level of Initialization**, navigate to “Review Initialization Follow-up Checklist” for a list of tasks yet to be completed.

Home » Management » School Administration » School Year Initialization » Follow-up Checklist			
<b>Review Initialization Follow-up Checklist</b>		<input checked="" type="checkbox"/> Incomplete Tasks Only	
This screen provides a working checklist of follow-up tasks for school year initialization			
<b>Initialization Task:</b>	Student: Profile	<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Student Codes	<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Review student code definitions		
<b>Instructions:</b>	<a href="#">Go to: Student Codes Administration</a>		
<b>Initialization Task:</b>	Student: Admission	<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Sub-Calendar Exception Days	<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Add exception days to the sub-calendars after running calendar wizard		
<b>Instructions:</b>	<a href="#">Go to: Sub-Calendars</a>		
<b>Initialization Task:</b>	Student: Admission	<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Admission/Withdrawal Codes	<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Review admission and withdrawal code definitions		
<b>Instructions:</b>	<a href="#">Go to: Student Codes Administration</a>		
<b>Initialization Task:</b>	Attendance: Absence Events	<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Update Attendance Configuration	<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Use DASL Options screen to configure attendance options and defaults		
<b>Instructions:</b>	<a href="#">Go to: DASL Options</a>		
<b>Initialization Task:</b>	Scheduling: Course Configuration	<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Course Terms	<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Create and update Course Terms		
<b>Instructions:</b>	<a href="#">Go to: Course Terms</a>		
<b>Initialization Task:</b>	Marks: Mark Configuration	<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Review Marks Options	<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Review the Marks options on the DASL Options screen, making any necessary changes		
<b>Instructions:</b>	<a href="#">Go to: DASL Options</a>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

### Review Initialization Follow-up Checklist

**Incomplete Tasks Only** – Select to display only incomplete tasks or uncheck it to show all tasks, regardless of completion status.

**Initialization Task** – Displays the name of the task.

**Follow-up Task** – Displays the name of the task that is yet to be completed.

**Description** – Displays a brief explanation of the follow-up task.

**Instructions** – Displays instructions on how to complete follow-up tasks.

**Run By/On** – Displays the name, date, and time of when the initialization task was run.

**Completed** – Displays a checkbox that displays if the task has been completed or not.

**“Go to” Link** – Provides a link to the relevant page to complete the follow-up task.

***Note:** Not all tasks will apply to all levels of context.*

---

## **School Year Initialization Tasks (Building Level – Second Pass)**

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks**

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before initialization tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup when completing the tasks at the Building Level. Building-level initialization tasks also require the Calendar Wizard to have been run.



**Important: Change your current working school to the Building and select the year you wish to initialize.**

## Execute Tasks – Module Task List Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Module Task List Tab

Home » Management » School Administration » School Year Initialization » Execute Tasks

### Execute School Year Initialization Tasks

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

Module Task List   Required Information   Confirmation   Results

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

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

Next >

### Module Task List Tab (Second Pass) on the Execute School Year Initialization Tasks Screen

In the second pass, only run the following tasks: Scheduling: Course Configuration and Scheduling: Courses.

**Do Not Execute** – Temporarily skip this task.

**Skip** – Skip the task entirely.

**Execute Now** – Perform this task now.

**Completed** – If the task has already been completed at this level, the Completed checkbox will automatically be filled in.

**Scheduling: Course Configuration** – This task will copy setup tables used by the course catalog.

**Scheduling: Courses** – This task will copy the course catalog, Credit Flex values and related fees.

For information on the remainder of the Module Names, see sections 5. School Year Initialization Tasks (Building Level – First Pass) and 11. School Year Initialization Tasks (Building Level – Third Pass).

Click **Next**> to proceed to the Required Information Tab.

## Execute Tasks – Required Information Tab

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Required Information Tab**

Home » Management » School Administration » School Year Initialization » Execute Tasks		Advanced Search				
<b>Execute School Year Initialization Tasks</b>						
This wizard will allow you to initialize a school year step by step						
<table border="1"> <tr> <td>Module Task List</td> <td>Required Information</td> <td>Confirmation</td> <td>Results</td> </tr> </table>			Module Task List	Required Information	Confirmation	Results
Module Task List	Required Information	Confirmation	Results			
<b>Step 2: Required Information</b>						
In order to process the selected tasks, some additional information is required. Please complete the form below and click 'Next'.						
Source School Year: 2005-2006						
-----						
<b>Source Report Term</b>		<b>Target Report Term</b>				
1QTR - 1st Quarter	→	1QTR - 1st Quarter				
2QTR - 2nd Quarter	→	2QTR - 2nd Quarter				
3QTR - 3rd Quarter	→	3QTR - 3rd Quarter				
4QTR - 4th Quarter	→	4QTR - 4th Quarter				
-----						
<b>Source Course Term</b>		<b>Target Course Term</b>				
AY - All Year	→	AY - All Year				
-----						
<b>Source Period</b>		<b>Target Period</b>				
Day: M - Period: 1	→	Day: M - Period: 1				
Day: M - Period: 2	→	Day: M - Period: 2				
Day: M - Period: 3	→	Day: M - Period: 3				
Day: M - Period: 4	→	Day: M - Period: 4				
Day: M - Period: 5	→	Day: M - Period: 5				
Day: M - Period: 6	→	Day: M - Period: 6				
Day: M - Period: 7	→	Day: M - Period: 7				
Day: M - Period: 8	→	Day: M - Period: 8				
Day: M - Period: 9	→	Day: M - Period: 9				

**Required Information Tab (Second Pass) on the Execute School Year Initialization Tasks Screen (Top)**

Day: F - Period: 1	→	Day: F - Period: 1
Day: F - Period: 2	→	Day: F - Period: 2
Day: F - Period: 3	→	Day: F - Period: 3
Day: F - Period: 4	→	Day: F - Period: 4
Day: F - Period: 5	→	Day: F - Period: 5
Day: F - Period: 6	→	Day: F - Period: 6
Day: F - Period: 7	→	Day: F - Period: 7
Day: F - Period: 8	→	Day: F - Period: 8
Day: F - Period: 9	→	Day: F - Period: 9

**Required Information Tab (Second Pass) on the  
Execute School Year Initialization Tasks Screen (Bottom)**

**Source School Year** – Select the school year you wish to copy values from for the new school year.

**Source Report Terms** – Each Target Report Term will have a Source Report Term assigned to it if the Reporting Term codes match exactly. Otherwise, select the appropriate Source Reporting Term or select "-- DO NOT LOAD --" for each Reporting Term.

**Source Course Term** – Each Target Course Term will have a Source Course Term assigned to it if the Course Term codes match exactly. Otherwise, select the appropriate Source Course Term or select "-- DO NOT LOAD --" for each Course Term.

**Source Period** – Each Target Period for each school day will have a Source Period assigned to it if the Period codes, Day Type and School Day Codes all match exactly. Otherwise, select the appropriate Source Period or select "-- DO NOT LOAD --" for each period of each day.

Click **<Back** to return to the Module Task List tab.

Click **Next>** to proceed to the Confirmation tab.

## Execute Tasks – Confirmation Tab

Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Confirmation Tab

Module Name	Module Description	Status
Scheduling: Course Configuration	Copies code configuration used by course master	Pending
Scheduling: Courses	Copies course catalog and related fees	Pending

Confirmation Tab (Second Pass) on the Execute School Year Initialization Tasks Screen

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the current status of each specific module: Pending, a processing icon, or Completed.

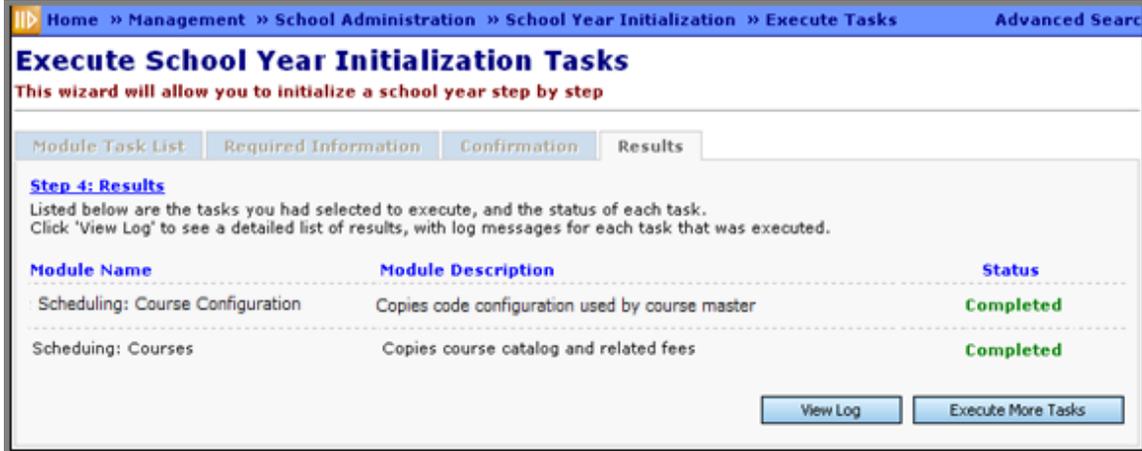
*Note: The Scheduling: Schedule Task will take a long period of time.*

Click **<Back** to return to the Required Information tab.

Click **Execute** to perform the specified tasks and proceed to the Results tab.

## Execute Tasks – Results Tab

**Navigation:** Home – Management – School Administration – School Year Initialization – Execute Tasks – Results Tab



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

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

**Step 4: Results**  
Listed below are the tasks you had selected to execute, and the status of each task.  
Click 'View Log' to see a detailed list of results, with log messages for each task that was executed.

Module Name	Module Description	Status
Scheduling: Course Configuration	Copies code configuration used by course master	Completed
Scheduling: Courses	Copies course catalog and related fees	Completed

[View Log](#) [Execute More Tasks](#)

**Results Tab (Second Pass) on the Execute School Year Initialization Tasks Screen**

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the results status of each specific module (Completed or Failed).

Click **View Log** to see a more detailed listing of errors on the Initialization Job History (View Details) screen.

Click **Execute More Tasks** to return to the Module Task List Tab and perform additional tasks.

## Review Job History

**Navigation:** Home – Management – School Administration – School Year Initialization – Job History

Use the Initialization Job History screen to review the School Year Initialization job details and error messages.



**Important:** This Job History information, and that on the View Details page, is different for each Level of Initialization.

Home » Management » School Administration » School Year Initialization » Job History						
<b>Initialization Job History</b>						
This page allows you to review previous executions of School Year Initialization tasks.						
	Date Run	Run By	Tasks Completed	Tasks Skipped	Tasks Incomplete	Tasks Failed
	12/12/2005 02:38 PM	User, DASL	10	0	0	0
	12/08/2005 02:55 PM	User, DASL	1	0	0	0

### Initialization Job History Screen

**Date Run** – Displays the date the job was submitted on.

**Run By** – Displays the name of the user who submitted the job in “Lastname, Firstname” format.

**Tasks Completed** – Displays the total of all tasks successfully completed.

**Tasks Skipped** – Displays the total of all tasks skipped for the specified job.

**Tasks Incomplete** – Displays the total of all tasks yet to be completed for the specified job.

**Tasks Failed** – Displays the total of all tasks that failed to complete successfully for the specified job.

Click to view the Initialization Job History Details page for the specific job.

Home » Management » School Administration » School Year Initialization » Job History				Advanced Search   Feedback   Mgmt   Help   Print			
<b>Initialization Job History</b>							
This page allows you to review previous executions of School Year Initialization tasks.							
<b>Execution Date/Time:</b>	12/12/2005 2:38:00 PM			<b>Executed By:</b>	User, DASL		
<b># of Tasks Completed:</b>	10			<b># of Tasks Skipped:</b>	0		
<b># of Tasks Incomplete:</b>	0			<b># of Tasks Failed:</b>	0		
<b>Include Message Types:</b> <input checked="" type="checkbox"/> Fatal Errors <input checked="" type="checkbox"/> Non-Fatal Errors <input type="checkbox"/> Informational Messages <input type="button" value="Refresh"/> <input type="button" value="View Jobs"/>							
<b>Task Name:</b>	Student: Profile						
<b>Task Status:</b>	Completed						
<b>Source Year:</b>	2004						
<b>Task Description:</b>	Copies code values to support student profiles but no student specific data						
<b>Follow-Up Actions:</b>	<input type="checkbox"/> Student Codes						
	<b>Message Type</b>		<b>Table Name</b>		<b>Message</b>		
					There are no records to display		

### Initialization Job History

**Include Message Types** – Check the appropriate box to display Fatal Errors, Non-Fatal Errors and/or Informational Messages.

**Fatal Errors** are represented when an entire record is not inserted because not all required elements were available. For example, when a schedule is copied and course sections are created, if a course section could not be matched to an existing course, that record would not be inserted.

**Non-Fatal Errors** occur when an optional field within a record could not be “translated.” The example with Fees and Memberships, given above, could

generate these types of errors. The new fee record could still be inserted without the membership filter value populated.

<p><b>Task Name:</b> Fees</p> <p><b>Task Status:</b> <b>Failed</b></p> <p><b>Source Year:</b> 2004</p> <p><b>Task Description:</b> Copies basic fee configuration excluding course and course section fees</p>	<table border="1"> <thead> <tr> <th>Message Type</th> <th>Table Name</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Non-Fatal Error</td> <td>tblFee</td> <td>2627 Update could not complete</td> </tr> <tr> <td>Fatal Error</td> <td>Unhandled Exception</td> <td>Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. The statement has been terminated. The statement has been terminated.</td> </tr> </tbody> </table>	Message Type	Table Name	Message	Non-Fatal Error	tblFee	2627 Update could not complete	Non-Fatal Error	tblFee	2627 Update could not complete	Non-Fatal Error	tblFee	2627 Update could not complete	Non-Fatal Error	tblFee	2627 Update could not complete	Fatal Error	Unhandled Exception	Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. The statement has been terminated. The statement has been terminated.
Message Type	Table Name	Message																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Non-Fatal Error	tblFee	2627 Update could not complete																	
Fatal Error	Unhandled Exception	Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. The statement has been terminated. The statement has been terminated.																	

### Non-Fatal Errors in the Initialization Job History

**Informational Messages** are simply that: messages providing optional information, such as how many codes were copied, which database tables were affected, and so on.

<p><b>Task Name:</b> Student: Profile</p> <p><b>Task Status:</b> <b>Completed</b></p> <p><b>Source Year:</b> 2004</p> <p><b>Task Description:</b> Copies code values to support student profiles but no student specific data</p> <p><b>Follow-Up Actions:</b> <input type="checkbox"/> Student Codes</p>	<table border="1"> <thead> <tr> <th>Message Type</th> <th>Table Name</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 6 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 6 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 7 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 7 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 15 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 15 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 19 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 19 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 25 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 25 updated.</td> </tr> </tbody> </table>	Message Type	Table Name	Message	Informational Message	tblCode	0 record(s) of codetypeid 6 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 6 updated.	Informational Message	tblCode	0 record(s) of codetypeid 7 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 7 updated.	Informational Message	tblCode	0 record(s) of codetypeid 15 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 15 updated.	Informational Message	tblCode	0 record(s) of codetypeid 19 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 19 updated.	Informational Message	tblCode	0 record(s) of codetypeid 25 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 25 updated.
Message Type	Table Name	Message																																
Informational Message	tblCode	0 record(s) of codetypeid 6 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 6 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 7 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 7 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 15 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 15 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 19 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 19 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 25 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 25 updated.																																

### Information Messages in the Initialization Job History

**Follow-Up Actions** – Each task may have one or more Follow-Up Actions listed at the lower-left of the task detail.



**Important: These actions are vital to School Year Initialization, but must be done manually for each Level of Initialization. For more information on Follow-Up Actions, see section 10. Complete Initialization Follow-up Checklist.**

Click **Refresh** to update the information on the screen. Use this option if you have changed the “Include Message Types” options.

Click **View Jobs** to return to the main Job History summary page.

## Complete Initialization Follow-up Checklist

**Navigation: Home – Management – School Administration – School Year Initialization – Follow-up Checklist**

After running tasks **at each Building Level of Initialization**, navigate to “Review Initialization Follow-up Checklist” for a list of tasks yet to be completed.

Home » Management » School Administration » School Year Initialization » Follow-up Checklist					
<b>Review Initialization Follow-up Checklist</b>					<input checked="" type="checkbox"/> Incomplete Tasks Only
This screen provides a working checklist of follow-up tasks for school year initialization					
<b>Initialization Task:</b>	Student: Profile			<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Student Codes			<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Review student code definitions				
<b>Instructions:</b>					<a href="#">Go to: Student Codes Administration</a>
<b>Initialization Task:</b>	Student: Admission			<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Sub-Calendar Exception Days			<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Add exception days to the sub-calendars after running calendar wizard				
<b>Instructions:</b>					<a href="#">Go to: Sub-Calendars</a>
<b>Initialization Task:</b>	Student: Admission			<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Admission/Withdrawal Codes			<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Review admission and withdrawal code definitions				
<b>Instructions:</b>					<a href="#">Go to: Student Codes Administration</a>
<b>Initialization Task:</b>	Attendance: Absence Events			<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Update Attendance Configuration			<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Use DASL Options screen to configure attendance options and defaults				
<b>Instructions:</b>					<a href="#">Go to: DASL Options</a>
<b>Initialization Task:</b>	Scheduling: Course Configuration			<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Course Terms			<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Create and update Course Terms				
<b>Instructions:</b>					<a href="#">Go to: Course Terms</a>
<b>Initialization Task:</b>	Marks: Mark Configuration			<b>Run By/On:</b>	User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b>	Review Marks Options			<b>Completed:</b>	<input type="checkbox"/>
<b>Description:</b>	Review the Marks options on the DASL Options screen, making any necessary changes				
<b>Instructions:</b>					<a href="#">Go to: DASL Options</a>

Save Cancel

**Review Initialization Follow-up Check List Screen**

**Incomplete Tasks Only** – Select the checkbox to display only incomplete tasks or uncheck it to show all tasks, regardless of completion status.

**Initialization Task** – Displays the name of the task.

**Follow-up Task** – Displays the name of the task that is yet to be completed.

**Description** – Displays a brief explanation of the follow-up task.

**Instructions** – Displays instructions on how to complete follow-up tasks.

**Run By/On** – Displays the name, date, and time of when the initialization task was run.

**Completed** – Displays a checkbox that displays if the task has been completed or not.

**“Go to” Link** – Provides a link to the relevant page to complete the follow-up task

*Note: Not all tasks will apply to all levels of context.*

---

## School Year Initialization Tasks (Building Level – Third Pass)

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks**

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before the remaining tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup when completing the tasks at the Building Level. Building-level initialization tasks also require the Calendar Wizard to have been run.



**Important: Change your current working school to the Building and select the year you wish to initialize.**

### Execute Tasks – Module Task List Tab

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Module Task List Tab**

Home » Management » School Administration » School Year Initialization » Execute Tasks

## Execute School Year Initialization Tasks

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

Module Task List | Required Information | Confirmation | Results

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

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

Next >

### Modula Task List Tab (Third Pass) on the Execute School Year Initialization Tasks Screen

In the third pass, only run the following tasks: Scheduling: Schedule, Marks: Marking Patterns, Marks: GPAs, Marks: Honor Rolls and Course History.

**Do Not Execute** – Temporarily skip this task.

**Skip** – Skip the task entirely.

**Execute Now** – Perform this task now.

**Completed** – If the task has already been completed at this level, the Completed checkbox will automatically be filled in.

**Scheduling: Schedule** – This task will copy course sections and the related fees from an existing schedule into a new schedule. StudentInformation copies course information, such as course section ID, staff ID, teacher name, location, start date and end date periods. The initial Teacher History records in the new school year are created from the Meeting Time records of the current school year.

**Marks: Marking Patterns** – This task will copy code values for Marking Patterns.

**Marks: GPAs** – This task will copy configuration used to calculate GPA's.

**Marks: Honor Rolls** – This task will copy configuration used to support Honor Roll.

**Course History** – This task will copy code values for Transfer Status.

For information on the remainder of the Module Names, see sections 5. School Year Initialization Tasks (Building Level – First Pass) and 8. School Year Initialization Tasks (Building Level – Second Pass).

Click **Next>** to proceed to the Required Information Tab.

## Execute Tasks – Required Information Tab

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Required Information Tab**

Home » Management » School Administration » School Year Initialization » Execute Tasks Advanced Search

### Execute School Year Initialization Tasks

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

Module Task List   Required Information   Confirmation   Results

**Step 2: Required Information**

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

**Source School Year:** 2005-2006

---

Source Report Term	Target Report Term
1QTR - 1st Quarter	1QTR - 1st Quarter
2QTR - 2nd Quarter	2QTR - 2nd Quarter
3QTR - 3rd Quarter	3QTR - 3rd Quarter
4QTR - 4th Quarter	4QTR - 4th Quarter

---

Source Course Term	Target Course Term
AY - All Year	AY - All Year

---

Source Period	Target Period
Day: M - Period: 1	Day: M - Period: 1
Day: M - Period: 2	Day: M - Period: 2
Day: M - Period: 3	Day: M - Period: 3
Day: M - Period: 4	Day: M - Period: 4
Day: M - Period: 5	Day: M - Period: 5
Day: M - Period: 6	Day: M - Period: 6
Day: M - Period: 7	Day: M - Period: 7
Day: M - Period: 8	Day: M - Period: 8
Day: M - Period: 9	Day: M - Period: 9

**Required Information Tab (Third Pass) on the Execute School Year Initialization Tasks Screen (Top)**

Day: F - Period: 1	→	Day: F - Period: 1
Day: F - Period: 2	→	Day: F - Period: 2
Day: F - Period: 3	→	Day: F - Period: 3
Day: F - Period: 4	→	Day: F - Period: 4
Day: F - Period: 5	→	Day: F - Period: 5
Day: F - Period: 6	→	Day: F - Period: 6
Day: F - Period: 7	→	Day: F - Period: 7
Day: F - Period: 8	→	Day: F - Period: 8
Day: F - Period: 9	→	Day: F - Period: 9

**Required Information Tab (Third Pass) on the  
Execute School Year Initialization Tasks Screen (Bottom)**

**Source School Year** – Select the school year you wish to copy values from for the new school year.

**Source Report Terms** – Each Target Report Term will have a Source Report Term assigned to it if the Reporting Term codes match exactly. Otherwise, select the appropriate Source Reporting Term or select "-- DO NOT LOAD --" for each Reporting Term.

**Source Course Term** – Each Target Course Term will have a Source Course Term assigned to it if the Course Term codes match exactly. Otherwise, select the appropriate Source Course Term or select "-- DO NOT LOAD --" for each Course Term.

**Source Period** – Each Target Period for each school day will have a Source Period assigned to it if the Period codes, Day Type and School Day Codes all match exactly. Otherwise, select the appropriate Source Period or select "-- DO NOT LOAD --" for each period of each day.

Click **<Back** to return to the Module Task List tab.

Click **Next>** to proceed to the Confirmation tab.

## Execute Tasks – Confirmation Tab

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Confirmation Tab**

Home » Management » School Administration » School Year Initialization » Execute Tasks Advanced Search

## Execute School Year Initialization Tasks

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

Module Task List   Required Information   **Confirmation**   Results

**Step 3: Confirmation**  
Listed below are the tasks you have selected to execute now.  
Please review this list and click 'Back' to make any changes. Click 'Execute' to begin executing these tasks.

Module Name	Module Description	Status
Scheduling: Schedule	Copies course sections and related fees	Pending
Marks: Marking Patterns	Builds marking patterns and automatic marks	Pending
Marks: GPAs	Configures GPA sets	Pending
Marks: Honor Rolls	Copies configuration used to support honor rolls	Pending
Course History	Copies configuration used to support course history	Pending

### Confirmation Tab (Third Pass) on the Execute School Year Initialization Screen

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the current status of each specific module: Pending, a processing icon, or Completed.

***Note:** The Scheduling: Schedule Task will take a long period of time.*

Click **<Back** to return to the Required Information tab.

Click **Execute** to perform the specified tasks and proceed to the Results tab.

### Execute Tasks – Results Tab

**Navigation: Home – Management – School Administration – School Year Initialization – Execute Tasks – Results Tab**

Home » Management » School Administration » School Year Initialization » Execute Tasks Advanced Search

## Execute School Year Initialization Tasks

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

Module Task List   Required Information   Confirmation   **Results**

**Step 4: Results**  
Listed below are the tasks you had selected to execute, and the status of each task.  
Click 'View Log' to see a detailed list of results, with log messages for each task that was executed.

Module Name	Module Description	Status
Scheduling: Schedule	Copies course sections and related fees	Completed
Marks: Marking Patterns	Builds marking patterns and automatic marks	Completed
Marks: GPAs	Configures GPA sets	Completed
Marks: Honor Rolls	Copies configuration used to support honor rolls	Completed
Course History	Copies configuration used to support course history	Completed

View Log   Execute More Tasks

### Results Tab (Third Pass) on the Execute School Year Initialization Tasks Screen

**Module Name** – Displays the name of the tasks to be performed.

**Module Description** – Displays a brief description of the module to be performed.

**Status** – Displays the results status of each specific module (Completed or Failed).

Click **View Log** to see a more detailed listing of errors on the Initialization Job History (View Details) screen.

Click **Execute More Tasks** to return to the Module Task List Tab and perform additional tasks.

## Review Job History

**Navigation: Home – Management – School Administration – School Year Initialization – Job History**

Use the Initialization Job History screen to review the School Year Initialization job details and error messages.



**Important: This Job History information, and that on the View Details page, is different for each Level of Initialization.**

Home » Management » School Administration » School Year Initialization » Job History

### Initialization Job History

This page allows you to review previous executions of School Year Initialization tasks.

	Date Run	Run By	Tasks Completed	Tasks Skipped	Tasks Incomplete	Tasks Failed
	12/12/2005 02:38 PM	User, DASL	10	0	0	0
	12/08/2005 02:55 PM	User, DASL	1	0	0	0

### Initialization Job History Screen

**Date Run** – Displays the date the job was submitted on.

**Run By** – Displays the name of the user who submitted the job in “Lastname, Firstname” format.

**Tasks Completed** – Displays the total of all tasks successfully completed.

**Tasks Skipped** – Displays the total of all tasks skipped for the specified job.

**Tasks Incomplete** – Displays the total of all tasks yet to be completed for the specified job.

**Tasks Failed** – Displays the total of all tasks that failed to complete successfully for the specified job.

Click  to view the Initialization Job History Details page for the specific job.

Home » Management » School Administration » School Year Initialization » Job History Advanced Search | Feedback | Mgmt | Help | Print

### Initialization Job History

This page allows you to review previous executions of School Year Initialization tasks.

<b>Execution Date/Time:</b>	12/12/2005 2:38:00 PM	<b>Executed By:</b>	User, DASL
<b># of Tasks Completed:</b>	10	<b># of Tasks Skipped:</b>	0
<b># of Tasks Incomplete:</b>	0	<b># of Tasks Failed:</b>	0

**Include Message Types:**  Fatal Errors  Non-Fatal Errors  Informational Messages

Task Name:	Message Type	Table Name	Message
Student: Profile			There are no records to display

**Task Status:**  
Completed

**Source Year:**  
2004

**Task Description:**  
Copies code values to support student profiles but no student specific data

**Follow-Up Actions:**  
 Student Codes

### Initialization Job History Details

**Include Message Types** – Check the appropriate box to display Fatal Errors, Non-Fatal Errors and/or Informational Messages.

**Fatal Errors** are represented when an entire record is not inserted because not all required elements were available. For example, when a schedule is copied and course sections are created, if a course section could not be matched to an existing course, that record would not be inserted.

**Non-Fatal Errors** occur when an optional field within a record could not be “translated.” The example with Fees and Memberships, given above, could generate these types of errors. The new fee record could still be inserted without the membership filter value populated.

Task Name:	Message Type	Table Name	Message
Fees	Non-Fatal Error	tblFee	2627 Update could not complete
	Non-Fatal Error	tblFee	2627 Update could not complete
	Non-Fatal Error	tblFee	2627 Update could not complete
	Non-Fatal Error	tblFee	2627 Update could not complete
	Fatal Error	Unhandled Exception	Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. Violation of UNIQUE KEY constraint 'IX_tblFee'. Cannot insert duplicate key in object 'tblFee'. The statement has been terminated. The statement has been terminated. The statement has been terminated.

**Task Status:**  
Failed

**Source Year:**  
2004

**Task Description:**  
Copies basic fee configuration excluding course and course section fees

### Non-Fatal Errors in the Initialization Job History

**Informational Messages** are simply that: messages providing optional information, such as how many codes were copied, which database tables were affected, and so on.

<p><b>Task Name:</b> Student: Profile</p> <p><b>Task Status:</b> Completed</p> <p><b>Source Year:</b> 2004</p> <p><b>Task Description:</b> Copies code values to support student profiles but no student specific data</p> <p><b>Follow-Up Actions:</b> <input type="checkbox"/> Student Codes</p>	<table border="1"> <thead> <tr> <th>Message Type</th> <th>Table Name</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 6 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 6 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 7 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 7 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 15 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 15 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 19 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 19 updated.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 25 inserted.</td> </tr> <tr> <td>Informational Message</td> <td>tblCode</td> <td>0 record(s) of codetypeid 25 updated.</td> </tr> </tbody> </table>	Message Type	Table Name	Message	Informational Message	tblCode	0 record(s) of codetypeid 6 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 6 updated.	Informational Message	tblCode	0 record(s) of codetypeid 7 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 7 updated.	Informational Message	tblCode	0 record(s) of codetypeid 15 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 15 updated.	Informational Message	tblCode	0 record(s) of codetypeid 19 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 19 updated.	Informational Message	tblCode	0 record(s) of codetypeid 25 inserted.	Informational Message	tblCode	0 record(s) of codetypeid 25 updated.
Message Type	Table Name	Message																																
Informational Message	tblCode	0 record(s) of codetypeid 6 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 6 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 7 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 7 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 15 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 15 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 19 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 19 updated.																																
Informational Message	tblCode	0 record(s) of codetypeid 25 inserted.																																
Informational Message	tblCode	0 record(s) of codetypeid 25 updated.																																

### Information Messages in the Initialization Job History

**Follow-Up Actions** – Each task may have one or more Follow-Up Actions listed at the lower-left of the task detail.



**Important: These actions are vital to School Year Initialization, but must be done manually for each Level of Initialization. For more information on Follow-Up Actions, see section 13. Complete Initialization Follow-up Checklist.**

Click **Refresh** to update the information on the screen. Use this option if you have changed the “Include Message Types” options.

Click **View Jobs** to return to the main Job History summary page.

## Complete Initialization Follow-up Checklist

**Navigation: Home – Management – School Administration – School Year Initialization – Follow-up Checklist**

After running tasks **at each Building Level of Initialization**, navigate to “Review Initialization Follow-up Checklist” for a list of tasks yet to be completed.

Home » Management » School Administration » School Year Initialization » Follow-up Checklist

## Review Initialization Follow-up Checklist Incomplete Tasks Only

This screen provides a working checklist of follow-up tasks for school year initialization

<b>Initialization Task:</b> Student: Profile	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Student Codes	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Review student code definitions	
<b>Instructions:</b>	<a href="#">Go to: Student Codes Administration</a>
<hr/>	
<b>Initialization Task:</b> Student: Admission	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Sub-Calendar Exception Days	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Add exception days to the sub-calendars after running calendar wizard	
<b>Instructions:</b>	<a href="#">Go to: Sub-Calendars</a>
<hr/>	
<b>Initialization Task:</b> Student: Admission	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Admission/Withdrawal Codes	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Review admission and withdrawal code definitions	
<b>Instructions:</b>	<a href="#">Go to: Student Codes Administration</a>
<hr/>	
<b>Initialization Task:</b> Attendance: Absence Events	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Update Attendance Configuration	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Use DASL Options screen to configure attendance options and defaults	
<b>Instructions:</b>	<a href="#">Go to: DASL Options</a>
<hr/>	
<b>Initialization Task:</b> Scheduling: Course Configuration	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Course Terms	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Create and update Course Terms	
<b>Instructions:</b>	<a href="#">Go to: Course Terms</a>
<hr/>	
<b>Initialization Task:</b> Marks: Mark Configuration	<b>Run By/On:</b> User, DASL on 12/12/2005 2:38:00 PM
<b>Follow-up Task:</b> Review Marks Options	<b>Completed:</b> <input type="checkbox"/>
<b>Description:</b> Review the Marks options on the DASL Options screen, making any necessary changes	
<b>Instructions:</b>	<a href="#">Go to: DASL Options</a>

### Review Initialization Follow-up Checklist

**Incomplete Tasks Only** – Check the checkbox to display only incomplete tasks or uncheck it to show all tasks, regardless of completion status.

**Initialization Task** – Displays the name of the task.

**Follow-up Task** – Displays the name of the task that is yet to be completed.

**Description** – Displays a brief explanation of the follow-up task.

**Instructions** – Displays instructions on how to complete follow-up tasks.

**Run By/On** – Displays the name, date, and time of when the initialization task was run.

**Completed** – Displays a checkbox that displays if the task has been completed or not.

**“Go to” Link** – Provides a link to the relevant page to complete the follow-up task.

*Note: Not all tasks will apply to all levels of context.*

---

## **Create Default Schedule Results (Building Level)**

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Result Sets**

Create a schedule result set using the name Default Schedule Result. Refer to the *ProgressBook StudentInformation Scheduling Guide* for more information.

This page intentionally left blank.

---

# ProgressBook StudentInformation Security Guide



# ProgressBook Student Information Security Guide

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

## Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Security Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.5.0	<a href="#">“SIS-Student-Edit Profile Node”</a>	17	Updated section and image to show new <b>Edit Profile FY15</b> node.
14.0.0	<a href="#">“Create Users”</a>	32	Updated description of Employee Number field to indicate the field only accepts numeric characters.
14.0.0	<a href="#">“Edit Users”</a>	34	Updated description of Employee Number field to indicate the field only accepts numeric characters.

This page intentionally left blank.

# Table of Contents

Change Log .....	i
Table of Contents.....	iii
Security Overview .....	1
Base Concepts .....	1
Group Hierarchy .....	1
School Hierarchy .....	1
Site Map Hierarchy.....	2
Understanding the Security Module .....	3
Default Domain.....	3
Domain.....	3
Group .....	3
Job Function.....	4
Node.....	4
Operator .....	4
Role.....	4
Role Scope.....	5
School .....	5
Site Map.....	5
Staff Impersonation .....	6
Staff Member.....	6
Staff User Permission.....	6
User.....	6
Vendor.....	6
Special Note concerning Security, EZ Query, and the Teacher Menu .....	6
Security Maintenance .....	7
Moving Accounts from DSL to StudentInformation.....	7
Role Maintenance .....	7
Find Roles .....	7
Remove Roles.....	9
Create/Update Roles.....	10

Sitemap Access .....	11
Display Role Access .....	18
Assign Roles .....	19
Group Maintenance .....	21
Find Groups .....	21
Remove Groups .....	22
Create/Update Groups .....	23
Add/Edit Groups .....	23
Assigning School/Roles .....	25
Assign Groups.....	26
View Group Members .....	28
View Group Members Of.....	29
User Maintenance .....	30
Find Users.....	30
Create Users .....	32
Edit Users.....	34
Assign Roles .....	36
Staff Member Impersonations .....	37
Assign User Groups .....	40
View Group Memberships .....	41
Reset Password .....	42
Delete Users .....	43
Vendor Maintenance .....	44
Create Vendors .....	44
Find Vendors.....	46
Edit Vendors.....	46
Assign Roles to Vendor.....	47
Delete Vendors .....	49
Staff Member Maintenance .....	50
Find Staff Members.....	50
Create and Update Staff Members.....	52
Remove Staff Members.....	54

View/Edit Staff Member Schools .....	55
View/Edit Staff Member Associations.....	58
Security Reports .....	61
Staff Listing (STAFF).....	61
Implementing StudentInformation Security .....	62
Suggested Practices .....	62
ESC StudentInformation Account Management.....	64
Pre-Defined Roles .....	65

This page intentionally left blank.

---

## Security Overview

Security defines access to the various features in the StudentInformation system. The security administration pages use a number of concepts similar to modern network operating systems. This section focuses on concepts and background information needed to understand and use the Security system.

### Base Concepts

**Determining the Access.** Roles are used or created to define access to specific nodes or branches of the site map. This is covered in more detail in the Site Map Hierarchy section below.

**Giving Users Access.** Users are given access to StudentInformation by being granted one or more role/school combinations. The role defines the access while school defines where that access is given. These role/school combinations can be assigned directly to the user account or can be applied to the user account through their membership in one or more groups with direct or inherited role/school assignments.

**Open – Shut – Clear.** Each node access (i.e. Create, Read, Update, Delete) in StudentInformation can have one of the following settings: Open, Shut, Clear. Open means the user is granted access. Shut means the user is denied access. Clear means neither an Open or Shut has been assigned to the menu item. When one school/role assigns an Open to the menu item and a second school/role assigns a Shut to that menu item, the shut will take precedence. A Shut always takes precedence over an Open. Each node defined in the role has the security options of Create, Read, Update, and Delete though for several items.

### Group Hierarchy

Groups can be members of other groups thus making a hierarchy of groups. While this is a very powerful feature, it should be used sparingly and only in situations where this is determined to be time saving or the complexity lends itself to solve the security configuration need.

In a group hierarchy, any security applied to the parent group is inherited by the members of that group and also members of any child (or grandchild, great-grandchild, etc.) groups. Note that security applied to a child group does not flow up to the members of the parent group.

### School Hierarchy

Access in StudentInformation is specified on a school basis. Schools within StudentInformation are organized in a hierarchical fashion. For instance, District

A has elementary school buildings E, F, G, and H; middle school buildings M and N; and high school building Z. The following hierarchy could be setup in StudentInformation to represent these buildings.

District A

- + Elementary Buildings
  - + Building E
  - + Building F
  - + Building G
  - + Building H
- + Middle School Buildings
  - + Building M
  - + Building N
- + Building Z (high school)

Assume that a user needs access to the Student List menu item for all schools in the district. While you could grant this user access to Student List for buildings E, F, G, H, M, N and Z; the easier approach would be to grant access to Student List for District A. Granting access at to District A rather than each individual building would give the user access to building I if it was added to the district at a later time. Likewise, access for the district wide elementary curriculum director could be added to the “Elementary Buildings” entry rather than each of the elementary buildings separately.

## Site Map Hierarchy

Navigation and security in StudentInformation is based on the hierarchical site map. In looking at the sample site map clip-it shown below, the menu item “Contact” is available by selecting “SIS” from the main menu then selecting “Student”. Security is configured by either adding or denying access to any of the nodes on the site map. Access is propagated down the site map. For instance, if access is granted to Student, then the user would have access to the Student node as well as each of the nodes below it (i.e. Contact, Medical, Misc. Data, and Notes). Also, in order to get to the Student node, access to the SIS node is implied.

## SIS

- + Student
  - + Contact
  - + Medical
  - + Misc. Data
  - + Notes
- + School
  - + Counselors
  - + Free Lockers
- + Registration

Denying access to a particular node takes precedence over granting access to it. Assume access was denied to school and access was granted to “Free **Lockers.**” The denying of access to school blocks access to the School node and each of the nodes below it (including Free Lockers).

---

## Understanding the Security Module

This section focuses on terminology used in the Security system.

### Default Domain

The domain value is used to create and house Windows user accounts at the DA-Site where StudentInformation is run. All accounts are created in the default domain unless your district or school has established a trust between your Windows server and the server at the DA-Site maintaining the Windows user accounts.

### Domain

A Windows user account is used to access StudentInformation. The domain value indicates which Windows domain the user account is located in. For installations with trusts to district servers, several domain values may be available to select from.

### Group

A group is a collection of users and other groups. Groups can be used for collection purposes, assignment of job functions, and/or assignment of security access.

## **Job Function**

Job functions are recognized jobs in the educational environment. For example, the current list of job functions include: All, Teacher, Principal, Superintendent, Secretary, Media Specialist, EMIS Coordinator, Technology Coordinator, Curriculum Coordinator, Bus Driver, Cafeteria Worker, Counselor, and Nurse. Job functions can be applied to groups which in turn determine what the users that comprise that group can see in the StudentInformation Portal. Job functions can also be applied to the staff school assignments which determine the list of staff members in several drop-down lists of staff members.

## **Node**

One menu item on the site map. A node includes information describing the page heading, the name in the navigation, what type of access the node provides, and the type of node.

## **Operator**

The operator is the person using the StudentInformation security administration pages. Most likely that is you since you are reading this information. Other references to the person using the StudentInformation security administration pages include the Security Administrator or the Super User.

## **Role**

A role is a collection of nodes with the corresponding security permissions. Roles are usually associated with a specific task, set of tasks, or type of position in the school. For example, one role, "Take Attendance", would allow users assigned the role to access the page used to enter attendance information. Another role, "Run Reports" would allow the users to run the various reports in the StudentInformation application. Yet another role, "Guidance Counselor" would define all the areas of StudentInformation that the guidance counselor for this school should have access to.

Permissions on the nodes within a role are Open, Shut, or Clear. Each of these permissions can be set for Create, Read, Update, and Delete access. Open means the role allows that action to be taken. Shut indicates that the role does not allow any of the assigned users access to that option. Clear means that the role does not define whether access is granted or denied.

Roles are either pre-defined roles (included as part of the StudentInformation software package – StudentInformation State Support recommends they not be used) or local roles. While both roles are available for use in StudentInformation, only the local roles can be created, modified, and removed.

## Role Scope

Role scope is the schools assigned to be able to use this role. When a school is assigned to a role, the role scope includes the assigned schools and any of their children. The role scope also includes the administrative school but does not include any children of the administrative school unless those schools are assigned.

## School

A school is any educational entity referenced in StudentInformation. Schools are organized into a hierarchy.

In StudentInformation, the following additional references to schools are made:

- **Administrative School** –The administrative school defines the recognized owner of the item which the administrative school is being applied. For instance, in the portal administration pages, the administrative school of an announcement indicates what school a user must have access to in order to edit or remove that announcement. Items such as users, groups, and roles also have administrative schools associated with them.
- **Context School** – Used in the maintenance of groups. The context school of a group indicates the school to which the group’s job functions apply.
- **Default School** – The default school is the school that is designated as the working school when the user logs into StudentInformation. Default school can be set or changed when changing your working school.
- **Selected Schools** – The list of schools the user has selected to be the currently active schools. The selected school determines what schools appear in the EZ Query portion of the application and also what content is displayed in the portal. Selected schools can either be saved for the current session or can be saved permanently.
- **Working School** – The working school is the current school that the user is working in. The working school name is listed in the upper right hand corner of StudentInformation.

## Site Map

The site map is a hierarchical listing of nodes. The site map is the basis for the StudentInformation navigational system.

## **Staff Impersonation**

Staff impersonation is the ability in StudentInformation for a user to be able to do tasks as if they were the staff member that they are impersonating. For each staff member that a user impersonates, zero or more staff user permissions can be applied. Users can also impersonate all staff members in the school if so specified. This option is mostly used by administrative staff.

## **Staff Member**

A staff member represents one district employee. A user can be assigned to one staff member per district.

## **Staff User Permission**

A staff user permission is a designation of what the user impersonating a staff member can do. For example, the current list of staff user permissions include: Full, Fee Collect, EZ Query, Attendance, and Marks.

## **User**

A user represents one login account to the StudentInformation system. Users have an administrative school which indicates which school can manage the user.

## **Vendor**

If your district uses ProgressBook VendorLink, a vendor is set up in StudentInformation as a user. You must assign the roles and schools to define the information the vendor application can access in StudentInformation.

## **Special Note concerning Security, EZ Query, and the Teacher Menu**

The EZ Query and Teacher Menu modules have specialized security functionality based on Staff Member settings and job functions. See *ProgressBook StudentInformation EZ Query Guide* and *ProgressBook StudentInformation Teacher Menu Guide* for additional information.

---

## Security Maintenance

### Moving Accounts from DSL to StudentInformation

Navigation: Home – Management – Security – DSL TO DASL

Please contact your ITC for more information about DSL to DASL.

### Role Maintenance

Navigation: Home – Management – Security – View Roles

Roles are used to define which of the StudentInformation features a user can access. Role management is the process of creating, changing, and removing roles as well as defining the access the role will have to each of the nodes on the site map. Role assignment involves assigning users to a role/school combination.

***Note:** A user may be assigned multiple roles. If two roles conflict regarding a node, any role that denies access to that node takes precedence over a role that grants access to that node. Denial of access to a node also takes precedence over default access (neither granted nor denied) to that node.*

### Find Roles

Navigation: Home – Management – Security – View Roles



The screenshot shows the 'View Roles' interface. At the top, there is a breadcrumb trail: Home » Management » Security » View Roles. Below this is the title 'View Roles'. The main content area contains a search form with two input fields: 'School' (a dropdown menu currently showing 'All Schools') and 'Role Name' (a text input field). To the right of the 'Role Name' field is a 'Search' button. Below the search form is a button labeled 'Add New Role'.

#### View Roles Screen

Click **Add New Role** to add a new role.

**School** – Choose the school of the group(s) to filter from the drop-down list. This will limit your search based on the administrative school of the role.

**Role Name** – The name of the role(s) to filter. See [“Find Users”](#) for an explanation and examples of the use of wildcards in filters.

Click **Search** to list the roles that match the criteria selected to which you have access.

In addition to matching the search filters, users must have an administrative school that you as the operator have security access to for the page where the search takes place.

Home » Management » Security » View Roles Advanced Se

## View Roles

School:  Role Name:

	School Name	Role
 	All Buildings	End User Accounts
 	DASL Local SD	Guidance Counselor
 	DASL Local SD	Principal
 	DASL Local SD	Secretary
 	DASL Local SD	Teacher
 	DASL Local SD	View Staff

### Adding New Roles

**School** – Administrative school of role.

**Role Name** – Descriptive name of role.

 – View/edit Details about a specific role.

 – Delete role

## Remove Roles

**Navigation: Home – Management – Security – View Roles**

**Note:** As of the 8.1.0 release, deleting a role now also removes that role from any user who was assigned that role.

	School Name	Role
	All Buildings	End User Accounts
	DASL Local SD	Guidance Counselor
	DASL Local SD	Principal
	DASL Local SD	Secretary
	DASL Local SD	Teacher
	DASL Local SD	View Staff

### Removing a Role on View Roles Screen

Click to delete the school name/role.

Are you sure you want to delete the following Roles?  
Teacher

Ok Cancel

### Deletion Confirmation Message

**Ok** – Delete the specified role.

**Cancel** – Do not delete the specified role.

**The selected Role was successfully deleted**

## Create/Update Roles

Navigation: Home – Management – Security – View Roles – Add/Edit Roles

Click **Add New Role** to add a new role.

School Name	Role
All Buildings	End User Accounts
DASL Local SD	Guidance Counselor
DASL Local SD	Principal
DASL Local SD	Secretary
DASL Local SD	Teacher
DASL Local SD	View Staff

Administrative School: DASL Demo

Role Name:

Available: DASL Demo, All Buildings, DASL Local SD, DASL ELEMENTARY SCHOOL

Assigned:

Save Save and New

Return To View Roles Page

### Adding a New Role

**Role Name** (required) – Enter the name of the new role (be as descriptive as possible).

**Administrative School** (required) – Choose the administrative school from the drop-down list. This designates what schools can edit the role.

**Note:** *The role/administrative school combination must be unique (no other role can have the same combination).*

**Available** – The available buildings and districts that can be assigned to be within the scope of this role.

**Assigned** – The schools assigned to be able to use this role.

**Save** – Save new role and proceed with setting Sitemap Access.

**Save and New** – Save new role and return to this page to enter another new role.

**The new Role was successfully added**

**Edit Sitemap Access** – Set sitemap access for this role (see [“Sitemap Access”](#)).

## Sitemap Access

**Navigation: Home – Management – Security – View Roles – Add New Role button or View Details icon – Sitemap Access button**

This screen is accessed by first selecting or creating a role, then clicking the Sitemap Access button on that role's maintenance screen.

Home >> Management >> Security >> View Roles Advanced Se

### View Roles

School: All Schools Role Name: Search

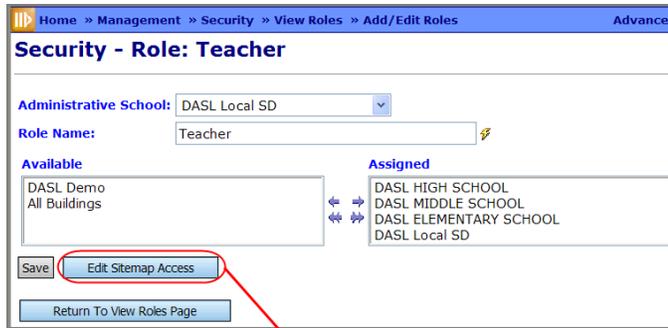
Add New Role

	School Name	Role
 	All Buildings	End User Accounts
 	DASL Local SD	Guidance Counselor
 	DASL Local SD	Principal
 	DASL Local SD	Secretary
 	DASL Local SD	Teacher
 	DASL Local SD	View Staff

### View Roles Screen

Click  to view details of this role, or click **Add New Role** to create a role.

Click **Edit Sitemap Access** to view and set sitemap access for this role.



### Edit Site Map Access

The Sitemap Access brings up the StudentInformation sitemap with the four access settings (Display, Add, Change, Delete) in front of each node. The sitemap is displayed hierarchically. Access for a node can be toggled between Open, Shut, and Clear by clicking on the space or icon to the right of each access setting name.

Open  – The user with this role can use the option in StudentInformation.

Shut  – The user with the role is denied access to this option in StudentInformation.

Clear (blank) – Access is neither allowed nor restricted to this node.

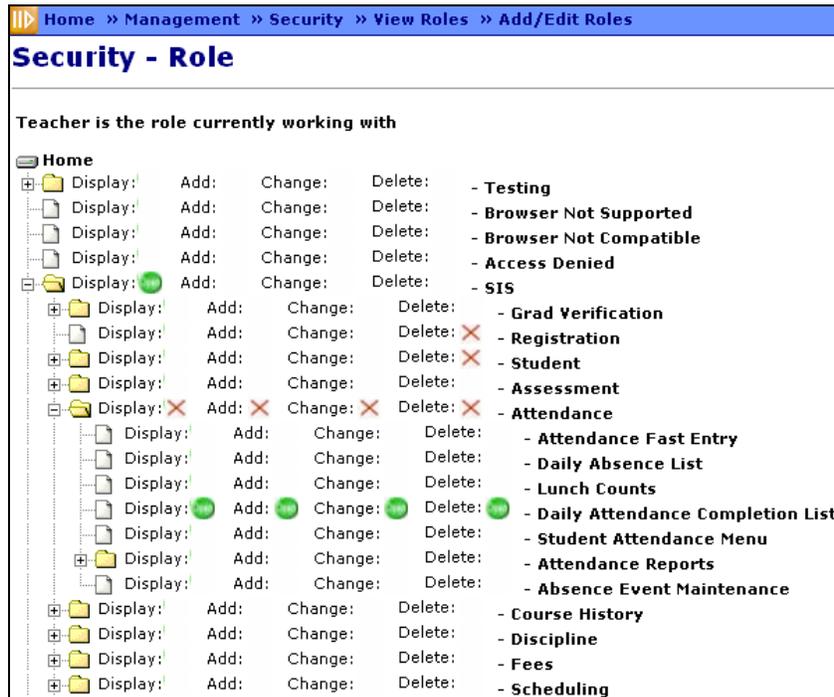
The nodes can be expanded and collapsed using the  and  buttons to the left of the folders.

**Save Access** – Save the Sitemap Access for this role.

**Cancel** – Do not save the Sitemap Access for this role.

In the following example, this role has Display access to all of SIS, except they do not have Delete access to SIS-Registration and SIS-Student. They also are denied all access to SIS-Attendance – except they have Display, Add, Change,

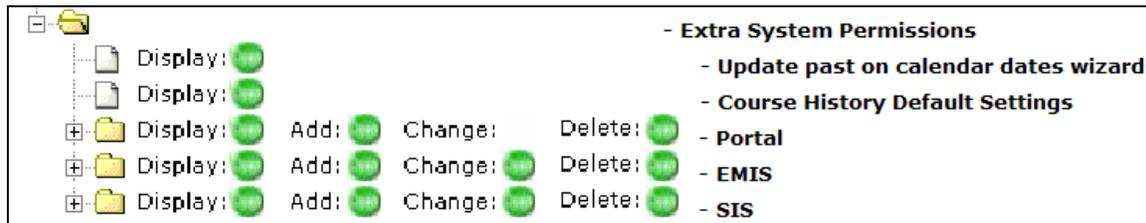
and Delete access to the Daily Attendance Completion List, if they can reach it from some other path (such as through a direct Portal Link).



**Defining Security Role Access**

### Extra System Permissions

Of particular note is the “Extra System Permissions” Sitemap Node.



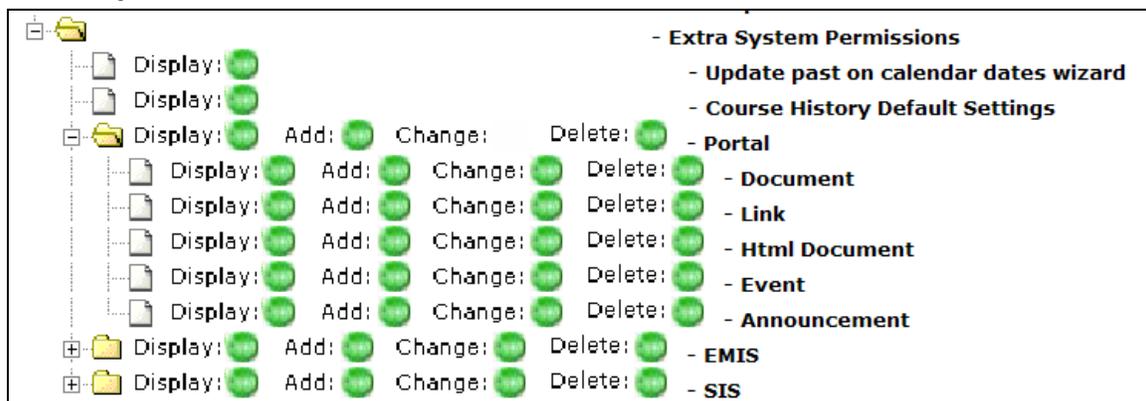
**Extra System Permissions Sitemap Node**

This node allows the Security Administrator to set specific permissions for individual actions, rather than pages, for certain elements of StudentInformation.

**Update past on calendar dates wizard** – Opening the Display access of this Extra Permission setting allows the role to edit past dates using the Calendar Dates Wizard. This is needed for any user not marked as “Is Privileged” who will edit past dates using the Calendar Dates Wizard.

**Course History Default Settings** – Opening the Display access of this Extra Permission setting allows the role to set the default Course History display settings for the Building.

## Extra System Permissions - Portal



### Extra System Permissions - Portal

**Portal – Document** – Opening this Extra Permission setting allows the role to Display, Add, Change or Delete items from the Portal page Documents section. If you want a user to have access to the Portal or Home page, you must assign the user at least Display access to the Portal.

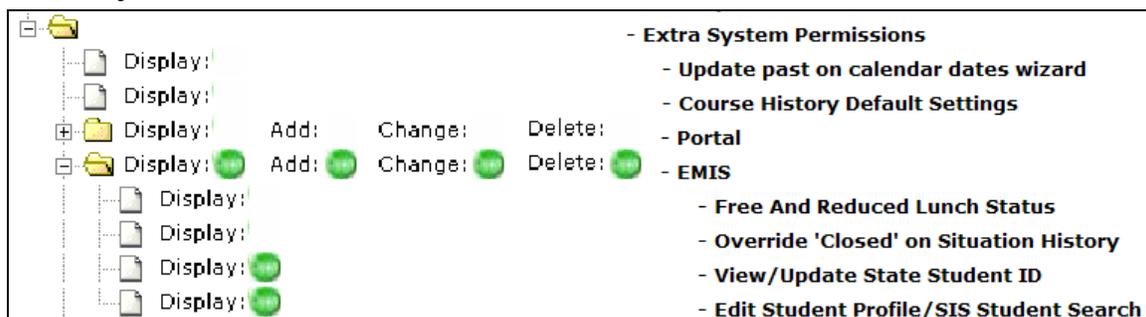
**Portal – Link** – Opening this Extra Permission setting allows the role to View, Display, Change or Delete items from the Portal page Quick Links section.

**Portal – Html Document** – Opening this Extra Permission setting allows the role to Display, Add, Change or Delete items from the Portal page Headlines! section.

**Portal – Event** – Opening this Extra Permission setting allows the role to Display, Add, Change or Delete items from the Portal page Upcoming Events section.

**Portal – Announcement** – Opening this Extra Permission setting allows the role to Display, Add, Change or Delete items from the Portal page Announcements section.

## Extra System Permissions - EMIS



**EMIS – Free and Reduced Lunch Status** – Opening the Display access of this Extra Permission setting allows the role to view and edit the Free and Reduced/Lunch Status on the Student Profile – FD-Attributes tab. It also allows the role to view and edit the Free/Reduced Lunch Status on the Student Profile Bulk Update – FS-Standing & FD-Attributes-Effective Date tab. It also displays the Free/Reduced Lunch Status when using the Student Registration Wizard.

***Note:** If you grant a user access to view the Free/Reduced Lunch Status, the user can also edit the status. The Free/Reduced Lunch Status security options provide all or nothing access for the user.*

**EMIS – Override “Closed” on Situation History** – Opening the Display access of this Extra Permission setting allows the role to update EMIS Situation History in closed EMIS Reporting Periods. Please note that EMIS Situation History is only used before FY09 (08-09).

**EMIS – View/Update State Student ID** – Opening the Display access of this Extra Permission setting allows the role to view or update the State Student ID (SSID) on the Private tab of the Student Profile (editing the Private tab also requires the Edit Student Profile/SIS Student Search extra permission). Access must be given to this Extra Permission Setting to access the State Student ID on the following screens:

- EZ Query – Reports – SIS Student Search
- EZ Query – EZ Students – Shared Student Data (JVS/Home)
- EZ Query – EZ Students – EMIS Demographic
- EZ Query – Reports – Download Class List

**EMIS – Edit Student Profile/SIS Student Search** – In the 08-09 school year and after, opening the Display access of this Extra Permission setting allows the role to view or update information on the FS-Student Standing, FS-Student Attendance, FD-Attributes-Effective Date, FN-Attributes-No Date, or Private tabs. In school years prior to 08-09, this setting allows the role to view or update information on the EMIS 1, EMIS 2, EMIS 3, Preschool, or Private tabs (the Custom tab also requires an additional permission, described below). This Extra System Permission is also required to access the Field Selection - EMIS sub-tab on the SIS Student Search.

***Note:** If you grant a user access to view the EMIS tabs on the Student Profile screen, the user can also edit the EMIS tabs on the Student Profile screen. These security options provide all or nothing access for the user.*

## Extra System Permissions - SIS

The screenshot displays a permissions management interface. On the left, a tree view shows a hierarchy of permissions with green status indicators. The tree includes folders for 'Display', 'Add', 'Change', and 'Delete' under various system categories. On the right, a list of permissions is shown, including 'Extra System Permissions', 'Update past on calendar dates wizard', 'Course History Default Settings', 'Portal', 'EMIS', 'SIS', 'Daily Attendance Extended Permissions', 'Period Attendance Extended Permissions', 'Custom Profile Data', 'Enrollment Alerts', 'Assign Course Conflicts', 'Overfill Course Sections', 'Marks Cutoff Date', 'Delete All Family Groups', 'Reassign Student Number', 'School - District Contact Code Mapping', and 'Add User -- As Vendor'.

### Extra System Permissions - SIS

**SIS – Daily Attendance Extended Permissions** – Opening this Extra Permission setting allows the role to display, add, change, or delete existing Absence Records through the Teacher Menu's Daily Attendance entry screen.

**SIS – Period Attendance Extended Permissions** – This Extra Permission is not used by StudentInformation and will be removed in a future release.

**SIS – Custom Profile Data** – Opening this Extra Permission setting allows the role to display, add, change, or delete information on the Custom tab of the Student Profile.

**SIS – Enrollment Alerts** – Opening this Extra Permission setting allows the role to display, add, change, and delete Enrollment Alerts from the Portal page.

**SIS – Assign Course Conflicts** – Opening this Extra Permission setting allows the role to assign courses for a student that cause conflicts with that student's schedule.

**SIS – Overfill Course Sections** – Opening this Extra Permission setting allows the role to add assignments to Course Sections that would create an overfill.

**SIS – Marks Cutoff Date** – Opening this Extra Permission setting allows the role to edit or update the Student Exception Credit screen and the Marks Cutoff Date on the Reporting Terms Maintenance screen.

**SIS – Delete All Family Groups** – Opening this Extra Permission setting allows the role to display the **Remove existing groups in the district** check box on the **General** tab of the **Family Groups Wizard**.

**SIS – Reassign Student Number** – Opening this Extra Permission setting allows the role to reassign the student number on the **General** tab of the Student Profile and use the **Auto-Assign Student Number** check box on the Student Profile.

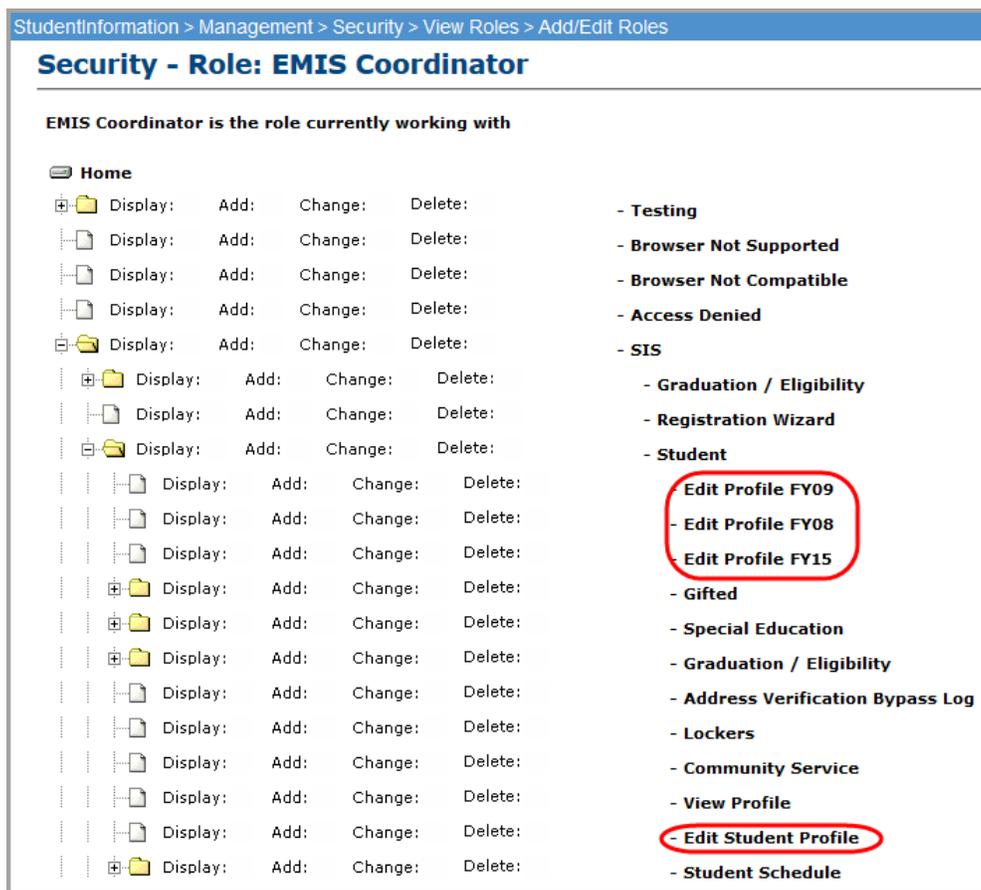
**SIS – School – District Contact Code Mapping** – Opening this Extra Permission setting allows the role to display the **District Codes** column on the **Contact Type Codes Maintenance** screen.

**SIS – Add User – As Vendor** – Opening this Extra Permission setting allows the role to display the **Is Vendor** check box on the **Security – User** screen.

**SIS-Student-Edit Profile Node**

In Security-View Roles-Edit Sitemap Access, the following Edit Profile nodes display under SIS-Student – Edit Profile FY09, Edit Profile FY08, Edit Profile FY15 and Edit Student Profile. If you have any roles with special security on Edit Profile (such as green dot or red X), you need to ensure all instances of the Edit Profile node are updated accordingly.

The Edit Profile Router controls access to all variations of the profile, so if you deny access to the Edit Profile Router, the user is not able to access any profile screen. You can set security on these nodes separately if needed.



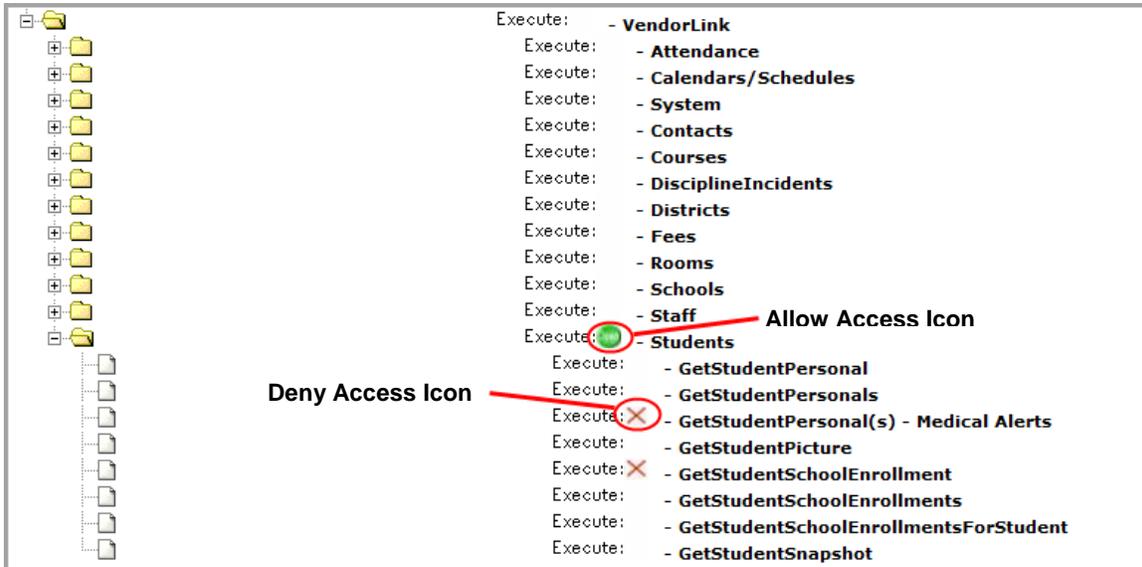
**Edit Student Profile Sitemap Node**

**VendorLink Permissions**

The VendorLink node contains permissions to the methods a vendor application needs to access information in StudentInformation. The only available access setting you can define is Execute.

To enable access to a method for this role, click the space to the right of the Execute access setting until the Allow Access icon displays. To deny access to a method, click the space again until the Deny Access icon displays.

**Note:** If you allow or deny access to the parent folder for a group of methods, the permission is applied to all of the methods unless you deny or allow access to a specific method. For example, in the following figure, the role allows access to all of the methods in the Students folder except *GetStudentPersonal(s) – Medical Alerts* and *GetStudentSchoolEnrollment*.



**VendorLink Permissions on the Sitemap Access Screen**

## Display Role Access

**Navigation: Home – Management – Security – Display Role Access**

The Display Role Access screen is a read-only screen that displays the Sitemap access (see [“Sitemap Access”](#)) for a selected role.



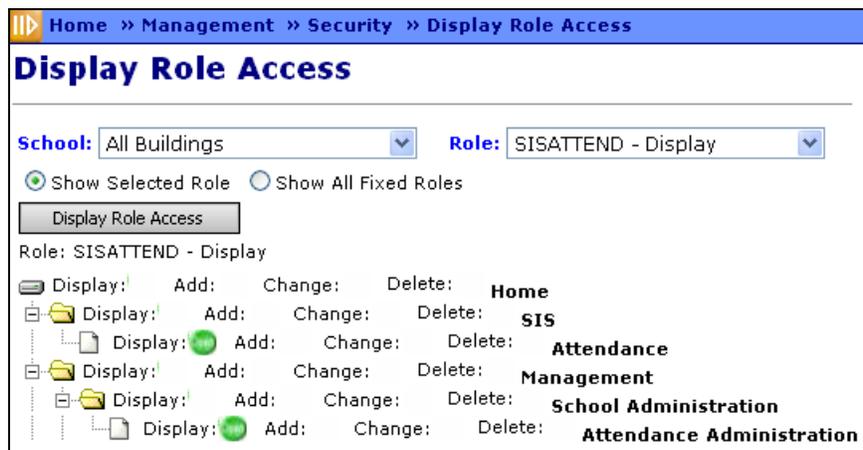
**Display Role Access Screen**

**School** – Select the appropriate school from the drop-down list.

**Role** – Select the role for which you want to display the sitemap access from the drop-down list.

**Show Selected Role** – Select this radio button to only show access for the role selected from the previous drop-down lists.

**Show All Fixed Roles** – (only available to ITC users with the “Is Privileged” check box marked on their user record) Select this radio button to show access for all fixed roles.



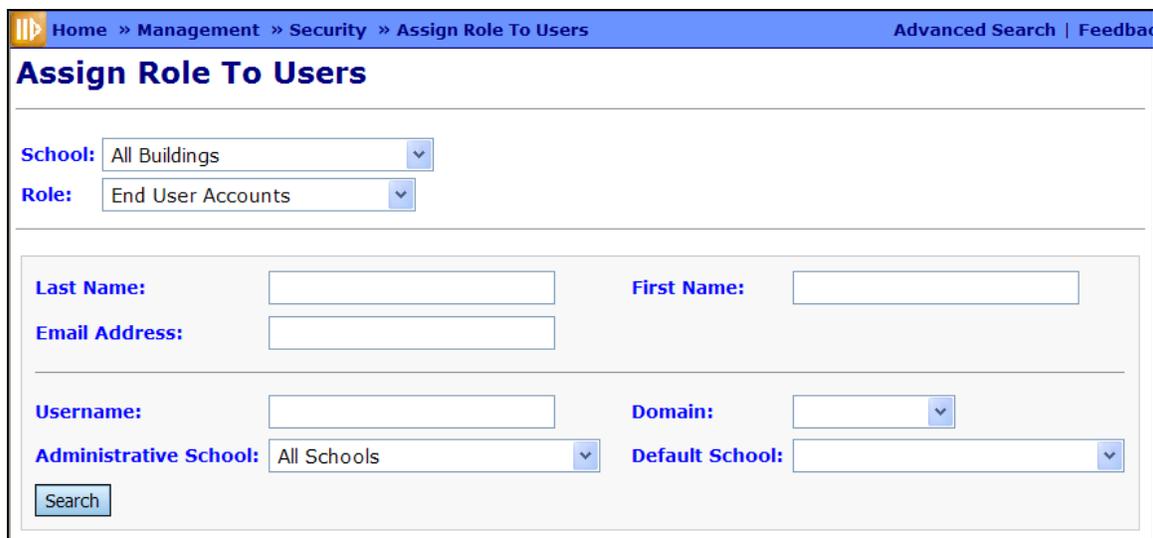
**Viewing the Role on the Display Role Access Screen**

Nodes will only display items which have defined access settings. Open (🟢) indicates that the user of the role can use the option in StudentInformation. Shut (🔴) indicates that the user of the role is denied access to this option in StudentInformation. Clear (blank) or not listed indicates that access is neither allowed nor restricted to this node.

## Assign Roles

### Navigation: Home – Management – Security – Assign Role to Users

The Assign Role to Users option allows the operator to assign a role/school combination to one or more users at a time.



**Assign Role To Users Screen**

**School** (required) – Select the school to which you want to assign the user(s).

**Role** (required) – Select the role to which you want to assign the user(s).

**Last Name** – The Last Name of the StudentInformation user(s) to filter.

**First Name** – The First Name of the StudentInformation user(s) to filter.

**Email Address** – The Email Address of the StudentInformation user(s) to filter.

**Username** – The username of the StudentInformation user(s) to filter.

**Domain** – Choose the Domain of the StudentInformation user(s) to filter from the drop-down list.

**Administrative School** – Choose the administrative school of the StudentInformation user(s) to filter from the drop-down list.

**Default School** – Choose the default school of the StudentInformation user(s) to filter from the drop-down list.

Click **Search** to list the StudentInformation users that match the criteria selected and that you have access to. See [“Find Roles”](#) for all of the filter and wildcard options.

Home » Management » Security » Assign Role To Users Advanced Search | Feedback | M

### Assign Role To Users

School: All Buildings  
Role: End User Accounts

Last Name:  First Name:   
Email Address:

Username:  Domain:   
Administrative School: All Schools Default School:

Available: noacsc.sheila, MEC.EastlandCC, NCOCC.Cheryl, test\_christine

Assigned:

Users Assigned Role at a Higher Level

Domain	Username
There are no records to display	

### Assigning Roles To Users

**Available** – Users available based on the filter criteria.

**Assigned** – Move selected user(s) from Available to Assigned. The Assigned user(s) will be assigned the school/role defined at the top of the screen.

**Save Assigned Users** – Save the Assigned user(s) to the specified school/role.

Users Assigned Role at a Higher Level	
Domain	Username
There are no records to display	

The “Users Assigned Role at a Higher Level” grid shows what users have already been assigned this role at a higher level. For example, user SmithN is assigned role “Truant Reports” for Anytown Local Schools. When the operator

pulls up Anytown High School (part of Anytown Local Schools) and role “Truant Reports,” they will see user SmithN in the “Users Assigned Role at a Higher Level” grid.

## Group Maintenance

### Navigation: Home – Management – Security – View Groups

A group is a collection of users. Groups can be used for collection purposes, assignment of job functions, and/or assignment of security access. This section of the manual discusses how to find existing groups and make alterations to them or how to add new groups to StudentInformation.

**Note:** Although StudentInformation does allow sub-groups (groups within groups) please note that this functionality has not been thoroughly tested and is very seldom used. We do not recommend using this functionality unless you have done thorough testing. Also, please note that the Copy Security portion of the go-live process does NOT support sub-groups. If any district (in Live or Play) uses sub-groups, it will cause any subsequent use of Copy Security on future go-lives to fail. Sub-groups should NOT be used until all districts have been converted to StudentInformation and then only with detailed testing.

## Find Groups

### Navigation: Home – Management – Security – View Groups

	Group Name	School
	All Users	All Buildings
	DA-Site Accounts	All Buildings
	Student Accounts	All Buildings

View Groups Screen

**Add New Group** – Add a new group.

**School** – Choose the school of the group(s) to filter from the drop-down list. This will limit your search based on the administrative school of the group.

**Group Name** – The Name of the group(s) to filter. See “[Find Users](#)” for an explanation and examples of the use of wildcards in filters.

Click **Search** to list the groups that match the criteria selected and that you have access to.

In addition to matching the search filters, users must have an administrative school that you as the operator have security access to for the page where the search takes place.

**Group Name** – Descriptive Name of group

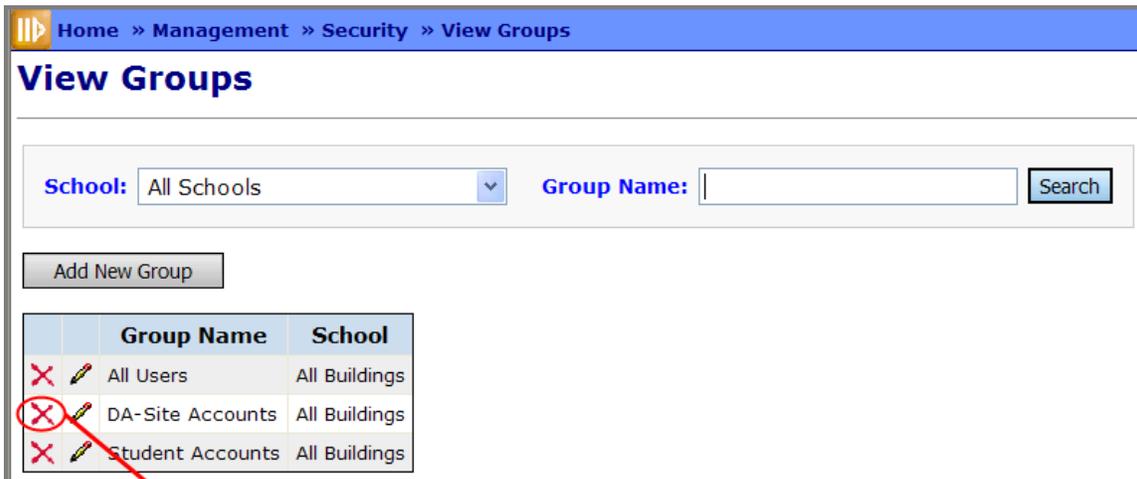
**School** – Administrative school of group

 – View/Edit Details about a specific group

 – Delete group

## Remove Groups

### Navigation: Home – Management – Security – View Groups



	Group Name	School
 	All Users	All Buildings
 	DA-Site Accounts	All Buildings
 	Student Accounts	All Buildings



Are you sure you want to delete the following Groups?  
DA-Site Accounts

Ok Cancel

### Removing a Group

Click  to delete a specific group.

**Ok** – Delete the specified group.

**Cancel** – Do not delete the specified group.

**The selected Group was successfully deleted**

## Create/Update Groups

Navigation: Home – Management – Security – View Groups – Group tab

Home » Management » Security » View Groups

### View Groups

School: All Schools Group Name: Search

Add New Group

	Group Name	School
	All Users	All Buildings
	DA-Site Accounts	All Buildings
	Student Accounts	All Buildings

### Adding a New Group

Click **Add New Group** to add a new group.

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

## Add/Edit Groups

Home » Management » Security » View Groups » Add/Edit Group

### Security - Group: All Users

Group | Group Roles | Group Assigned Groups | Group Members | Member Of

Group Name: All Users

Administrative School: All Buildings

Context School: All Buildings

Job Functions

All  Media Specialist  Bus Driver  
 Teacher  EMIS Coordinator  Cafeteria Worker  
 Principal  Technology Coordinator  Counselor  
 Superintendent  Curriculum Coordinator  Nurse  
 Secretary

Save

Return To View Groups Page

### Adding or Editing a Group

**Group Name** (required) – Enter the name of the new group (be as descriptive as possible).

**Administrative School** (required) – Choose the administrative school from the drop-down list.

**Context School** (required) – Choose the context school from the drop-down list.

**Job Functions** (optional) – Check the appropriate Job Function(s) from the check boxes. Job Functions are optional and do not need to be specified.

The context school drop-down list and Job Function check boxes work together. The job functions indicate what job functions this group of users represent and the context school indicates the school to which those job functions apply. Job Function and context school determine what items on the Portal screen are visible to this group. Portal items have defined “Intended Audience” school and Job Function fields, and only roles with the appropriate context school and Job Function will see those items on their Portal page.

Home

## Manage Portal Links

From this screen, you can display, add, change and delete data pertaining to portal link records.

Title:

Url:

Mobile Url:

Description:

View Order:

Administrative School: All Buildings

Intended Audience: DASL HIGH SCHOOL

All

School	Group
There are no records to display	

Save Save and New Cancel

Teacher  
Principal  
Superintendent  
Secretary  
Media Specialist  
EMIS Coordinator  
Technology Coordinator  
Curriculum Coordinator  
Bus Driver  
Cafeteria Worker  
Counselor  
Nurse

### Manage Portal Links Screen

**Save Group** – Save new group and apply additional settings to the new group. The group/administrative school combination must be unique (no other group can have the same combination) for the save to be successful.

**Save and New** – Save new group and return to this page to enter another new group.

**Return To View Groups Page** – Return to Management – Security – View Groups.

## Assigning School/Roles

Navigation: Home – Management – Security – View Groups – Group Roles tab

Home » Management » Security » View Groups

### View Groups

School: All Schools Group Name: Search

Add New Group

	Group Name	School
 	All Users	All Buildings
 	DA-Site Accounts	All Buildings
 	Student Accounts	All Buildings

Click Edit Icon to edit the group.

Click  to view/edit a specific group.

Click **Group Roles**.

Home » Management » Security » View Groups » Add/Edit Group

### Security - Group: Student Accounts

Group Group Roles Group Assigned Groups Group Members Member Of

School: DASL Demo Role: test Add

School	Role
 DASL Local SD	End User Accounts

Return To View Groups Page

Group Roles Tab on the Security Group - Screen

**School** (required) – Choose the administrative school from the drop-down list.

**Role** (required) – Choose the role from the drop-down list. These will be both pre-defined roles that are a part of StudentInformation and roles that have been added by your school.

**Add** – Add this school/role combination to this group. School/role combinations must be unique – you will receive a “not successful” message if you try to re-add a school/role combination.

**The role was NOT successfully added to the group**

In the grid at the bottom of the tab is a listing of school/role combinations that have been assigned to this user. Click on **X** to delete a specific school/role combination from this group.

**Return To View Groups Page** – Return to Management – Security – View Groups

### Assign Groups

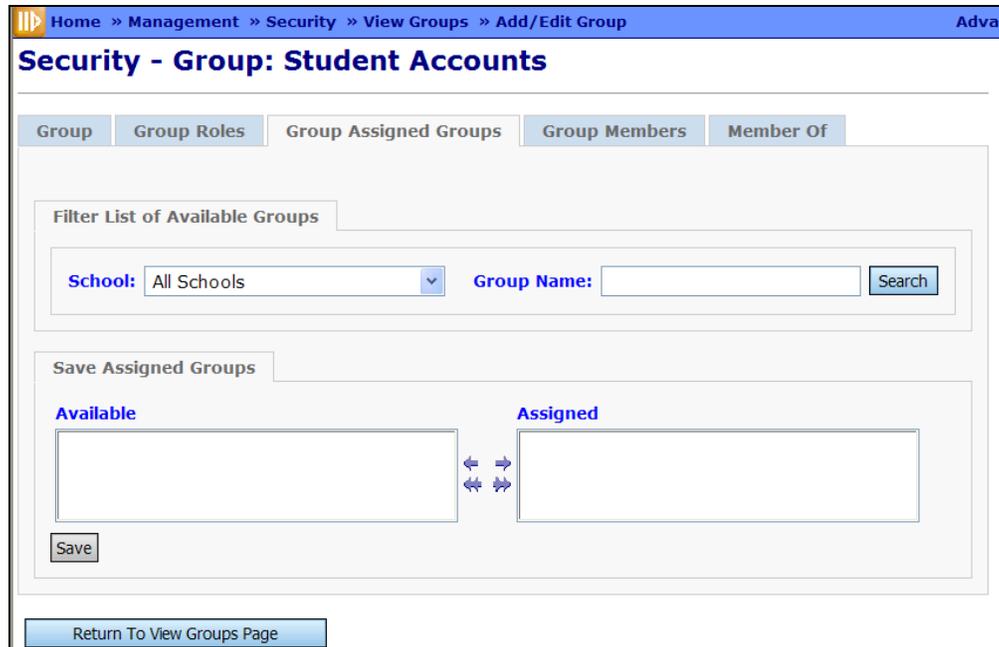
**Navigation: Home – Management – Security – View Groups – Group Assigned Groups tab**

Groups can be members of other groups forming a group hierarchy.

	Group Name	School
	All Users	All Buildings
	DA-Site Accounts	All Buildings
	Student Accounts	All Buildings

Click to view/edit a specific group.

Click on the Group Assigned Groups tab.



**Group Assigned Groups Tab on the Security - Group Screen**

### ***Filter List of Available Groups***

Choose the school or group that you wish to filter by. Click **Search** to execute the filter and populate the Available box in the Save Assigned Groups section.

### ***Save Assigned Groups***

Groups that have already been assigned to this group will be in the Assigned box. Groups that are available but have not been assigned to this group will be in the Available box. Move groups from the Available to the Assigned box (and vice versa) as needed.

Click **Save** to Save Assigned Groups. Once assigned, this group is now a member of the Assigned Groups.

**Return To View Groups Page** – Return to Management – Security – View Groups

## View Group Members

Navigation: Home – Management – Security – View Groups – Group Members tab

	Group Name	School
	All Users	All Buildings
	DA-Site Accounts	All Buildings
	Student Accounts	All Buildings

Click to view/edit a specific group.

Click on the **Group Members** tab.

Type	Last/Group Name	First Name	School	Username	Domain
User	Career Center	Eastland	All Buildings	MEC.EastlandCC	DASL-Demo
User	Demo	D3A2	All Buildings	noacsc.d3a2	DASL-Demo
User	Findlay1	University	All Buildings	noacsc.ufindlay1	DASL-Demo
User	Findlay10	University	All Buildings	noacsc.ufindlay10	DASL-Demo
User	Findlay11	University	All Buildings	noacsc.ufindlay11	DASL-Demo
User	Findlay2	University	All Buildings	noacsc.ufindlay2	DASL-Demo
User	Findlay3	University	All Buildings	noacsc.ufindlay3	DASL-Demo

### Group Members on the Security - Group Screen

Lists the users and/or groups who are members of the selected group.

**Type** – User or group

**Group Name** – If group, name of group.

**Last and First Name** – If user, last name and first name of user.

**School** – Administrative school of user or group.

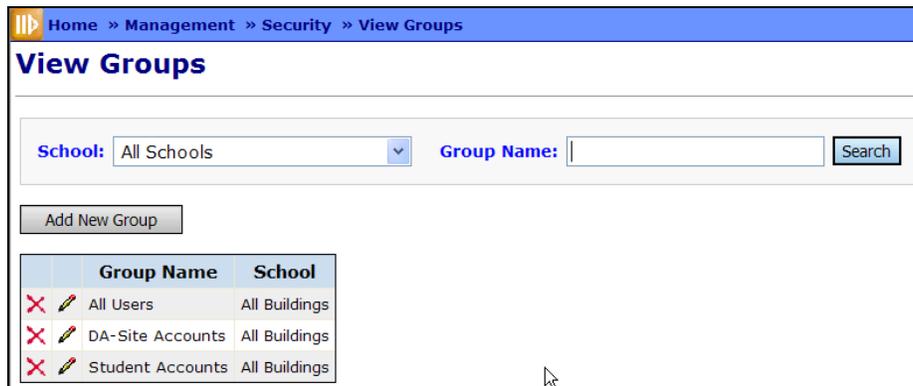
**Username** – User Name

**Domain** – Domain of user or group

**Return To View Groups Page** – Return to Management – Security – View Groups.

### View Group Members Of

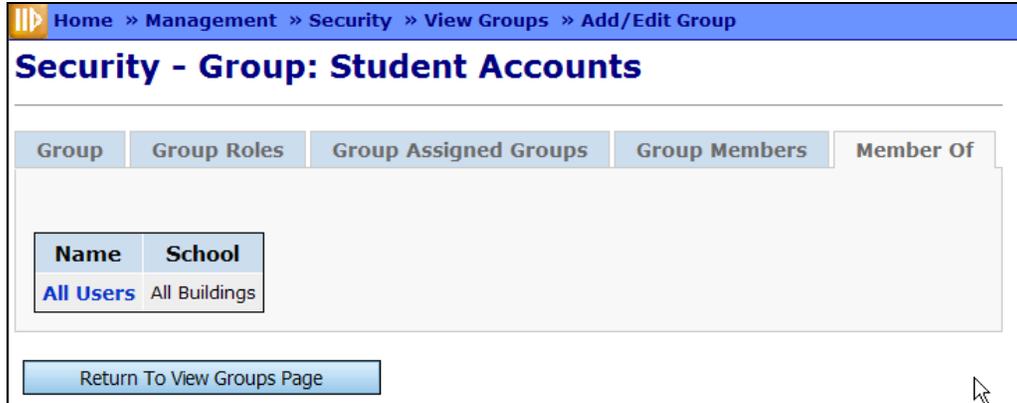
**Navigation: Home – Management – Security – View Groups – Member Of tab**



**View Groups Screen**

Click to view/edit a specific group.

Click on the **Member Of** tab.



**Member Of Tab on the Security - Group Screen**

Lists the groups of which the selected group is a member.

**Name** – Name of group

**School** – Administrative school of group

**Return To View Groups Page** – Return to Management – Security – View Groups

## User Maintenance

A user account is necessary for users to access StudentInformation. The following sections describe how to create new and modify existing users in StudentInformation. StudentInformation user accounts must link to a CentralAdmin user account.

You can add new and edit existing users from the View Users screen located in the following path: Home > Management > Security > View Users.

### Find Users

Several places in the Security module, a user needs to be searched for and selected. Most notably is the View Users option on the Security menu. Users can be found using any combination of the provided filters.

The screenshot shows the 'View Users' interface. At the top, there is a breadcrumb trail: Home > Management > Security > View Users. The page title is 'View Users'. Below the title, there are several filter fields: 'Last Name:' with a text input, 'First Name:' with a text input, 'Email Address:' with a text input, 'Username:' with a text input, 'Domain:' with a dropdown menu, 'Administrative School:' with a dropdown menu (currently showing 'All Schools'), and 'Default School:' with a dropdown menu. There is also an 'Active:' checkbox which is checked. A 'Search' button is located below the filters. At the bottom left, there is an 'Add New User' button.

**Add New User** – Add a new StudentInformation user.

**Last Name** – The Last Name of the StudentInformation user(s) to filter.

**First Name** – The First Name of the StudentInformation user(s) to filter.

**Email Address** – The Email Address of the StudentInformation user(s) to filter.

**Username** – The Username of the StudentInformation user(s) to filter.

**Domain** – Choose the Domain of the StudentInformation user(s) to filter from the drop-down list.

**Administrative School** – Choose the administrative school of the StudentInformation user(s) to filter from the drop-down list.

**Default School** – Choose the default school of the StudentInformation user(s) to filter from the drop-down list.

Click **Search** to list the StudentInformation users that match the criteria selected and to which you have access.

The filters find any matches that contain the filter string unless you place a wildcard in the value to be filtered. For instance, searching for chris is the same

as searching for \*chris\*. The \* means that anything (including nothing) can come before chris and anything (including nothing) can come after chris. The search is not case sensitive. Here are some matches for the search string chris.

Chris, Christopher, mcchristopher, HS\_Christoff, OttoChris

Searching for chris\* means the matching entries must start with chris and end with anything (including nothing). The following are matches from the first example.

Chris, Christopher

If the search string is \*chris, then the matching entries must end with chris. The following are matches from the first example.

Chris, OttoChris

Using a combination of several filters will further refine your search and more narrowly limit the number of users returned.

In addition to matching the search filters, users must have an administrative school that you as the operator have security access to for the page where the search takes place.

Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Active
DASL-Demo					All Buildings	DASL HIGH SCHOOL	

**Sorting** – You may sort by any column (Domain, Username, First Name, Last Name, Email, Administrative School, Default School) in ascending or descending order by clicking on the column header.

– View Details about a specific StudentInformation user.

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

## Create Users

1. On the **View Users** screen, click **Add New User**.

The **Add/Edit User** screen displays.

Home > Management > Security > View Users > Add/Edit User

Advanced Search | Feedback | Mgmt

### Security - User

User | User Roles | Staff Member Impersonations | User Groups | Group Memberships | Reset Password

Is Vendor:

Username:

Is Privileged:

First Name:

Last Name:

Employee Number:

Domain: software-answers.com

Email Address:

Is Active:

Administrative School: TCCSA ITC

Default School: TCCSA ITC

Account Selection: Create New Central User

Save User | Save and New

[Return To View Users Page](#)

### Adding a New User

2. In the **Username** field, enter the user name you want to assign to the user. This is the name the user enters to log in to StudentInformation.
3. If you want to assign the user additional security permissions, select the **Is Privileged** check box.

**Note:** The **Is Privileged** check box only displays for users with this check box selected in their own user account. Only assign this privilege to technology center personnel.

4. In the **First Name** field, enter the user's first name.
5. In the **Last Name** field, enter the user's last name.
6. In the **Employee Number** field, enter the user's employee number (numeric characters only).
7. In the **Domain** drop-down list, select the domain in which the user's account exists.

**Note:** Once the user record is saved, you cannot change the user's domain. If you need to change the user's domain at a later time, contact your technology center.

8. In the **Email Address** field, enter the user's email address.

**Note:** Ensure you enter the correct and unique email address for the user as this is the account to which his/her StudentInformation password is emailed.

9. Ensure the **Is Active** check box is selected to create an active StudentInformation account. If this option is not selected, the user account is not active, and the user is unable to log in to StudentInformation.

**Note:** This option is selected by default when you create a new user.

10. In the **Administrative School** drop-down list, select the user's administrative school.
11. In the **Default School** drop-down list, select the school or school district that is in context by default when the user logs in to StudentInformation.
12. In the **Account Selection** drop-down list, select one of the following options:
  - **Search By Username** – Enables you to link the StudentInformation user account to an existing CentralAdmin user account. This option is only available if the Staff: Link to Staff resource activity is assigned to your CentralAdmin user account.
  - **Create New Central User** – Enables you to create a new CentralAdmin user. This option is only available if the Staff: Create Account & Profile resource activity is assigned to your CentralAdmin user account.

**Note:** The **Account Selection** drop-down list does not display for users not assigned the Staff: Link to Staff or Staff: Create Account & Profile resource activity in CentralAdmin.

**Note:** In the *DASL.config*, if you set *BypassActiveDirectory* to *True*, StudentInformation does not create a user in Active Directory or in CentralAdmin. You must create the user directly in ActiveDirectory, then within CentralAdmin, and then use StudentInformation to link a new staff member to the one you created in CentralAdmin.

13. If you selected Search By Username in the **Account Selection** drop-down list, perform the following steps. Otherwise, proceed to [step 14](#).
  - a. In the **Search (by Username)** field, enter the user's CentralAdmin user name, and then click **Go**.

The CentralAdmin user account that matches the user name you entered displays in a grid below the **Search (by Username)** field.

The screenshot shows a web interface for user selection. At the top, there is a dropdown menu labeled 'Account Selection' with 'Search By Username...' selected. Below it is a search field labeled 'Search (by Username):' containing the text 'answersb'. To the right of the search field is a domain dropdown menu showing 'software-answers.com' and a 'Go' button. Below the search field is a table with the following columns: 'Last Name', 'First Name', 'Middle Name', 'Central Username', and 'Central Domain'. The table contains one row with the following data: 'Answers', 'Bob', (empty), 'AnswersB', and 'software-answers.com'. There is a checkmark in a small box to the left of the first row. At the bottom of the interface are two buttons: 'Save User' and 'Save and New'.

	Last Name	First Name	Middle Name	Central Username	Central Domain
<input checked="" type="checkbox"/>	Answers	Bob		AnswersB	software-answers.com

#### Selecting the CentralAdmin User Account

- b. Select the check box in the row of the CentralAdmin user account you want to link to the StudentInformation user.
- c. Click **Save User**.

The user is linked to the selected CentralAdmin user account. Information about the linked CentralAdmin user account displays on the **Add/Edit User** screen.

**Linked CentralAdmin User Account Information on the Add/Edit User Screen**

14. If you selected Create New Central User, click **Save User**. To save the current StudentInformation user and create a new user, click **Save and New**.

The following message displays: “The selected User was successfully updated.”

If your user account is assigned the appropriate access in CentralAdmin, both the StudentInformation and CentralAdmin user accounts are created, and the CentralAdmin account is linked to the StudentInformation account. Otherwise, only the StudentInformation user account is created.

**Edit Users**

1. On the **View Users** screen, enter the search criteria to locate the user you want to edit, and then click **Search**.

The users who match the criteria you entered display in the grid.

Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
software-answers.com	QATest	Luke	Skywalker	lskywalker@jedi.org	ASHLAND HIGH SCHOOL	ASHLAND HIGH SCHOOL	<input checked="" type="checkbox"/>	Username: QATest Domain: software-answers.com Account Type: Windows	

**Searching for a User on the View Users Screen**

2. Click the edit icon in the row of the user you want to edit.

The **Add/Edit User** screen displays with the information for the selected user.

Home > Management > Security > View Users > Add/Edit User

Advanced Search | Feedback | M

### Security - User: Luke Skywalker

User | User Roles | Staff Member Impersonations | User Groups | Group Memberships | Reset Password

**Username:** QAstest **Is Privileged:**

**First Name:** Luke **Last Name:** Skywalker

**Employee Number:** 93240923 **Domain:** software-answers.com

**Email Address:** lskywalker@jedi.org **Is Active:**

**Administrative School:** ASHLAND HIGH SCHOOL **Default School:** ASHLAND HIGH SCHOOL

Username: QAstest  
Domain: software-answers.com  
Account Type: Windows

Save

Return To View Users Page

### Editing a User

3. You can you perform any of the following tasks:

- Modify whether or not the user has special privileges by selecting or deselecting the **Is Privileged** check box.

**Note:** The **Is Privileged** check box only displays for users with this check box selected in their own user account. Only assign this privilege to technology center personnel.

- Modify the user's first name in the **First Name** field
- Modify the user's last name in the **Last Name** field
- Modify the user's employee number in the **Employee Number** field (numeric characters only)
- Modify the user's email address in the **Email Address** field
- Modify whether or not the user's account is active by selecting or deselecting the **Is Active** check box
- Modify the user's administrative school in the **Administrative School** drop-down list
- Modify the user's default school in the **Default School** drop-down list
- Modify the CentralAdmin user account linked to this StudentInformation user account by clicking the **edit icon** next to the linked CentralAdmin user account information. See [step 13](#) in "Create Users."

**Note:** The edit icon does not display in the linked CentralAdmin user account information area for users not assigned the Staff: Link to Staff resource activity in CentralAdmin.

4. Click **Save**.

The following message displays: “The selected User was successfully updated.”

The StudentInformation user account is updated.

## Assign Roles

You can assign the roles and schools to which you want a user to have access on the User Roles tab on the Add/Edit User screen located in the following path: Home > Management > Security > View Users > User Roles Tab.

**Note:** To assign role/school combinations to a large number of users, use the Assign Role to User option on the Security menu.

1. On the View Users screen, locate the user to which you want to assign roles. See “[Find Users.](#)”

The users who match the entered search criteria display in the grid at the bottom of the View Users screen.

The screenshot shows the 'View Users' interface. At the top, there is a breadcrumb trail: Home > Management > Security > View Users. Below this are search filters for Last Name (skywalker), First Name, Email Address, Username, Domain, Administrative School (All Schools), and Default School. There is an 'Active' checkbox checked and a 'Search' button. Below the filters is an 'Add New User' button and an 'Edit Icon' label. A table lists users with columns: Domain, Username, First Name, Last Name, Email, Administrative School, Default School, Central Linked, Central Info, and Active. The first row shows user 'sa1' with a pencil icon in the Domain column, indicating it is selected for editing.

Domain	Username	First Name	Last Name	Email	Administrative School	Default School	Central Linked	Central Info	Active
sa1	skywalkerl	Luke	Skywalker	skywalkerl@software-answers.com	ASHLAND HIGH SCHOOL	ASHLAND HIGH SCHOOL	<input checked="" type="checkbox"/>	Username: skywalker Domain: Beta Account Type: ProgressBook	

### Edit Icon on the View Users Screen

2. Click the **edit icon** in the row of the user to which you want to assign roles.

The Add/Edit User screen displays with the information for the selected user.

The screenshot shows the 'Add/Edit User' screen for 'Luke Skywalker'. The breadcrumb trail is: Home > Management > Security > View Users > Add/Edit User. The title is 'Security - User: Luke Skywalker'. There are tabs for 'User', 'User Roles', 'Staff Member Impersonations', 'User Groups', 'Group Memberships', and 'Reset Password'. The 'User' tab is active, showing fields for Username (skywalkerl), First Name (Luke), Employee Number (12345), Email Address (skywalkerl@software-answers.com), Administrative School (ASHLAND HIGH SCHOOL), Link to Central (checked), Is Privileged (unchecked), Last Name (Skywalker), Domain (sa1), Is Active (checked), and Default School (ASHLAND HIGH SCHOOL). A preview box shows the user's details: Username: skywalker, Domain: Beta, Account Type: ProgressBook. There is a 'Save' button and a 'Return To View Users Page' button.

### User Information on the Add/Edit User Screen

3. Click the **User Roles** tab.
4. In the **School** drop-down list, select the school or district to which you want to assign access.
5. In the **Role** drop-down list, select the role you want to assign to the user, and then click **Add**.

The role assignment displays in the grid.

**Note:** If you try to add a role/school combination that already exists, a message displays indicating that adding the role was not successful.

Home » Management » Security » View Users » Add/Edit User Advanced Search

### Security - User: Luke Skywalker

User | **User Roles** | Staff Member Impersonations | User Groups | Group Memberships | Reset Password

School: - ASHLAND HIGH SCHOOL      Role: EZQuery - All     

	School	Role
✗	ASHLAND HIGH SCHOOL	EZQuery - All
✗	ASHLAND HIGH SCHOOL	RB-Full Access

#### Assigning Roles to Users

6. To add additional roles, repeat [step 4](#) and [step 5](#).
7. When you are done assigning roles, click **Return To View Users Page** to return to the blank View Users screen.

## Staff Member Impersonations

### Navigation: Home – Management – Security – View Users – Staff Member Impersonations tab

Home » Management » Security » View Users Advanced Search | Feedback | Mgmt | Help | Version | Print

### View Users

Last Name:       First Name:

Email Address:

Username:       Domain:

Administrative School: All Schools      Default School:

Active:

     **Edit Icon**

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
✗	tccsa	gren_howie	Deanna	KELLER		Green Local Schools	SMITHVILLE HIGH SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	
✗	tccsa	lopr_elliott	Deanna	KELLER		Loudonville-Perryville Ex. Village Schools	PERRYSVILLE JUNIOR HIGH	<input checked="" type="checkbox"/>	Account Type: No Account	
✗	tccsa	soea_dcabassa	Deanna	KELLER		Southeast Local Schools	MOUNT EATON ELEMENTARY	<input checked="" type="checkbox"/>	Account Type: No Account	
✗	ashc	sstarter	Chris	Keller		Ashland City Schools	TAFT ELEMENTARY SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	

#### Searching for Users

Click the **edit icon** to view/edit a specific user.

Click the **Staff Member Impersonations** tab to view and edit Staff Member Impersonations for this StudentInformation user. Staff impersonation is the ability in StudentInformation for a user to be able to do tasks as if they were the staff member that they are impersonating. Users can also impersonate all staff members in the school if so specified.

In the grid at the bottom of the tab is a listing of school/school year/staff combinations that have been assigned to this user. Click **X** to remove a specific Staff Member Impersonation assignment.

Click **Add** to add staff impersonation entries for the selected user.

The school and school year is pre-selected based on the current working school and school year. The school will be a district if a district is in context. District impersonations trickle down to the buildings and enable building impersonations for the school year, staff, and permissions selected. The list of staff members is based on the school district associated with the pre-selected school. Select any of the staff permissions that you wish to set for this school/school year/staff combination. If you try to add a combination that already exists, you will receive a message that indicates that the Add was not successful.

Available Permissions include: Full (all permissions), Fee Collect, EZ Query, Attendance, Marks, and Medical.

The screenshot shows a web interface titled "Security - User: Melissa". At the top, there are several tabs: "User", "User Roles", "Staff Member Impersonations", "User Groups", "Group Memberships", and "Reset Password". Below the tabs, there are several fields: "School:" with a dropdown menu showing "HIGH SCHOOL", "School Year:" with a dropdown menu showing "2009-2010", and "Staff Member:" with a dropdown menu showing "All Staff". Below these fields, there are two columns: "Available Permissions" and "Selected Permissions". The "Available Permissions" column contains a list of permissions: "Fee Collect", "EZ Query", "Attendance", "Marks", and "Medical". The "Selected Permissions" column is currently empty. Between the two columns are four arrows: a left-pointing arrow, a right-pointing arrow, a double left-pointing arrow, and a double right-pointing arrow. Below the columns are two buttons: "Save" and "Cancel". At the bottom of the interface, there is a button labeled "Return To View Users Page".

**Fee Collect** – Users with Fee Collect impersonations may collect full fee payments using the Teacher Menu.

**EZ Query** – Users with EZ Query impersonations may view students in EZ Query.

**Attendance** – Users with Attendance impersonation may take attendance using the Teacher Menu.

**Marks** – Users with Marks impersonations may enter marks using the Teacher Menu.

**Medical** – Users with Medical impersonations may view private medical information using the Teacher Menu.

Click **Save** to save the selected Staff Member – Selected Permissions combination. It will appear on the grid as shown in the previous screen shot.

Impersonations are school year-specific. To change the selected school/school year, use the Change Working School page that is accessed by clicking on the working school in the upper right hand corner of the StudentInformation screen.

**IMPORTANT:** As of DASL v10.2.0, Staff Member Impersonations are now copied from year to year as part of the School Year Initialization process. Once Staff Member Impersonations are entered for a user, they will be carried on to following years as part of School Year Initialization.

**Return To View Users Page** – Return to Management – Security – View Users

## Assign User Groups

Navigation: Home – Management – Security – View Users – User Groups tab

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
	tccsa	gren_howie	Deanna	KELLER		Green Local Schools	SMITHVILLE HIGH SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	
	tccsa	lopr_elliott	Deanna	KELLER		Loudonville-Perrysville Ex. Village Schools	PERRYSVILLE JUNIOR HIGH	<input checked="" type="checkbox"/>	Account Type: No Account	
	tccsa	soea_dcabassa	Deanna	KELLER		Southeast Local Schools	MOUNT EATON ELEMENTARY	<input checked="" type="checkbox"/>	Account Type: No Account	
	ashc	stharter	Chris	Keller		Ashland City Schools	TAFT ELEMENTARY SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	

### Searching for a User

Click the **edit icon** to view/edit a specific user.

Click the User Groups tab to view and edit User Groups for this StudentInformation user.

### User Groups Tab on the Security - User Screen

#### Filter List of Available Groups

Choose the school or group that you wish to filter by. Click **Search** to execute the filter and populate the Available box in the Save Assigned Groups section.

## Save Assigned Groups

Groups that have already been assigned to this user will be in the Assigned box. Groups that are available but have not been assigned to this user will be in the Available box. Move groups from the Available to the Assigned box (and vice versa) as needed.

Click **Save** to Save Assigned Groups. Once assigned, this user is now a member of this group.

**Return To View Users Page** – Return to Management – Security – View Users

## View Group Memberships

**Navigation: Home – Management – Security – View Users – View Group Memberships tab**

The screenshot shows the 'View Users' interface with search filters and a table of users. A red arrow points to the 'Edit' icon (a pencil) in the first row of the table.

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
X	tccsa	gren_howie	Deanna	KELLER		Green Local Schools	SMITHVILLE HIGH SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	
X	tccsa	lopr_elliott	Deanna	KELLER		Loudonville-Perryville Ex. Village Schools	PERRYVILLE JUNIOR HIGH	<input checked="" type="checkbox"/>	Account Type: No Account	
X	tccsa	soea_dcabassa	Deanna	KELLER		Southeast Local Schools	MOUNT EATON ELEMENTARY	<input checked="" type="checkbox"/>	Account Type: No Account	
X	ashc	sstarter	Chris	Keller		Ashland City Schools	TAFT ELEMENTARY SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	

### Searching for a User

Click **edit icon** to view/edit a specific user.

Click on the Group Memberships tab.

The screenshot shows the 'Security - User' page with the 'Group Memberships' tab selected. Below the tabs, there is a table with columns 'Name' and 'School'.

Name	School
All Users	All Buildings

At the bottom of the page, there is a button labeled 'Return To View Users Page'.

### Group Memberships Tab on the Security - User Screen

The Group Memberships tab lists all the groups of which this user is a direct or indirect member.

**Name/School** – Name of the group/school combination that this user is a member of.

**Return To View Users Page** – Return to Management – Security – View Users.

## Reset Password

**Navigation: Home – Management – Security – View Users – Reset Password tab**

The Reset Password option gives the operator the ability to reset the password of the selected user.

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
X	tccsa	gren_howie	Deanna	KELLER		Green Local Schools	SMITHVILLE HIGH SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	💡
X	tccsa	lopr_elliott	Deanna	KELLER		Loudonville-Perryville Ex. Village Schools	PERRYSVILLE JUNIOR HIGH	<input checked="" type="checkbox"/>	Account Type: No Account	💡
X	tccsa	soea_dcabassa	Deanna	KELLER		Southeast Local Schools	MOUNT EATON ELEMENTARY	<input checked="" type="checkbox"/>	Account Type: No Account	💡
X	ashc	stharter	Chris	Keller		Ashland City Schools	TAFT ELEMENTARY SCHOOL	<input checked="" type="checkbox"/>	Account Type: No Account	💡

### Searching for a User

Click the **edit icon** to view/edit a specific user.

Click the Reset Password tab.

**Security - User:** [User Name]

User | User Roles | Staff Member Impersonations | User Groups | Group Memberships | **Reset Password**

**Instructions:**  
Click the "Reset Password" button to reset the user's password. The user will receive an email with the new password at the email address associated with the user's account.

### Reset Password Tab on the Security - User Screen

Click **Reset Password** to reset the displayed user's password. You will receive a message "The User Password was successfully reset." The new password is reset and will be immediately emailed to the email address on the StudentInformation user's account.

If the user's domain is not the same as the default domain, the following message is displayed and the Reset Password button is not available.

**Your password can not be changed. Use your local server password change facilities.**

This indicates that the user account is on a server local to the user and the user should use the local password change or reset mechanisms for this account.

System administrators can set a variable in the Web.config file to enable or disable the ability of users to reset their password. With Forms Authentication enabled, setting ScreenAccessibility to true allows the Reset Password button to be displayed and allows passwords to be reset. Setting ScreenAccessibility to false prevents the Reset Password button from being displayed, disabling the ability to reset passwords.

For schools that want to have specific people in their buildings or district to be able to reset passwords but not alter the user accounts in any other way, they can grant access to only the Reset Password node. This will only make the Reset Password tab available to the person they wish to assist in resetting passwords.

**Return To View Users Page** – Do not reset password and return to View Users Page.

**The User Password was successfully reset**



**StudentInformation (and DSL) passwords expire after 120 days, and must have a minimum of 4 characters. After the expiration time, you must change your StudentInformation password. StudentInformation does not retain a history of previous passwords, nor does StudentInformation require “complex” passwords consisting of at least 1 number, at least one capital letter, and at least one lower-case letter, though these types of passwords are more secure, and should be chosen by users.**

### Delete Users

1. On the **View Users** screen, locate the user you want to delete. See *“Find Users.”*

The **View Users** screen displays with the users who match your search criteria.

The screenshot shows the 'View Users' page with search filters for Last Name (sky), First Name, Email Address, Username, Domain, Administrative School (All Schools), and Default School. Below the filters is a table of users. A red arrow points to a delete icon (a circle with an X) in the first row of the table.

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
	sa1	skywalkerl	Luke	Skywalker	skywalkerl@software-answers.com	ASHLAND HIGH SCHOOL	ASHLAND HIGH SCHOOL	<input checked="" type="checkbox"/>	Username: skywalker Domain: Eds Account Type: ProgressBook	

### Deleting a User

2. Click the delete icon in the row of the vendor you want to delete.

The following message displays, “Are you sure you want to delete the following User? [User’s First and Last Name] – [User Name]?”

3. Click **OK** on the deletion confirmation message.  
The user is deleted.

## Vendor Maintenance

To enable vendors to access information in StudentInformation, the vendor must exist in StudentInformation as a user and link to a vendor in CentralAdmin. Some vendors are loaded into StudentInformation by default. You must assign the VendorLink roles to the school to which you want the vendor to have access.

You can create, find, and modify vendors from the View Users screen located in the following path: Home > Management > Security > View Users.

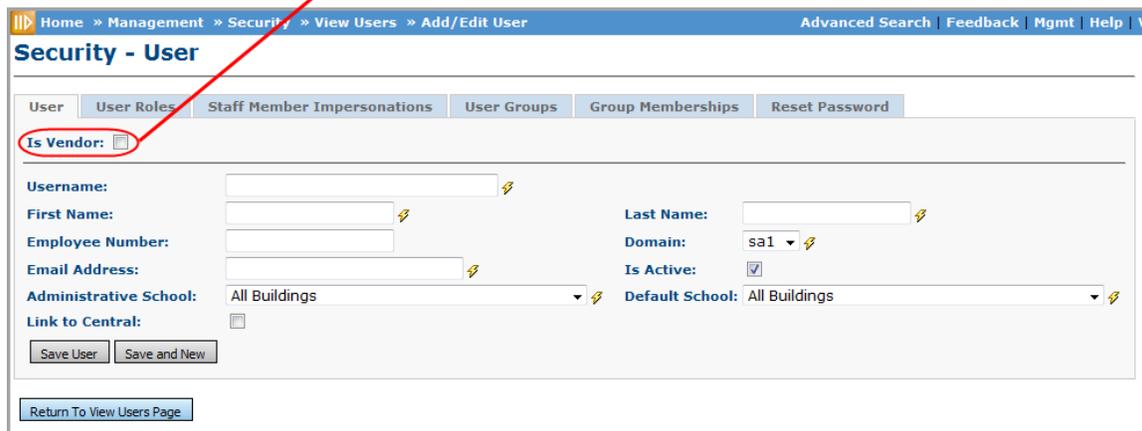
### Create Vendors

When you create a vendor in StudentInformation, you must create a corresponding vendor in CentralAdmin. Only users assigned the Vendor Admin role in CentralAdmin can create vendors in CentralAdmin.

1. On the **View Users** screen, click **Add New User**.
2. On the **Add/Edit User** screen, select the **Is Vendor** check box.

**Note:** *The **Is Vendor** check box only displays if your role has security access to add a user as a vendor. See [“Extra System Permissions - SIS.”](#)*

The **Add/Edit User** screen displays the **Vendor** and **Vendor Roles** tabs, which contain fields for vendor information.



### Selecting the Is Vendor Check Box

3. In the **Vendor Name** field, enter the vendor's name.
4. Ensure the **Is Active** check box is selected to create an active StudentInformation vendor. If this option is not selected, the vendor is not active, and the vendor is unable to access information in StudentInformation.

**Note:** This option is selected by default when you create a new vendor.

5. To link the vendor to a vendor in CentralAdmin, select the **Link to Central** check box.
6. Click **Save**.

If you selected the **Link to Central** check box, and your user account in CentralAdmin is assigned the Vendor Admin role in CentralAdmin, the **Create Vendor** screen in CentralAdmin displays. On the **Create Vendor** screen, you can create the vendor in CentralAdmin. For more information, see *ProgressBook CentralAdmin User Guide*.

The following message displays to indicate that the vendor is successfully added to StudentInformation: "The new User was successfully added." If the vendor is linked to CentralAdmin, the **Security – Vendor** screen displays.

Home » Management » Security » View Users » Add/Edit User

## Security - Vendor: ABC Vendor

The new User was successfully added

Vendor **Vendor Roles**

Vendor Name:

Is Active:

Central

Central Linked:

Central Vendor Name:

Identifier:

Vendor Key:

### Vendor Successfully Saved and Linked to CentralAdmin

- Proceed to ["Assign Roles to Vendor"](#) to assign roles to the vendor.

## Find Vendors

To find a vendor, on the View Users screen, enter all or part of the vendor's name in the **Last Name** or **User Name** field, and then click **Search**. You can also use a wild card search (\*). Both vendors and users that match your entered search criteria display.

Home » Management » Security » View Users

Advanced Search | Feedback | Mgmt | Help | Version | Print

### View Users

Last Name:  First Name:

Email Address:

Username:  Domain:

Administrative School: All Schools Default School:

Active:

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
<input checked="" type="checkbox"/>		ABC Vendor		ABC Vendor		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: ABC Vendor	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		StudentInformation Vendor Name		StudentInformation Vendor Name		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: CentralVendorName	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		VendorLink Test Client		VendorLink Test Client		TCCSA ITC	TCCSA ITC	<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		VendorLink Test Client		VendorLink Test Client		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: VendorLink Test Client	<input checked="" type="checkbox"/>

### View Users Screen with Vendors in the Search Results

## Edit Vendors

- On the View Users screen, enter the search criteria to locate the vendor you want to edit, and then click **Search**. Refer to ["Find Vendors."](#)

The vendors and users that match your entered criteria display.

Home » Management » Security » View Users Advanced Search | Feedback | Mgmt | Help | Version | Print

### View Users

Last Name:  First Name:

Email Address:

---

Username:  Domain:

Administrative School: All Schools Default School:

Active:

**Edit Icon**

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ABC Vendor		ABC Vendor		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: ABC Vendor	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	StudentInformation Vendor Name		StudentInformation Vendor Name		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: CentralVendorName	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendorLink Test Client		VendorLink Test Client		TCCSA ITC	TCCSA ITC	<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendorLink Test Client		VendorLink Test Client		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: VendorLink Test Client	<input checked="" type="checkbox"/>

### Editing a Vendor

2. Click the edit icon in the row of the vendor you want to edit.

The Add/Edit User screen displays with the information for the selected vendor.

Home » Management » Security » View Users » Add/Edit User Adv

### Security - Vendor: ABC Vendor

**Vendor** | Vendor Roles

Vendor Name:

Is Active:

Central

Central Linked:

Central Vendor Name:

Identifier:

Vendor Key:

### Selected Vendor on the Security - Vendor Screen

3. You can assign roles to the vendor. See [“Assign Roles to Vendor.”](#)

### Assign Roles to Vendor

Roles define the information to which a vendor has access. By default, StudentInformation contains a role for each of the currently approved vendors. You can create a new or edit an existing role for a vendor if you want to modify the information a vendor can access. For more information about defining roles for VendorLink, see [“VendorLink Permissions.”](#)

You must assign the appropriate role and school to the default vendors and the vendors you manually create in StudentInformation.

1. Access the existing vendor, as described in *“Edit Vendors,”* or create a new vendor, as described in *“Create Vendors.”*

The Add/Edit User screen displays with the information for the selected vendor.

Home » Management » Security » View Users » Add/Edit User

### Security - Vendor: ABC Vendor

Vendor | **Vendor Roles**

Vendor Name: ABC Vendor

Is Active:

Central

Central Linked:

Central Vendor Name: ABC Vendor

Identifier: ABCVENDOR

Vendor Key: mElIqYQ6LZMa3LxmQy3ZnpGcUok4oSOnjpX43RZmZ2NXk9W2UwcDdk1Mw

Save

Return To View Users Page

#### Vendor Tab on the Add/Edit User Screen

2. On the Vendor tab on the Add/Edit User screen, click the **Vendor Roles** tab.
3. In the **School** drop-down list, select the school to which you want to assign the vendor access.
4. In the **Role** drop-down list, select the appropriate role for the vendor, and then click **Add**.

The role assignment displays in the grid at the bottom of the tab.

Home » Management » Security » View Users » Add/Edit User

### Security - Vendor: ABC Vendor

Vendor | **Vendor Roles**

School: - ASHLAND HIGH SCHOOL | Role: VLK - Vendor - ABC Vendor | Add

	School	Role
X	ASHLAND HIGH SCHOOL	VLK - Vendor - ABC Vendor

Return To View Users Page

#### New Role Added on the Vendor Roles Tab

5. To assign additional roles to the vendor, repeat [step 3](#) and [step 4](#).
6. When you are done assigning roles, click **Return To View Users Page** to return to the blank View Users screen.

## Remove Roles from Vendor

1. Access the existing vendor, as described in [“Edit Vendors.”](#)
2. On the Vendor tab on the Add/Edit User screen, click the **Vendor Roles** tab.

Home » Management » Security » View Users » Add/Edit User Advanced Search

### Security - Vendor: ABC Vendor

Vendor **Vendor Roles** Delete Icon

School: - LINCOLN ELEMENTARY Role: VLK - Vendor - ABC Vendor Add

	School	Role
<input checked="" type="checkbox"/>	LINCOLN ELEMENTARY	VLK - Vendor - ABC Vendor
<input checked="" type="checkbox"/>	ASHLAND MIDDLE SCHOOL	VLK - Vendor - ABC Vendor
<input checked="" type="checkbox"/>	ASHLAND HIGH SCHOOL	VLK - Vendor - ABC Vendor

Return To View Users Page

### Removing a Role Assignment on the Vendor Roles Tab

3. Click the **delete icon** in the row of the role assignment you want to delete. The selected role assignment is removed.

## Delete Vendors

1. On the View Users screen, locate the vendor you want to delete. See [“Find Vendors.”](#)

The View Users screen displays with the vendors and users that match the search criteria.

Home » Management » Security » View Users Advanced Search | Feedback | Mgmt | Help | Version | Print

### View Users

Last Name: vendor First Name:

Email Address:

Username:  Domain:

Administrative School: All Schools Default School:

Active:

Search

Add New User Delete Icon

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Central Linked	Central Info	Active
<input checked="" type="checkbox"/>		ABC Vendor		ABC Vendor		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: ABC Vendor	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		StudentInformation Vendor Name		StudentInformation Vendor Name		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: CentralVendorName	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		VendorLink Test Client		VendorLink Test Client		TCCSA ITC	TCCSA ITC	<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		VendorLink Test Client		VendorLink Test Client		TCCSA ITC	TCCSA ITC	<input checked="" type="checkbox"/>	Vendor Name: VendorLink Test Client	<input checked="" type="checkbox"/>

2. Click the **delete icon** in the row of the vendor you want to delete. The following message displays, “Are you sure you want to delete the following User? [Name of Vendor] – [Name of Vendor]?”

3. Click **OK** on the deletion confirmation message.  
The vendor is deleted.

## Staff Member Maintenance

### Navigation: Home – Management – Security – View Staff Members

Staff Members are an important part of the StudentInformation system. They provide a reference to the district employees and are used in the security management portion of StudentInformation as well as their relationships to such things as students and courses. This section of the StudentInformation Security manual describes the management of Staff Members.

### Find Staff Members

### Navigation: Home – Management – Security – View Staff Members

Home » Management » Security » View Staff Members

#### View Staff Members

Staff Member Name:  Assigned Username:  Show Active Only:

Add Staff Member To:

#### View Staff Members Screen

**Add Staff Member To:** (required) – Will default to the District associated with the working school.

**Go** – Add New Staff Member.

When searching for a staff member, you can filter the resulting list using either a staff member name, the username assigned to the staff member, or a combination of the two filters. Also, the results displayed are only from the district associated with the working school.

**Staff Member Name** (optional) – Allows you to filter on last name, first name, or both. To filter on last name, type in the string on which you wish to filter. To filter on first name, type in a comma, then type in the string on which you wish to filter. See [“User Maintenance.”](#)

A user account is necessary for users to access StudentInformation. The following sections describe how to create new and modify existing users in StudentInformation. StudentInformation user accounts must link to a CentralAdmin user account.

You can add new and edit existing users from the **View Users** screen located in the following path: **Home > Management > Security > View Users.**

See [“Find Users”](#) for an explanation and examples of the use of wildcards in filters.

**Assigned Username** (optional) – The Assigned Username filter takes the provided string and returns only entries where the assigned username matches the filter string. The assigned username filter is a little different than the other filters. An assigned username is optional for a staff member whereas most of the other filters used in StudentInformation filter on fields that are required – not optional. As a result, if you specify an assigned username filter and there is no assigned username for the staff record, then that record with no username assignment will not be returned. Furthermore, if you specify an asterisk (\*) for the value to filter on, this will return any staff member that has a username assigned to it.

**Show Active Only** – Yes or No; if this check box is checked, only active staff members will be displayed. If this check box is unchecked, all staff members will display, regardless of their active/inactive status.

**Please Note:** If you don't find any results, you may not have access to staff members. This access requires that you have access to this page at the district level.

**Search** – Execute the search based on the filters selected.

Last Name	First Name	Staff Code	District	Domain	Username	Active
ALLEN	MARK	ALLM	DASL Local SD			Lightbulb
ALLEN	MARCIA	ALLE	DASL Local SD			Lightbulb
ALLSS	RYAN	ALLS	DASL Local SD			Lightbulb
AMON	CINDY	AMON	DASL Local SD			Lightbulb
ASH	BRITTANY	ASHB	DASL Local SD			Lightbulb
AUSTIN	SHARRI	AUST	DASL Local SD	DASLDemo	noacsc.christine	Lightbulb

**View Staff Members Screen with Search Results**

– Delete this Staff Member.

- View/Edit this Staff Member.

– Active Staff Member.

– Inactive Staff Member; this Staff Member will not be available to be selected in drop-down menus in StudentInformation.

## Create and Update Staff Members

Navigation: Home – Management – Security – View Staff Members – Staff Members tab

Home » Management » Security » View Staff Members

### View Staff Members

Staff Member Name:  Assigned Username:  Show Active Only:  Search

Add Staff Member To:  Go

Search for staff member on the View Staff Members screen.

**Add Staff Member To:** (required) – Will default to the District associated with the working school.

Click **Go** to add a new Staff Member.

Home » Management » Security » View Staff Members » Add/Edit Staff Member

### Security - Staff Member: MICHELLE Teacher1854

Staff Members **Staff Member Schools**

Staff Code:  State Staff ID:

Social Security Number:  Name Prefix:

First Name:  Middle Name:

Last Name:  Last Name Suffix:

Address:  Address 2:

City:  State:

Zip:  Email Address:

Telephone:  Telephone Is Unlisted:

Start Date:  Stop Date:

Primary School Id:  Is Active:

Comments:

Bypass Address Standardization

### Security - Staff Member Screen

**Staff Code** (required) – A four character code that uniquely identifies this staff member. Although optional, it is required for scheduling and marks purposes.

**State Staff ID** (optional, but see below) –A unique nine character, state-generated ID for this staff member. This state ID can be up to nine numbers (or two letters followed by seven numbers) in length. A value of nine 9s can be used to indicate a post-secondary enrollment teacher. If this field is filled in, this state ID value is used in place of the staff member’s social security number. This is

also known as the Credential ID and is used by the Pre-Ident, Student Subject records, Program records for contracted staff, and for the D3A2 project.

**Social Security Number** (optional, but see below) – Enter the Social Security Number of the staff member.

A new Staff Member must have either a State Staff ID or a Social Security Number entered. If neither field is filled, the user will see an error message:

**Either Social Security Number or State Staff Id must be specified**

**Name Prefix** (optional) – Choose from Mr., Mrs., Ms., Dr.

**First Name** (required) – Enter the First Name of the staff member. This will appear on various scheduling and marks reports.

**Middle Name** (optional) – Enter the Middle Name of the staff member.

**Last Name** (required) – Enter the Last Name of the staff member. This will appear on various scheduling and marks reports.

**Last Name Suffix** (optional) – Enter the Last Name suffix (i.e. Jr., Sr., III) of the staff member.

**Address** (optional) – Enter the home Address of the staff member.

**Address 2** (optional) – Enter the 2<sup>nd</sup> line of the home Address of the staff member.

**City** (optional) – Enter the home City of the staff member.

**State** (optional) – Enter the home State of the staff member.

**Zip** (optional) – Enter the home Zip code of the staff member. Once a zip code is entered, Address Verification will run. For more information about Address Verification, see *ProgressBook StudentInformation Getting Started Guide*.

**Email Address** (optional) – Enter the home Email Address of the staff member. Please note that the school email address is entered under the Username.

**Telephone** (optional) – Enter the home Telephone of the staff member.

**Telephone is Unlisted** (optional) – Check if the home Telephone is unlisted. Uncheck if the home Telephone is not unlisted.

**Start Date** (optional) – Enter the Start Date of the staff member in this district.

**Stop Date** (optional) – Enter the Stop Date of the staff member in this district.

**Primary School ID** (optional) – Choose the primary school ID from the drop-down list based upon the District ID chosen previously.

**Is Active** (optional) – Check (default) if the staff member is active and can be used on scheduling records. Uncheck if the staff member is no longer active in this district and cannot be used on scheduling records.

**Comments** (optional) – Enter any additional comments about this staff member.

**Save** – Save this Staff Member. You will receive a message “The new Staff Member was successfully saved” and be returned to the Update Staff Member screen to make any additional changes to this Staff Member.

**Save and New** – Save this Staff Member and return to this screen to additional Staff Members.

**Bypass Address Standardization** – If this check box is selected, this staff member’s address will not use Address Standardization.

**Return To View Staff Members Page** – Return to Management – Security – View Staff Members.

If you attempt to add a staff member with matching information to an inactive Staff Member, you will get the following message when you attempt to save the staff member.

**The new Staff Member was NOT successfully added**

To make an inactive staff member active again, uncheck the **Show Active Only** check box, click **Search**, click the inactive staff member’s  icon, check the Is Active check box, and click **Save**.

### Remove Staff Members

**Navigation: Home – Management – Security – View Staff Members –Staff Members tab**

	Last Name	First Name	Staff Code	District	Domain	Username	Active
	ALLEN	MARK	ALLM	DASL Local SD			
	ALLEN	MARCIA	ALLE	DASL Local SD			
	ALLSS	RYAN	ALLS	DASL Local SD			
	AMON	CINDY	AMON	DASL Local SD			
	ASH	BRITTANY	ASHB	DASL Local SD			
	AUSTIN	SHARRI	AUST	DASL Local SD	DASLDemo	noacsc.christine	

**Click the delete icon to remove a staff member.**

Click  to delete a Staff Member.



### Staff Member Deletion Confirmation Message

**Ok** – Delete Staff Member. Please note that the Staff Member is not actually deleted, but rather made inactive. To re-activate a Staff Member, see [“Create and Update Staff Members.”](#)

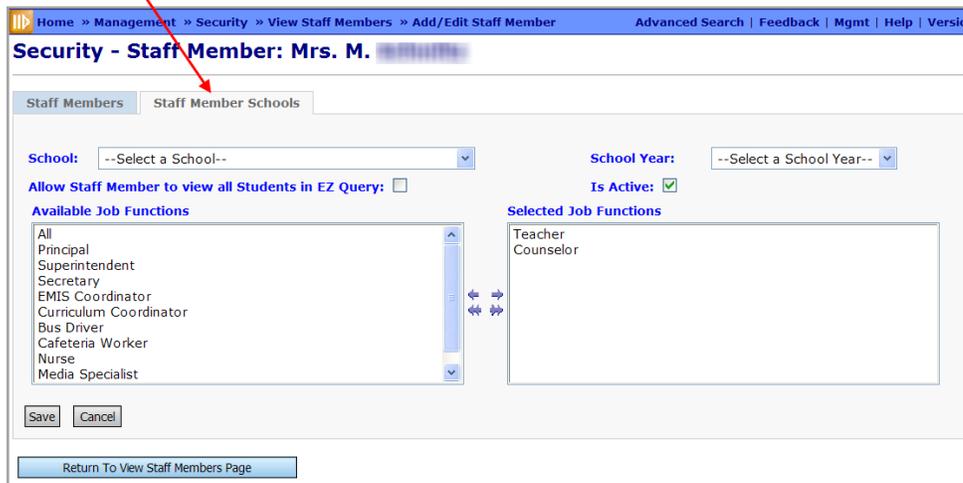
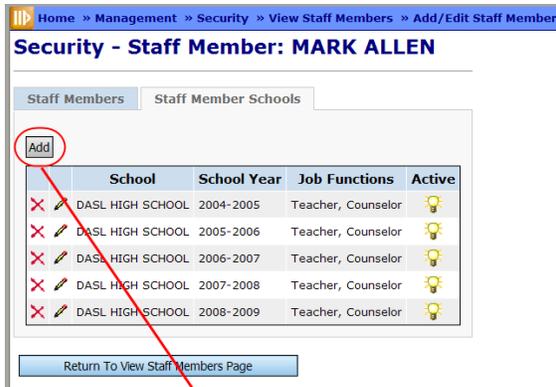
**Cancel** – Do Not Delete Staff Member. You will receive the following confirmation message:



### View/Edit Staff Member Schools

**Navigation: Home – Management – Security – View Staff Members – Staff Member Schools tab**

The View/Edit Staff Member Schools defines what assignments this staff member has for the various school and school years.



### Adding School to Staff Member Security

Click  to view/edit details of a specific Staff Member.

Click the **Staff Member Schools** tab.

Click  to delete (inactivate) a current school/school year/job function record.

Click  to edit a staff member's a specific school/school year/job function record.

Click **Add** to add a new staff member's school/school year/job function record. You will receive the screen below.

**School** (required) – Choose the school from the drop-down list.

**School Year** (required) – Choose the school year from the drop-down list.

**Allow Staff Member to view all Students in EZ Query** (optional) - IMPORTANT! Currently this check box only affects student access when using EZ Query SIS Student Search and Upcoming Birthdays. Eventually other EZ Query pages will use this check box functionality.

- If checked, the user will have access to all students in EZ Query SIS Student Search and Upcoming Birthdays in the school and school year selected, with or without Impersonations, regardless of their Job Function.

- If unchecked and there is no Job Function or a Job Function other than Teacher or Counselor, the user will have access to all students in EZ Query SIS Student Search and Upcoming Birthdays in the school and school year selected, with or without Impersonations.
- If unchecked and the Job Function = Teacher, the user will only have access to students in EZ Query SIS Student Search and Upcoming Birthdays in the school and school year selected that are assigned to course sections that the user teaches. If Impersonations are used, then the user will also inherit the Impersonation access.
- If unchecked and the Job Function = Counselor, the user will only have access to students in EZ Query SIS Student Search and Upcoming Birthdays in the school and school year selected that are assigned to the user in a counselor role. If Impersonations are used, then the user will also inherit the Impersonation access.

**Is Active** (optional) – Check if this school/school year combination is Active.

**Selected Job Functions** – Select the Job Function(s) that apply to this Staff Member by moving them from the Available Job Functions side of the dual select box to the Selected Job Functions side. Job Functions control how a staff member functions in StudentInformation. Three Job Functions currently have special functionality in StudentInformation.

- *Counselor* - A staff member must have a job function of Counselor before they will appear in the Counselor Maintenance or Counselor drop-down lists.
- *Teacher* - A staff member must have a job function of Teacher before they will appear in the Teacher drop-down lists for that specific school.
- *Superintendent* – A staff member must have a job function of Superintendent before they will appear on the custom transcript or custom report cards (with the proper keyword) as the Superintendent of the district.

**IMPORTANT! Job Functions also play a role in ProgressBook. StudentInformation Staff Members with job functions of All, Teacher, Principal, Secretary, Cafeteria Worker, and/or Counselor will be added to the ProgressBook Staff table for the specified school.**

**Save** – Saves the current job role selections.

**Cancel** – Cancel the current selection.

**Return To View Staff Members Page** – Return to Management – Security – View Staff Members.

## View/Edit Staff Member Associations

### Navigation: Home – Management – Security – View/Edit Staff Member Associations

Each district should create one staff member record for each member of their staff. Most schools and districts will also provide each of their staff members with a user account to access StudentInformation. The intent of the View/Edit Staff Member Associations page is to associate a user account with a Staff Member. Once such an association is created, the user account will have access to perform any task as that staff member that they have been given access to on the site map.

Staff Member Associations tie a login account (username) to a staff record (to which the school then attaches their course sections and those course sections' students. When a user is deleted, Staff Member Associations are removed for that user.

**Note:** A user will only see students that they have access to when using certain functions in EZ Query and the Teacher Menu. Access to a student is accomplished through Staff Member Associations or Impersonations (see “[Staff Member Impersonations](#)”).

The screenshot shows the top navigation bar with the path: Home » Management » Security » View/Edit Staff Member Associations. Below the navigation bar is the title "View/Edit Staff Member Associations" and a sub-header: "From this screen, you can add a new staff member association or remove an existing one." There are two tabs: "Search for Staff Members" and "Staff Member Associations". Below the tabs are two input fields: "Staff Member Name:" and "Assigned Username:". To the right of these fields is a "Show Active Only:" checkbox (checked) and a "Search" button.

### View/Edit Staff Member Associations Screen

1. Use the filters to find the specific Staff Member. See “[Find Staff Members](#)” for more information on the filter criteria. Click **Search** to execute the filter.

The screenshot shows the same navigation and title as the previous screenshot. Below the search filters, there is a table with search results. The table has columns: Last Name, First Name, Staff Code, District, Domain, and Username. The results are as follows:

Last Name	First Name	Staff Code	District	Domain	Username
ALLEN	MARK	ALLM	DASL Local SD		
ALLEN	MARCIA	ALLE	DASL Local SD		
ALLSS	RYAN	ALLS	DASL Local SD		
AMON	CINDY	AMON	DASL Local SD		
ASH	BRITTANY	ASHB	DASL Local SD		
AUSTIN	SHARRI	AUST	DASL Local SD	DASLDemo	noacsc.christine

### View Staff Member Associations Screen with Search Results

2. Click  to select the Staff Member you wish to associate.

Home » Management » Security » View/Edit Staff Member Associations Advanced Search | Feedback | Mgm

## View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

Search for Staff Members | **Staff Member Associations**

**Staff Member Selected:** BRITTANY ASH

This staff member is not currently assigned to a user. Please select a user below.

[Return to Search for Staff Members](#)

---

**Last Name:**  **First Name:**

**Email Address:**

---

**Username:**  **Domain:**

**Administrative School:** All Schools  **Default School:**

[Search](#)

**Search for staff member to association  
on the View/Edit Staff Members Associations screen.**

If the Staff Member is already associated with a user, you will receive the message below. Click **Remove Staff Member Association** to remove the existing association. After confirmation, you will be returned to the View/Edit Staff Member Associations Screen.

**View/Edit Staff Member Associations**

From this screen, you can add a new staff member association or remove an existing one.

Search for Staff Members | **Staff Member Associations**

**Staff Member Selected:** SHARRI AUSTIN

This staff member is currently assigned to user: DASLDemo\noacsc.christine [Remove Staff Member Association](#)

[Return to Search for Staff Members](#)

**Removing Existing Staff Member Association.**

- Use the filters to find the specific user. See *“User Maintenance.”*

A user account is necessary for users to access StudentInformation. The following sections describe how to create new and modify existing users in StudentInformation. StudentInformation user accounts must link to a CentralAdmin user account.

You can add new and edit existing users from the **View Users** screen located in the following path: **Home > Management > Security > View Users**.

See *“Find Users”* for more information on the filter criteria.

- Click **Search** to execute the filters and search for a user.

Home » Management » Security » View/Edit Staff Member Associations Advanced Search | Feedback | Mgmt | Help | Versi

## View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

Search for Staff Members Staff Member Associations

**Staff Member Selected:** BRITTANY ASH

This staff member is not currently assigned to a user. Please select a user below.

[Return to Search for Staff Members](#)

Last Name:  First Name:

Email Address:

---

Username:  Domain:

Administrative School:  Default School:

Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School
DASL-Demo	noacsc.chris	Chris	Keller	chris@noacsc.org	All Buildings	DASL HIGH SCHOOL

### View/Edit Staff Member Associations Screen with Search Results

- Click  to assign the user to the Staff Member Selected.

Home » Management » Security » View/Edit Staff Member Associations

## View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

**Are you sure you want to assign DASL-Demo\noacsc.chris to BRITTANY ASH?**

### Assign Staff Member Association Confirmation Message

- Click **Ok** to assign the specified user to the Staff Member.

The following confirmation message displays.

Home » Management » Security » View/Edit Staff Member Associations Advanced Search | Feedback | Mgmt | Help | Version

## View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

**BRITTANY ASH was assigned to Chris Keller successfully**

Search for Staff Members Staff Member Associations

Staff Member Name:  Assigned Username:  Show Active Only:

### Successful Assignment of User to Staff Member Message

---

## Security Reports

### Staff Listing (STAFF)

The Staff Listing (STAFF) report will allow you to display and sort staff members by job function and staff code.

Home > SIS > School > Staff Listing (STAFF)

### Staff Listing (STAFF)

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

Selection Criteria   Selection Summary   Load Settings

**Job Function**

Not Specified  
All  
Teacher  
Principal

**Sorting Options**

Staff Member Name (DESC)  
Staff Member Code (ASC)  
Staff Member Code (DESC)

Staff Member Name (ASC)

**Delivery Method:** Pickup   Set As Default

**Email Address:** DASL\_Documentation@noacsc.org

**Description:**

Submit

**Staff Listing Report Parameters Screen**

**Note:** Running this report at the district level, will only display staff members who have district access. It will not display all staff members at the district. Running this report at the building level will only display staff members for that specific building. Staff members with no job function, will display on the STAFF report with a job function of “Not Specified.”

**Job Function** (option) – Choose one or more job functions – which are defined for each staff member.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

STAFF NAME	STAFF CODE	STATE STAFF ID	JOB FUNCTION	ADDRESS	ADDRESS LINE 2	City	STATE	ZipCode	Telephone
MS Teacher1202	FIN	VL792	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
POST Teacher1209	POST	VL696	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
DENISE Teacher1210	HAND	VL691	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
JEAN Teacher1215	HANJ	VL669	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
MR. T. Teacher1216	ELLT	VL663	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
MRS. C. Teacher1217	ELLC	VL661	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
ANN Teacher1225	HUGA	VL612	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
DEBRA Teacher1229	SELD	VL597	Teacher, Principal	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
TONYA Teacher1231	BUST	VL677	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
D BRAD Teacher1236	LEIB	VL555	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
ANGELA Teacher1237	KYLA	VL555	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
RICK Teacher1238	HUGR	VL553	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
TROY Teacher1244	YANT	VL536	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
ALAN Teacher1245	LAUA	VL533	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555
THOMAS Teacher1247	WILT	VL530	Teacher	645 S Main St		Lima	OH	45004-1241	(555)-555-5555

### Staff Listing Report

## Implementing StudentInformation Security

### Suggested Practices

The following items are suggested practices for using the StudentInformation Security system.

#### Step 1 – Determine Type Security Management

Determine what type of security management your district wants to utilize: centralized, decentralized, or a combination.

**ITC Controlled** - All security administration is done at the ITC level by ITC staff.

**Centralized** – All security administration is done at the district level by a centralized and usually small number of people.

**Decentralized** – Moves the security administration to the building level.

**Combination** – Some of the security administration takes place at the district level (centralized) while certain other tasks take place at the building level (decentralized).

#### Step 2 – Determine Type of Staff Members and Access

Determine what types of staff members you have, and the type of access you want them to have in StudentInformation. This information will help you

determine what roles to use/create and what groups to create and configure. Some questions to assist you this area include:

1. Will teachers (substitute also secretary, principal, guidance counselor) at all the buildings in the district have the same access to StudentInformation or will access vary by building?
2. Will each of these groups of people have the same access in all buildings (whether they teach in that building or not) or only in the building(s) in which they work?
3. What special supplemental jobs or tasks do staff members have that will require additional access in StudentInformation?

### **Step 3 – Review and Create Roles**

At this point, you should review the list of pre-defined roles and determine which of these roles you intend to use and for which population of users. More information on predefined roles is available in the next section of the manual. Are the pre-defined roles sufficient to provide the necessary access to StudentInformation or are there gaps that will require you to create your own roles for specific types of staff members or additional staff tasks?

With this information, you can create the roles that you will need for your school and/or district. As you create these roles, use names that define the access you are granting. If in a centralized model, define the administrative school as the district and do not set any working schools. In a decentralized model, each building would create their own roles using their building as the administrative school. In a combination model, the district staff would create some roles for use by district staff only, while other roles where the working school includes the buildings that will be assigning this role.

### **Step 4 – Create Groups (as needed)**

### **Step 5 – Assign Role/School Combinations to Groups (as needed)**

**and/or**

### **Step 6 – Assign Role/School Combinations to Users (as needed)**

There are two ways to proceed from this point. You can begin assigning role/school combinations to users or you can create a group of users then assign the role/school combinations to the group of users. Assigning role/school combinations to users works well if you have a lot of staff members with different needs, thus not allowing for more than one user per group. Creating a group and assigning the role/school combinations to the group works much better if you

have many users that need the same access. For example, if you are in a small school where there is only one guidance counselor and 20 teachers, you may want to assign the needed roles directly to the guidance counselor's account while creating a group for the teachers and assigning the role/school combination to the group for the teachers.

### **Step 7 – Create User Accounts**

### **Step 8 – Put Users in Groups (as needed)**

Once you have your group access configured and user created, the final step is to put the users into the appropriate groups.

## **ESC StudentInformation Account Management**

ESC staff members frequently serve multiple schools. Here are some options on setting up ESC staff members in StudentInformation.

### **If the ESC and the served schools are both on StudentInformation:**

This method gives the ESC staff member a single StudentInformation user account with access to multiple school districts and buildings.

- The ESC staff member is set up in StudentInformation at the ESC with a StudentInformation user name and password.
- The served school who wants the ESC staff member to have access to their StudentInformation data sets up a specific group/role with the privileges that will give the ESC staff member the access they need to specific StudentInformation screens and specific buildings in that served school district.
- ITC StudentInformation support can then be notified of the name of the applicable group/role and ITC StudentInformation support can go to the served school and assign the ESC staff member to that group/role. The served school cannot do this because normally they won't have access to that ESC staff member in StudentInformation.

### **If the ESC is not on StudentInformation, but the served schools are on StudentInformation:**

This method gives the ESC staff member a StudentInformation account for each school they serve. However, it works around the need for unique email addresses for each StudentInformation user account.

- The ESC staff member is set up in StudentInformation at each served school and will have a separate StudentInformation user name for each served school.
- The ESC staff member's email address can be used when creating the first StudentInformation user account.
- When creating subsequent StudentInformation user accounts, a unique email address will be required. To work around this issue, a "+1", "+2", etc. can be added to the email address before the domain name. For example, [chris+1@noacsc.org](mailto:chris+1@noacsc.org) and [chris+2@noacsc.org](mailto:chris+2@noacsc.org) will both be sent to [chris@noacsc.org](mailto:chris@noacsc.org) .

## Pre-Defined Roles

StudentInformation State Support recommends Pre-Defined Roles not be used at this time.

Display Role Access Screen

This page intentionally left blank.

---

# ProgressBook StudentInformation Student Promotion Guide



*ProgressBook*<sup>®</sup>  
*StudentInformation*



# **ProgressBook StudentInformation Student Promotion Guide**

**(This document is current for ProgressBook StudentInformation v14.5.0 or later.)**

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Student Promotion Guide* have been made.

Product Version	Heading	Page	Reason
14.5.0	<i>"Bulk Enroll Students"</i>	14	Updated procedure and image of <b>Bulk Enroll</b> tab to reflect new <b>Attendance Pattern</b> information.
14.4.0	Global	N/A	Converted source files to FrameMaker. Updated formatting/structure to match ProgressBook Suite. Rewrote topics using procedural steps.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Overview</b>	<b>1</b>
<b>Set Building Progression Tracks</b>	<b>3</b>
Maintain Building Progression Tracks .....	3
Add Building Progression Tracks .....	3
Edit Building Progression Tracks .....	5
Delete Building Progression Tracks .....	7
Select Default Building Progression Track .....	8
Bulk Assign Students to Building Progression Tracks .....	9
<b>Run Student Promotion</b>	<b>11</b>
Promote Students .....	11
Bulk Enroll Students .....	14

---

This page intentionally left blank.

# Overview

This guide explains student promotion in StudentInformation. Student promotion is the process of creating admission records for students in the next school year. To do this, you first promote students in the current school/school year and then bulk enroll them in the next school/school year. StudentInformation includes building progression tracks to which you can assign students to indicate their expected path through schools within a district (for example, from an elementary school to a specific middle school and then high school).

Refer to the appropriate section as follows:

- For information on creating and maintaining building progression tracks and assigning them to students, see [“Set Building Progression Tracks.”](#)
- For information on the student promotion process, see [“Run Student Promotion.”](#)

This page intentionally left blank.

# Set Building Progression Tracks

Building progression tracks indicate students' expected path through schools within a district (for example, from an elementary school to a specific middle school and then high school). You can create different tracks and select a default track. You then assign students to a track.

- To create and maintain tracks, see [“Maintain Building Progression Tracks.”](#)
- To set a default track, see, [“Select Default Building Progression Track.”](#)
- To assign students to a track, see [“Bulk Assign Students to Building Progression Tracks.”](#)

---

## Maintain Building Progression Tracks

You can maintain building progression tracks at the district level only. Refer to the appropriate section as follows:

- [“Add Building Progression Tracks.”](#)
- [“Edit Building Progression Tracks.”](#)
- [“Delete Building Progression Tracks.”](#)

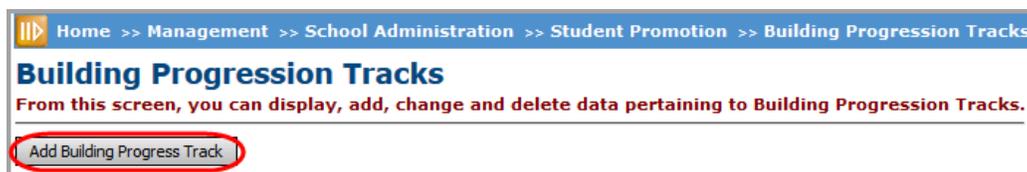
***Note:** For more information on setting up district and building grade level codes and grade level progressions, see [ProgressBook StudentInformation School Year Setup and Configuration Guide](#).*

## Add Building Progression Tracks

**Navigation: Home – Management – School Administration – Student Promotion – Building Progression Tracks**

You can create as many building progression tracks as needed to account for all of the building progressions that can occur in your district. You should create at least one progression track for each elementary school in the district.

1. With the district in context on the **Building Progression Tracks** screen, click **Add Building Progress Track**.



### Add Building Progression Tracks

The add-edit version of the screen displays.

2. Enter a **Code** and **Name** for this track.
3. Optional: Enter a **Description** of this track.

- Optional: If you do not want this track to be currently active, deselect the **Is Active** check box.

**Note:** You cannot assign students to inactive tracks.

- In the row of each grade level, in the **Building/School** drop-down list, select the school that students attend at the grade level. (For example, if you are creating a track for students starting at a particular elementary school, in the rows of the elementary grades, select that school. Then in the rows of the higher grades, select the schools that students from that elementary school will attend in those grades.)
- Click **Save**. Or, to continue adding building progression tracks, click **Save and New**.

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

### Building Progression Tracks

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

Code: DLTN

Name: DAKI - DADA - DAJH - DAHS

Description: KG - High School

Is Active:

Grade Level Code	Building/ School
PS	KIDRON ELEMENTARY
KG	KIDRON ELEMENTARY
01	KIDRON ELEMENTARY
02	KIDRON ELEMENTARY
03	DALTON ELEMENTARY
04	DALTON ELEMENTARY
05	DALTON INTERMEDIATE
06	DALTON INTERMEDIATE
07	DALTON INTERMEDIATE
08	DALTON INTERMEDIATE
09	DALTON HIGH SCHOOL
10	DALTON HIGH SCHOOL
11	DALTON HIGH SCHOOL
12	DALTON HIGH SCHOOL
GR	
UG	
13	
DR-D	
**	
23	

20 Records Displayed [Back To Top](#)

Save Save and New Cancel

### Add Building Progression Track

The newly created building progression track displays.

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

### Building Progression Tracks

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

Add Building Progress Track

		Code	Name	Description	Active
		DLTN	DAKI - DADA - DAJH - DAHS	KG - High School	

Show Active Only

#### Building Progression Track Added

**Note:** Inactive tracks only display if you deselect the **Show Active Only** check box.

## Edit Building Progression Tracks

Navigation: Home – Management – School Administration – Student Promotion – Building Progression Tracks

1. With the district in context on the **Building Progression Tracks** screen, in the row of the building progression track you want to edit, click .

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

### Building Progression Tracks

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

Add Building Progress Track

		Code	Name	Description	Active
		DLTN	DAKI - DADA - DAJH - DAHS	KG - High School	

Show Active Only

#### Edit Building Progression Tracks

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Building Progression Tracks.”](#)

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

### Building Progression Tracks

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

Code: DLTN

Name: DAKI - DADA - DAJH - DAHS

Description: Kindergarten - High School

Is Active:

Grade Level Code	Building/ School
PS	KIDRON ELEMENTARY
KG	KIDRON ELEMENTARY
01	KIDRON ELEMENTARY
02	KIDRON ELEMENTARY
03	DALTON ELEMENTARY
04	DALTON ELEMENTARY
05	DALTON INTERMEDIATE
06	DALTON INTERMEDIATE
07	DALTON INTERMEDIATE
08	DALTON INTERMEDIATE
09	DALTON HIGH SCHOOL
10	DALTON HIGH SCHOOL
11	DALTON HIGH SCHOOL
12	DALTON HIGH SCHOOL
GR	
UG	
13	
DR-D	
**	
23	

20 Records Displayed [Back To Top](#)

Save Cancel

### Edit Building Progression Track

A confirmation message displays, and the edited building progression track displays in the list.

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

## Building Progression Tracks

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

The Building Progression Track was saved successfully

Add Building Progress Track

	Code	Name	Description	Active
✕	DLTN	DAKI - DADA - DAJH - DAHS	Kindergarten - High School	💡

Show Active Only

### Confirmation of Edited Building Progression Track

## Delete Building Progression Tracks

Navigation: Home – Management – School Administration – Student Promotion – Building Progression Tracks

1. With the district in context on the **Building Progression Tracks** screen, in the row of the building progression track you want to delete, click ✕.

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

## Building Progression Tracks

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

Add Building Progress Track

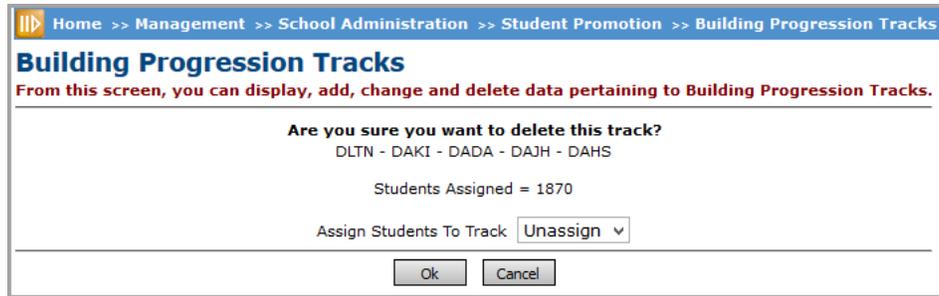
	Code	Name	Description	Active
✕	DLTN	DAKI - DADA - DAJH - DAHS	Kindergarten - High School	💡

Show Active Only

### Delete Building Progression Tracks

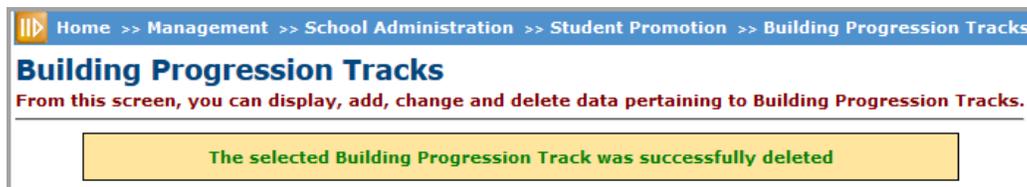
A message displays, asking if you are sure you want to delete the building progression track.

2. Optional: If students are currently assigned to the track you are deleting (as indicated by the "Students Assigned = " line) and your district has another track to which you want to assign the students, in the **Assign Students To Track** drop-down list, select the track.
3. Click **Ok**.



### Confirm Delete

A confirmation message displays, and the building progression track no longer displays.



### Confirmation of Deleted Building Progression Track

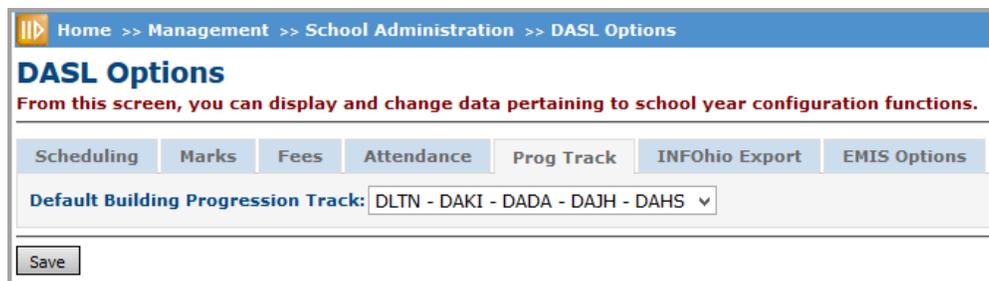
## Select Default Building Progression Track

Navigation: Home – Management – School Administration – DASL Options

You can select a default building progression track at the building level. This is the track to which you want to assign new students at registration.

**Note:** *If your district has several building progression tracks, it is recommended that you not set a default track.*

1. With the building in context on the **DASL Options** screen, click the **Prog Track** tab.
2. In the **Default Building Progression Track** drop-down list, select the default track to use when registering new students.
3. Click **Save**.



### Select Default Building Progression Track

A confirmation message displays, and the selected track now defaults when you register new students.

The screenshot shows a web application interface for 'DASL Options'. At the top, there is a breadcrumb trail: 'Home >> Management >> School Administration >> DASL Options'. Below this, the title 'DASL Options' is displayed in blue, followed by a red instruction: 'From this screen, you can display and change data pertaining to school year configuration functions.' A yellow message box in the center states: 'The Default Building Progression Track was saved successfully'. Below the message box is a navigation bar with tabs for 'Scheduling', 'Marks', 'Fees', 'Attendance', 'Prog Track', 'INFOhio Export', and 'EMIS Options'. Under the 'Prog Track' tab, there is a label 'Default Building Progression Track:' followed by a dropdown menu showing 'DLTN - DAKI - DADA - DAJH - DAHS'. At the bottom left, there is a 'Save' button.

Confirmation of Default Building Progression Track

## Bulk Assign Students to Building Progression Tracks

**Navigation:** Home – Management – School Administration – Student Promotion – Bulk Assign Building Progression Track

At the building level, you can assign many students to a building progression track at once based on an ad-hoc membership.

**Note:** You can also set building progression tracks during the student promotion process. For details, see [“Run Student Promotion.”](#)

1. With the building in context on the **Bulk Assign Building Progression Track** screen, select the **Ad-Hoc Membership** that includes the students you want to bulk assign to a building progression track.

**Note:** To find or build an ad-hoc membership, click . (For more information on setting up ad-hoc memberships, see *ProgressBook StudentInformation Getting Started Guide*.)

2. Select the **Building Progression Track** to which you want to assign students in the selected ad-hoc membership.
3. Optional: If you want to override any previous building progression track assignments for these students, select the **Override Existing Tracks** check box. (If you leave this check box deselected, StudentInformation only assigns to this building progression track any students in the ad-hoc membership who are not currently assigned to a track.)
4. Click **Assign**.

Home >> Management >> School Administration >> Student Promotion >> Bulk Assign Building Progression Track

### Bulk Assign Building Progression Track

Ad-Hoc Membership: [dropdown] [lightning bolt]

Building Progression Track: [dropdown] [lightning bolt]

Override Existing Tracks:

Assign

### Bulk Assign Students to Building Progression Track

A confirmation message displays, indicating that StudentInformation has assigned the students in the ad-hoc membership to the selected building progression track.

Home >> Management >> School Administration >> Student Promotion >> Bulk Assign Building Progression Track

### Bulk Assign Building Progression Track

The Bulk Assign Building Progression Track was run successfully

Ad-Hoc Membership: Honor Society [dropdown] [lightning bolt]

Building Progression Track: EL to HS [dropdown] [lightning bolt]

Override Existing Tracks:

Assign

### Students Assigned to Building Progression Track

StudentInformation also updates the students' building progression track on the student profile.

Home >> SIS >> Student >> Edit Profile FY09

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Arrival FD-Attributes FN-Attributes FN-Graduate Transportation

Save Cancel

Last Modified: 05/18/2009 2:23 PM by User: stavengj

Primary Building: ELEMENTARY [dropdown]

Special Ed: [text]

Citizenship: 04 - United States citizen [dropdown]

Country of Origin: US - United States Of America [dropdown]

Building Progression Track: Trac - District Track [dropdown]

Graduation Year: [text]

New School: ELEMENTARY [dropdown]

### Building Progression Track on Student Profile

# Run Student Promotion

Student promotion is the process of creating admission records for students in the next school year. To do this, you first promote students in the current school/school year and then bulk enroll them in the next school/school year.

Refer to the appropriate topic as follows:

- [“Promote Students”](#)
- [“Bulk Enroll Students”](#)

---

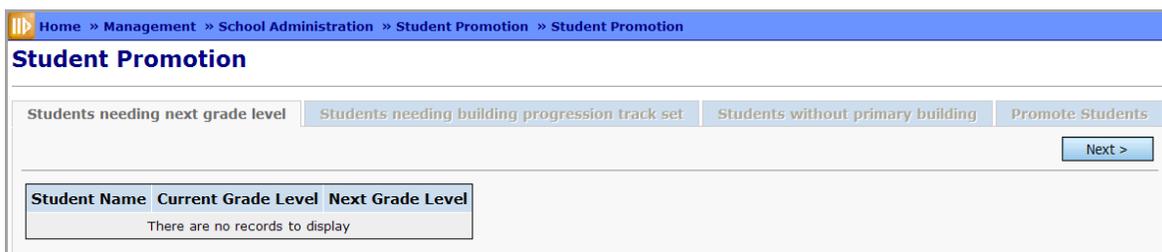
## Promote Students

**Navigation: Home – Management – School Administration – Student Promotion – Student Promotion**

Each year you must promote all students who pass their grade to the next grade level. This process uses the students’ grade level next year and their building progression track to determine and set the school the student will attend during the upcoming school year. You can run this process many times while preparing for the new school year (up until the day the new school year begins).

***Note:** You should complete the student promotion process in all buildings in the same order in which the buildings appear on building progression tracks (typically elementary schools first, then middle schools and then high schools).*

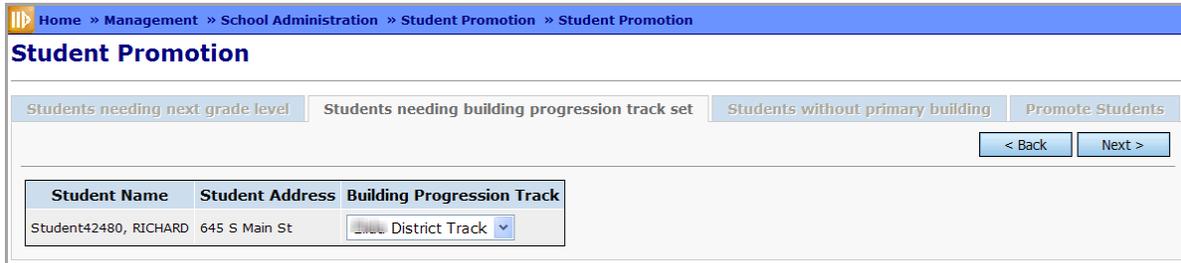
1. With the current school and school year in context on the **Student Promotion** screen, review the **Students needing next grade level** tab to determine if any students display, which indicates their next grade level is not set.
2. Optional: If students needs their grade level set, in the **Next Grade Level** drop-down list of each student, select the student’s correct next grade level.
3. Click **Next**.



### Student Promotion – Students Needing Next Grade Level

4. Review the **Students needing building progression track set** tab to determine if any students display, which indicates their building progression track is not set.

- Optional: If students needs their building progression track set, in the **Building Progression Track** drop-down list of each student, select the student’s correct building progression track.
- Click **Next**.

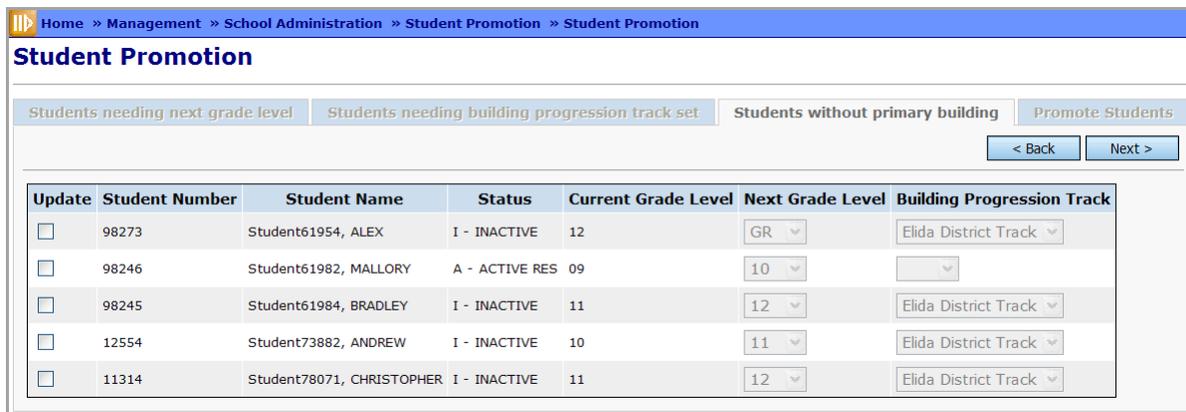


**Student Promotion – Students Needing Building Progression Track Set**

- Review the **Students without primary building** tab to determine if any students display, which indicates their primary building is set to the district.

*Note: There are very limited EMIS situations that allow you to set a student’s primary building to the district. However, if the primary building is set to the district, StudentInformation does not promote the student.*

- Optional: If you need to promote students who have their primary building set to the district, you must correct the primary building for these students on the student profile (**Additional** tab). Then return to the **Student Promotion** screen.
- Click **Next**.



**Student Promotion – Students Without Primary Building**

- On the **Promote Students** tab, review the list of students and the details related to their promotion.

**Note:** The student promotion and bulk enrollment processes populate the **New School** and **Enrolled Next Year** fields. If you are running student promotion for the first time this year, these fields are typically blank. However, the **New School** field could contain data for a student if you previously set this value for the student on the student profile or as part of a student profile bulk update. In this case, the student promotion process resets any previously set values. If you want to return to the original values, after you run student promotion, go back and reenter these values on the student profile or through the student profile bulk update.

The list of students displays based on the following criteria:

- Students have an enrollment in the school/school year in context (student annual record).
- Enrollment in the current school/school year is the students' primary building enrollment (as set on the student profile).
- Students are active (not withdrawn) on an attendance calendar.
- Students' progression track forecasted grade level is not "GR."

11. Click **Promote**.

The screenshot shows a web application interface for 'Student Promotion'. The breadcrumb trail is 'Home » Management » School Administration » Student Promotion » Student Promotion'. The main heading is 'Student Promotion'. Below the heading are four tabs: 'Students needing next grade level', 'Students needing building progression track set', 'Students without primary building', and 'Promote Students'. The 'Promote Students' tab is active. Below the tabs are two buttons: '< Back' and 'Promote'. A table displays student information with the following columns: Number, Student Name ^, Grade, Next Grade, Prog. Track, New School, and Enrolled Next Year. The table contains five rows of student data.

Number	Student Name ^	Grade	Next Grade	Prog. Track	New School	Enrolled Next Year
13513	Student14257, DELQUAN	09	10	District Track		
13512	Student14258, TANISHA	09	10	District Track		
13511	Student14260, KASSEE	09	10	District Track		
13510	Student14262, MARCUS	09	10	District Track		
13509	Student14264, BRITTANY	09	10	District Track		

### Student Promotion – Promote Students

A confirmation message displays, and StudentInformation promotes the students based on their grade level and progression track, determining which school they will attend in the upcoming year. (This value now displays in the **New School** field of both the **Promote Students** tab and the student profile **Additional** tab.)

## Bulk Enroll Students

**Navigation: Home – Management – School Administration – Student Promotion – Student Bulk Enrollment**

**Note:** Before running this process, you must first promote students from the current school year. (See “[Promote Students](#).”) You must also run the school year initialization process on the upcoming school year. (For more information, see *ProgressBook StudentInformation School Year Initialization Guide*.)

After promoting students, you need to bulk enroll the students in the next school year. This process creates a new student admission record for these students. You can run this process many times while preparing for the new school year (up until the day the new school year begins).

**Note:** You should complete the bulk enrollment process in all buildings in the same order in which you promote students (typically elementary schools first, then middle schools and then high schools).

1. With the future school and school year in context on the **Student Bulk Enrollment** screen, review the **Currently enrolled here and set to go elsewhere** tab to determine if any students display, which indicates the students are enrolled in this building but should not be because they have a different building set as their next school.

**Note:** This can occur if someone mistakenly sets the students' new school values and processes bulk enrollment during the new school year setup. In that case, even though in the prior year the students had a different building set as their next school, they are incorrectly enrolled in this building.

2. Optional: If there are students in this list, you may remove them from the current building for the new school year. To do this, select the **Remove** check box for the student(s) you want to remove (or **Select all**), and then click **Remove Selected Student Enrollments**.

**Note:** This step completely removes the students' records from the school/school year in context, including course history, absences, alerts, discipline, fees and grades. It also deletes EMIS records if the school is the last enrollment in the district for the school year.

3. Click **Next**.

Home » Management » School Administration » Student Promotion » Student Bulk Enrollment

## Student Bulk Enrollment

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

Next >

Students already enrolled in this school and school year, but now have another building set as their new school in last year. You may choose to remove the student enrollments from this school and school year.

Select all:     Remove Selected Student Enrollments

Remove	Student Number	Student Name	Grade Level	School (New School)
There are no records to display				

### Student Bulk Enrollment – Currently Enrolled Here and Set to Go Elsewhere

- Review the **Currently enrolled elsewhere and set to go here** tab to determine if any students display, which indicates they have this building set as their next school but are enrolled elsewhere in the district for the upcoming school year.

***Note:** You cannot include these students in the bulk enrollment into this building until the other school removes their enrollment.*

- Contact the other school to resolve this issue. (You can run bulk enrollment again once it is resolved.)
- Click **Next**.

Home » Management » School Administration » Student Promotion » Student Bulk Enrollment

## Student Bulk Enrollment

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

< Back    Next >

Students set to be enrolled in this school and school year, but have an enrollment in another school in the district this school year.

Student Number	Student Name	Enrolled
There are no records to display		

### Student Bulk Enrollment – Currently Enrolled Elsewhere and Set to Go Here

- Review the **Students to Enroll** tab to view a list of students set to be enrolled at this building in the upcoming school year who do not have an enrollment in another building in the district and school year in context. Students display in this list based on the following criteria:
  - They have the school in context set as the **New School** on their student profile in the prior year.
  - They have an active calendar admission in the prior school year (that is, not withdrawn) as of the date you run this bulk enrollment.
  - They are not enrolled in another building in the district in the upcoming school year.
- Optional: To filter the list by prior school, in the **Show Only Students In Prior School** drop-down list, select the prior school.

9. Optional: To filter the list by prior grade level, in the **Show Only Students In Prior Grade Level** drop-down list, select the prior grade level.
10. Select the check box for the student(s) you want to enroll (or **Select All**).
11. Click **Next**.

Home » Management » School Administration » Student Promotion » Student Bulk Enrollment

### Student Bulk Enrollment

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

< Back | Next >

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

**Show Only Students In Prior School:** [Show All] v

**Show Only Students In Prior Grade Level:** [Show All] v

Select All:

Student Number	Student Name	Admitting From	Prior Grade Level	Current Grade Level	Student Status
<input type="checkbox"/> 99914	Student86552, LOGAN	HIGH SCHOOL	09	10	OTH RESIDE
<input type="checkbox"/> 99908	Student86555, RICHARD	HIGH SCHOOL	11	12	ACTIVE RES
<input type="checkbox"/> 99904	Student86559, BROOKE	HIGH SCHOOL	11	12	ACTIVE RES
<input type="checkbox"/> 1571	Student88646, CHELSEA	HIGH SCHOOL	07	08	ACTIVE RES

#### Student Bulk Enrollment – Students to Enroll

12. On the **Bulk Enroll** tab, in the **Enrollment Options** section, indicate which of the following options you want to apply to this bulk enrollment by selecting the related check box:
  - **Copy Locker Assignments** – Copies the students’ locker assignments to the next school/school year (only if previous and next schools are identical)
  - **Copy Free Lunch Status Assignments** – Copies the students’ free lunch status assignments to the next school/school year (only if previous and next schools are identical)
  - **Copy Counselor Assignments** – Copies the students’ counselor assignments to the next school/school year (only if previous and next schools are identical)
  - **Clear All Data Flags** – Clears (does not carry forward) all data values on the student profile to the new school year student record
  - **Clear Homerooms** – Clears (does not carry forward) student homeroom assignments to the next school/school year (If deselected, only copies homerooms if previous and next schools are identical)
13. In the **Map Sub-Calendars** section, in the **Current Calendar** list, review the attendance calendars to which students being promoted are currently assigned and the number of students assigned to each.
14. For each **Current Calendar**, in the **Calendar to Assign** drop-down list, select the attendance calendar to assign to all students included in this bulk enrollment. (If you do not want to promote students with a specific **Current Calendar**, select “-- DO NOT ENROLL --.”)

**Note:** In most cases, you map students to the same calendar. An example of an exception would be mapping current Kindergarten students from a half day calendar to a default (full day) calendar for the next year as 1st grade students.

Your selection in each **Calendar to Assign** drop-down list causes the associated **Attendance Pattern** to display. (It is also used on the student's profile as both the **Attendance Calendar** on the **General** tab and the **Reporting Calendar** on the **FD-Attributes** tab.)

15. In the **Map Student Statuses** section, in the **Current Status** list, review the current statuses of all students being promoted and the number of students with each status.
16. For each **Current Status**, in the **Status to Assign** drop-down list, select the student status to assign to all students included in this bulk enrollment. (If you do not want to promote students with a specific **Current Status**, such as Withdrawn or Deleted, select "-- DO NOT ENROLL --.")

**Note:** In most cases, you map students to the same status.

17. Click **Process Bulk Enrollment**.

StudentInformation > Management > School Administration > Student Promotion > Student Bulk Enrollment

### Student Bulk Enrollment

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

< Back | Process Bulk Enrollment

**Enrollment Options**

Copy Locker Assignments:  Clear All Data Flags:   
 Copy Free Lunch Status Assignments:  Clear Homerooms:   
 Copy Counselor Assignments:

**Map Sub-Calendars**

**Current Calendar**: BHAB - Default Calendar (65 students)  
**Calendar to Assign**: Default Calendar  
**Attendance Pattern**: \*\* - Not Applicable

**Map Student Statuses**

**Current Status**

BHAB - Active (44 students) | Status to Assign: -- DO NOT ENROLL --  
 BHAB - Non-Resident (21 students) | Status to Assign: -- DO NOT ENROLL --

### Student Bulk Enrollment – Bulk Enroll

A confirmation message displays, and StudentInformation processes the student bulk enrollment.

Home » Management » School Administration » Student Promotion » Student Bulk Enrollment

### Student Bulk Enrollment

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

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

Next >

### Student Bulk Enrollment Submitted

18. Optional: Check the status of the bulk enrollment on the **Batch/Report Management** screen.

DASL		Batch/Report Management		1/20/2010 12:35:41 PM	
Display: All		Refresh Display			
Job Type	Job Name	Job Description	Job Status	School Name	Date Added
Students Batch Process	DASL_STUDENT	DASL Students Batch Process	Complete	HIGH SCHOOL	1/20/2010 12:35:00 PM
Close		Clear All Items		Clear Selected Items	
		Refresh Display			

**Batch/Report Management**

**Note:** When you promote students, any student alerts with an empty stop date go forward into the next school year. However, memberships are school year specific and do not copy to the next year.

The student bulk enrollment process creates the following student EMIS records:

- FS Student Standing record for new school year with effective date of July 1
- FD Attributes Effective Date record for new school year with effective date of July 1
- FN Attributes No Date record for new school year

---

# ProgressBook StudentInformation Teacher Menu Guide



# **ProgressBook StudentInformation Teacher Menu Guide**

**(This document is current for ProgressBook StudentInformation v14.5.0 or later.)**

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Teacher Menu Guide* have been made.

Product Version	Heading	Page	Reason
14.5.0	<i>"Manage Discipline Referrals"</i>	36	Added section.
14.4.0	Global	N/A	Converted source files to FrameMaker. Updated formatting/structure to match ProgressBook Suite. Rewrote topics using procedural steps.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Teacher Menu</b>	<b>1</b>
View Course List .....	1
Take Attendance .....	2
Take Daily Attendance .....	2
Take Period Attendance .....	5
Override Attendance on Report Cards .....	7
Maintain Marks .....	9
View All Student Marks .....	9
View Students with Missing Marks .....	10
Enter Marks .....	11
Edit Marks .....	15
Bulk Update Marks .....	18
Enter Exception Credits .....	21
Maintain Comments .....	23
View Comments .....	23
Add Comments .....	24
Add Standard Comments .....	24
Add Freeform Comments .....	25
Edit Comments .....	27
Delete Comments .....	28
Post Fee Payments .....	30
View Student Medical Information .....	32
View Student Medical Alerts .....	32
View Student Medications .....	34
Manage Discipline Referrals .....	36
Add Discipline Referrals .....	36
View List of Submitted Referrals .....	38



# Teacher Menu

If your district gives you access to the appropriate options on the **Teacher Menu** in StudentInformation, you can use this menu to view a list of your courses and take attendance, enter marks and comments, post fee collection payments and view medical information for students in your course sections.

***Note:** If you have the job function of teacher in StudentInformation, you can only see information on the **Teacher Menu** for students in your assigned course sections. If your job function is other than teacher or you need access to additional students, you need to have staff member impersonations set up. For more information, see ProgressBook StudentInformation Security Guide.*

Refer to the appropriate section as follows:

- [“View Course List”](#)
- [“Take Attendance”](#)
- [“Maintain Marks”](#)
- [“Maintain Comments”](#)
- [“Post Fee Payments”](#)
- [“View Student Medical Information”](#)
- [“Manage Discipline Referrals”](#)

---

## View Course List

### Navigation: Home – Teacher Menu – Teacher Course List

You can view a list of your courses or (with the proper impersonations set up) those of another teacher for the current reporting period or all reporting periods.

1. On the **Teacher Course List** screen, select the **Teacher** whose course list you want to view.
2. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.

The selected teacher’s courses display, including a count of the students in each course (**Filling Count**) and the course period and meeting place of the course (**Meeting**).

Home >> Teacher Menu >> Teacher Course List

## Teacher Course List

From this screen, you can jump to a page with a course section.

Teacher: DONALD BERRY  Course Sections In Progress

Code	Name	Section	Filling Count	Meeting	
240	PRACTICAL GEOMETRY	3	5.00	2,3 (112)	Go to... <input type="button" value="v"/>
240	PRACTICAL GEOMETRY	2	13.00	3 (112)	Go to... <input type="button" value="v"/>

[View Course List](#)

## Take Attendance

Depending on your setup, you can take daily and/or period attendance. You can also adjust the attendance information on your students' report cards. Refer to the appropriate section as follows:

- ["Take Daily Attendance"](#)
- ["Take Period Attendance"](#)
- ["Override Attendance on Report Cards"](#)

## Take Daily Attendance

**Navigation: Home – Teacher Menu – Daily Attendance**

Depending on your setup, you can take daily attendance by homeroom or classroom. You may also be able to take lunch counts.

1. On the **Daily Attendance by Classroom** screen, in the **Date** field, confirm that the date that displays (which defaults to the current date) is the date for which you want to take attendance. If needed, enter or select a different date.

**Note:** If your school setup only allows you to take attendance for the current date, that date defaults, and you cannot change it. In that case, skip this step.

2. Click **Go**.

Home >> Teacher Menu >> Daily Attendance

## Daily Attendance by Classroom

From this screen, you can collect daily attendance information for a classroom or homeroom.

School is not in session on the date selected

Date: 4/4/2014

**Daily Attendance**

- Depending on your setup, confirm either the **Period** and **Course Section** or the **Homeroom** for which you want to take attendance. If needed, you can make different selections.

- Click **Go**.

The screen refreshes to display a listing of students in the classroom or homeroom.

- Optional: If your setup displays lunch options, enter the number of students choosing each option for the date on which you are taking attendance.
- For each student who is not present, in the **Absence Type** column, select “Late” or “Absent,” as appropriate.

**Note:** Any student who is already marked late by the office displays in yellow, and any student marked absent by the office displays in orange. A second grid may display students marked absent for the day (for instance, if parents notified the office of the absence and the office marked the students absent prior to you taking homeroom attendance). You can only remove students from the second grid if you have the proper security permissions.

- Optional: If you wish to add a comment related to an absence or tardy, enter it in the **Comments** column.

- Click **Submit Attendance**.

Home » Teacher Menu » Daily Attendance

### Daily Attendance by Classroom

From this screen, you can collect daily attendance information for a classroom or homeroom.

Date: 3/10/2008   Period: 1 - 1 Course Section: ECONOMICS: Section 3 - LAURA CROFT 

sack lunch:  tray lunch:  salad:  milk:

Absence Type	Student Name	Student Number	Comments
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	CONTRARY, JASON WILLIAM	00007001	<input type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	Contrary, Jesse	48652281	<input type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	EYE, CORY ROBERT	00006001	<input type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	EYE, MAGNUM P.	00004001	<input type="text"/>

### Take Daily Attendance by Classroom

Home » Teacher Menu » Daily Attendance

### Daily Attendance by Classroom

From this screen, you can collect daily attendance information for a classroom or homeroom.

---

Date:    Homeroom:

---

sack lunch:  tray lunch:  salad:  milk:

Absence Type	Student Name	Student Number	Comments
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	EYE, MAGNUM P.	00004001	<input style="width: 100%;" type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	FONT, ELLA JANE	00004002	<input style="width: 100%;" type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	JOHNSON, GEORGE EVAN	00004003	<input style="width: 100%;" type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	POTTS, JORDAN DANIEL	00004004	<input style="width: 100%;" type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	WELLS, JOBETH	00004005	<input style="width: 100%;" type="text"/>

#### Take Daily Attendance by Homeroom

A confirmation message displays, and StudentInformation submits the attendance and lunch counts to the office. In addition, the **Daily Attendance by Classroom** screen now displays any late students in yellow and any absent students in orange.

9. Optional: If you need to make additional changes to the attendance or lunch counts, make the changes, and then click **Submit Attendance** again.

Home » Teacher Menu » Daily Attendance

## Daily Attendance by Classroom

From this screen, you can collect daily attendance information for a classroom or homeroom.

The Attendance changes were saved successfully

Date: 1/16/2008   Homeroom: A105

sack lunch:  tray lunch:  salad:  milk:

Absence Type	Student Name	Student Number	Comments
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	EYE, MAGNUM P.	00004001	<input type="text"/>
<input type="radio"/> Present <input checked="" type="radio"/> Late <input type="radio"/> Absent	FONT, ELLA JANE	00004002	<input type="text"/>
<input type="radio"/> Present <input type="radio"/> Late <input checked="" type="radio"/> Absent	JOHNSON, GEORGE EVAN	00004003	<input type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	POTTS, JORDAN DANIEL	00004004	<input type="text"/>
<input checked="" type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	WELLS, JOBETH	00004005	<input type="text"/>

### Daily Attendance Submitted

## Take Period Attendance

### Navigation: Home – Teacher Menu – Period Attendance

If your school is set up for period attendance, you can take attendance by period/course section.

1. On the **Period Attendance by Course Section** screen, select the **Teacher** and **Date**.
2. Click **Go**.

Home » Teacher Menu » Period Attendance

## Period Attendance by Course Section

From this screen, you can collect attendance information by course section for each period of the day.

Step 1: Teacher: DONALD BERRY  Date: 12/6/2004

Step 2: Period: -- Select a Period/Course Section --

### Period Attendance

If the selected teacher has only one period/course section, the system defaults these students in the grid. If the teacher has more than one period/course section, these populate the **Period** drop-down list.

3. Optional: If the **Period** drop-down list displays, select the period/course section for which you want to take attendance.

A grid displays the students in the selected period/course section. Students marked absent for the day by the office display in orange (as already marked absent).

- For each student who is not present, in the **Absence Type** column, select “Late” or “Absent,” as appropriate.

**Note:** Depending on your school’s setup, “Late” might not be an available option.

- Optional: If your setup includes the **Absence Reason** and **Absence Note** columns and you wish to indicate these, select the appropriate options.
- Optional: If you wish to add a comment related to an absence or tardy, enter it in the **Comments** column.
- Click **Save**.

**Take Period Attendance**

A confirmation message displays, and StudentInformation submits the attendance to the office.

- Optional: To display the attendance for this period/course section, reselect the appropriate **Period**.

**Period Attendance Submitted**

The **Period Attendance by Course Section** screen now displays the grid again with any late students in yellow and any absent students in orange.

Home » Teacher Menu » Period Attendance

### Period Attendance by Course Section

From this screen, you can collect attendance information by course section for each period of the day.

Step 1: Teacher:  Date: 12/6/2004

Step 2: Period:

Student Number	Student	Course Section	Absence Type	Absence Reason	Absence Notes	Comments
Student Information			<input type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	-- Select Reason --	-- Select Note --	<input type="text"/>
			<input type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	-- Select Reason --	-- Select Note --	<input type="text"/>
			<input type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	-- Select Reason --	-- Select Note --	<input type="text"/>
			<input type="radio"/> Present <input type="radio"/> Late <input type="radio"/> Absent	-- Select Reason --	-- Select Note --	<input type="text"/>

### Period Attendance by Period/Course Section

## Override Attendance on Report Cards

### Navigation: Home – Teacher Menu – Report Card Attendance

You can override the number of period absences and tardies that appear on a student's report card.

1. Access the **Period Attendance for Report Cards** screen using the navigation path shown above. Or, to access this screen from the **Teacher Course List** screen:
  - a. Select the **Teacher** whose course list you want to view.
  - b. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.  
The selected teacher's courses display.
  - c. In the drop-down list in the row of the course, select "Report Card Attendance."

Home » Teacher Menu » Teacher Course List

### Teacher Course List

From this screen, you can jump to a page with a course section.

Teacher:   Course Sections In Progress

Code	Name	Section	Filling Count	Meeting	
240	PRACTICAL GEOMETRY	3	5.00	2,3 (112)	- Report Card Attendance
240	PRACTICAL GEOMETRY	2	13.00	3 (112)	Go to...

### Access Period Attendance for Report Cards from Teacher Course List

2. On the **Period Attendance for Report Cards** screen, select the **Reporting Term** and **Course Section** for which you want to override report card period attendance values.
3. Review the number of calculated period absences and tardies for each student.

Home » Teacher Menu » Report Card Attendance

### Period Attendance for Report Cards

From this screen, you can override period absence values that appear on student report cards.

Reporting Term:  Course Section:

Student Name	Calculated Absences	Calculated Tardies	Number of Absences	Number of Tardies
CONTRARY, JASON WILLIAM	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
CONTRARY, MARY M.	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
James, Steven	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
JOHNSON, GEORGE EVAN	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
Loo, Lucy	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
POTTS, JORDAN DANIEL	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
RING, NICOLE SUZANNE	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
SARGENT, LEANN JEAN	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
SAWYER, THOMAS (JACK)	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>

**Override Period Attendance on Report Cards**

- In the **Number of Absences** and/or **Number of Tardies** columns of any student whose attendance information you want to override, enter the revised number of absences and tardies, respectively, that you want to display on the student's report card. You can also use the up and down arrows to adjust the number.

CONTRARY, JASON WILLIAM	0	0	<input type="text" value="1"/>	<input type="text" value="3"/>
-------------------------	---	---	--------------------------------	--------------------------------

**Override Student's Attendance**

- Click **Save**.

A confirmation message displays, and StudentInformation overrides the attendance records of each student as needed with the appropriate period absence and tardy values. These overridden values will appear on each the student's report card.

Home » Teacher Menu » Report Card Attendance

### Period Attendance for Report Cards

From this screen, you can override period absence values that appear on student report cards.

Report Card Attendance successfully saved.

Reporting Term:  Course Section:

**Report Card Attendance Overridden**

## Maintain Marks

You can maintain marks for a course section in a variety of ways. Refer to the appropriate section as follows:

- [“View All Student Marks”](#)
- [“View Students with Missing Marks”](#)
- [“Enter Marks”](#)
- [“Edit Marks”](#)
- [“Bulk Update Marks”](#)
- [“Enter Exception Credits”](#)

**Note:** For more information on how StudentInformation calculates marks, see *ProgressBook StudentInformation Marks Guide*.

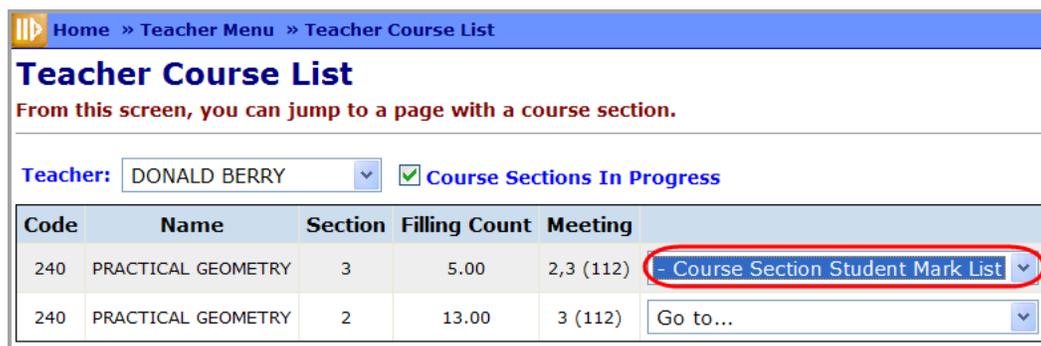
## View All Student Marks

You can view the marks of all students enrolled in a specific course section on the read-only **Student Mark List** screen.

1. Navigate to **Home – Teacher Menu – Teacher Course List**.
2. On the **Teacher Course List** screen, select the **Teacher** whose course list you want to view.
3. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.

The selected teacher’s courses display.

4. In the drop-down list in the row of the course whose marks you want to view, select “Course Section Student Mark List.”



The screenshot shows the 'Teacher Course List' interface. At the top, there is a breadcrumb trail: Home » Teacher Menu » Teacher Course List. Below this is the title 'Teacher Course List' and a sub-header: 'From this screen, you can jump to a page with a course section.' The main area contains a form with 'Teacher: DONALD BERRY' and a checked box for 'Course Sections In Progress'. Below the form is a table with the following data:

Code	Name	Section	Filling Count	Meeting	
240	PRACTICAL GEOMETRY	3	5.00	2,3 (112)	- Course Section Student Mark List
240	PRACTICAL GEOMETRY	2	13.00	3 (112)	Go to...

### Access Student Mark List from Teacher Course List

5. Select the **Reporting Term** and **Mark Type** of the marks you want to view.
6. Click **Go**.
7. Review the marks.

- Optional: To view a list that includes students who were previously enrolled in this course section, deselect the **Show Current Students Only** check box.

Home » Teacher Menu » Teacher Course List » Student Mark List

### Course Section Student Mark List - 240 - PRACTICAL GEOMETRY: Section 3

A listing of all students in the course section and what marks have been assigned

Reporting Term: All Reporting Terms ▼ Mark Type: Qtr - Quarter Mark ▼ Go Back

Student Name	Student Number	Status	Qtr1 - Qtr Qtr for Qtr1	Qtr2 - Qtr Qtr for Qtr2	Qtr3 - Qtr Qtr for Qtr3	Qtr4 - Qtr Qtr for Qtr4
Banana, Hannah	48652258	Assigned				
Contrary, Jesse	48652281	Assigned				
CONTRARY, MARY M.	00005001	Assigned				
EYE, CORY ROBERT	00006001	Assigned				
EYE, PRIVA	00122445	Assigned				

Show Current Students Only

Student Mark List

## View Students with Missing Marks

You can view a list of students with missing marks so you can enter these marks before the marks cutoff date. For more information about marks cutoff dates, see *ProgressBook StudentInformation Marks Guide*.

- Navigate to **Home – Teacher Menu – Teacher Course List**.
  - On the **Teacher Course List** screen, select the **Teacher** whose course list you want to view.
  - Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.
- The selected teacher’s courses display.
- In the drop-down list in the row of the course whose marks you want to view, select “Course Section Mark Summary.”

Home » Teacher Menu » Teacher Course List

### Teacher Course List

From this screen, you can jump to a page with a course section.

Teacher: DONALD BERRY ▼  Course Sections In Progress

Code	Name	Section	Filling Count	Meeting	
240	PRACTICAL GEOMETRY	3	5.00	2,3 (112)	- Course Section Mark Summary ▼
240	PRACTICAL GEOMETRY	2	13.00	3 (112)	Go to... ▼

Access Course Section Mark Summary from Teacher Course List

The **Course Section Mark Summary** screen displays.

5. Optional: To limit the summary to a particular **Reporting Term** and/or **Mark Type**, select these in the drop-down lists, and then click **Go**.
6. In the **Students Missing Mark Value** column, review the students missing marks for each mark type.

Home » Teacher Menu » Teacher Course List » Course Section Mark Summary

### Course Section Mark Summary - 240 - PRACTICAL GEOMETRY: Section 3

All marks for the course section with a list of students missing a mark value

Reporting Term:  Mark Type:

The following grid displays **all** marks required by marking patterns where students are **missing** mark value entries.

Reporting Term	Mark Type	Mark ^	Students Missing Mark Value
Qtr1	Qtr	1st Quarter Mark	Banana, Hannah Contrary, Jesse CONTRARY, MARY M. EYE, CORY ROBERT EYE, PRIVA
Qtr2	Qtr	2nd Quarter Mark	Banana, Hannah Contrary, Jesse CONTRARY, MARY M. EYE, CORY ROBERT EYE, PRIVA
Qtr3	Qtr	3rd Quarter Mark	Banana, Hannah Contrary, Jesse CONTRARY, MARY M. EYE, CORY ROBERT EYE, PRIVA
Qtr4	Qtr	4th Quarter Mark	Banana, Hannah Contrary, Jesse CONTRARY, MARY M. EYE, CORY ROBERT EYE, PRIVA

#### Course Section Mark Summary

7. Optional: To enter the missing marks:
  - a. In the **Mark** column, click the mark term for which you want to enter missing marks.
  - b. On the **Course Section Mark Entry** screen, enter the missing marks. (See [“Enter Marks.”](#))

## Enter Marks

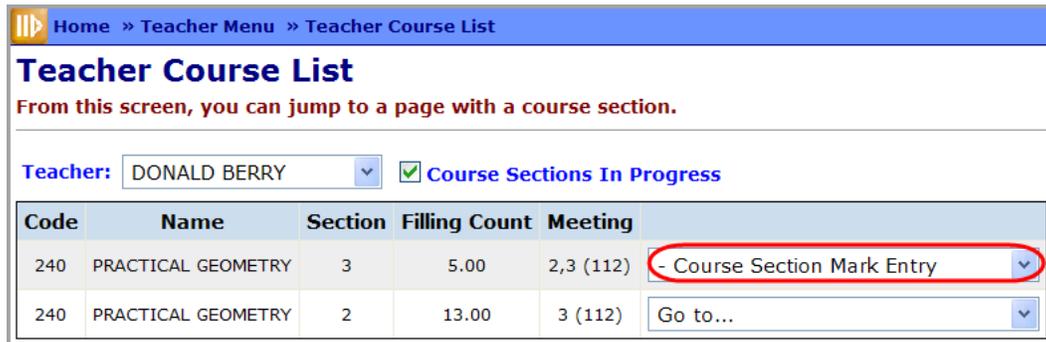
### Navigation: Home – Teacher Menu – Course Section Mark Entry

You can enter marks for students in your course sections or (with the proper impersonations set up) those of another teacher up to the marks cutoff date. For more information about marks cutoff dates, see *ProgressBook StudentInformation Marks Guide*.

1. Access the **Course Section Mark Entry** screen using the navigation path shown above. Or, to access this screen from the **Teacher Course List** screen:
  - a. Select the **Teacher** whose course list you want to view.
  - b. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.

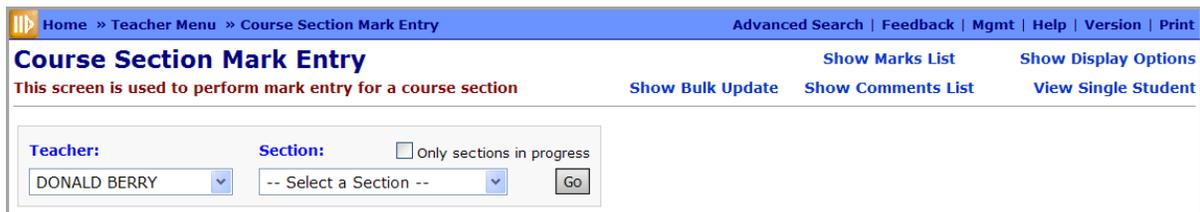
The selected teacher’s courses display.

- c. In the drop-down list in the row of the course, select “Course Section Mark Entry.”



### Access Course Section Mark Entry from Teacher Course List

2. On the **Course Section Mark Entry** screen, select the **Teacher** and **Section** for which you want to enter marks.
3. Optional: To view course sections that are not currently in progress, deselect the **Only sections in progress** check box.
4. Click **Go**.



### Select Course Section

Display options for the course display on screen.

**Note:** If during your current StudentInformation session you have already selected display options for the marking pattern that applies to this course section, these options load automatically from memory, and you do not see this screen.

5. Select the marking patterns and type of mark comments you want to enter for this course section.
6. Click **Apply and View Marks**.

**Display Options - Marking Pattern: All Year Course**

**Marks**

1st Quarter Mark     1st Semester Exam     4th Quarter Interim  
 1st Quarter Interim     3rd Quarter Mark     2nd Semester Average  
 2nd Quarter Mark     3rd Quarter Interim     2nd Semester Exam  
 2nd Quarter Interim     4th Quarter Mark     Final  
 1st Semester Average

All

**Mark Comments**

General Mark  
 All

View All Students     View Single Student    **Apply and View Marks**    Cancel

### Select Display Options

The selected display options display in a grid.

Home > Teacher Menu > Course Section Mark Entry

**Course Section Mark Entry** [Show Marks List](#) [Show Display Option](#)  
[Show Bulk Update](#) [Show Comments List](#) [View Single Student](#)

This screen is used to perform mark entry for a course section

Teacher: DONALD BERRY    Section: 240 (PRAC GEOMETRY) - 3     Only sections in progress    Go

**240 - PRACTICAL GEOMETRY: Section 3** [Save Changes](#)

Student Name	Number	Grade	Mark	Value	General
Banana, Hannah	48652258	09	2nd Semester Average		
			2nd Semester Exam		
			Final (Auto)	(Auto)	
Contrary, Jesse	48652281	09	2nd Semester Average		
			2nd Semester Exam		
			Final (Auto)	(Auto)	
CONTRARY, MARY M.	0005001	09	2nd Semester Average		
			2nd Semester Exam		
			Final (Auto)	(Auto)	

### Marks Grid

- In the **Value** field for each student, enter the student's mark for this course.  
As you enter marks, valid values display in green; invalid entries display in red.

Home » Teacher Menu » Course Section Mark Entry Advanced Search | Feedback | Mgmt | Help | Version | Print

**Course Section Mark Entry** Show Marks List Show Display Options

This screen is used to perform mark entry for a course section Show Bulk Update Show Comments List View Single Student

Teacher: DONALD BERRY Section: 240 (PRAC GEOMETRY) - 3  Only sections in progress

**240 - PRACTICAL GEOMETRY: Section 3**

Student Name	Number	Grade	Mark	Value	General
Banana, Hannah	48652258	09	3rd Quarter Mark	A	
Contrary, Jesse	48652281	09	3rd Quarter Mark	G	
CONTRARY, MARY M.	00005001	09	3rd Quarter Mark	C	
EYE, CORY ROBERT	00006001	09	3rd Quarter Mark		
EYE, PRIVA	00122445	09	3rd Quarter Mark		

### Enter Marks

8. Optional: To view a list of valid values, click **Show Marks List**.
9. Once all entries display in green (indicating they are valid), click **Save Changes**.  
The newly saved entries display highlighted in yellow.
10. Optional: To enter comment codes for a student, in the **General** fields, enter one or more comment codes supported by your school.  
As you enter comments, valid values display in green; invalid entries display in red.
11. Optional: To view a list of valid values, click **Show Comments List**.
12. Once all entries display in green (indicating they are valid), click **Save Changes**.

Home » Teacher Menu » Course Section Mark Entry Advanced Search | Feedback | Mgmt | Help | Version | Print

**Course Section Mark Entry** Show Marks List Show Display Options

This screen is used to perform mark entry for a course section Show Bulk Update Show Comments List View Single Student

Teacher: DONALD BERRY Section: 240 (PRAC GEOMETRY) - 3  Only sections in progress

**240 - PRACTICAL GEOMETRY: Section 3**

Student Name	Number	Grade	Mark	Value	General
Banana, Hannah	48652258	09	3rd Quarter Mark	A	001 739
Contrary, Jesse	48652281	09	3rd Quarter Mark	G	002
CONTRARY, MARY M.	00005001	09	3rd Quarter Mark	C	999
EYE, CORY ROBERT	00006001	09	3rd Quarter Mark		
EYE, PRIVA	00122445	09	3rd Quarter Mark		

### Enter Comments

The newly saved entries display highlighted in yellow.

13. Optional: To change the view to enter marks for a single student (for example, in the case of a missing mark that you need to enter at a later time for a specific student):
  - a. Click **View Single Student**.
  - b. In the drop-down list at the top of the grid, select the student. You can move from one student to the next by clicking the  and  icons.

- c. Enter any marks and comments.
- d. When you are finished entering marks and comments for one or more students individually, click **Save Changes**.

### Single Student View

## Edit Marks

### Navigation: Home – Teacher Menu – Course Section Mark Entry

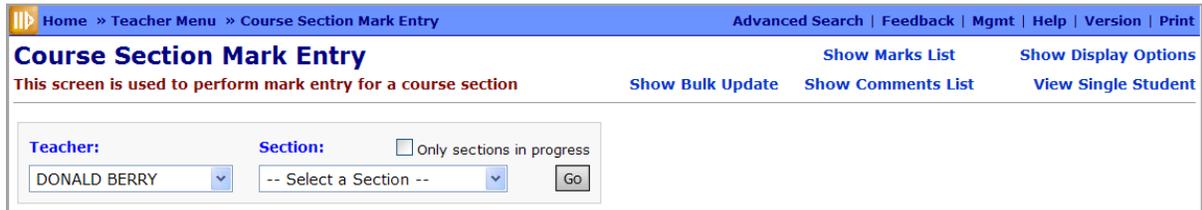
You can edit marks for students in your course sections or (with the proper impersonations set up) those of another teacher up to the marks cutoff date. For more information about marks cutoff dates, see *ProgressBook StudentInformation Marks Guide*.

**Note:** To update the marks or comments for a group of students, see [“Bulk Update Marks.”](#)

1. Access the **Course Section Mark Entry** screen using the navigation path shown above. Or, to access this screen from the **Teacher Course List** screen:
  - a. Select the **Teacher** whose course list you want to view.
  - b. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.  
The selected teacher’s courses display.
  - c. In the drop-down list in the row of the course, select “Course Section Mark Entry.”

### Access Course Section Mark Entry from Teacher Course List

2. On the **Course Section Mark Entry** screen, select the **Teacher** and **Section** for which you want to edit marks.
3. Optional: To view course sections that are not currently in progress, deselect the **Only sections in progress** check box.
4. Click **Go**.

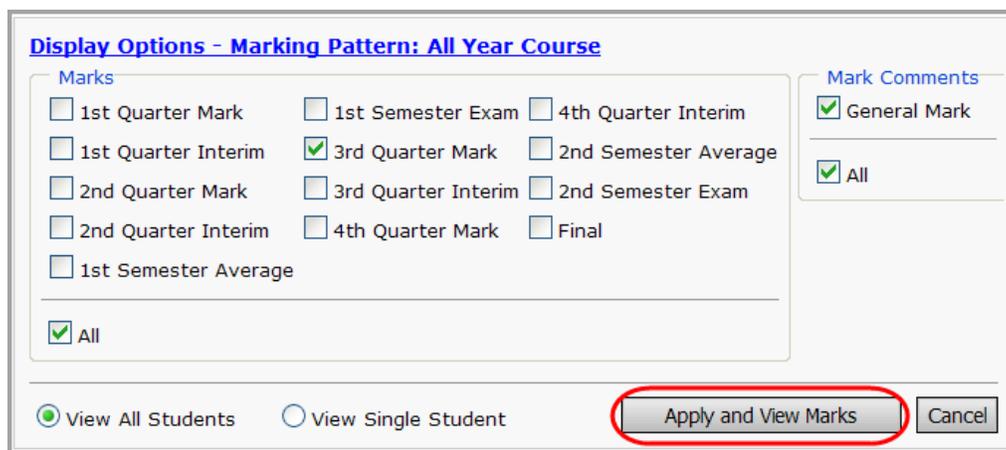


### Select Course Section

Display options for the course display on screen.

**Note:** If during your current StudentInformation session you have already selected display options for the marking pattern that applies to this course section, these options load automatically from memory, and you do not see this screen.

5. Select the marking patterns and type of mark comments you want to enter for this course section.
6. Click **Apply and View Marks**.



### Select Display Options

The selected display options display in a grid.

Home » Teacher Menu » Course Section Mark Entry

### Course Section Mark Entry

This screen is used to perform mark entry for a course section

[Show Marks List](#)   [Show Display Options](#)  
[Show Bulk Update](#)   [Show Comments List](#)   [View Single Student](#)

**Teacher:** DONALD BERRY   **Section:** 240 (PRAC GEOMETRY) - 3    Only sections in progress  

**240 - PRACTICAL GEOMETRY: Section 3**

Student Name	Number	Grade	Mark	Value	General
Banana, Hannah	48652258	09	2nd Semester Average		
			2nd Semester Exam		
			Final (Auto)	(Auto)	
Contrary, Jesse	48652281	09	2nd Semester Average		
			2nd Semester Exam		
			Final (Auto)	(Auto)	
CONTRARY, MARY M.	00005001	09	2nd Semester Average		
			2nd Semester Exam		
			Final (Auto)	(Auto)	

### Marks Grid

- In the **Value** field for each student, update any student marks for this course as needed. As you enter marks, valid values display in green; invalid entries display in red.

Home » Teacher Menu » Course Section Mark Entry

[Advanced Search](#) | [Feedback](#) | [Mgmt](#) | [Help](#) | [Version](#) | [Print](#)

### Course Section Mark Entry

This screen is used to perform mark entry for a course section

[Show Marks List](#)   [Show Display Options](#)  
[Show Bulk Update](#)   [Show Comments List](#)   [View Single Student](#)

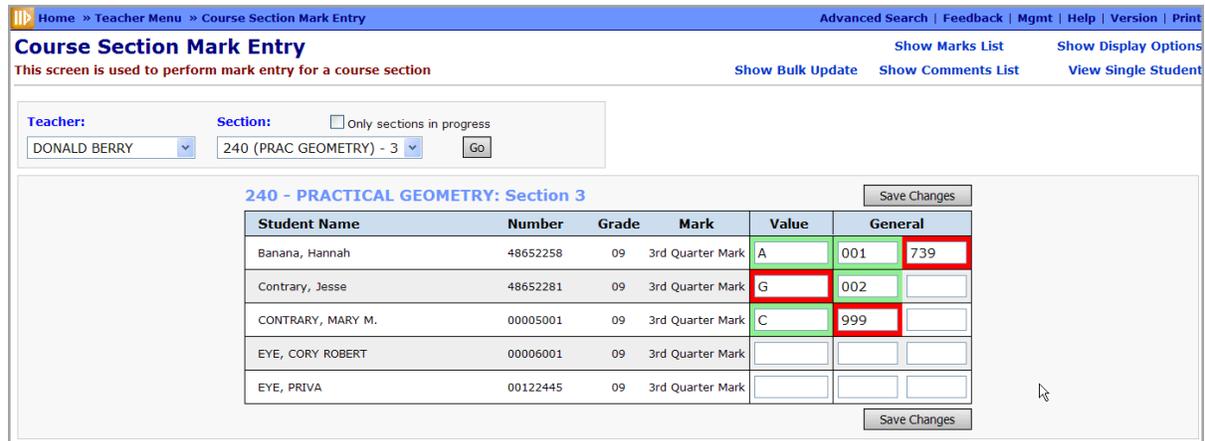
**Teacher:** DONALD BERRY   **Section:** 240 (PRAC GEOMETRY) - 3    Only sections in progress  

**240 - PRACTICAL GEOMETRY: Section 3**

Student Name	Number	Grade	Mark	Value	General
Banana, Hannah	48652258	09	3rd Quarter Mark	A	
Contrary, Jesse	48652281	09	3rd Quarter Mark	G	
CONTRARY, MARY M.	00005001	09	3rd Quarter Mark	C	
EYE, CORY ROBERT	00006001	09	3rd Quarter Mark		
EYE, PRIVA	00122445	09	3rd Quarter Mark		

### Enter Marks

- Optional: To view a list of valid values, click **Show Marks List**.
- Once all entries display in green (indicating they are valid), click **Save Changes**.  
The newly saved entries display highlighted in yellow.
- Optional: To enter or edit comment codes for a student, in the **General** fields, enter one or more comment codes supported by your school.  
As you enter comments, valid values display in green; invalid entries display in red.
- Optional: To view a list of valid values, click **Show Comments List**.
- Once all entries display in green (indicating they are valid), click **Save Changes**.

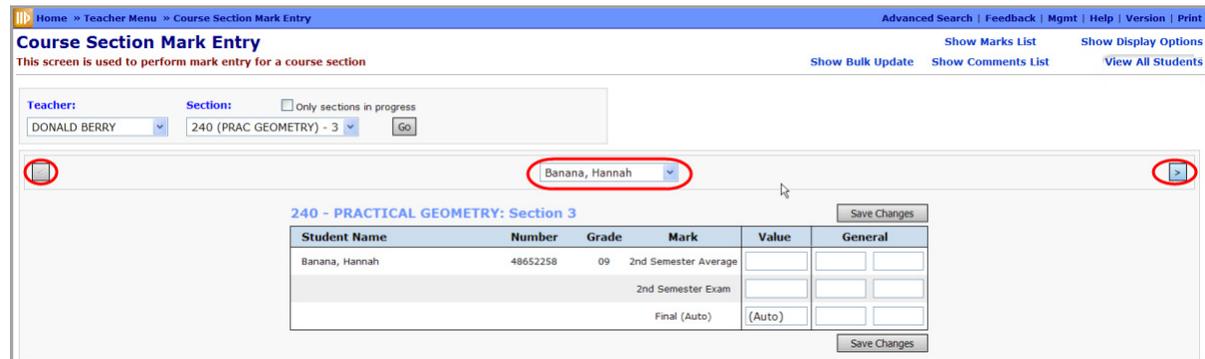


### Enter Comments

The newly saved entries display highlighted in yellow.

13. Optional: To change the view to edit marks for a single student:

- a. Click **View Single Student**.
- b. In the drop-down list at the top of the grid, select the student. You can move from one student to the next by clicking the  and  icons.
- c. Edit any marks and comments as needed.
- d. When you are finished editing marks and comments for one or more students individually, click **Save Changes**.



### Single Student View

## Bulk Update Marks

Navigation: Home – Teacher Menu – Course Section Mark Entry

You can update marks or comments for a group of students up to the marks cutoff date. For more information about marks cutoff dates, see *ProgressBook StudentInformation Marks Guide*.

**Note:** To update the marks or comments for individual students, see [“Edit Marks.”](#)

1. Access the **Course Section Mark Entry** screen using the navigation path shown above. Or, to access this screen from the **Teacher Course List** screen:
  - a. Select the **Teacher** whose course list you want to view.
  - b. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.  
The selected teacher's courses display.
  - c. In the drop-down list in the row of the course, select "Course Section Mark Entry."

#### Access Course Section Mark Entry from Teacher Course List

2. On the **Course Section Mark Entry** screen, select the **Teacher** and **Section** for which you want to bulk update marks.
3. Optional: To view course sections that are not currently in progress, deselect the **Only sections in progress** check box.
4. Click **Go**.

#### Select Course Section

Display options for the course display on screen.

**Note:** If during your current StudentInformation session you have already selected display options for the marking pattern that applies to this course section, these options load automatically from memory, and you do not see this screen.

5. Select the marking patterns and type of mark comments you want to bulk update for this course section.
6. Click **Apply and View Marks**.

**Display Options - Marking Pattern: All Year Course**

**Marks**

1st Quarter Mark     1st Semester Exam     4th Quarter Interim  
 1st Quarter Interim     3rd Quarter Mark     2nd Semester Average  
 2nd Quarter Mark     3rd Quarter Interim     2nd Semester Exam  
 2nd Quarter Interim     4th Quarter Mark     Final  
 1st Semester Average

All

**Mark Comments**

General Mark  
 All

View All Students     View Single Student    **Apply and View Marks**    Cancel

**Select Display Options**

The selected display options display in a grid.

7. Click **Show Bulk Update**.

Home » Teacher Menu » Course Section Mark Entry

**Course Section Mark Entry**    Show Marks List    Show Display Option  
 This screen is used to perform mark entry for a course section    **Show Bulk Update**    Show Comments List    View Single Student

**Teacher:** DONALD BERRY    **Section:** 240 (PRAC GEOMETRY) - 3     Only sections in progress    Go

**240 - PRACTICAL GEOMETRY: Section 3**    Save Changes

Student Name	Number	Grade	Mark	Value	General
Banana, Hannah	48652258	09	2nd Semester Average	<input type="text"/>	<input type="text"/>
			2nd Semester Exam	<input type="text"/>	<input type="text"/>
			Final (Auto)	(Auto)	<input type="text"/>
Contrary, Jesse	48652281	09	2nd Semester Average	<input type="text"/>	<input type="text"/>
			2nd Semester Exam	<input type="text"/>	<input type="text"/>
			Final (Auto)	(Auto)	<input type="text"/>
CONTRARY, MARY M.	00005001	09	2nd Semester Average	<input type="text"/>	<input type="text"/>
			2nd Semester Exam	<input type="text"/>	<input type="text"/>
			Final (Auto)	(Auto)	<input type="text"/>

**Marks Grid**

8. In the **Marks** drop-down list, select the marking pattern rule you want to bulk update.
9. Select the types of bulk updates you want to make as follows:
  - To bulk update marks, select the **Value** check box, and enter the new mark.
  - To bulk update comments, select the **General** check box, and enter one or more new comments.
10. Select the check box beside each student to include in the bulk update. To include all students, select the check box at the top of the column.
11. Click **Update Selected Students**.
12. Optional: Make any adjustments to individual student marks and/or comments as needed.
13. Click **Save Changes**.

Mark:		Value:		General:			
3rd Quarter Mark		<input checked="" type="checkbox"/>	A	<input checked="" type="checkbox"/>	001		
							Update Selected Students
<b>240 - PRACTICAL GEOMETRY: Section 3</b>							Save Changes
<input checked="" type="checkbox"/>	Student Name	Number	Grade	Mark	Value	General	
<input type="checkbox"/>	Banana, Hannah	48652258	09	3rd Quarter Mark			
<input type="checkbox"/>	Contrary, Jesse	48652281	09	3rd Quarter Mark			
<input type="checkbox"/>	CONTRARY, MARY M.	00005001	09	3rd Quarter Mark			
<input type="checkbox"/>	EYE, CORY ROBERT	00006001	09	3rd Quarter Mark			
<input type="checkbox"/>	EYE, PRIVA	00122445	09	3rd Quarter Mark			
							Save Changes

### Bulk Update Marks

## Enter Exception Credits

You can establish a credit exception for individual students in a course section or all students in the course section. StudentInformation applies the exception credit amount you specify as the attempted credit value when calculating GPA and reporting course history for each student.

1. Navigate to **Home – Teacher Menu – Teacher Course List**.
2. On the **Teacher Course List** screen, select the **Teacher** whose course list you want to view.
3. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.

The selected teacher's courses display.

4. In the drop-down list in the row of the course whose marks you want to view, select "Exception Credits."

Home » Teacher Menu » Teacher Course List

### Teacher Course List

From this screen, you can jump to a page with a course section.

Teacher: DONALD BERRY  Course Sections In Progress

Code	Name	Section	Filling Count	Meeting	
240	PRACTICAL GEOMETRY	3	5.00	2,3 (112)	- Exception Credits
240	PRACTICAL GEOMETRY	2	13.00	3 (112)	Go to...

### Access Course Section Exception Credits from Teacher Course List

The **Course Section Exception Credits** screen displays.

5. Use one of the following methods to indicate the exception credit you want to apply:

**Note:** If you specify exception credits for both an entire course section and an individual student, the individual student value takes precedence for that student.

- To apply the credit to the whole course section:
    - i. Above the grid, select the **Apply Exception Credit** check box.
    - ii. Enter the amount of the exception credit in the text box.
  - To apply the credit to one or more students individually:
    - i. In the row of each student to whom you want to apply the credit, select the **Apply Exception Credit** check box.
    - ii. In the **Exception Credit** field, enter the amount of the exception credit.
6. Click **Save**.

Home » Teacher Menu » Teacher Course List » Course Section Exception Credits

### Course Section Exception Credits

From this screen, you can display and edit student and course exception credits.

Course Code	Course Name	Course Section	Teacher	Course Credit
240	PRACTICAL GEOMETRY	3	BERRY, DONALD	1.000000

Apply Exception Credit:

Student Number	Student	Apply Exception Credit	Exception Credit	Applied Credit
48652258	Banana, Hannah	<input type="checkbox"/>	<input type="text"/>	1.000000
48652281	Contrary, Jesse	<input type="checkbox"/>	<input type="text"/>	1.000000
00005001	CONTRARY, MARY M.	<input type="checkbox"/>	<input type="text"/>	1.000000
00006001	EYE, CORY ROBERT	<input type="checkbox"/>	<input type="text"/>	1.000000
00122445	EYE, PRIVA	<input type="checkbox"/>	<input type="text"/>	1.000000

#### Course Section Exception Credits

A confirmation message displays.

**The Exception Credit information was saved successfully**

#### Exception Credit Confirmation

7. Optional: To delete exception credits for one or more students, deselect the **Apply Exception Credit** check box in the row of each student, and then click **Save**.
8. Optional: To delete exception credits for the entire course section, deselect the **Apply Exception Credit** check box above the grid, and then click **Save**.

## Maintain Comments

You can maintain comments related to student performance in a variety of ways. You can also choose whether or not to include these comments on interims and report cards. Refer to the appropriate section as follows:

- [“View Comments”](#)
- [“Add Comments”](#)
- [“Edit Comments”](#)
- [“Delete Comments”](#)

## View Comments

Navigation: Home – SIS – Student – Marks – Teacher Comment or  
Navigation: Home – Teacher Menu – Teacher Comments

1. With a student in context on the **Teacher Comment** screen, select the **Teacher** and **Course Section** in which you want to view comments for the selected student.
2. Click **Filter**.

The screenshot shows the 'Teacher Comment' screen with a breadcrumb trail: Home >> SIS >> Student >> Marks >> Teacher Comment. Below the title, there is a red instruction: 'From this screen, you can display, add, change and delete data pertaining to student teacher comments.' The form includes two dropdown menus: 'Teacher: -- Filter By Teacher --' and 'Course Section: -- Filter By Course Section --', followed by a 'Filter' button. At the bottom, there are two buttons: 'Add Standard Comment' and 'Add Freeform Comment'.

Teacher Comment Screen

The comments related to the selected course section for this student display in a grid.

The screenshot shows the 'Teacher Comment' screen with the same breadcrumb trail. The filter dropdowns are now populated: 'Teacher: TRACY HOLT' and 'Course Section: INTRO TO SOCIOLOGY DE'. The 'Filter' button is visible. Below the form, there are two buttons: 'Add Standard Comment' and 'Add Freeform Comment'. A table displays the following data:

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Teacher
✗	INTRO TO SOCIOLOGY DE	19	GPL	General Mark	MATH CONCEPTS GOOD	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT

At the bottom left of the table, there is a checkbox labeled 'Show Active Only' which is checked.

View Comments

**Note:** Cancelled comments (indicated with icons at the beginning of the row and a  icon in the **Cancelled** column) display only if you deselect the **Show Active Only** check box.

## Add Comments

You can add comments about a student's performance using either standard comments defined by your school or freeform comments. Refer to the appropriate section as follows:

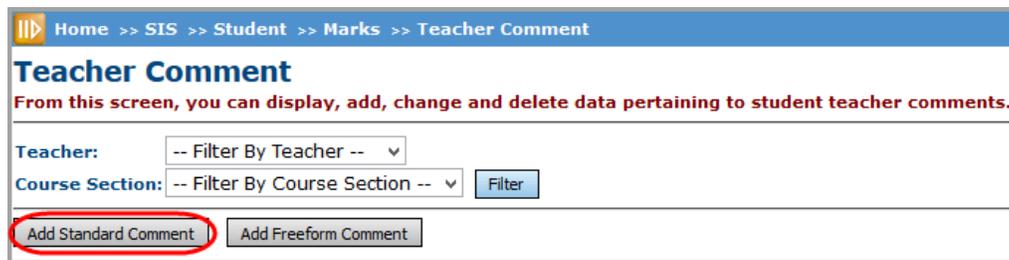
- [“Add Standard Comments”](#)
- [“Add Freeform Comments”](#)

### Add Standard Comments

Navigation: Home – SIS – Student – Marks – Teacher Comment or

Navigation: Home – Teacher Menu – Teacher Comments

1. With a student in context on the **Teacher Comment** screen, click **Add Standard Comment**.



The screenshot shows the 'Teacher Comment' screen. At the top, there is a breadcrumb trail: 'Home >> SIS >> Student >> Marks >> Teacher Comment'. Below this is the title 'Teacher Comment' and a red instruction: 'From this screen, you can display, add, change and delete data pertaining to student teacher comments.' There are two dropdown menus: 'Teacher: -- Filter By Teacher --' and 'Course Section: -- Filter By Course Section --'. A 'Filter' button is next to the Course Section dropdown. At the bottom, there are two buttons: 'Add Standard Comment' (which is circled in red) and 'Add Freeform Comment'.

### Add Standard Comments

The add-edit version of the screen displays.

2. Select the **Teacher** and **Course Section** in which you want to add a comment for the selected student.
3. Select the **Comment Type** (“General Mark,” “Effort” or “Work Habit”).
4. Select the school-defined **Standard Comment** that you want to add for this student.
5. Optional: If you want the comment to display in a particular order relative to this student's other comments, in the **Sort Order** field, enter the place order in which it should display. You can also increase or decrease the order using the up and down arrows.
6. Select the **Marking Pattern Rule** (reporting period) to which this comment applies.
7. Optional: If you want the comment to display on interim and/or regular report cards, select the **Include On Interim Report Card** and/or **Include On Report Card** check boxes.
8. Click **Save**. Or, to continue adding comments for this student, click **Save and New**.

### Add Standard Comment

A confirmation message displays, and the new comment displays in the list.

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Teacher
X	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	MATH CONCEPTS GOOD	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
X	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	NEEDS TO CHECK WORK CAREFULLY	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT

### Standard Comment Added

## Add Freeform Comments

Navigation: Home – SIS – Student – Marks – Teacher Comment or  
 Navigation: Home – Teacher Menu – Teacher Comments

1. With a student in context on the **Teacher Comment** screen, click **Add Freeform Comment**.

### Add Freeform Comments

The add-edit version of the screen displays.

2. Select the **Teacher** and **Course Section** in which you want to add a comment for the selected student.
3. Select the **Comment Type** (“General Mark,” “Effort” or “Work Habit”).
4. In the **Comment** field, enter a freeform comment for this student.
5. Optional: If you want the comment to display in a particular order relative to this student’s other comments, in the **Sort Order** field, enter the place order in which it should display. You can also increase or decrease the order using the up and down arrows.
6. Select the **Marking Pattern Rule** (reporting period) to which this comment applies.
7. Optional: If you want the comment to display on interim and/or regular report cards, select the **Include On Interim Report Card** and/or **Include On Report Card** check boxes.
8. Click **Save**. Or, to continue adding marks for this student, click **Save and New**.

**Add Freeform Comment**

A confirmation message displays, and the new comment displays in the list.

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Teacher
✗	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	MATH CONCEPTS GOOD	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
✗	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	NEEDS TO CHECK WORK CAREFULLY	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
✗	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	Nellie is capable of doing the work, but she needs to pay more attention in class.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT

**Freeform Comment Added**

## Edit Comments

You can edit standard and freeform comments using the same procedure.

**Navigation: Home – SIS – Student – Marks – Teacher Comment** or  
**Navigation: Home – Teacher Menu – Teacher Comments**

1. With a student in context on the **Teacher Comment** screen, select the **Teacher** and **Course Section** in which you want to edit a comment for the selected student.
2. Click **Filter**.

The screenshot shows the 'Teacher Comment' screen with a breadcrumb trail: Home >> SIS >> Student >> Marks >> Teacher Comment. Below the title, there is a red instruction: 'From this screen, you can display, add, change and delete data pertaining to student teacher comments.' The form includes two dropdown menus: 'Teacher: -- Filter By Teacher --' and 'Course Section: -- Filter By Course Section --', followed by a 'Filter' button. At the bottom, there are two buttons: 'Add Standard Comment' and 'Add Freeform Comment'.

### Teacher Comment Screen

The comments related to the selected course section for this student display in a grid.

3. In the row of the comment you want to edit, click .

The screenshot shows the 'Teacher Comment' screen with the following filters: Teacher: TRACY HOLT, Course Section: INTRO TO SOCIOLOGY DE. The grid below shows three comments:

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Teacher
	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	MATH CONCEPTS GOOD	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	NEEDS TO CHECK WORK CAREFULLY	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	Nellie is capable of doing the work, but she needs to pay more attention in class.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT

At the bottom left of the grid, there is a checkbox labeled 'Show Active Only' which is checked.

### Edit Comments

The add-edit version of the screen displays.

4. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Comments.”](#)

### Edit Comment

A confirmation message displays, and the edited comment displays in the list.

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Teacher
✕	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	MATH CONCEPTS GOOD	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
✕	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	NEEDS TO CHECK WORK CAREFULLY	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
✕	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	Nellie is capable of doing the work, but she continually forgets to turn in assignments.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT

### Confirmation of Edited Comment

## Delete Comments

You can delete standard and freeform comments using the same procedure.

**Navigation: Home – SIS – Student – Marks – Teacher Comment** or  
**Navigation: Home – Teacher Menu – Teacher Comments**

1. With a student in context on the **Teacher Comment** screen, select the **Teacher** and **Course Section** in which you want to delete a comment for the selected student.
2. Click **Filter**.

Home >> SIS >> Student >> Marks >> Teacher Comment

### Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

Teacher: -- Filter By Teacher -- ▾

Course Section: -- Filter By Course Section -- ▾

### Teacher Comment Screen

The comments related to the selected course section for this student display in a grid.

- In the row of the comment you want to delete, click **X**.

Home >> SIS >> Student >> Marks >> Teacher Comment Advanced Search | Feedback | Mgmt | Help | Version | Print

### Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

Teacher: TRACY HOLT ▾

Course Section: INTRO TO SOCIOLOGY DE ▾

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Teacher
<input checked="" type="checkbox"/>	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	MATH CONCEPTS GOOD	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
<input checked="" type="checkbox"/>	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	NEEDS TO CHECK WORK CAREFULLY	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
<input checked="" type="checkbox"/>	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	Nellie is capable of doing the work, but she needs to pay more attention in class.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT

Show Active Only

### Delete Comments

A message displays, asking if you are sure you want to delete (cancel) the comment.

- Click **Ok**.

Home >> SIS >> Student >> Marks >> Teacher Comment

### Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

**Are you sure you want to cancel the following Teacher Comment?**  
MATH CONCEPTS GOOD

### Confirm Delete

A confirmation message displays, and the comment no longer displays in the list.

Home >> SIS >> Student >> Marks >> Teacher Comment Advanced Search | Feedback | Mgmt | Help | Version | Print

### Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

The selected Teacher Comment was successfully canceled

Teacher: TRACY HOLT  
 Course Section: INTRO TO SOCIOLOGY DE

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Teacher
<input checked="" type="checkbox"/>	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	NEEDS TO CHECK WORK CAREFULLY	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT
<input checked="" type="checkbox"/>	INTRO TO SOCIOLOGY DE	19	GP1	General Mark	Nellie is capable of doing the work, but she continually forgets to turn in assignments.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Not Canceled	TRACY HOLT

Show Active Only

### Confirmation of Deleted Comment

**Note:** To view deleted (cancelled) comments again, deselect the **Show Active Only** check box.

## Post Fee Payments

You can collect fees from students in your homeroom and post the payments.

### Navigation: Home – Teacher Menu – Homeroom Fee Collection

**Note:** You can only accept the full amount of fees due. If a student is making a partial payment or presenting a payment in excess of the total fees due, you cannot collect the fees in the classroom. Instead, the student must pay the fees with the payment clerk or in the office, as appropriate for your school.

1. On the **Homeroom Fee Collection** screen, verify the **Collection Date**, or enter or select a new date.
2. In the **Select a homeroom for which to collect fees** drop-down list, verify that your homeroom is selected, or select a new homeroom.
3. If you changed the defaulted collection date and/or homeroom, click **Go**.

A list of students in the homeroom displays, along with any outstanding fee information.

**Note:** The **Payment Reference** column shows “No Outstanding Fees” for students with a \$0.00 balance. It shows “Must Pay in Office” if the student has any unusual circumstances, such as a credit balance, refund due, dropped classes, etc.

4. For each student who is paying fees, in the **Payment Reference** field, enter any relevant details (such as check number, etc.).
5. Select the **Paid in Full** check box.
6. Click **Submit**.

Home >> Teacher Menu >> Homeroom Fee Collection

### Homeroom Fee Collection

Select the students making exact payments and click 'Submit'

Collection Date:

Select a homeroom for which to collect fees:

Student	Fees	Payment Reference	Paid in Full
BAILEY, MELISSA	\$0.00	No Outstanding Fees	<input type="checkbox"/>
BEASLEY, RICHARD	\$3.00	<input type="text"/>	<input type="checkbox"/>
BEASLEY, THOMAS	\$6.00	<input type="text"/>	<input type="checkbox"/>
BERG, JIMMY	\$6.00	<input type="text"/>	<input type="checkbox"/>
BERG, ROSE	\$0.00	No Outstanding Fees	<input type="checkbox"/>
BEST, ELLEN	\$14.00	<input type="text"/>	<input type="checkbox"/>
BEST, FRANKLIN	\$11.00	ck 2246	<input checked="" type="checkbox"/>
BOWERS, PEGGY	\$6.00	<input type="text"/>	<input type="checkbox"/>
BRADY, LOIS	\$6.00	<input type="text"/>	<input type="checkbox"/>

#### Homeroom Fee Collection Screen

A confirmation message displays, and the student's fee balance now shows \$0.00.

Home >> Teacher Menu >> Homeroom Fee Collection

### Homeroom Fee Collection

Select the students making exact payments and click 'Submit'

**The selected payments were saved successfully**

Collection Date:

Select a homeroom for which to collect fees:

Student	Fees	Payment Reference	Paid in Full
BAILEY, MELISSA	\$0.00	No Outstanding Fees	<input type="checkbox"/>
BEASLEY, RICHARD	\$3.00	<input type="text"/>	<input type="checkbox"/>
BEASLEY, THOMAS	\$6.00	<input type="text"/>	<input type="checkbox"/>
BERG, JIMMY	\$6.00	<input type="text"/>	<input type="checkbox"/>
BERG, ROSE	\$0.00	No Outstanding Fees	<input type="checkbox"/>
BEST, ELLEN	\$14.00	<input type="text"/>	<input type="checkbox"/>
BEST, FRANKLIN	\$0.00	No Outstanding Fees	<input type="checkbox"/>
BOWERS, PEGGY	\$6.00	<input type="text"/>	<input type="checkbox"/>
BRADY, LOIS	\$6.00	<input type="text"/>	<input type="checkbox"/>

#### Confirmation of Fees Paid

In addition, the fees now show as paid on the **Student Fee Details** screen for this student.

**Student Fee Details**

View/Delete fees and fee activity for the student

Select a School Year and/or Fee Status to filter the fees listed. Optionally filter results by Payment Date.

School Year Enrolled: -- All -- Fee Status: -- All -- Filter By Payment Date: 4/9/2014

**Fee Options**

Show Fees from Past School Years:   
 Show Fees from Future School Years:   
 Show Fees from All Buildings:

Display Active fees:

School	Student Grade Level	Code	Name	Section	Date	Type	Status	Amount	Balance
DAHS	09	CHR FEES	CHOIR		Jun 06, 2013	Course Fee	Paid	\$8.00	\$0.00
Apr 09, 2014 P - Payment ck 2246								\$8.00	
DAHS	09	PHY SCI	PHYSICAL SCIENCE		Jun 06, 2013	Course Fee	Paid	\$3.00	\$0.00
Apr 09, 2014 P - Payment ck 2246								\$3.00	

**Student Fee Details**

## View Student Medical Information

You can view important medical information about your students. Refer to the appropriate section as follows:

- [“View Student Medical Alerts”](#)
- [“View Student Medications”](#)

## View Student Medical Alerts

**Navigation: Home – Teacher Menu – Medical Alerts**

You can view the medical alerts of all students enrolled in a specific course section on the read-only **Medical Alert Class List** screen.

1. Access the **Medical Alert Class List** screen using the navigation path shown above. Or, to access this screen from the **Teacher Course List** screen:
  - a. Select the **Teacher** whose course list you want to view.

- b. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.

The selected teacher's courses display.

- c. In the drop-down list in the row of the course, select "Medical Alert Class List."

Home >> Teacher Menu >> Teacher Course List

### Teacher Course List

From this screen, you can jump to a page with a course section.

Teacher: DONALD BERRY  Course Sections In Progress

Code	Name	Section	Filling Count	Meeting	
240	PRACTICAL GEOMETRY	3	5.00	2,3 (112)	- Medical Alert Class List
240	PRACTICAL GEOMETRY	2	13.00	3 (112)	Go to...

#### Access Medical Alert Class List from Teacher Course List

2. On the **Medical Alert Class List** screen, select the **Teacher** and **Course Section** for which you want to view medical alerts.

Home >> Teacher Menu >> Medical Alerts

### Medical Alert Class List

From this screen you can view and print classlists of student medical alerts

Teacher: -- Select a Teacher -- Course Section: -- Select a Course Section --

All Students  Only Students with Alerts

#### Medical Alert Class List Screen

The screen displays a list of all students in the class. For any student with a medical alert, information regarding the alert displays, along with the student's medical contact information.

3. Optional: To display only the students with alerts, select "Only Students with Alerts."

Home >> Teacher Menu >> Medical Alerts

### Medical Alert Class List

From this screen you can view and print classlists of student medical alerts

Teacher: MICHAEL WEBBER Course Section: 330 - 7

All Students  Only Students with Alerts [Return to Course List](#)

CONTRARY, MARY M.	00005001	Grade: 11
PERRY, MICHAEL JAY	00005002	Grade: 11
POTTS, IAN MICHAEL	00005003	Grade: 11
SPRAT, JACK JOSEPH	00005004	Grade: 11
• student is allergic to bee stings, carries an Epi-pen ⚠ 2/14/2005		JOLENE TREECE (ONE PARENT) Home: (419) 228-7417
WELLS, JONA RENEE	00005005	Grade: 11

List of Medical Alerts

## View Student Medications

Navigation: Home – Teacher Menu – Medications

You can view the prescription medications taken by all students enrolled in a specific course section on the read-only **Medications Class List** screen.

1. Access the **Medications Class List** screen using the navigation path shown above. Or, to access this screen from the **Teacher Course List** screen:
  - a. Select the **Teacher** whose course list you want to view.
  - b. Optional: To view all course sections (not limited to the current reporting period), deselect the **Course Sections In Progress** check box.

The selected teacher’s courses display.

- c. In the drop-down list in the row of the course, select “Medication Class List.”

Home » Teacher Menu » Teacher Course List

## Teacher Course List

From this screen, you can jump to a page with a course section.

Teacher: DONALD BERRY  Course Sections In Progress

Code	Name	Section	Filling Count	Meeting	
240	PRACTICAL GEOMETRY	3	5.00	2,3 (112)	- Medication Class List
240	PRACTICAL GEOMETRY	2	13.00	3 (112)	Go to...

### Access Medications Class List from Teacher Course List

- On the **Medications Class List** screen, select the **Teacher** and **Course Section** for which you want to view students' prescription medications.

Home » Teacher Menu » Medications

## Medications Class List

From this screen you can view and print classlists of student medications

Teacher: -- Select a Teacher -- Course Section: -- Select a Course Section -- [Return to Course List](#)

### Medications Class List Screen

The screen displays a list of any students taking prescription medications, along with the details of the medications (such as dosage, timing, etc.).

Home » Teacher Menu » Medications

## Medications Class List

From this screen you can view and print classlists of student medications

Teacher: MICHAEL WEBBER Course Section: 330 - 7 [Return to Course List](#)

<b>CONTRARY, MARY M.</b>	<b>00005001</b>	<b>Grade: 11</b>
<ul style="list-style-type: none"> <li>• <b>Experimental Drug</b> This must be taken every day promptly at 9 am!</li> </ul>	<ul style="list-style-type: none"> <li>• 1 tablet at 9 am</li> </ul>	<ul style="list-style-type: none"> <li>• 6/1/2005 - 5/1/2006</li> </ul>
<b>SPRAT, JACK JOSEPH</b>	<b>00005004</b>	<b>Grade: 11</b>
<ul style="list-style-type: none"> <li>• <b>Zyrtec D</b></li> </ul>	<ul style="list-style-type: none"> <li>• 1 pill at noon</li> </ul>	<ul style="list-style-type: none"> <li>• 8/14/2004</li> </ul>

### List of Medications

## Manage Discipline Referrals

You can enter discipline referrals for your students and view a list of referrals that you have submitted. Refer to the appropriate section as follows:

- [“Add Discipline Referrals”](#)
- [“View List of Submitted Referrals”](#)

## Add Discipline Referrals

### Navigation: Home – Teacher Menu – Discipline Referral

1. On the **Discipline Referral** screen, enter or select the following information:
  - Name you want to assign to the incident
  - Date, time and time frame during which the incident occurred (defaults to current date, current time and “During school hours”)
  - Description of the incident
  - (Optional): General and specific location where the incident occurred (defaults to “On School Property”)

### Add Discipline Referral

2. Optional: To add an offender to the referral:
  - a. In the search box, search for the offender as follows:
    - i. Enter the first couple letters of the offender’s first or last name.
    - ii. In the search results that display beneath the field, select the correct offender.
  - b. Click **Add Offender**.

### Add Offender

The offender's information displays.

**Note:** To delete an offender, click .

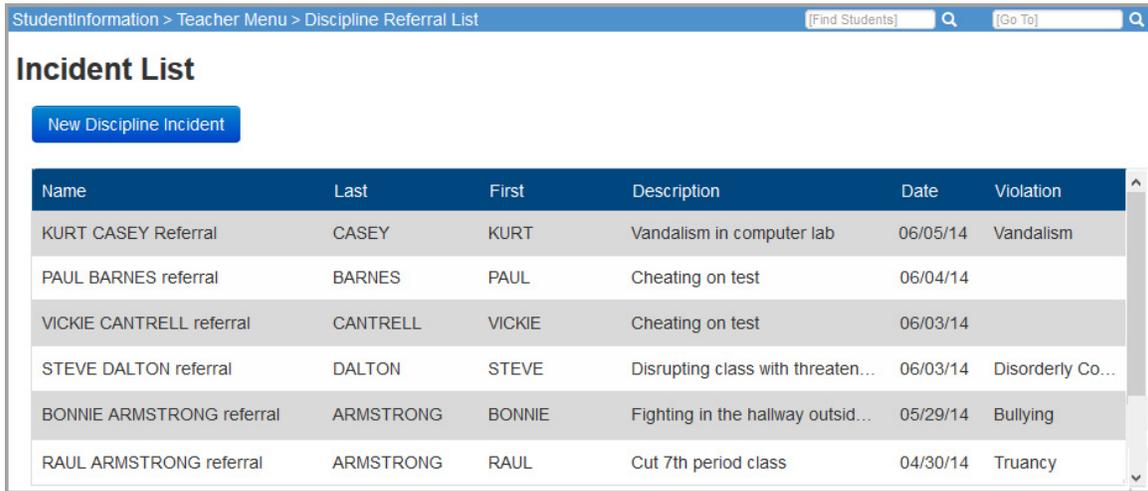
3. Optional: To document the district policy that the student violated and/or the infraction that occurred:
  - a. In the **Policy / Infractions** section, click .
  - b. Select the appropriate policy and/or infraction.

**Note:** To document additional policies/infractions, click . To delete a policy/infraction, click .

4. Click **Submit**.

### Document Policy/Infraction

StudentInformation creates the referral, and it now displays on the **Incident List** screen. (See “[View List of Submitted Referrals.](#)”)



The screenshot shows the 'Incident List' screen in a web browser. At the top, there is a breadcrumb trail: 'StudentInformation > Teacher Menu > Discipline Referral List'. Below this, there are search fields for 'Find Students' and 'Go To'. The main heading is 'Incident List', followed by a blue button labeled 'New Discipline Incident'. Below the button is a table with the following data:

Name	Last	First	Description	Date	Violation
KURT CASEY Referral	CASEY	KURT	Vandalism in computer lab	06/05/14	Vandalism
PAUL BARNES referral	BARNES	PAUL	Cheating on test	06/04/14	
VICKIE CANTRELL referral	CANTRELL	VICKIE	Cheating on test	06/03/14	
STEVE DALTON referral	DALTON	STEVE	Disrupting class with threaten...	06/03/14	Disorderly Co...
BONNIE ARMSTRONG referral	ARMSTRONG	BONNIE	Fighting in the hallway outsid...	05/29/14	Bullying
RAUL ARMSTRONG referral	ARMSTRONG	RAUL	Cut 7th period class	04/30/14	Truancy

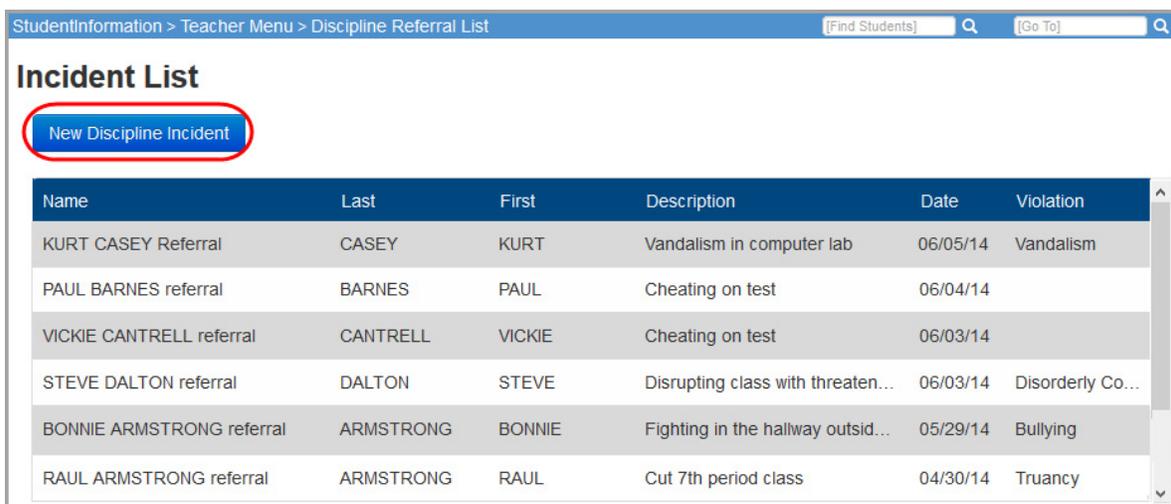
**Referral Submitted**

## View List of Submitted Referrals

Navigation: Home – Teacher Menu – Discipline Referral List

**Note:** Using this procedure, you can only view your own referrals. You cannot view referrals submitted by any other teacher or administrator.

1. On the **Incident List** screen, review the list of discipline referrals you have submitted.
2. Optional: To create a new referral, click **New Discipline Incident**.



This screenshot is identical to the one above, but the 'New Discipline Incident' button is circled in red to highlight it.

**View List of Your Submitted Referrals**

The **Discipline Referral** screen displays, and you can create a new referral. (For more information, see [“Add Discipline Referrals.”](#))

The screenshot shows a web application interface for creating a discipline referral. At the top, there is a breadcrumb trail: "StudentInformation > Teacher Menu > Discipline Referral". To the right of the breadcrumb are two search boxes: "[Find Students]" and "[Go To]". Below the breadcrumb is the main heading "Discipline Referral". The form contains several input fields and buttons: "Incident Name" (text input), "7/2/2014" (date input with a calendar icon), "11:02 AM" (time input with a clock icon), and "During school hours" (dropdown menu). Below these is a large text area for "Incident Description". To the right of the description area are two more dropdown menus: "On School Property" and "Select location/room...". At the bottom left of the form is a "Search students..." input field and an "Add Offender" button. At the bottom center, there are "Submit" and "Cancel" buttons.

**Discipline Referral Screen**

This page intentionally left blank.

---

# ProgressBook StudentInformation Assessment Guide



# **ProgressBook StudentInformation Assessment Guide**

(This document is current for v14.9.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Assessment Guide* have been made.

Product Version	Heading	Page	Reason
14.9.0	<a href="#">“Assessment Imports”</a>	11	Updated image and text to reflect new KRA import.
14.9.0	<a href="#">“KRA”</a>	32	Added section.
14.9.0	<a href="#">“Preschool ELA”</a>	43	Added section.
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.7.0	<a href="#">“Assessment Imports”</a>	11	Updated images to remove the term “BrerProf.”
14.7.0	<a href="#">“Assessment Import Management”</a>	14	Updated image to remove the term “BrerProf.”
14.7.0	<a href="#">“Assessment Import History”</a>	18	Updated images to remove the term “BrerProf.”
14.5.0	<a href="#">“Student Assessment Menu”</a>	23	Added reference to new “CTE Industry Credential” section.
14.5.0	<a href="#">“CTE Industry Credential”</a>	53	Added section.
14.4.0	<a href="#">“Assessment Imports”</a>	11	Updated text and image to show new SAT import option and matching criteria.
14.4.0	<a href="#">“Add/Edit CTE Industry Assessment”</a>	52	Added note to <b>CTE Industry Assessment Results</b> field. Added description of new <b>CTE Industry Assessment Score Not Reported Value</b> drop-down list and updated image.
14.4.0	<a href="#">“CTE Student Assessment (OCTCA)”</a>	54	Updated image to show new <b>CTE Assessment Technical Score Not Reported</b> column.
14.4.0	<a href="#">“Add the CTE Technical Score”</a>	54	Added description of new <b>CTE Technical Assessment Score Not Reported Value</b> drop-down list and updated image. Updated note to indicate new valid values of “I” and “****” in the <b>CTE Technical Score</b> field.
14.4.0	<a href="#">“Add the CTE Portfolio Score”</a>	56	Updated note to indicate new valid value of “I” in the <b>CTE Teaching Professions Portfolio Score</b> field.
14.4.0	<a href="#">“International Baccalaureate (IB)”</a>	57	Added section.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Overview</b>	<b>1</b>
Assessment Overview.....	1
Understanding the Assessment Module .....	1
Assessment Outline and Flow.....	2
<b>Assessment - General</b>	<b>5</b>
Who Needs It .....	5
Example - 3rd Through 8th Grade Achievement.....	5
Example - Ohio Graduation Test (OGT).....	6
Test Type/Test Part Summary .....	7
Student Details Grid .....	8
Export All Option .....	9
Sample Output .....	10
Standards .....	10
Assessment Imports.....	11
Assessment Import Management .....	14
Unmatched Records Tab.....	14
Matched Records tab .....	17
Errors tab .....	17
Assessment Import History .....	18
Assessment Import View Details.....	19
Assessment Import Delete .....	19
Accelerated List.....	20
WebXam Assessment Coordinator Records.....	21
Add WebXam Assessment Coordinator Records .....	21
Edit WebXam Assessment Coordinator Records.....	22
<b>Student Assessment Menu</b>	<b>23</b>
Student Proficiency .....	24
View Student Proficiency Test Details .....	24
OGT (Ohio Graduation Test).....	25
Add/Edit Ohio Graduation Test.....	26
Accelerated Student.....	27

---

Add/Edit Accelerated .....	28
Student Achievement.....	28
Add/Edit Student Achievement .....	29
ACT.....	30
Add/Edit ACT Scores .....	31
AP Exams .....	31
Add/Edit AP Exam Scores .....	32
KRA.....	32
View KRA Scores.....	32
Add KRA Scores.....	33
KRA-L .....	35
Add/Edit KRA-L Exam Scores .....	36
OTELA .....	36
Add/Edit OTELA Exam Scores .....	37
PLAN (Pre-ACT).....	38
Add/Edit PLAN (Pre-ACT) Exam Scores .....	39
Preschool GGG.....	39
Add/Edit Preschool GGG Scores.....	40
Preschool ASQ/SE.....	41
Add/Edit Preschool ASQ/SE Scores.....	41
Preschool ECO .....	42
Add/Edit Preschool ECO Assessment Records.....	42
Preschool ELA .....	43
View Preschool ELA Scores .....	43
Add Preschool ELA Scores.....	44
PSAT/NMSQT.....	46
Add/Edit PSAT/NMSQT .....	47
SAT Reasoning Test .....	47
Add/Edit SAT Reasoning Test Scores.....	48
SAT Subject Tests.....	48
Add/Edit SAT Subject Test Scores.....	49
Student Assessment List .....	50
CTE Industry Assessment .....	52
Add/Edit CTE Industry Assessment.....	52
CTE Industry Credential.....	53
Add/Edit CTE Industry Credential .....	53
CTE Student Assessment (OCTCA).....	54
Add the CTE Technical Score .....	54

Add the CTE Portfolio Score .....	56
International Baccalaureate (IB) .....	57
View IB Scores.....	57
Add IB Scores.....	58
Edit IB Scores .....	59
Delete IB Scores.....	60
<b>3. Additional Assessment Tests</b>	<b>63</b>
3A. ACT .....	64
Add/Edit ACT Scores .....	65
3B. AP Exams .....	66
Add/Edit AP Exam Scores .....	66
3C. KRA-L .....	67
Add/Edit KRA-L Exam Scores .....	67
3D. OTELA .....	68
Add/Edit OTELA Exam Scores .....	68
3E. PLAN (Pre-ACT) .....	70
Add/Edit PLAN (Pre-ACT) Exam Scores .....	71
3F. Preschool GGG .....	71
Add/Edit Preschool GGG Scores .....	72
3G. Preschool ASQ/SE .....	73
Add/Edit Preschool ASQ/SE Scores .....	73
3H. Preschool ECO .....	74
Add/Edit Preschool ECO Assessment Records.....	74
3I. PSAT/NMSQT .....	75
Add/Edit PSAT/NMSQT .....	76
3J. SAT Reasoning Test .....	76
Add/Edit SAT Reasoning Test Scores.....	77
3K. SAT Subject Tests .....	77
Add/Edit SAT Subject Test Scores .....	78
3L. Student Assessment List .....	79
3M. CTE Industry Assessment .....	81
Add/Edit CTE Industry Assessment.....	82
3N. CTE Student Assessment (OCTCA) .....	82
Add/Edit CTE Student Assessment (OCTCA) .....	83
<b>Assessment Reports</b>	<b>85</b>
Achievement Detail Report .....	86

---

Sample Output .....	88
ASQ/SE (Preschool) Report .....	89
Sample Output .....	90
ECO (Preschool Early Childhood Outcome) Report .....	91
Sample Output .....	92
KRAL (Kindergarten Readiness Assessment - Literacy) Report .....	93
Sample Output .....	94
Misc to AAT Conversion.....	94
Ohio Graduation Test (OGT) Report .....	95
Sample Output .....	97
OTELA (Ohio Test of English Language Acquisition) Report.....	98
Sample Output .....	99
Preschool Report .....	100
Sample Output .....	101
PROH Report.....	102
Sample Output .....	103
Standardized Test Detail Report .....	104
Sample Output .....	105

# Overview

The following information is described in this section:

- [“Assessment Overview”](#)
- [“Understanding the Assessment Module”](#)
- [“Assessment Outline and Flow”](#)

---

## Assessment Overview

Districts need the ability to add, update, delete, view, and track all of the students' testing results. Those tests currently include Ohio Graduation Test (OGT) and a variety of grade level Achievement tests. These testing requirements may change from year to year, depending on the state requirements. Achievement testing is likely to change from year to year. StudentInformation not only addresses testing concerns for the current school year, but also accommodates changes and additions to future testing requirements. StudentInformation is the primary repository for all testing results for the buildings/districts. All testing data maintenance is done in StudentInformation and then moved to EMIS for EMIS reporting requirements.

StudentInformation gives the district the ability to create electronic files for the testing company for producing pre-identification labels used during the student testing. StudentInformation allows districts to import test results from testing companies and then copy that same data from StudentInformation to EMIS for your EMIS reporting requirements. StudentInformation provides optional reports that can be processed to validate the data as well as reports to inquire which students still need to fulfill their testing requirements (refer to [“Who Needs It”](#) ). DSL & REPO reports used in the past are incorporated into the various reports within StudentInformation. Achievement test results can then be integrated on the report cards and transcripts for school use if desired. District personnel also have the ability to view testing data by grade level, building, courses, teacher, etc. and use that data to analyze results and needs of the students and district.

---

## Understanding the Assessment Module

The Assessment module is a set of tools to maintain the assessment data, reports to provide the details on the assessment records and an assessment import managing system to assist the user in loading results returned from assessment vendors as well as tools to determine who needs to sit for a particular part of a test.

## Assessment Outline and Flow

1. Assessment - General
  - a. **Who Needs It** – View students who have not passed a specific test type and test part that is required for graduation.
  - b. **Standards** – View the assessment standards used to determine scaled score standards.
  - c. **Assessment Imports** – Import OGT, OTELA, CTE and Standardized Assessment results into StudentInformation.
  - d. **Assessment Import Management** – View a listing of assessment records that contain errors and could not be automatically associated to a student. These records need to be fixed, deleted, or associated with a specific student.
  - e. **Assessment Import History** – View the job run history of Assessment Import loads.
  - f. **Accelerated List** – View a listing of assessment students with accelerated tests.
  - g. **WebXam Assessment Coordinator Records** – Allows each CTE Program of Concentration to be assigned to a default Assessment Coordinator in each district. These records are then used to create records for the WebXam Export.

2. Student Assessment Menu
  - a. **Student Proficiency** – View and change a specific student's proficiency test records.
  - b. **OGT** – View and change a specific student's OGT (Ohio Graduation Test) test records.
  - c. **Accelerated Student** – View and change a specific student's accelerated records prior to Pre-Ident for OAA.

*Note: These accelerated records are only used by the Pre-Ident process and are not reported to EMIS.*

- d. **Student Achievement** – View, edit, and add a specific student's achievement records.
- e. **ACT** – View and change a specific student's ACT records.
- f. **AP Exams** – View and change a specific student's AP exam records.
- g. **CTE Industry Assessment** – View and change a specific student's CTE industry assessment record.
- h. **CTE Student Assessment (OCTCA)** – View or change a specific student's CTE student assessment (OCTCA) record.
- i. **KRA-L** – View and change a specific student's KRA-L record.
- j. **OTELA** – View and change a specific student's OTELA record.
- k. **PLAN (pre-ACT)** – View and change a specific student's PLAN test records.
- l. **Preschool ASQ/SE** – View and change a specific student's preschool ASQ/SE record.
- m. **Preschool ECO** – View and change a specific student's preschool ECO record.

- 
- n. **Preschool GGG** – View and change a specific student's preschool GGG record.
  - o. **PSAT/NMSQT** – View and change a specific student's PSAT/NMSQT test records.
  - p. **SAT Reasoning Test** – View and change a specific student's SAT reasoning test records.
  - q. **SAT Subject Tests** – View and change a specific student's SAT subject test records.
  - r. **Student Assessment List** – View and change all student assessment records.
3. Assessment Reports
- a. **Achievement Detail** – This report lists students' detailed 3rd through 8th grade achievement information.
  - b. **ASQ/SE** – This report lists student's detailed preschool ASQ/SE information.
  - c. **ECO** – This report lists student's detailed preschool ECO (Early Childhood Outcome) information.
  - d. **KRAL** – This report lists student's detailed KRA-L (Kindergarten Readiness Assessment - Literacy) information.
  - e. **Misc to AAT Conversion** – This process will convert existing assessment data on the Misc screens to the assessment test screens.
  - f. **OGT** – This report lists student's detailed OGT (Ohio Graduation Test) information.
  - g. **OTELA** – This report lists student's detailed OTELA (Ohio Test of English Acquisition) information.
  - h. **Preschool** – This report lists student's detailed Preschool GGG assessment information.
  - i. **PROH** – This report lists student's proficiency test records.
  - j. **Standardized Test Detail** – This report lists student's Standardized Test Detail (ACT, SAT, etc.) information.

This page intentionally left blank.

# Assessment - General

The following information is described in this topic:

- [“Who Needs It”](#)
- [“Standards”](#)
- [“Assessment Imports”](#)
- [“Assessment Import Management”](#)
- [“Assessment Import History”](#)
- [“Accelerated List”](#)
- [“WebXam Assessment Coordinator Records”](#)

---

## Who Needs It

### Navigation: Home - SIS - Assessment - Who Needs It

The Who Needs It screen gives districts the ability to quickly determine how many students will need to pass a specific Ohio Achievement Assessment (OAA) or the Ohio Graduation Test (OGT). The Who Needs It screen lists all students who have not passed the selected test type and part and are eligible to be tested. Detailed results can be viewed through filters (students passing, students not passing and students missing) and exported to a txt file.

### Example - 3rd Through 8th Grade Achievement

Home SIS Teacher Menu EZ Query Management EMIS My Account ITC Local Develop Sitemap

DASL DATABASENAME This Screen does not use a Selected Student Data on this screen applies to the current school building XXXXXX City Schools - 2010-2011 ()

User Name [Find Students] Find [Go To] Go

Home » SIS » Assessment » Who Needs It Advanced Search | Feedback | Mgmt | Help | Version | Print

### Who Needs It

This screen displays the number of students who need to pass required assessment tests and a list of those students.

[Hide Filter]

Test Type:  
03A - 3rd Ach

Test Part:  
MATH - Math  
READ - Reading

Return only these students (comma separated student numbers):

Counselor:  
-- Show All -- View

Who Needs It Screen (3rd Grade Achievement Test Selected)

**Test Type** (required) – Choose from 3rd through 8th Grade Achievement or the Ohio Graduation Test (OGT).

**Test Part** (optional) – If no Test Parts are selected, the display returns all test parts specific to the test type chosen. You may also filter your results by selecting one or more test parts.

**Return only these students (comma separated student numbers)** (optional) – To return on specific students, enter student numbers separated by commas. If no student numbers are selected, all students matching the other filters are returned.

**Counselor** (optional) – To filter students assigned to a specific counselor, pick the counselor from the drop-down list. Only students assigned to the specified counselor in the school and school year in context are returned to the screen. To show students assigned to all counselors, choose Show All.

## Example - Ohio Graduation Test (OGT)

Home » SIS » Assessment » Who Needs It Advanced Search | Feedback | Me

### Who Needs It

This screen displays the number of students who need to pass required assessment tests and a list of those students.

[\[Hide Filter\]](#)

**Test Type:**  
OGT - OGT

**Test Part:**  
MATH - Math  
READ - Reading  
SSC - Social Studies / Citizen  
SCI - Science

**Include the following grades:**  
 10th Grade  
 11th Grade  
 12th Grade  
 13th Grade

**Include the following students:**  
 Include only required students  
 Contract Vocational - In  
 Contract Vocational - Out  
 JVS

**Return only these students (comma separated student numbers):**

**Counselor:**  
-- Show All --

**Who Needs It Screen (Ohio Graduation Test Selected)**

In addition to the filters described above for achievement tests, the Who Needs It screen for OGT tasks has two additional filters.

**Include the following grades** (optional) – Choose one or more grades that you wish to filter on. If no grades are selected, all grade levels (10-13) are returned.

**Include the following students** (optional) – Choose one or more student types that you wish to filter on. If no student types are selected, no students represented by the student types are returned. When “Include only required students” is checked, the Passed column and the “Show students passing” check box do not appear on the results screen.

Click **View** to display the Who Needs It summary results on the screen.

## Test Type/Test Part Summary

**Who Needs It**  
This screen displays the number of students who need to pass required assessment tests and a list of those students.

[Show Filter]

**Summary**

Test Type	Test Part	Passed	Not Passed	Missing	Total
OGT	Math	0	0	1	1
OGT	Reading	0	0	1	1
OGT	Science	0	0	1	1
OGT	Social Studies/Citizenship	0	0	1	1
OGT	Writing	0	0	1	1

These checkboxes control the students returned in the view and export of assessment details.

Show students missing  
 Show students not passing  
 Show students passing

Export All

**Who Needs It Screen (Summary)**

Click **Show Filter** to show the filters specified for this summary. This menu option toggles between Show Filter and Hide Filter.

Each test type and test part selected is listed in a summary.

- **Passed** – The number of students selected whose maximum score on the test type/test part is passing.
- **Not Passed** – The number of students selected whose maximum score on the test type/test part is failing.
- **Missing** – The number of students selected that do not have an assessment record for the specified test type/test part.
- **Total** – The total number of students selected for this specific test type/test part. (Passed + Not Passed + Missing)

– Click on the magnifying glass icon to view the list of students that make up the total number of students for a specific test type/test part. Check the appropriate check boxes to control the students returned in the Student Details Grid (refer to “*Student Details Grid*”). To refresh your student details grid, simply click on the magnifying glass after making your student selections.

These checkboxes control the students returned in the view and export of assessment details.

Show students missing  
 Show students not passing  
 Show students passing

**Who Needs It Screen (Assessment Details Filter Options)**

## Student Details Grid

Home » SIS » Assessment » Who Needs It Advanced Search | Feedback | Mgmt | Help | Version | Print

### Who Needs It - OGT - Writing

This screen displays the number of students who need to pass required assessment tests and a list of those students.

[\[Show Filter\]](#)

**Summary**

Test Type	Test Part	Passed	Not Passed	Missing	Total
OGT	Math	0	0	1	1
OGT	Reading	0	0	1	1
OGT	Science	0	0	1	1
OGT	Social Studies/Citizenship	0	0	1	1
OGT	Writing	0	0	1	1

These checkboxes control the students returned in the view and export of assessment details.

Show students missing

Show students not passing

Show students passing

[Export All](#)

**Details**  
1 Record Displayed

Student Number ^	First	Last	Grade	Gender	Ethn.	Situation	Test	Part	Missing	Passing	Date	Test Grade	Scaled Score	Required Score
00007001	JASON	WILLIAM	CONTRARY	11	M	ASIAN, PAC. ISL	Resident attending full time	OGT	Writing	<input checked="" type="checkbox"/>	<input type="checkbox"/>			400.00

### Who Needs It Screen (Assessment Details Grid)

**Sorting** – You may sort the student details grid by any column (Student Number, First (name), Last (name), Grade, Gender, Ethnicity, Situation, Missing, Passing, Date, Test Grade, Scaled Score, Required Score) in ascending or descending order by clicking on the column header. The default sort is by Student Number.

The student details grid lists the following for each student:

- **Student Number** – The student ID number
- **First/Last** – The name of the student from the student profile
- **Grade** – The current grade of the student from the student profile
- **Gender** – The gender of the student (M or F) from the student profile
- **Ethnicity** – The ethnicity of the student from the student profile
- **Situation** – The EMIS situation of the student from the student profile
- **Test** – The selected test type
- **Part** – The selected test part
- **Missing** – Will be checked if the student is missing this specific test type/test part
- **Passing** – Will be checked if the student has passed this specific test type/test part
- **Date** – The date when this student took the last occurrence of the specified test type/test part
- **Test Grade** – The grade of this student when taking the last occurrence of the specified test type/test part
- **Scaled Score** – The scaled score of this student when taking the last occurrence of the specific test type/test part
- **Required Score** – The required score of this student when taking the last occurrence of the required test type/test part. This may be different depending on whether the student has taken an ALT (alternate) test or a STR (standard) test.

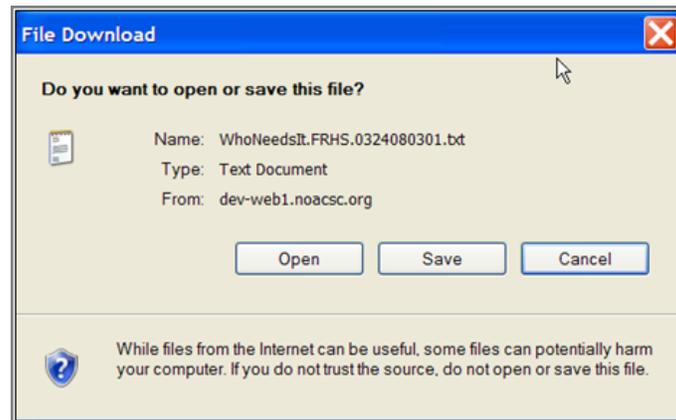
## Export All Option

Click **Export All** to export the selected students to a Fixed Format file. Check the appropriate check boxes to control the students returned in the export file.

These checkboxes control the students returned in the view and export of assessment details.

- Show students missing
- Show students not passing
- Show students passing

**Who Needs It Screen (Assessment Details Filter Options)**



**File DownLoad Screen (Export All Option)**

**Save** – Save this file to your hard drive or network drive

The file is fixed width, left justified, with spaces for padding. The file layout is as follows with the starting point of that field and the length.

- State student ID SSID – 1, 9
- Student ID – 10, 9
- Student name (First Name, Middle Initial, Last Name) – 19, 100
- Current grade – 119, 2
- Gender – 223, 1
- Ethnicity description – 224, 30
- EMIS situation ID and description – 254
- Test type (ex 10 for OGT) – 304, 2
- Test part code – 306, 1
- Missing – 307, 1 (0 = not missing, 1 = missing)
- Passing – 308, 1 (0 = not passing, 1 = passing)
- Test date – 309, 8
- Test grade – 318, 2
- Best scaled score – 320, 3
- Required score – 323, 3

## Sample Output

The following figure shows part of an example Export All file.

CS9131554000011590MARY		BENT	5 - Resident attending Full Time	12	10R003 1 20111	384400
CS9131554000011590MARY	FWHITE	BENT	5 - Resident attending Full Time	12	10S003 1 20111	373400
CS9131554000011590MARY	FWHITE	BENT	5 - Resident attending Full Time	12	10C003 1 20111	380400

Sample Export All Output

## Standards

### Navigation: Home - SIS - Assessment - Standards

The Assessment Standards screen is a view-only table maintained by StudentInformation State Support Team for all ITCs. The determination of what is passing or not is set by ODE and is defined in the Assessment Standards screen. This screen translates the raw scores into Scaled Score Standards. This screen is changed and modified by StudentInformation State Support Team as per ODE standards.

Home » SIS » Assessment » Standards Advanced Search | Feedback | Mgmt | Help | Ver

**Assessment Standards**  
From this screen, you can view the assessment standards.

Choose Assessment

Fiscal Year	Test Type	Test Part	Scaled Score Standard	Alternate	Min Score	Max Score	Passing	Transcript Desc	Report Card Desc
2009	3rd Ach	Math	Limited	<input type="checkbox"/>	0	377.00	<input type="checkbox"/>		Failed
2009	3rd Ach	Math	Basic	<input type="checkbox"/>	378.00	399.00	<input type="checkbox"/>		Failed
2009	3rd Ach	Math	Proficient	<input type="checkbox"/>	400.00	428.00	<input checked="" type="checkbox"/>	Passed	Passed
2009	3rd Ach	Math	Accelerated	<input type="checkbox"/>	429.00	446.00	<input checked="" type="checkbox"/>	Passed	Passed
2009	3rd Ach	Math	Advanced	<input type="checkbox"/>	447.00	999.00	<input checked="" type="checkbox"/>	Passed	Passed
2009	3rd Ach	Reading	Limited	<input type="checkbox"/>	0	384.00	<input type="checkbox"/>		Failed
2009	3rd Ach	Reading	Basic	<input type="checkbox"/>	385.00	399.00	<input type="checkbox"/>		Failed
2009	3rd Ach	Reading	Proficient	<input type="checkbox"/>	400.00	414.00	<input checked="" type="checkbox"/>	Passed	Passed
2009	3rd Ach	Reading	Accelerated	<input type="checkbox"/>	415.00	431.00	<input checked="" type="checkbox"/>	Passed	Passed
2009	3rd Ach	Reading	Advanced	<input type="checkbox"/>	432.00	999.00	<input checked="" type="checkbox"/>	Passed	Passed
2008	OGT	Writing	Limited	<input checked="" type="checkbox"/>	0	70.00	<input type="checkbox"/>		Failed
2008	OGT	Writing	Basic	<input checked="" type="checkbox"/>	80.00	110.00	<input type="checkbox"/>		Failed
2008	OGT	Writing	Proficient	<input checked="" type="checkbox"/>	120.00	160.00	<input checked="" type="checkbox"/>	Passed	Passed
2008	OGT	Writing	Accelerated	<input checked="" type="checkbox"/>	170.00	200.00	<input checked="" type="checkbox"/>	Passed	Passed
2008	OGT	Writing	Advanced	<input checked="" type="checkbox"/>	210.00	240.00	<input checked="" type="checkbox"/>	Passed	Passed

Show All Years

560 Records Displayed [Back To Top](#)

Assessment Standards Screen

**Choose Assessment** – Use the drop-down list to limit the assessment test type displayed. If left blank, then all test types display.

**Sorting** – You may sort by any column (Fiscal Year, Test Type, Test Part, Scaled Score Standard, Alternate, Min Score, Max Score, Passing, Transcript Desc, Report Card Desc) in ascending or descending order by clicking on the column header.

**Fiscal Year** – The test year to which this standard applies.

**Test Type** – The test type to which this standard applies (4th Prof, 6th Prof, 9th Prof, 3rd Ach, OGT, etc. for example).

**Test Part** – Citizenship, Math, Reading, Science or Writing

**Scaled Score Standard** – Description of this standard.

**Alternate** – A check indicates this is an Alternate Assessment Standard.

**Min Score** – The minimum score for this standard.

**Max Score** – The maximum score for this standard.

**Passing** – A check indicates this is a passing score when calculating passing percentages.

**Transcript Desc** – Description of this standard to be printed on transcripts. Only passing test results and scores are printed on transcripts.

**Report Card Desc** – Description of this standard to be printed on report cards.

**Show All Years** – If checked, standards for all years are displayed. If not checked, only the current year's standards are displayed.

## Assessment Imports

**Navigation: StudentInformation - SIS - Assessment - Assessment Imports**

This feature imports achievement assessment results into StudentInformation from vendor files.

*Note: This screen is available only at the district level.*

The screenshot shows the 'Assessment Imports' screen within the StudentInformation > SIS > Assessment > Assessment Imports navigation path. The main heading is 'Assessment Imports'. Below it, there is a form with two fields: 'Assessment Type:' and 'File Name:'. The 'Assessment Type:' field is a dropdown menu with a blue border and a downward arrow. The dropdown is open, showing a list of assessment types: ACT, OAA, OAA & OGT Alternate, OCTCA, OGT, OTELA, PLAN, SAT, and KRA. The 'File Name:' field has a 'Browse' button next to it.

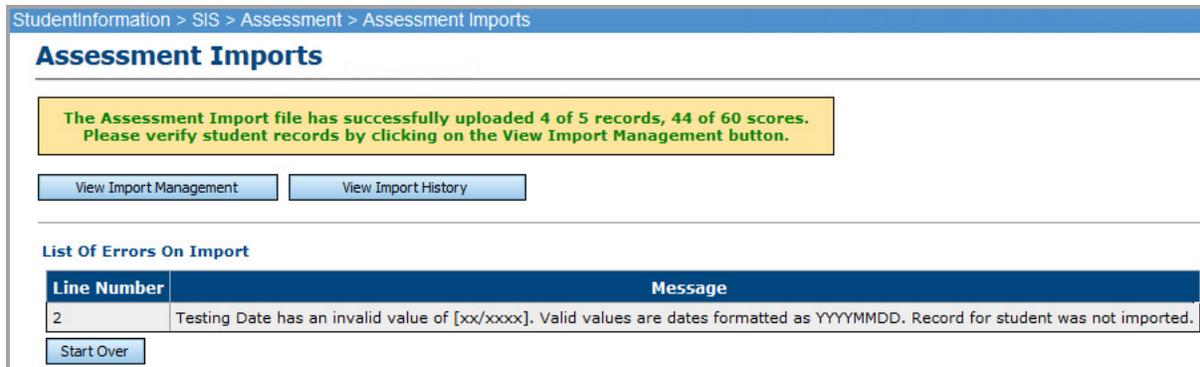
**Assessment Imports Screen (Type Selection)**

**Assessment Type** – Use the drop-down list to select the type of assessment being imported.

**Test Date** (required) – The date the assessment was administered. This field is available for OCTCA imports only.

**Browse** – Browse to the vendor file. This file can contain assessment results for a single building, single district or entire ITC.

**Upload** – Upload the selected vendor file into StudentInformation. Uploading the file may take a few minutes depending on the number of student records in the import file. Once the upload is complete, a message details how many records were successfully uploaded and requests student records be verified by clicking **View Import Management**.



**Assessment Imports Screen (Upload Completed)**

**View Import Management** – Proceed to the Assessment Import Management screen to view the results of the file import. Refer to [“Assessment Import Management”](#) for details.

**View Import History** – Proceed to the Assessment Import History screen to view detailed information on each assessment import. Refer to [“Assessment Import History”](#) for details.

Assessment Import tries to match the students in StudentInformation with the results from the import file. Assessment Imports uses the following criteria to match students. In all matching sets, the search must include a single student or StudentInformation will not assign the record to a student. To import OAA, OAA alternate, OGT, OGT alternate and OTELA records, one of the following sets of data is required to match to a student:

- SSID and Birthdate and district
- SSID and LastName and district
- StudentNumber and Birthdate and district
- StudentNumber and LastName and district
- FirstName and LastName and Birthdate and district (NEW in 9.0.2)

**Note:** *If the student is not found according to the criteria listed above, then the testing records are displayed in the Assessment Import Management - Unmatched Records tab. The district user can use this Assessment Import Management tab to search for a student in the district and then assign a student to the unassigned record. Refer to [“Assessment Import Management”](#) for additional details.*

To import ACT assessment records, the following data must match to a student:

- Social Security Number (optional)
- Legal Last Name and First Name (Student Last Name and First Name will be used if legal names do not match)
- Gender
- Birthdate

ACT assessment records are updated according to the following rules:

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

To import OCTCA assessment records, the following data must match to a student:

- EMIS ID **AND** District ID
- OR**
- District ID **AND** Legal Last, First and Middle (if available) Names. Student Last, First and Middle (if available) Names are used if no legal name match is found.

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

To import PLAN assessment records, the following data must match to a student:

- Legal Last Name and First Name (Student Last Name and First Name will be used if legal names do not match)
- Gender
- Birthdate

PLAN assessment records are updated according to the following rules:

- If the student has no previous PLAN record for the test date, a test record is created and all scores are imported.
- If the student has a previous PLAN record for the test date:
  - Existing scores are updated with scores from the import file.
  - New scores are added.
  - Existing scores not found in the import file are not updated.

**Note:** *The Assessment Import feature cannot handle records provided by testing companies that contain incorrect district IRNs.*

**Note:** *For FY11 and beyond, checks for Composite Performance Level and Comprehensive Domain Score were removed from the OTELA Import.*

**Note:** *OGT records cannot be imported into JVS school districts.*

To import SAT assessment records, the following data must match to a student:

- District IRN in context (student must be in that district)
- Last name or legal last name
- First name or legal first name
- Gender
- Birth date

To import KRA assessment records, the following data must match to a student:

- State Student ID
- EMIS ID
- School IRN
- District IRN

## Assessment Import Management

### Navigation: StudentInformation - SIS - Assessment - Assessment Import Management

The Assessment Import Management screen shows the results of each Assessment Import in three separate tabs:

- Unmatched Records – Records imported but not yet assigned to a student
- Matched Records – Records imported and assigned to a student
- Errors – Records that were not imported because of stated errors.

If the appropriate import file does not display in the Import field, click **Import Another File** to return to the Assessment Imports screen to import the desired file.

**Note:** *If the school in context is a district, then errors for students in all buildings within the district in context display for all imports. If the school in context is an ITC, then errors for students in all buildings in the ITC will only be displayed for imports performed in StudentInformation versions 11.3 or earlier.*

The screenshot shows the 'Assessment Import Management' screen. At the top, there is a breadcrumb trail: 'StudentInformation > SIS > Assessment > Assessment Import Management'. Below this is the title 'Assessment Import Management' and a sub-header: 'From this screen, you can manage assessment import records that have a building IRN accessible through the school and school year in context.' There is an 'Import:' dropdown menu showing 'Jun 24 2013 11:07:AM - OAA & OGT Alternate - OAAOGTAltAssessFY13.txt' and an 'Import Another File' button. Below this are three tabs: 'Unmatched Records', 'Matched Records', and 'Errors'. The 'Unmatched Records' tab is selected, and a message states: 'The following records were included in the import file but are not yet assigned to a student in DASL.' Below this message is a table with 10 columns: 'Line No.', 'First', 'Middle', 'Last', 'Test', 'BirthDate', 'Building IRN', 'District IRN', and 'Records'. The table contains 8 rows of data, each with a red 'X' icon in the first column.

	Line No.	First	Middle	Last	Test	BirthDate	Building IRN	District IRN	Records
X	1	Jesus	A	Allison	06A	Dec 14, 1999	000851	050583	2
X	2	Jean	S	Barnes	04A	Jul 04, 2002	016659	050583	2
X	3	Jessica		Brooks	05A	Nov 22, 2000	016659	050583	3
X	4	Todd	N	Bass	06A	Dec 01, 1999	016659	050583	2
X	5	Amanda	J	Bush	06A	Aug 08, 2000	016659	050583	2
X	6	Nicole	G	Bailey	07A	Feb 28, 2000	018440	050583	2
X	7	Debra	R	Beasley	07A	Nov 15, 1999	018440	050583	2
X	8	Wayne	P	Berry	07A	Dec 02, 1999	018440	050583	2

Assessment Import Management Screen

### Unmatched Records Tab

This tab shows assessment records from the testing company that could not be automatically associated to a student. These unassigned records may have occurred because there was a mismatch of data. Refer to [“Assessment Imports”](#) for the matching criteria.

**Note:** The column headings and data input fields shown on this tab depend on the type of assessment selected in the Input field.

Unmatched Records		Matched Records	Errors							
The following records were included in the import file but are not yet assigned to a student in DASL.										
	Line No.	First	Middle	Last	Test	BirthDate	Building IRN	District IRN	Records	
		1	Jesus	A	Allison	06A	Dec 14, 1999	000851	050583	2
		2	Jean	S	Barnes	04A	Jul 04, 2002	016659	050583	2
		3	Jessica		Brooks	05A	Nov 22, 2000	016659	050583	3
		4	Todd	N	Bass	06A	Dec 01, 1999	016659	050583	2
		5	Amanda	J	Bush	06A	Aug 08, 2000	016659	050583	2
		6	Nicole	G	Bailey	07A	Feb 28, 2000	018440	050583	2
		7	Debra	R	Beasley	07A	Nov 15, 1999	018440	050583	2
		8	Wayne	P	Berry	07A	Dec 02, 1999	018440	050583	2

**Assessment Import Management Screen (Unmatched Records Tab)**

### Assigning records

The unassigned records displayed on this tab can be assigned to the appropriate students without having to retype the proficiency data. The majority of load errors are caused by mismatches in

ID/SSN/name. Click beside the student you are working on to view details of this unassigned record and to manually assign the record to a student in StudentInformation.

Unmatched Records		Matched Records	Errors
The following records were included in the import file but are not yet assigned to a student in DASL.			
<b>Match student from file to a student in DASL</b>			
Use the search criteria to find a matching student in DASL			
<b>First Name:</b>	<input type="text" value="FFFF"/>	<input checked="" type="checkbox"/>	<b>Student Identifier:</b>
<b>Called Name:</b>	<input type="text"/>	<input type="checkbox"/>	<b>Building IRN:</b>
<b>Middle Name:</b>	<input type="text"/>	<input type="checkbox"/>	<b>District IRN:</b>
<b>Last Name:</b>	<input type="text" value="LLLLLLL1"/>	<input checked="" type="checkbox"/>	
<b>Birthdate:</b>	<input type="text" value="M/D/19YY"/>		
<b>Student Number:</b>	<input type="text"/>		
<b>Emis Id:</b>	<input type="text"/>		
<b>State Student Id:</b>	<input type="text"/>		
<input type="button" value="Search"/> <input type="button" value="Cancel"/>			

**Assessment Import Management Screen (Unmatched Records Tab - Record Details)**

### Match student from file to a student in StudentInformation (Search Criteria)

It is recommended that you first search using the defaults to locate a student match. If necessary,

change or enhance the search criteria to locate the correct student.

Partial name searches can be used by checking the Wild Card Search box after the First Name, Called Name, Middle Name, and/or Last Name.

**Cancel** – Do not execute the Search.

**Search** – Search for a student match. Matching students in the district are displayed at the bottom of the screen. The search is performed by district as OGT and achievement records are a district file. A student may have taken the test in one building, but by the time the results are received and loaded, the student may be at another building in the district. This is especially true of summer testing. Please note, as of 9.0.2 searching for the StudentInformation student to which a record belongs is school year independent.

District IRN	District Name	Student Number	EMIS ID	SSID	Name	Birthdate
						Feb 06, 1991

**Assessment Import Management Screen (Unmatched Records Tab - Search Results)**

 – Assign the testing data to this student. Click this icon if the results should be loaded into this student’s assessment record. You will receive a confirmation message (Import Record Successfully Assigned to a StudentInformation Student). The record is moved from the Unmatched Records tab to the Matched Records tab.

**Caution:** All other testing records can be manually corrected or added for new students coming in to the districts. This is covered in [“Student Assessment Menu”](#) of this document.

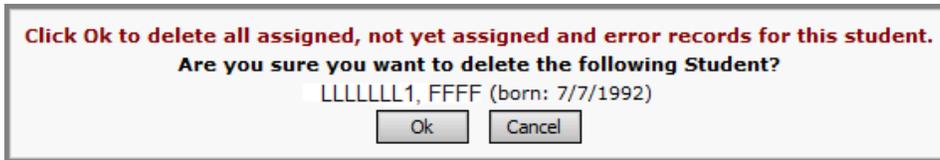
### Deleting Unassigned Records

If there are unassigned records that should not be loaded, particularly records from previous years, they can be deleted from the Assessment Import Management – Unmatched Records tab.

	Line No.	First	Middle	Last	Test	BirthDate	Building IRN	District IRN	Records
X	1	Jesus	A	Allison	06A	Dec 14, 1999	000851	050583	2
X	2	Jean	S	Barnes	04A	Jul 04, 2002	016659	050583	2
X	3	Jessica		Brooks	05A	Nov 22, 2000	016659	050583	3
X	4	Todd	N	Bass	06A	Dec 01, 1999	016659	050583	2
X	5	Amanda	J	Bush	06A	Aug 08, 2000	016659	050583	2
X	6	Nicole	G	Bailey	07A	Feb 28, 2000	018440	050583	2
X	7	Debra	R	Beasley	07A	Nov 15, 1999	018440	050583	2
X	8	Wayne	P	Berry	07A	Dec 02, 1999	018440	050583	2

**Assessment Import Management Screen (Unmatched Records Tab)**

 – Delete the unassigned record for this student.



**Assessment Import Management Screen (Unmatched Records Tab - Delete Record)**

Click **OK** to continue with the delete. Click **Cancel** to not delete this record.

**Matched Records tab**

This tab shows assessment records from the import file that were successfully matched to a student in StudentInformation.

*Note: The column headings shown on this tab depend on the type of assessment selected in the Input field.*

Line No.	File Student Name	Test	File BirthDate	File Bld. IRN	File Dist. IRN	Matched Dist. IRN	Matched Std. No.	Matched Student Name	Matched BirthDate	Records
9	Atkins, Eddie J	08A	Dec 20, 1997	018440	050583	050583	175004	ATKINS, EDDIE JONATHAN	Sep 05, 1999	3
10	Beasley, Craig	08A	Jul 07, 1998	018440	050583	050583	132038	BEASLEY, CRAIG	Dec 20, 1997	3
11	Boone, Julie E	08A	Dec 23, 1997	018440	050583	050583	172003	BOONE, JULIE ELIZABETH	Nov 08, 1998	3
12	Bowman, Jerry C	08A	Feb 25, 1999	018440	050583	050583	173010	BOWMAN, JERRY COLE	Jun 12, 1999	3
13	Anthony, Todd A	OGT	Jul 30, 1996	040071	050583	050583	150083	ANTHONY, TODD ALLEN	Nov 21, 1996	5
14	Barnes, Nicole	OGT	Nov 12, 1996	040071	050583	050583	150114	BARNES, NICOLE	Jan 22, 1997	5

**Assessment Import Management Screen (Matched Records Tab)**

**Line No** – Line number of the record in the import file.

Column headings containing the word File list data obtained from the import file. Columns with headings containing the word Matched list data from the student's record that matched data in the import file.

**Records** – Total number of assessment records matched.

**Errors tab**

Any assessment import errors are displayed on the Assessment Import Management – Errors tab.

*Note: The column headings shown on this tab depend on the type of assessment selected in the Input field.*

Errors			
 The following records are unable to be imported in DASL due to errors listed below.			
Line No.	File Student Name	File Birthdate	Message
4	LLLLLLL, FFFFF M	M/DD/19YY	English has an invalid score of [xx]. Valid scores are two character numeric scores (01-36), --.

### Assessment Import Management Screen (Errors Tab)

**Line No** – Line number of the record in the import file.

**Message** – Error message. These will typically be field error messages (the Testing Date field is not a valid date or the English Score is missing, for example).

## Assessment Import History

**Navigation: StudentInformation - SIS - Assessment - Assessment Import History**

This screen is only viewable with the appropriate permissions. This screen displays summary and detailed information on each Assessment Import.

StudentInformation > SIS > Assessment > Assessment Import History									
Assessment Import History									
From this screen, you can view history on assessment import records that have a building accessible through the school and school year in context.									
User: <input type="text"/> <input type="button" value="Filter"/>									
	Assessment Type	File Name	Total Test Records	Unmatched Test Records	Matched Test Records	Errors	User	Date	
 	ACT	ACT_ASSESSMENT_SAMPLE_FILE.txt	45	16	29	16	Dxxxx, Rxx	07/08/2011 08:20 AM	

### Assessment Import History Screen

**User** (optional) – Use the drop-down list to limit the assessment import history to a specified user.

**Filter** – Filter and return assessment import history only for the user specified.

**Assessment Type** – Type of assessment uploaded via Assessment Imports.

**File Name** – The name of the file uploaded via Assessment Imports.

**Total Test Records** – Total number of test records in the vendor assessment file.

**Unmatched Test Records** – Total number of test records not yet assigned to a student. These records will need reviewed on the Assessment Import Management – Unmatched Records tab.

**Matched Test Records** – Total number of test records matched to a student and imported into StudentInformation. These records can be reviewed on the Assessment Import Management – Matched Records tab.

**Errors** – Total number of test records with errors. These records will need reviewed in the Assessment Import Management – Errors tab.

**User** – The user who submitted this Assessment Import.

**Date** – The date that this Assessment Import was executed.

## Assessment Import View Details

 – Click this icon to view details of the specified Assessment Import. Details of the specified assessment import are displayed and record counts are displayed by Building IRN, School, Test, Part, Records, Imported, Not yet assigned to Student and Errors.

StudentInformation > SIS > Assessment > Assessment Import History

### Assessment Import History

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

**File Name:** OCTCATestFile.txt  
**User:** Name, User  
**Date:** Tuesday, April 05, 2011

Building IRN	School	Test	Part	Records	Imported	Not yet assigned to student	Errors
001081	Xxxxx High School	All	All	4	0	1	3
		OCTCA	OCT	4	0	1	3

**Assessment Import History Screen (Details)**

**Back** – Return to the Assessment Import History screen.

## Assessment Import Delete

 – Delete the specified assessment import from the assessment import history.

StudentInformation > SIS > Assessment > Assessment Import History

### Assessment Import History

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

Click Ok to delete this assessment import, including all student records and errors.  
 Are you sure you want to delete the following Import?  
 OGT\_MAR\_2008\_AIR\_SWD\_044222-ogtswd.txt - Barbee, Debbie - 9/12/2008 12:55:00 PM

**Assessment Import History Screen (Delete Assessment)**

**Ok** – Delete the assessment import history. You will receive a confirmation message (The Assessment Import Was Successfully Deleted).

**Note:** Deleting the assessment import history also deletes this assessment import information from Assessment Import Management.

**Cancel** – Do not process the delete.

## Accelerated List

### Navigation: Home - SIS - Assessment- Accelerated List

The Accelerated List screen shows a list of all students with accelerated records used in the Pre-Identification process for the filtered test and test part.

**Note:** The accelerated records used for the Pre-Identification process are not reported to EMIS.

The screenshot shows the 'Accelerated List' screen with a breadcrumb trail: Home » SIS » Assessment » Accelerated List. Below the title, there is a subtitle: 'View and filter list of assessment students with accelerated tests'. There are two dropdown menus for 'Test:' and 'Part:', and a 'Search' button. Below these is a table with the following data:

Student Name ^	Student Grade Level	Test	Part
ETHAN	03	4th Ach	Math
ERICA	03	5th Ach	Reading
ISABELLA	03	4th Ach	Reading

**Accelerated List Screen**

**Test** – You can filter by a particular test or leave blank to not filter on test.

**Part** – You can filter by a particular test part (you must select a test before you can select a part) or leave blank to not filter on part.

Click **Search** to display the list of students matching the chosen test and part filters.

**Sorting** – You may sort by any column (Student Name, Student Grade Level, Test, Part) in ascending or descending order by clicking the column header.

Click the student's name to go to that specific accelerated record.

The screenshot shows the 'Accelerated Student' screen with a breadcrumb trail: Home » SIS » Student » Assessment » Accelerated Student. Below the title, there is a subtitle: 'From this screen, you can display, add, change and delete data pertaining to Accelerated Student.' There is an 'Add' button. Below that is a table with the following data:

	Test	Part	Accelerated Grade
✕ ✎	6th Ach	Math	06

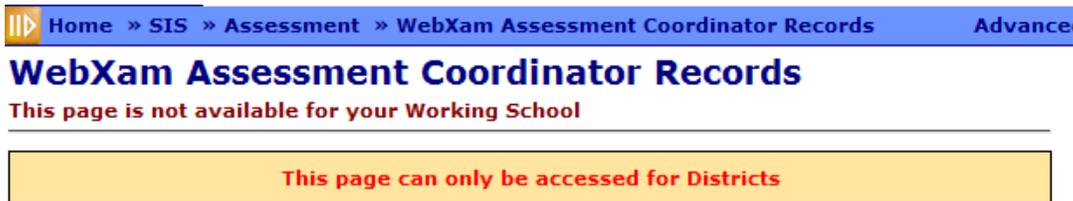
**Accelerated Student Screen**

## WebXam Assessment Coordinator Records

### Navigation: Home - SIS - Assessment- WebXam Assessment Coordinator Records

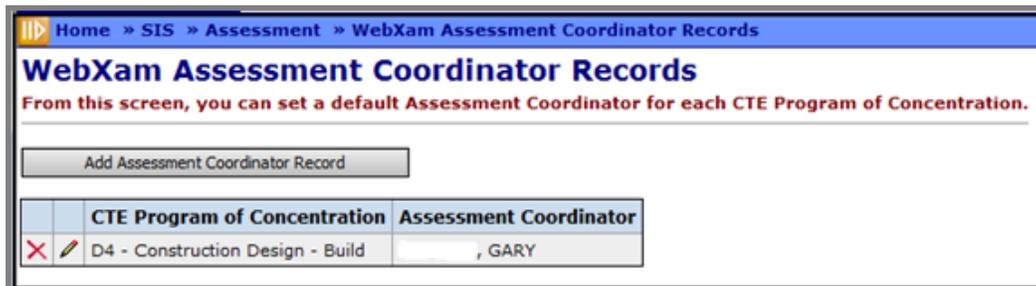
The WebXam Assessment Coordinator Records screen allows for each CTE program of concentration to be assigned to a default assessment coordinator in each district. These records are then used to create records for the WebXam Export.

The WebXam Assessment Coordinator Records screen is only available for districts. You will receive the message below if you do not have a district in context.



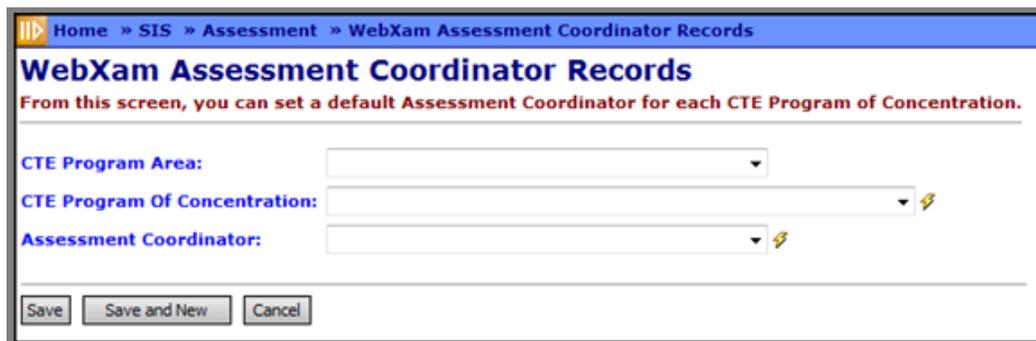
### Context Message on WebExam Assessment Coordinator Records Screen

This screen has standard add record, edit record and delete record controls.



WebExam Assessment Coordinator Records Screen

## Add WebXam Assessment Coordinator Records



WebXam Assessment Coordinator Records Screen (Add Record)

**CTE Program Area** (required) – Choose a program area for the CTE Program of Concentration

element.

**CTE Program of Concentration** (required) – Choose an element that designates the program of concentration for a CTE concentrator. The list of available values in the CTE Program of Concentration drop-down list is dependent on the value selected for the CTE Program Area field.

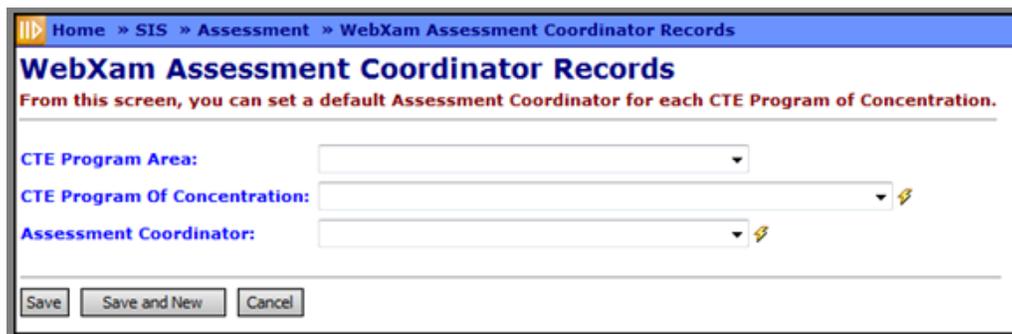
**Assessment Coordinator** (required) – Choose from the list of staff.

**Save** – Saves the current WebXam assessment coordinator record and returns to the WebXam Assessment Coordinator Records screen where you will see the updated information.

**Save and New** – Saves the current WebXam assessment coordinator record and displays a new blank record to enter subsequent records. A message displays stating that the record was successfully saved.

**Cancel** – Will clear out data already entered.

## Edit WebXam Assessment Coordinator Records



**WebXam Assessment Coordinator Records Screen (Edit Record)**

When editing a WebXam assessment coordinator record, the CTE Program Area and CTE Program of Concentration fields are not available. Only the Assessment Coordinator field is editable. If the CTE Program Area and CTE Program of Concentration fields need edited, delete the record (click the red X) and add a new record.

**Assessment Coordinator** (required) – Choose a different person from the list of staff.

**Save** – Saves the current WebXam assessment coordinator record and returns to WebXam Assessment Coordinator Records screen where you will see the updated information.

**Cancel** – Clears out data already entered.

**Note:** The WebXam Export is located under the Import/Export menu in following path: Management > Import/Export. Refer to ProgressBook StudentInformation Import Export Guide for further information.

# Student Assessment Menu

The following information is described in this topic:

- *“Student Proficiency”*
- *“OGT (Ohio Graduation Test)”*
- *“Accelerated Student”*
- *“Student Achievement”*
- *“ACT”*
- *“AP Exams”*
- *“KRA”*
- *“KRA-L”*
- *“OTELA”*
- *“PLAN (Pre-ACT)”*
- *“Preschool GGG”*
- *“Preschool ASQ/SE”*
- *“Preschool ECO”*
- *“Preschool ELA”*
- *“PSAT/NMSQT”*
- *“SAT Reasoning Test”*
- *“SAT Subject Tests”*
- *“Student Assessment List”*
- *“CTE Industry Assessment”*
- *“CTE Industry Credential”*
- *“CTE Student Assessment (OCTCA)”*
- *“International Baccalaureate (IB)”*

## Student Proficiency

Navigation: Home - SIS - Student - Assessment - Student Proficiency

To view a student's proficiency data, select a student and then select Student Proficiency under Assessment.

Home » SIS » Student » Assessment » Student Proficiency												Advanced Search   Feedback   Mgmt   E
Student Proficiency												
From this screen, you can display, add, change and delete data pertaining to Student Proficiency Tests.												
[Hide Filter]												
Proficiency Test: [Show All]												
	Test	Part	Test Date	Req Test Type	Grade	Accomm	Scaled Score	Reason Test Not Taken	Attempts	Grad Req	Mar Admin IRN	
X	4th Prof	Science	03/2005	STR	04	NO	192	*	1	*	034785	
X	4th Prof	Math	03/2005	STR	04	NO	222	*	1	*	034785	
X	4th Prof	Social Studies / Citizenship	03/2005	STR	04	NO	212	*	1	*	034785	

Student Proficiency Screen

**Proficiency Test** (required) – Choose to show all proficiency test results or just the results for 4th, 6th, 9th or 12th grades.

**Sorting** – You may sort by any column (Test, Part, Test Date, Req Test Type, Grade, Accomm, Scaled Score, Reason Test Not Taken, Attempts, Grad Req, Mar Admin IRN) in ascending or descending order by clicking on the column header.

### View Student Proficiency Test Details

Home » SIS » Student » Assessment » Student Proficiency	
Student Proficiency	
From this screen, you can display, add, change and delete data pertaining to Student Proficiency Tests.	
<b>Test:</b>	4th Prof
<b>Part:</b>	Science
<b>Required test type:</b>	STR - Standard (regular)
<b>Test Date:</b>	3/2005
<b>Grade at Time of Test:</b>	04 (*)
<b>Accommodations:</b>	NO - No
<b>Scaled Score:</b>	192
<b>Reason Test Not Taken:</b>	* - Not Applicable
<b>Attempts:</b>	1
<b>Required for Graduation:</b>	*
<b>March Administration Building IRN:</b>	034785 - Smithville Elementary School
<input type="button" value="Cancel"/>	

Student Proficiency Screen (Details)

**Test** – Grade level proficiency test.

**Part** – Social Science/Citizenship, Math, Reading, Science or Writing.

**Required Test Type** – Format of the proficiency the student took.

**Test Date** (required) – Month and year the test was administered or should have been administered (mm/yyyy).

**Grade at Time of Test** – Grade level of the student at the time this particular test was administered.

**Accommodations** – Any accommodations taken with the STR test format.

**	Not applicable
NO	No accommodations
Y1	Yes, 504
Y2	Yes, IEP
Y3	Yes, IEP (only valid during March administration)

**Scaled Score** – Scaled score achieved on this test subject.

**	Student did not take the test
0 – 499	Scaled test score – regular test

**Reason Test Not Taken** – Reason the subject test was not taken.

**Attempts** – Number of test attempts (including the current attempt) for the subject test reported.

**Required for Graduation** – If the student is required to meet the passing standard of this subject test in order to graduate.

**March Administration Building IRN** – Building IRN where the student was enrolled during the test administration.

## OGT (Ohio Graduation Test)

**Navigation: Home - SIS - Student - Assessment - OGT**

All portions of the OGT (Ohio Graduation Test) will be administered to all 10th grade students in Ohio schools starting in the 2005-2006 school year. Each 10th grade student whom your district is responsible for testing needs an OGT record for each of the five subject areas. The OGT data is loaded by districts (or ITCs) from the appropriate files received from the testing company as per the district's instruction. To view a student's OGT data, select a student and then select OGT under Assessment.

Home » SIS » Student » Assessment » OGT <span style="float: right;">Advanced Search   Feedback   Mgmt   Help   Version   Print</span>															
From this screen, you can display, add, change and delete data pertaining to a student's ohio graduation test results.															
Add OGT Test															
	Part	Test Date	Test Type	Grade at Test Time	Accomm	Score Not Reported	Raw Score	Scaled Score	Grad Req	Standard	Passing	Mar Admin IRN	Transferred From IRN	Re-report Time Period	
X	Math	03/2012	STR - Standard	11	NO	*	370	448	Y	Advanced	<input checked="" type="checkbox"/>	001081	*****		
X	Reading	03/2012	STR - Standard	11	NO	*	275	418	Y	Proficient	<input checked="" type="checkbox"/>	001081	*****		
X	Science	03/2012	STR - Standard	11	NO	*	380	448	Y	Advanced	<input checked="" type="checkbox"/>	001081	*****		
X	Social Studies / Citizenship	03/2012	STR - Standard	11	NO	*	400	460	Y	Advanced	<input checked="" type="checkbox"/>	001081	*****		
X	Writing	03/2012	STR - Standard	11	NO	*	350	430	Y	Accelerated	<input checked="" type="checkbox"/>	001081	*****		

OGT Assessment Screen

This screen has standard add record, edit record and delete record controls.

**Note:** In FY10 and going forward, this screen loads records by the fiscal year in context, and not by test date.

## Add/Edit Ohio Graduation Test

Home » SIS » Student » Assessment » OGT

From this screen, you can display, add, change and delete data pertaining to a student's ohio graduation test results.

Building IRN - Spring Test Administration: 001081 - Ashland High School

Test Type: STR - Standard

Part: MATH - Math

Test Date: 3/2012

Grade at Time of Test: 11

Accommodations: No - Student did not receive accommodations on STR or took ALT assessment

Score Not Reported: \* - Option Not Applicable, Student took Test

Scaled Score: 800

Raw Score: 800

Required for Graduation: Y

Re-report Time Period:

Transferred From IRN: -

Save Save and New Cancel

OGT Assessment Details Screen

**Building IRN - Spring Test Administration** (required) – Enter the building IRN where the student was enrolled during the test administration. Will default to the IRN of your current working school.

**Grade at Time of Test** (required) – Enter the grade level of the student at the time this particular test was administered.

**Test Date** (required) – Enter the month and year the test was administered or should have been administered (mm/yyyy).

**Test Type** (required) – Enter the format of the subject test the student is required to take.

**Part** (required) – Choose from C = Citizenship/Social Studies, M = Math, R = Reading, S = Science, W = Writing.

**Score Not Reported** (required) – Enter the reason that the subject test was not reported. Refer to *ODE EMIS Guide* for a list of valid values.

**Scaled Score** (optional) – Raw scores will be reported in the “subject” raw score element in FY2004. The actual scaled score achieved on the test will be reported after that time. The scaled score will default to \*\*\* when test type is set to ALT – Alternate and the scaled score was previously blank. If the scaled score previously contained a value, the value will not change when the test type is set to ALT.

**Raw Score** (optional) – Enter the number of points assigned to student's performance on test subject.

**Accommodations** (required) – Enter any accommodations taken with the STR test format.

**Required for Graduation** (required) – Enter if the student is required to meet the passing standard of this subject test in order to graduate.

**Re-report Time Period** (optional) – The OGT EMIS transfer includes any records marked for re-reporting for the fiscal year in Period G.

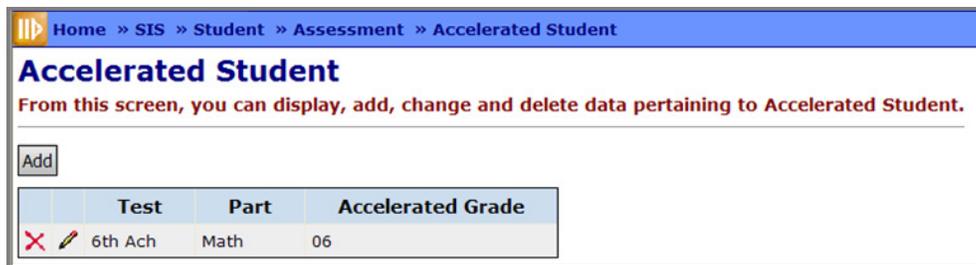
**Transferred From IRN** (optional) – The Building IRN of the school at which the OGT test generating this record was taken. This field is read-only for transferred student but is editable for manually entered OGT test results.

## Accelerated Student

### Navigation: Home - SIS - Student - Assessment - Accelerated

An accelerated record must be added for each test part in which the student is accelerated. To add a record for a student, search for the student for which you wish to add a record and then select Accelerated Student under Assessment. In order for the Pre-Identification file to include a student testing at an accelerated level, a record needs to be added for each test part in which the student is testing as accelerated.

**Note:** *The accelerated records added on this screen are only used for the purpose of creating the Pre-Identification labels for accelerated students taking parts of the Ohio Achievement Assessment only. The information entered on this screen is not reported to EMIS.*



The screenshot shows a web interface for managing accelerated student records. At the top, a breadcrumb trail reads: Home » SIS » Student » Assessment » Accelerated Student. Below this is the title "Accelerated Student" and a red instruction: "From this screen, you can display, add, change and delete data pertaining to Accelerated Student." There is an "Add" button. Below the button is a table with the following data:

	Test	Part	Accelerated Grade
 	6th Ach	Math	06

**Accelerated Student Screen**

This screen has standard add record, edit record and delete record controls.

## Add/Edit Accelerated

**Accelerated Student Screen (Details)**

**Test** (required) – The drop-down list contains any available tests which are for grade levels higher than the current grade level. An accelerated test record may only be entered for a grade level test greater than the student's current grade level.

**Part** (required) – The drop-down list contains those parts which are available for a student to take for the selected test.

**Caution:** *It is possible that a student will be reported to EMIS for an accelerated test part for a test that does not exist (i.e. 9th grade Math). Since no test materials will be ordered for this student, these records do not need to be on the Pre-Ident file. These types of records should be added directly to the Achievement Test records screen for the appropriate grade level test and part. Refer to ProgressBook StudentInformation EMIS Guide for guidelines on how to report these types of test records.*

## Student Achievement

**Navigation: Home - SIS - Student - Assessment - Student Achievement**

Student Achievement is a single screen to view, edit, and delete all student achievement records (currently 3rd-8th grade). The Student Achievement screen includes grade of the student when the test was taken as well as the test grade level (i.e. 3rd-8th grade achievement) allowing accelerated student achievement results to be entered.

	Grade	Test Date	IRN	Reqd Test Type	Test	Part	Score Not Reported	Accomm	Raw Score	Scaled Score	Standard	Passing	Accel
✗	08	03/2012	001081	STR	8th Ach	Reading	*	NO	100	368	Limited	<input type="checkbox"/>	<input type="checkbox"/>
✗	08	03/2012	001081	STR	8th Ach	Math	*	NO	090	377	Limited	<input type="checkbox"/>	<input type="checkbox"/>

**Student Achievement Screen**

This screen has standard add record, edit record and delete record controls.

**Sorting** – You may sort by any column (Grade, Test Date, IRN, Reqd Test Type, Test, Part, Score Not Reported, Accom, Raw Score, Scaled Score, Standard, Passing and Accel) in ascending or descending order by clicking on the column header. The records are initially sorted in the following order: student grade (desc), reporting period/school year (desc), reporting period sort order (desc), test date (desc), test (desc), test part (desc).

**Student Grade** – Choose the default [Show All] or select a specific student grade for filtering. Student grade ranges from KG – 8 to accommodate accelerated student test results (if a 1st grader takes the 3rd grade achievement for example).

**Achievement Test** – Choose the default [Show All] or select a specific achievement test for filtering. Achievement test ranges from 3rd – 12th to accommodate accelerated student test results. An example would be if an 8th grader does not take the 8th grade achievement because he would have taken the 10th grade achievement (which does not exist).

**Passing** – This field is checked when a student's test score falls on or after the passing test score for the subject area.

**Accel** – This field is checked when a student tests at a higher grade level OAA than the student's current grade level. For example, StudentInformation will check the Accel field for a 6th grade student who takes a 7th grade Achievement test.

**View** – Click to view student achievement records matching the above filter criteria. The achievement grid for the student in context will be populated.

## Add/Edit Student Achievement

**Add Achievement** – Click to add new achievement records for this student.

The screenshot shows the 'Student Achievement' screen with the following fields and values:

- Building IRN - Spring Test Administration: 001081 - Ashland High School
- Test Grade/Type: 8th Ach - Standard
- Part: MATH - Math
- Test Date: 3/2012
- Grade at time of test: 08
- Accommodations: No - Student did not receive accommodations on STR or took ALT assessmen
- Score Not Reported: \* - Option Not Applicable, Student took Test
- Scaled score: 377
- Raw score: 90

Buttons at the bottom: Save, Save and New, Cancel.

**Student Achievement Screen (Add/Edit Data)**

**Building IRN - Spring Test Administration** (optional) – Formerly the March Building Administration IRN, this field indicates the IRN of the building within the district that the student was enrolled during the spring test administration of the math test, with exceptions for accelerated students. The IRN must be a valid IRN within the district. If the student was not enrolled in the district at the time of the spring math testing, the value \*\*\*\*\* is reported. This field defaults to the current context building IRN.

**Test Grade/Type** (required) – The achievement test/type taken by the student (8th Ach for example). Range is 3rd – 12th to accommodate for accelerated student achievement results. The test grade/type must be selected before the part can be selected.

**Part** (required) – The achievement test part taken by the student (Math, Reading, Writing, Science or Social Studies). The test grade/type must be selected before the part can be selected.

**Test Date** (required) – The date (mm/yyyy) when the student took this administration of the achievement test.

**Grade at Time of Test** (required) – The grade level of the student at the time the test was administered for the test score report.

**Accommodations** (optional) – Identifies accommodations the student received while taking the standard format of the test.

**Score Not Reported** (optional) – Identifies the reason the student did not take a required test. This field defaults to \*. Refer to *ODE EMIS Guide* for a list of valid values.

**Scaled Score** (optional) – The scaled score achieved by the student for the test being reported. The Scaled Score field is always displayed. When test type is set to Alternate, the scale scored must be entered as \*\*\*.

**Raw Score** (optional) – The raw score achieved by the student for the test being reported.

## ACT

### Navigation: Home - SIS - Student - Assessment - ACT

To view a student's ACT data, select the student and then select ACT under Assessment.

**ACT Scores**  
From this screen, you can display, add, change and delete data pertaining to the ACT.

	04/2012
English Score	21
English Usage/Mechanics Sub Score	11
English Rhetorical Skills Sub Score	10
Mathematics Score	23
Mathematics Pre-Algebra/Elementary Algebra Sub Score	15
Mathematics Intermediate Algebra/Coordinate Geomet	14
Mathematics Plane Geometry/Trigonometry Sub Score	9
Reading Score	20
Reading Social Studies/Sciences Sub Score	8
Reading Arts/Literature Sub Score	12
Science Score	26
Composite Score	23
Combined English/Writing Score	24
Writing Test Sub Score	12
Essay Comments	22,33,51

### ACT Scores Screen

**Add Attempt** – Add a new ACT Attempt record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit ACT Scores

Home » SIS » Student » Assessment » ACT

### ACT Scores

From this screen, you can display, add, change and delete data pertaining to the ACT.

Testing Date:

English Score:

English Usage/Mechanics Sub Score:

English Rhetorical Skills Sub Score:

Mathematics Score:

Mathematics Pre-Algebra/Elementary Algebra Sub Score:

Mathematics Intermediate Algebra/Coordinate Geometry Sub Score:

Mathematics Plane Geometry/Trigonometry Sub Score:

Reading Score:

Reading Social Studies/Sciences Sub Score:

Reading Arts/Literature Sub Score:

Science Score:

Composite Score:

Combined English/Writing Score:

Writing Test Sub Score:

Essay Comments:   


- 01 -
- 02 -
- 20 -
- 21 -

Save Save and New Cancel

ACT Scores Screen (Details)

**Testing Date** (required) – Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

**ACT Scores and Sub Scores** (optional) – Enter the ACT scores and sub scores received for each test part for this student. All scores are optional.

**Essay Comments** (optional) – Choose the essay comments applicable to this ACT test.

## AP Exams

**Navigation: Home - SIS - Student - Assessment - AP Exams**

To view a student's AP Exam data, select the student and then select AP Exams under Assessment.

Home » SIS » Student » Assessment » AP Exams

### AP Exam Scores

From this screen, you can display, add, change and delete data pertaining to AP Exams.

Add

	Testing Date ^	Subject	Score
	Sep 01, 2010	Biology	4

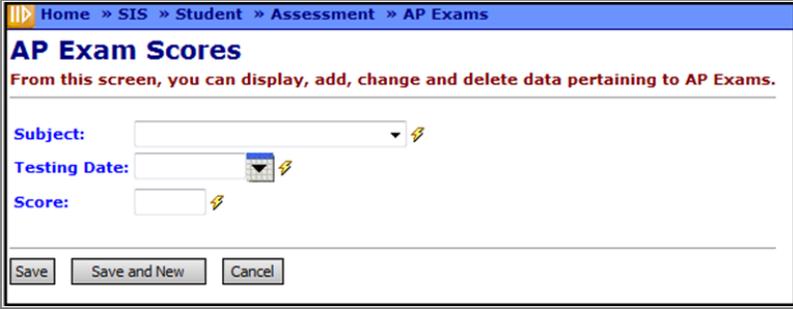
AP Exam Scores Screen

This screen has standard add record, edit record and delete record controls.

**Sorting** – You may sort by any column (Testing Date, Subject, Score) in ascending or descending order by clicking on the column header

**Add** – Add a new AP Exam record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit AP Exam Scores



The screenshot shows a web application interface for managing AP Exam Scores. At the top, there is a breadcrumb trail: Home » SIS » Student » Assessment » AP Exams. Below this is the title "AP Exam Scores" and a red instruction: "From this screen, you can display, add, change and delete data pertaining to AP Exams." The form contains three input fields: "Subject" (a dropdown menu), "Testing Date" (a date picker), and "Score" (a text input). Each field has a lightning bolt icon to its right, indicating a required field. At the bottom of the form are three buttons: "Save", "Save and New", and "Cancel".

AP Exam Scores Screen (Add/Edit Scores)

**Subject** (required) – Select the AP Exams subject from the drop-down list.

**Testing Date** (required) – Enter the date that the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Score** (required) – Enter the AP Exam score for this student.

---

## KRA

You can view and maintain a student's KRA (Kindergarten Readiness Assessment) data. Refer to the appropriate topic:

- [“View KRA Scores”](#)
- [“Add KRA Scores”](#)

## View KRA Scores

**Navigation: StudentInformation - SIS - Student - Assessment - KRA**

You can view and maintain a student's KRA (Kindergarten Readiness Assessment) data when you have the student in context on the **KRA** screen.

**Note:** To delete a record, in the row of the assessment date, click . To edit an existing record, click  and make the needed changes. (For field descriptions, see [“Add KRA Scores.”](#))

StudentInformation > SIS > Student > Assessment > KRA

### KRA Assessment Record

Add Assessment +

Assessment Date: 08/2014

Subject	Score	Score Not Reported	Accommodations
Language Literacy	25.00	*	NO
Language Literacy Error Band	35.00	*	NO
Mathematics	40.00	*	NO
Mathematics Error Band	35.00	*	NO
Physical Development	60.00	*	NO
Physical Development Error Band	65.00	*	NO
Social Foundation	45.00	*	NO
Social Foundation Error Band	35.00	*	NO
Overall Individual Student Report	52.00	*	NO

#### View KRA Scores

## Add KRA Scores

**Navigation: StudentInformation - SIS - Student - Assessment - KRA**

You can add KRA records for a student.

**Note:** You can add multiple test occurrences, but they must have different testing dates.

1. With a student in context on the **KRA** screen, click **Add Assessment**.

StudentInformation > SIS > Student > Assessment > KRA

### KRA Assessment Record

Add Assessment +

Subject	Score	Score Not Reported	Accommodations
There are no records to display			

#### KRA – Add Assessment

An entry window opens.

2. In the **Assessment Date** field, enter or select the date the test was administered in mm/yyyy format.
3. For each test part, complete the following information:
  - a. In the **Accommodations** drop-down list, if the student received accommodations during administration of the test, select the type of accommodations.

**Note:** *If the student did not take the test or took the test without accommodations, select “\*\* - Not Applicable - student did not test or accommodations not reported.”*

- b. In the **Score Not Reported** drop-down list, if the student did not take the test, select the reason.

**Note:** *If the student took the test, leave the default value of “\* - Option Not Applicable, Student took Test.”*

- c. If the student took the test, in the **Score** field, enter the student’s score.
4. Click **Create**.

The screenshot shows a web form titled "Add KRA Scores". At the top, there is a blue header bar with "Assessment Date: 08/2014" on the left, a calendar icon, and "Cancel" and "Create" buttons on the right. Below the header, the form is divided into three sections, each with a blue header:

- Language Literacy:** Accommodations: NO - Student did not receive accommodations on the STR test or took AL1; Score Not Reported: \* - Option Not Applicable, Student took Test; Score: 25.00
- Language Literacy Error Band:** Accommodations: NO - Student did not receive accommodations on the STR test or took AL1; Score Not Reported: \* - Option Not Applicable, Student took Test; Score: 35.00
- Mathematics:** Accommodations: NO - Student did not receive accommodations on the STR test or took AL1; Score Not Reported: \* - Option Not Applicable, Student took Test; Score: 40.00

**Add KRA Scores**

A confirmation message displays, and the added scores display.

StudentInformation > SIS > Student > Assessment > KRA

Success! KRA Record for 08/2014 was Created.

### KRA Assessment Record

Add Assessment +

Assessment Date: 08/2014

Subject	Score	Score Not Reported	Accommodations
Language Literacy	25.00	*	NO
Language Literacy Error Band	35.00	*	NO
Mathematics	40.00	*	NO
Mathematics Error Band	35.00	*	NO
Physical Development	65.00	*	NO
Physical Development Error Band	45.00	*	NO
Social Foundation	35.00	*	NO
Social Foundation Error Band	52.00	*	NO
Overall Individual Student Report	60.00	*	NO

**KRA Scores Added**

## KRA-L

**Navigation: Home - SIS - Student - Assessment - KRA-L**

To view a student's KRA-L (Kindergarten Readiness Assessment - Literacy) data, select the student and then select KRA-L under Assessment.

Home » SIS » Student » Assessment » KRA-L

### Kindergarten Readiness Assessment - Literacy Record

From this screen, you can display, add, change and delete data pertaining to a student's KRA-L results.

Add KRA-L Record

Test Part	Test Date	Accomm	Score Not Reported	Total Score
Reading	05/2009	NO	*	025

**Kindergarten Readiness Assessment - Literacy Record Screen**

This screen has standard add record, edit record and delete record controls.

**Add KRA-L Record** – Add a new KRA-L record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit KRA-L Exam Scores

### Kindergarten Readiness Assessment - Literacy Record Screen (Details)

**Test Date** – Date test taken by student in mm/yyyy format or use the calendar to select the date.

**Accommodations** – List of accommodation choices for students.

**Score Not Reported** – List of possible reasons for not taking the test. Refer to *ODE EMIS Guide* for a list of the valid values.

**Total Score** – Total score for the assessment. Refer to *ODE EMIS Guide* for a list of the valid values.

## OTELA

### Navigation: Home - SIS - Student - Assessment - OTELA

To view a student's OTELA data, select the student and then select OTELA under Assessment.

	Test Date	Grade	Acc	Reading		Writing		Listening		Speaking								
				Score Not Reported	Score	Acc	Score Not Reported	Score	Acc	Score Not Reported	Score	Comp	Prod Level	Prod Scaled	Compos / Perf			
X	12/2012	09	NO	*	440	NO	*	560	NO	*	950	Y1	*	367	302	2	110	2

### Ohio Test of English Language Acquisition Screen

This screen has standard add record, edit record and delete record controls.

**Add OTELA Record** – Add a new OTELA record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit OTELA Exam Scores

Home » SIS » Student » Assessment » OTELA

### Ohio Test of English Language Acquisition

From this screen, you can display, add, change and delete data pertaining to a student's OTELA assessment results.

Required Test Type: STR

Test Date: 12/2012

Grade Level at Time of Test: 09 - Ninth Grade

**Reading Scaled**

Accommodations: NO - Student did not receive accommodations on the STR test or took ALT

Score Not Reported: \* - Option Not Applicable, Student took Test

Score: 440

**Writing Scaled**

Accommodations: NO - Student did not receive accommodations on the STR test or took ALT

Score Not Reported: \* - Option Not Applicable, Student took Test

Score: 560

**Listening Scaled**

Accommodations: NO - Student did not receive accommodations on the STR test or took ALT

Score Not Reported: \* - Option Not Applicable, Student took Test

Score: 950

**Speaking Scaled**

Accommodations: NO - Student did not receive accommodations on the STR test or took ALT

Score Not Reported: \* - Option Not Applicable, Student took Test

Score: 367

Comprehension Scaled Score: 302 **Note:** Acceptable values are (000-999), \*\*\*, INV.

Production Performance Level: 2 **Note:** Acceptable values are 1-5, or enter \* for Not Applicable.

Production Scaled Score: 110 **Note:** Acceptable values are (000-999).

Composite Performance Level: 2 **Note:** Acceptable values are 1-5, "1", or enter \* for Not Applicable.

Save Cancel

### Ohio Test of English Language Acquisition Screen (Details)

**Test Date** (required) - Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

**Grade Level at Time of Test** (required) – Current grade level of student at time of test.

**Accommodations** (required) – Type of accommodations provided to student during this test administration.

**Score Not Reported** – Applicable reasons for a student not taking the test. If there is a Reason Test Not Taken value, scores are not required. Refer to *ODE EMIS Guide* for a list of valid values.

**Score** – The student's scaled score for the Reading, Writing, Listening, or Speaking test parts. The valid values are 000-999 or \*\*\* if not applicable.

**Comprehension Scaled Score** – The scaled score for the assessment. Refer to *ODE EMIS Guide* for further information. The valid values are 000-999, INV, or \*\*\* if not applicable.

Some scaled score concerns unique to OTELA are:

- OTELA exam scores are saved successfully when a Score Not Reported value other than \* is entered for the Reading, Writing, Listening or Speaking test, and the score for that test is set to \*\*\*. Each of the test parts—Reading, Writing, Listening, and Speaking—must have values for the Score Not Reported and Score fields to save the OTELA record.
- An error is generated when OTELA exam scores are saved if a Score Not Reported value other than \* is entered and all scaled scores are set to a valid number.

**Production Performance Level** – The calculated level based on the relationship between the student’s Speaking and Writing performance level scores. The valid values are 1-5 or \* if not applicable.

**Production Scaled Score** – The student’s Scaled Score value returned in the results from the vendor. The valid values are 000-999.

**Composite Performance Level** – Composite performance level score. The valid values are 1-5, I, or \* if not applicable.

After you click **Save**, the following banner message displays:

The Ohio Test of English Language Acquisition Record was saved successfully

The Transfer – Student Assessment (FA) feature generates one record for each entered scaled score. Records generated for valid scaled scores contain the score and a Score Not Reported value of \*. Records generated for \*\*\* scaled scores contain the scaled score of \*\*\* and a Score Not Reported value other than \*.

## PLAN (Pre-ACT)

**Navigation: Home - SIS - Student - Assessment - PLAN**

To view a student's PLAN (pre-ACT) data, select the student and then select PLAN under Assessment.

	10/2/2009
English Score	30
English Usage/Mechanics Sub Score	18
English Rhetorical Skills Sub Score	12
Mathematics Score	30
Mathematics Pre-Algebra/Algebra Sub Score	18
Mathematics Geometry Sub Score	12
Reading Score	30
Science Score	30
Composite Score	30

PLAN (pre-ACT) Scores Screen

**Add Attempt** – Add a new PLAN record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit PLAN (Pre-ACT) Exam Scores

**PLAN (pre-ACT) Scores Screen (Details)**

**Testing Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**PLAN Scores and Sub Scores** (optional) – Enter the PLAN scores and sub scores for this student. All scores are optional.

Valid scores:

**Main Score** = 1 – 36

**Subset Scores** = 1 – 18

## Preschool GGG

**Navigation: Home - SIS - Student - Assessment - Preschool GGG**

To view a student's Preschool GGG data, select the student and then select Preschool GGG under Assessment.

Preschool GGG Assessment Record										
From this screen, you can display, add, change and delete data pertaining to a student's Preschool GGG assessment results.										
Add Preschool GGG Record										
	Test Date	Accomm	Score Not Reported	Score	Accomm	Score Not Reported	Score	Accomm	Score Not Reported	Score
X	08/2012	NO	*	070	**	U	***	NO	*	030

**Preschool GGG Assessment Record Screen**

This screen has standard add record, edit record and delete record controls.

**Add Preschool GGG Record** – Add a new Preschool GGG record. Multiple tests occurrences can be added, but they must have different testing dates.

### Add/Edit Preschool GGG Scores

Home » SIS » Student » Assessment » Preschool GGG

### Preschool GGG Assessment Record

From this screen, you can display, add, change and delete data pertaining to a student's Preschool GGG assessment results.

Test Grade Level: PS  
 Test Date: 8/2012

**Picture Naming**

Accommodations: NO - Student did not receive accommodations on the STR test or took ALT  
 Score Not Reported: \* - Option Not Applicable, Student took Test  
 Score: 070

**Rhyming**

Accommodations: \*\* - Not Applicable - student did not test or accommodations not reporte  
 Score Not Reported: U - Unable to answer sample items  
 Score: \*\*\*

**Alliteration**

Accommodations: NO - Student did not receive accommodations on the STR test or took ALT  
 Score Not Reported: \* - Option Not Applicable, Student took Test  
 Score: 030

Save Save and New Cancel

**Preschool GGG Assessment Record Screen (Details)**

**Test Date** – Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

For each testing area, complete the following fields:

**Accommodations** – Select whether or not the student received accommodations for the test. If you select one of the values in the Score Not Reported field, the Accommodations field value changes to “\*\* - Not Applicable, student did not take or accommodations not reported.”

**Score Not Reported** – Reason for a student not taking the test, if applicable. If you select U – Unable to answer sample items, and you enter a value in the Picture Naming Score, Rhyming Score or Alliterative Score fields, StudentInformation only creates a GB record with a reason of U for the score with the value of \*\*\*. Refer to *ODE EMIS Guide* for a list of valid values.

**Score** – Enter the student’s score for the test using the following valid scores:

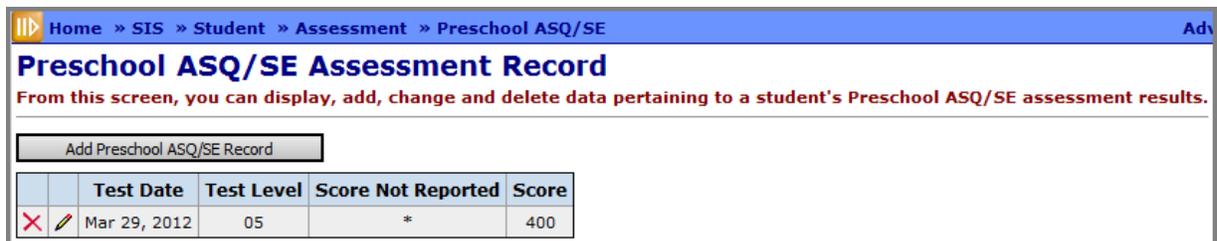
- **Picture Naming** – A value from 000 to 096.
- **Rhyming** – A value from 000 to 048.
- **Alliterative** – A value from 000 to 040.

If the score is not applicable because the student did not take the test, enter \*\*\*. When you select a reason in the Score Not Reported field for a test, the Score field for that test defaults to \*\*\*.

## Preschool ASQ/SE

**Navigation: Home - SIS - Student - Assessment - Preschool ASQ/SE**

To view a student's Preschool ASQ/SE data, select the student and then Preschool ASQ/SE under Assessment.

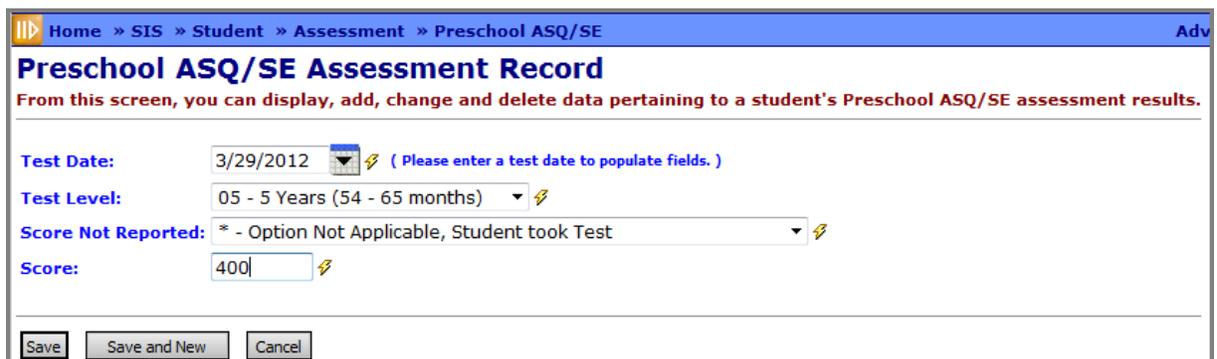


Preschool ASQ/SE Assessment Record Screen

This screen has standard add record, edit record and delete record controls.

**Add Preschool ASQ/SE Assessment Record** – Add a new Preschool ASQ/SE record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit Preschool ASQ/SE Scores



Preschool ASQ/SE Assessment Record Screen (Details)

**Test Date** – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Test Level** – Level of test given to student.

**Score Not Reported** – Any reason a student may not have taken a test part. Refer to *ODE EMIS Guide* for a list of valid values.

**Score** – A value from 000 to 495. If the score is not applicable because the student did not take the test, enter \*\*\*.

## Preschool ECO

**Navigation: Home - SIS - Student - Assessment - Preschool ECO**

To view a student's Preschool ECO (Early Childhood Outcome) data, select the student and select Preschool ECO under Assessment.

The screenshot shows the 'Preschool ECO Assessment Record' screen. At the top, there is a breadcrumb trail: Home » SIS » Student » Assessment » Preschool ECO. Below the title, a red text box states: 'From this screen, you can display, add, change and delete data pertaining to a student's Preschool ECO assessment results.' There is a button labeled 'Add Preschool ECO Record'. Below this is a table with the following data:

	Test Date	Test Part	Score Not Reported	Score	Progress
	Mar 29, 2012	Acquiring and Using Knowledge and Skills	*	3	F
	Mar 29, 2012	Positive Social Emotional Skills	A	*	*
	Mar 29, 2012	Taking Appropriate Action to Meet Needs	*	5	Y

**Preschool ECO Assessment Record Screen**

This screen has standard add record, edit record and delete record controls.

**Add Preschool ECO Record** – Add a new Preschool ECO record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit Preschool ECO Assessment Records

The screenshot shows the 'Preschool ECO Assessment Record' screen in detail. It includes the same breadcrumb trail and title as the previous screenshot. Below the title, a red text box states: 'From this screen, you can display, add, change and delete data pertaining to a student's Preschool ECO assessment results.' The form contains the following fields:

- Building IRN:** 001081 - Ashland High School
- Test Date:** 3/29/2012
- Test Part:** E - Positive Social Emotional Skills
- Score Not Reported:** \* - Option Not Applicable, Student took Test
- Score:** 5 - Somewhat
- Progress:** F - First Assessment This record represents the first ECO assessment for this student, so progress is not relevant

At the bottom of the form, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

**Preschool ECO Assessment Record Screen (Details)**

**Building IRN** (required) – Choose the building IRN where the student was enrolled during the test administration. The field will default to the student's primary building IRN.

**Test Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Test Part** (required) – Choose one of the three ECO test parts.

**Score Not Reported** – Any reason a student may not have taken the test part. Refer to *ODE EMIS Guide* for a list of valid values.

**Score** – Level of age appropriate functioning exhibited by the child.

**Progress** – Whether the child has shown any new skills or behaviors since the last outcomes summary.

---

## Preschool ELA

You can view and maintain a student's Preschool ELA assessment data. Refer to the appropriate topic:

- [“View Preschool ELA Scores”](#)
- [“Add Preschool ELA Scores”](#)

### View Preschool ELA Scores

**Navigation: StudentInformation - SIS - Student - Assessment - Preschool ELA**

You can view and maintain a student's Preschool ELA assessment data when you have the student in context on the **Preschool ELA** screen.

**Note:** To delete a record, in the row of the assessment date, click . To edit an existing record, click  and make the needed changes. (For field descriptions, see [“Add Preschool ELA Scores.”](#))

StudentInformation > SIS > Student > Assessment > Preschool ELA

### Preschool ELA Assessment Record

Add Assessment +

Assessment Date: 04/2015

Subject	Score	Score Not Reported	Accommodations
Awareness and Expression of Emotion	10.00	*	NO
Cooperation with Peers	20.00	*	NO
Phonics and Letter Recognition	30.00	*	NO
Communication	40.00	*	NO
Emergent Writing	50.00	*	NO
Classification	60.00	*	NO
Coordination-Small Motor	70.00	*	NO
Safety and Injury Prevention	80.00	*	NO
Personal Care Tasks	90.00	*	NO

View Preschool ELA Scores

## Add Preschool ELA Scores

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

You can add Preschool ELA records for a student.

**Note:** You can add multiple test occurrences, but they must have different testing dates.

1. With a student in context on the **Preschool ELA** screen, click **Add Assessment**.

StudentInformation > SIS > Student > Assessment > Preschool ELA

### Preschool ELA Assessment Record

Add Assessment +

Subject	Score	Score Not Reported	Accommodations
There are no records to display			

Preschool ELA – Add Assessment

An entry window opens.

2. In the **Assessment Date** field, enter or select the date the test was administered in mm/yyyy format.
3. For each test part, complete the following information:
  - d. In the **Accommodations** drop-down list, if the student received accommodations during administration of the test, select the type of accommodations.

**Note:** *If the student did not take the test or took the test without accommodations, select “\*\* - Not Applicable - student did not test or accommodations not reported.”*

- e. In the **Score Not Reported** drop-down list, if the student did not take the test, select the reason.

**Note:** *If the student took the test, leave the default value of “\* - Option Not Applicable, Student took Test.”*

- f. If the student took the test, in the **Score** field, enter the student’s score.
4. Click **Create**.

The screenshot shows a web form titled "Add Preschool ELA Scores". At the top, there is a blue header bar containing the text "Assessment Date: 04/2015", a calendar icon, and two buttons: "Cancel" and "Create". Below the header, the form is organized into three distinct sections, each with a blue title bar:

- Awareness and Expression of Emotion:**
  - Accommodations: NO - Student did not receive accommodations on the STR test or took AL1
  - Score Not Reported: \* - Option Not Applicable, Student took Test
  - Score: 10.00
- Cooperation with Peers:**
  - Accommodations: NO - Student did not receive accommodations on the STR test or took AL1
  - Score Not Reported: \* - Option Not Applicable, Student took Test
  - Score: 20.00
- Phonics and Letter Recognition:**
  - Accommodations: NO - Student did not receive accommodations on the STR test or took AL1
  - Score Not Reported: \* - Option Not Applicable, Student took Test
  - Score: 30.00

### Add Preschool ELA Scores

A confirmation message displays, and the added scores display.

StudentInformation > SIS > Student > Assessment > Preschool ELA

Success! ELA Record for 04/2015 was Created.

### Preschool ELA Assessment Record

Add Assessment +

Assessment Date: 04/2015

Subject	Score	Score Not Reported	Accommodations
Awareness and Expression of Emotion	10.00	*	NO
Cooperation with Peers	20.00	*	NO
Phonics and Letter Recognition	30.00	*	NO
Communication	40.00	*	NO
Emergent Writing	50.00	*	NO
Classification	60.00	*	NO
Coordination-Small Motor	70.00	*	NO
Safety and Injury Prevention	80.00	*	NO
Personal Care Tasks	90.00	*	NO

Preschool ELA Scores Added

## PSAT/NMSQT

Navigation: Home - SIS - Student - Assessment - PSAT/NMSQT

To view a student's PSAT/NMSQT data, select the student and then select PSAT/NMSQT under Assessment.

Home > SIS > Student > Assessment > PSAT/NMSQT

### Preliminary SAT / National Merit Scholarship Qualifying Test

From this screen, you can display, add, change and delete data pertaining to the PSAT/NMSQT.

Add Attempt

Test Date	Category / Score
Oct 01, 2009	Critical Reading Score 30
	Critical Reading Percentile 50
	Math Score 29
	Math Percentile 50
	Selection Index 99
	Selection Index Percentile 50
	Writing Skills Score 30
	Writing Skills Percentile 50

Preliminary SAT/National Merit Scholarship Qualifying Test Screen

**Add Attempt** – Add a new PSAT/NMSQT record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit PSAT/NMSQT

**Preliminary SAT/National Merit Scholarship Qualifying Test Screen (Details)**

**Testing Date** (required) – Enter the date that the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Grade at Time of Test** (required) – Select grade from drop-down list.

**PSAT/NMSQT Scores, Percentiles, and Index** (optional) – Enter the PSAT/NMSQT scores, percentiles and index for this student. All entries are optional.

## SAT Reasoning Test

**Navigation: Home - SIS - Student - Assessment - SAT Reasoning Test**

To view a student's SAT Reasoning Test data, select the student and then select SAT Reasoning Test under Assessment.

Home » SIS » Student » Assessment » SAT Reasoning Test

### SAT Reasoning Test Scores

From this screen, you can display, add, change and delete data pertaining to the SAT Reasoning Test.

Add Attempt

	✖ 5/1/2010 ✎
Critical Reading Score	600
Math Score	650
Writing Score	620
Writing Multiple-Choice Sub Score	75
Essay Sub Score	10

SAT Reasoning Test Scores Screen

## Add/Edit SAT Reasoning Test Scores

Home » SIS » Student » Assessment » SAT Reasoning Test

### SAT Reasoning Test Scores

From this screen, you can display, add, change and delete data pertaining to the SAT Reasoning Test.

Testing Date:

Grade at Time of Test:

Critical Reading Score:

Math Score:

Writing Score:

Writing Multiple-Choice Sub Score:

Essay Sub Score:

Save Save and New Cancel

SAT Reasoning Test Scores Screen (Details)

**Testing Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Grade at Time of Test** (required) – Select grade from drop-down list.

**SAT Reasoning Test Scores and Sub Scores** (optional) – Enter the SAT Reasoning Test scores and sub scores for this student. All scores are optional.

## SAT Subject Tests

**Navigation: Home - SIS - Student - Assessment - SAT Subject Tests**

To view a student's SAT Subject Test data, select the student and then select SAT Subject Tests under Assessment.

The SAT Subject Tests Scores screen should only be used by a school after that school has converted from using fixed transcript formats to custom transcript formats. The original fixed transcript formats only use assessment data from the MISC module, and will not import any data from the following screens.

The screenshot shows the 'SAT Subject Test Scores' screen. At the top, there is a breadcrumb trail: Home » SIS » Student » Assessment » SAT Subject Tests. Below the title, a red instruction reads: 'From this screen, you can display, add, change and delete data pertaining to the SAT Subject Tests.' An 'Add' button is located above a table. The table has four columns: 'Testing Date', 'Grade at Test Time', 'Subject Test', and 'Score'. The first row contains the following data: 'May 01, 2010', '11', 'Writing', and '650'. There are small icons for edit and delete in the first column of the row.

	Testing Date ^	Grade at Test Time	Subject Test	Score
X ✎	May 01, 2010	11	Writing	650

**SAT Subject Test Scores Screen**

This screen has standard add record, edit record and delete record controls.

**Sorting** – You may sort by any column (Testing Date, Grade at Test Time, Subject Test, Score) in ascending or descending order by clicking on the column header

**Add** – Add a new SAT Subject Test record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit SAT Subject Test Scores

The screenshot shows the 'SAT Reasoning Test Scores Screen (Details)'. It features a breadcrumb trail: Home » SIS » Student » Assessment » SAT Subject Tests. Below the title, a red instruction reads: 'From this screen, you can display, add, change and delete data pertaining to the SAT Subject Tests.' There are four input fields: 'Subject Test' (a drop-down menu), 'Testing Date' (a date picker), 'Grade at Time of Test' (a drop-down menu), and 'Score' (a text input). Each field has a small lightning bolt icon to its right. At the bottom, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

**SAT Reasoning Test Scores Screen (Details)**

**Subject Test** (required) – Select the SAT Subject Test from the drop-down list.

**Testing Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Grade at Time of Test** (required) – Select grade from drop-down list.

**Score** (required) – Enter the SAT Subject Test score for this student.

## Student Assessment List

Navigation: Home - SIS - Student - Assessment - Student Assessment List

The Student Assessment List screen allows users to view, edit, add and delete all student assessment records. Users can filter by test type or view all test types.

Home » SIS » Student » Assessment » Student Assessment List <span style="float: right;">Advanced Search   Feedback</span>									
<b>Student Assessment List</b>									
View, edit and delete student assessment records									
[Hide Filter]									
Test Type: -Show All-									
	Building IRN	Test Type	Test	Part	Testing Date	Raw Score	Scaled Score	Reported Score	Passing
X	028910	STR	OGT	Math	03/2009	450	510.00	510	<input checked="" type="checkbox"/>
X	028910	STR	OGT	Reading	03/2009	370	444.00	444	<input checked="" type="checkbox"/>
X	028910	STR	OGT	Science	03/2009	400	456.00	456	<input checked="" type="checkbox"/>
X	028910	STR	OGT	Social Studies / Citizenship	03/2009	470	521.00	521	<input checked="" type="checkbox"/>
X	028910	STR	OGT	Writing	03/2009	290	413.00	413	<input checked="" type="checkbox"/>
X	013508	STR	8th Ach	Math	05/2007	390	469.00	469	<input checked="" type="checkbox"/>
X	013508	STR	8th Ach	Reading	05/2007	340	431.00	431	<input checked="" type="checkbox"/>
X	013508	STR	8th Ach	Science	05/2007	320	434.00	434	<input checked="" type="checkbox"/>
X	013508	STR	8th Ach	Social Studies / Citizenship	05/2007	320	429.00	429	<input checked="" type="checkbox"/>
X	013508	STR	7th Ach	Math	03/2006	400	467.00	467	<input checked="" type="checkbox"/>
X	013508	STR	7th Ach	Reading	03/2006	360	442.00	442	<input checked="" type="checkbox"/>
X	013508	STR	6th Prof	Math	03/2005	***	270.00	270	<input checked="" type="checkbox"/>
X	013508	STR	6th Prof	Reading	03/2005	***	235.00	235	<input checked="" type="checkbox"/>
X	013508	STR	6th Prof	Science	03/2005	***	231.00	231	<input checked="" type="checkbox"/>
X	013508	STR	6th Prof	Social Studies / Citizenship	03/2005	***	261.00	261	<input checked="" type="checkbox"/>
X	013508	STR	6th Prof	Writing	03/2005	***	70.00	070	<input checked="" type="checkbox"/>

**Student Assessment List Screen**

This screen has standard edit and delete record controls.

**Hide Filter** – Hide the Test Type filter; Toggles between Hide Filter and Show Filter.

**Test Type** – Select -Show All- to display all assessment types student or select a specific assessment type in the drop-down list to filter the list.

The Student Assessment List grid shows the following information:

- Building IRN – The building IRN on the assessment record
- Test Type – STD (standard) or ALT (alternate)
- Test – Test taken
- Part – Test part taken
- Testing Date – The date the test was taken
- Raw Score – The raw score on the assessment record
- Scaled Score – The scaled score on the assessment record
- Reported Score – The reported score on the assessment record
- Passing – Will be checked if the student passed the specified assessment

Home » SIS » Student » Assessment » Student Assessment List Advanced Search | Feedback

### Student Assessment List

View, edit and delete student assessment records

[Hide Filter]

Test Type: OGT - OGT

Add OGT

	Building IRN	Test Type	Test	Part	Testing Date	Raw Score	Scaled Score	Reported Score	Passing
	028910	STR	OGT	Math	03/2009	450	510.00	510	<input checked="" type="checkbox"/>

#### Student Assessment List Screen (OGT Test Type)

When filtering on a specific test type, the Add button appears for the filtered test type. Click the Add button (in this case Add OGT) to go to the appropriate assessment maintenance screen where you can add a new assessment record for the filtered test type.

Home » SIS » Student » Assessment » OGT

From this screen, you can display, add, change and delete data pertaining to a student's ohio graduation test results.

Building IRN - Spring Test Administration: 001081 - Ashland High School

Test Type: STR - Standard

Part: WRI - Writing

Test Date: 3/2012

Grade at Time of Test: 11

Accommodations: No - Student did not receive accommodations on STR or took ALT assessmen

Score Not Reported: \* - Option Not Applicable, Student took Test

Scaled Score: 430

Raw Score: 350

Required for Graduation: Y

Re-report Time Period:

Transferred From IRN:

Save and Return    Return

#### Student Assessment List Screen (OGT Details)

Enter the assessment information as needed.

**Save and Return** – Save the new assessment record and return to the Student Assessment List screen.

**Save and New** – Save the new assessment record and bring up the maintenance screen again so another new record can be added.

**Return** – Return to the Student Assessment List screen without saving a new assessment record. Same as cancel.

## CTE Industry Assessment

### Navigation: Home - SIS - Student - Assessment - CTE Industry Assessment

To view a student's CTE Industry Assessment data, select the student and then select CTE Industry Assessment under Assessment.

Industry assessments are technical assessments developed by industry associations or state licensing agencies. A CTE Industry Assessment Record (GU) is to be reported for all students who have been reported as a CTE Concentrator and who took an industry assessment that is listed as an option for the Industry Assessment Element. All CTE Industry Assessment records transferred using the Transfer – Student Assessment (FA) feature are given a test date of January 1. Refer to *ODE EMIS Manual* for additional details.

Home » SIS » Student » Assessment » CTE Industry Assessment				
CTE Industry Assessment				
From this screen, you can display, add, change and delete data pertaining to CTE Industry Assessments.				
Add CTE Industry Assessment				
Testing Date	Assessment Code	Assessment Result		
03/2010	190 - Electrical Trades - National Construction Career Test - National Ce	P		

CTE Industry Assessment Screen

**Add CTE Industry Assessment** – Add a new CTE Industry Assessment record for this student.

### Add/Edit CTE Industry Assessment

Home » SIS » Student » Assessment » CTE Industry Assessment

### CTE Industry Assessment

From this screen, you can display, add, change and delete data pertaining to CTE Industry Assessments.

Testing Date: 04/2014

CTE Industry Assessment Code: 420 - National Council Licensure Exam for Lic. Pract/Vocational Nurses (N)

CTE Industry Assessment Results: P - Student Passed the CTE Industry Assessment

CTE Industry Assessment Score Not Reported Value: \* - Option Not Applicable, Student took the test.

Save Save and New Cancel

CTE Industry Assessment Screen (Add/Edit Data)

**Testing Date** (required) – Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

**CTE Industry Assessment Code** (required) – Indicates the CTE Industry Assessment the student took. The drop-down list is populated from EMIS code table GU060 options that are reported in Period N.

**CTE Industry Assessment Results** (required) – Indicates whether the student passed or did not pass the CTE Industry Assessment. The drop-down list is populated from EMIS code table GU070.

**Note:** If the student was required to take the test but did not take the test, in the **CTE Industry Assessment Results** drop-down list, select “\*\*\*”. Then in the **CTE Industry Assessment Score Not Reported Value** drop-down list, select either “V – CTE student was not given a Technical or Industry Assessment” or “T – CTE student is taking an industry assessment, to be reported in March (D).”

**CTE Industry Assessment Score Not Reported Value** – Indicates the reason the student does not have a score to report for this assessment.

## CTE Industry Credential

**Navigation: StudentInformation - SIS - Student - Assessment - CTE Industry Credential**

This screen displays a student's CTE Industry Credential data. You must report the CTE Industry Credential (GW) record to EMIS. Refer to *ODE EMIS Manual* for additional details.

StudentInformation > SIS > Student > Assessment > CTE Industry Credential

### CTE Industry Credential

From this screen, you can display, add, change and delete data pertaining to CTE Industry Credential.

Add CTE Industry Credential

	Testing Date	Assessment Area	Score
 	07/2014	CA03 - Adobe Certified Associate (ADA) - Dreamweaver	005

CTE Industry Credential Screen

**Add CTE Industry Credential** – Add a new CTE Industry Credential record for this student.

## Add/Edit CTE Industry Credential

StudentInformation > SIS > Student > Assessment > CTE Industry Credential

### CTE Industry Credential

From this screen, you can display, add, change and delete data pertaining to CTE Industry Credential.

Testing Date:   

Assessment Area:   

Score:  

CTE Industry Credential Screen (Add/Edit Data)

**Testing Date** (required) – Enter or select the date the student took the test.

**Assessment Area** (required) – Select the CTE Industry Credential area in which the student was assessed. The drop-down list is populated from EMIS data and is school year dependent.

**Score** (required) – Indicate the student's score in the assessed area.

## CTE Student Assessment (OCTCA)

### Navigation: Home - SIS - Student - Assessment - CTE Student Assessment (OCTCA)

To view a student's CTE Student Assessment data, select the student and then select CTE Student Assessment (OCTCA) under Assessment.

The State Board of Education has approved career-technical performance measures that require school districts to assess students in workforce development programs with a CTE Technical Assessment. One record per student should be reported for each student who takes the CTE Technical Assessment Test or Career Paths for the Teaching Professions Portfolio Assessment. CTE Assessment Records (GY) are reported during the Yearend Reporting Period (N). All CTE Student Assessment records transferred using the Transfer – Student Assessment (FA) feature are given a test date of January 1. Refer to *ODE EMIS Manual* for additional details.

The **CTE Student Assessment (OCTCA)** screen contains the **CTE Technical Score** and **CTE Portfolio Score** tabs.

	Test Date	CTE Assessment Code	CTE Technical Score	CTE Technical Assessment Score Not Reported
✕ ✎	01/04/2014	08DA - Animal Management Technician	056	*

**CTE Student Assessment (OCTCA) Screen**

This screen has standard add record, edit record and delete record controls.

### Add the CTE Technical Score

The **CTE Technical Score** tab on the **CTE Student Assessment (OCTCA)** screen enables you to enter the CTE technical score for the student.

1. On the **CTE Technical Score** tab on the **CTE Student Assessment (OCTCA)** screen, click **Add CTE Technical Assessment**.

The tab displays the fields for entering the technical assessment score.

Home >> SIS >> Student >> Assessment >> CTE Student Assessment (OCTCA)

### CTE Student Assessment (OCTCA)

From this screen, you can display, add, change and delete data pertaining to CTE Student Assessments.

CTE Technical Score | CTE Portfolio Score

Test Date: 04/01/2014

CTE Student Assessment Code: 01EA - Accounting

CTE Technical Assessment Score Not Reported Value: \* - Option Not Applicable, Student took the test.

CTE Technical Score: 76

Save Save and New Cancel

#### CTE Technical Score Tab on the CTE Student Assessment (OCTCA) Screen

- In the **Test Date** field, enter the date the student took the CTE technical assessment.
- In the **CTE Student Assessment Code** drop-down list, select the type of CTE technical assessment the student took.

**Note:** The values in the drop-down list are populated from EMIS code table GY760.

- Optional: If the student does not have a score to report, in the **CTE Technical Assessment Score Not Reported Value** drop-down list, select the reason.
- In the **CTE Technical Score** field, enter the score assigned to a student's performance on the CTE technical assessment.

**Note:** The valid values are 000-100, "I" for a student participating in the assessment who has not completed enough modules for a valid score and "\*\*\*\*" for a student whose **CTE Technical Assessment Score Not Reported Value** is "V – CTE student was not given a Technical or Industry Assessment."

- Click **Save** to save the record and return to viewing the technical scores on the **CTE Technical Score** tab, or click **Save and New** to enter the score for another CTE technical assessment.

The following message displays: "The achievement record was successfully saved."

#### Edit the CTE Technical Score

- On the **CTE Technical Score** tab on the **CTE Student Assessment (OCTCA)** screen, click the edit icon in the row of the assessment you want to modify.

The tab displays the fields for entering the technical test score.

- You can perform any of the following tasks:
  - Modify the date the student took the CTE technical assessment in the **Test Date** field.
  - Modify the type of CTE Student Assessment Code in the **CTE Student Assessment Code** drop-down list.
  - Modify the score assigned to the student's performance in the **CTE Technical Score** field.

3. Click **Save**.

The following message displays: “The achievement record was successfully saved.”

## Add the CTE Portfolio Score

The **CTE Portfolio Score** tab on the **CTE Student Assessment (OCTCA)** screen enables you to enter the score for students enrolled in the 090011 Career Paths for the Teaching Professions course.

1. On the **CTE Student Assessment (OCTCA)** screen, click the **CTE Portfolio Score** tab.
2. Click **Add CTE Portfolio Assessment**.

The tab displays the fields for entering the CTE portfolio assessment score.

The screenshot shows a web application interface for the CTE Student Assessment (OCTCA). The breadcrumb trail is Home » SIS » Student » Assessment » CTE Student Assessment (OCTCA). The main heading is CTE Student Assessment (OCTCA) with a sub-heading: From this screen, you can display, add, change and delete data pertaining to CTE Student Assessments. There are two tabs: CTE Technical Score and CTE Portfolio Score. The CTE Portfolio Score tab is active. The form contains the following fields: Test Date: 1/4/2013; CTE Student Assessment Code: 14TP - Teaching Professions Portfolio Score; Reason Portfolio Score Not Reported: \* - Option Not Applicable, Student took the test.; CTE Teaching Professions Portfolio Score: \*\*\*. At the bottom, there are three buttons: Save, Save and New, and Cancel.

### CTE Portfolio Score Tab on the CTE Student Assessment (OCTCA) Screen

3. In the **Test Date** field, enter the date the student took the CTE Teaching Professions Portfolio assessment.

**Note:** For the CTE portfolio score, the **CTE Student Assessment Code** drop-down list is always 14TP - Teaching Professions Portfolio Score. This drop-down list contains no other options.

4. Optional: If the student does not have a score to report, in the **Reason Portfolio Score Not Reported** drop-down list, select the reason.
5. In the **CTE Teaching Professions Portfolio Score** field, enter the portfolio score for the student.

**Note:** The valid values are 000-100 (or “1” if the student is participating in the assessment but has not completed enough modules for a valid score). If the student was required to take the test, but did not take the test, select a valid reason in the **Reason Portfolio Score Not Reported** drop-down list, and then in the **CTE Teaching Professions Portfolio Score** field, enter \*\*\*. If the student was not required to take the test, then no CTE Portfolio Score is required.

- Click **Save** to save the record and return to viewing the portfolio scores on the **CTE Portfolio Score** tab, or click **Save and New** to enter the score for another CTE portfolio assessment.

The following message displays: "The achievement record was successfully saved."

### Edit the CTE Portfolio Score

- On the **CTE Portfolio Score** tab on the **CTE Student Assessment (OCTCA)** screen, click the edit icon in the row of the assessment you want to modify.

The tab displays the fields for entering the CTE portfolio score.

- You can perform any of the following tasks:
  - Modify the date the student took the CTE portfolio assessment in the **Test Date** field.
  - Modify the reason the CTE portfolio score was not reported for the assessment in the **Reason Portfolio Score Not Reported** drop-down list.
  - Modify the actual score assigned to the student's performance in the **CTE Teaching Professions Portfolio Score** field.
- Click **Save**.

The following message displays: "The achievement record was successfully saved."

## International Baccalaureate (IB)

You can maintain student scores on the International Baccalaureate (IB) assessment. Refer to the appropriate section as follows:

- ["View IB Scores"](#)
- ["Add IB Scores"](#)
- ["Edit IB Scores"](#)
- ["Delete IB Scores"](#)

### View IB Scores

**Navigation: Home – SIS – Student – Assessment – International Baccalaureate (IB)**

With a student in context on the **International Baccalaureate (IB)** screen, review the student's International Baccalaureate assessment data.

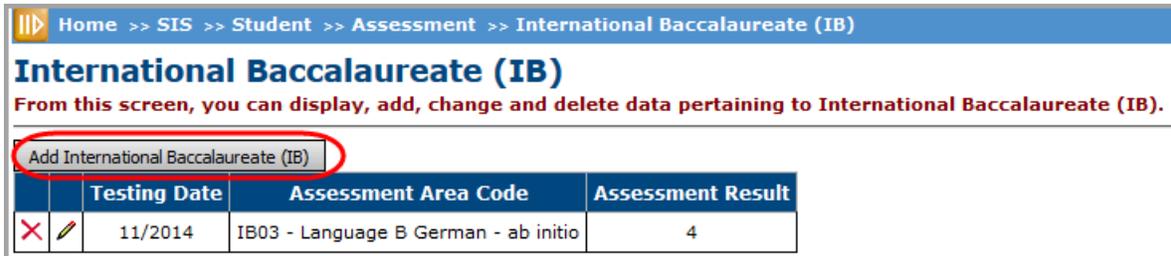
Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)			
International Baccalaureate (IB)			
From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).			
Add International Baccalaureate (IB)			
	Testing Date	Assessment Area Code	Assessment Result
 	11/2014	IB03 - Language B German - ab initio	4

### View IB Scores

## Add IB Scores

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

1. On the **International Baccalaureate (IB)** screen, click **Add International Baccalaureate (IB)**.



Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

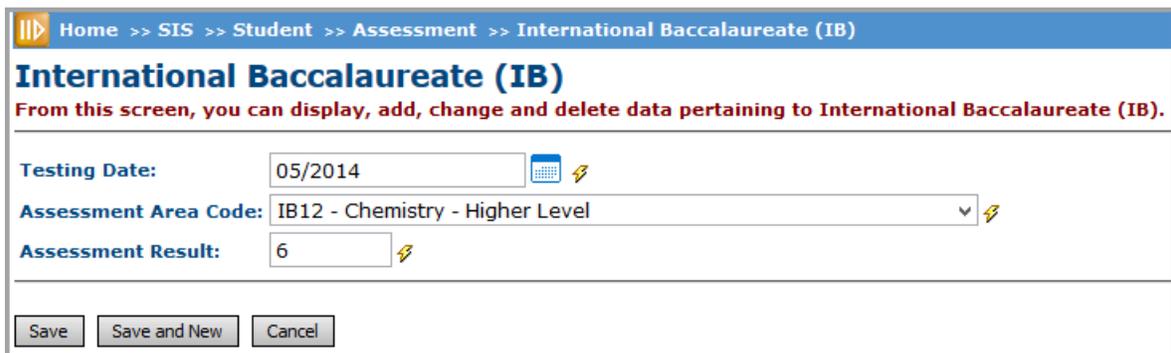
**Add International Baccalaureate (IB)**

	Testing Date	Assessment Area Code	Assessment Result
 	11/2014	IB03 - Language B German - ab initio	4

### Add IB Scores

The add-edit version of the screen displays.

2. In the **Testing Date** field, enter or select the date the student took the assessment. (Valid testing dates are in November and May.)
3. In the **Assessment Area Code** drop-down list, select the test or subject area covered by the assessment.
4. In the **Assessment Result** field, enter the student's score on the assessment. (Valid scores are 1-7.)
5. Click **Save**. Or, to continue adding IB scores, click **Save and New**.



Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

**Testing Date:** 05/2014  

**Assessment Area Code:** IB12 - Chemistry - Higher Level  

**Assessment Result:** 6 

### Add IB Score

A confirmation message displays, and the new IB score displays in the list.

Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

The International Baccalaureate (IB) Record was saved successfully

Add International Baccalaureate (IB)

	Testing Date	Assessment Area Code	Assessment Result
 	11/2014	IB03 - Language B German - ab initio	4
 	05/2014	IB12 - Chemistry - Higher Level	6

#### Confirmation of Added IB Score

## Edit IB Scores

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

1. On the **International Baccalaureate (IB)** screen, in the row of the IB score you want to edit, click .

Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

Add International Baccalaureate (IB)

	Testing Date	Assessment Area Code	Assessment Result
 	11/2014	IB03 - Language B German - ab initio	4
 	05/2014	IB12 - Chemistry - Higher Level	6

#### Edit IB Scores

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add IB Scores.”](#)

Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

Testing Date:   

Assessment Area Code:   

Assessment Result:  

#### Edit IB Score

A confirmation message displays, and the edited IB score displays in the list.

Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

The International Baccalaureate (IB) Record was saved successfully

	Testing Date	Assessment Area Code	Assessment Result
 	05/2014	IB12 - Chemistry - Higher Level	6
 	11/2013	IB03 - Language B German - ab initio	4

#### Confirmation of Edited IB Score

## Delete IB Scores

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

1. On the **International Baccalaureate (IB)** screen, in the row of the IB score you want to delete, click .

Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

	Testing Date	Assessment Area Code	Assessment Result
 	05/2014	IB12 - Chemistry - Higher Level	6
 	11/2013	IB03 - Language B German - ab initio	4

#### Delete IB Scores

A message displays, asking if you are sure you want to delete the IB score.

2. Click **Ok**.

Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

Are you sure you want to delete this record?  
IB03 - 11/2013

Ok Cancel

#### Confirm Delete

A confirmation message displays, and the IB score no longer displays in the list.

Home >> SIS >> Student >> Assessment >> International Baccalaureate (IB)

### International Baccalaureate (IB)

From this screen, you can display, add, change and delete data pertaining to International Baccalaureate (IB).

The selected record was successfully deleted.

Add International Baccalaureate (IB)

	Testing Date	Assessment Area Code	Assessment Result
✕ ✎	05/2014	IB12 - Chemistry - Higher Level	6

#### Confirmation of Deleted IB Score

This page intentionally left blank.

# 3. Additional Assessment Tests

The following information is described in this topic:

- *“3A. ACT”*
- *“3B. AP Exams”*
- *“3C. KRA-L”*
- *“3D. OTELA”*
- *“3E. PLAN (Pre-ACT)”*
- *“3F. Preschool GGG”*
- *“3G. Preschool ASQ/SE”*
- *“3H. Preschool ECO”*
- *“3I. PSAT/NMSQT”*
- *“3J. SAT Reasoning Test”*
- *“3K. SAT Subject Tests”*
- *“3L. Student Assessment List”*
- *“3M. CTE Industry Assessment”*
- *“3N. CTE Student Assessment (OCTCA)”*

## 3A. ACT



### Navigation: Home - SIS - Student - Assessment - ACT

To view a student's ACT data, select the student and then select ACT under Assessment.

**ACT Scores**  
From this screen, you can display, add, change and delete data pertaining to the ACT.

	✖ <input type="button" value="04/2012"/>
English Score	21
English Usage/Mechanics Sub Score	11
English Rhetorical Skills Sub Score	10
Mathematics Score	23
Mathematics Pre-Algebra/Elementary Algebra Sub Sco	15
Mathematics Intermediate Algebra/Coordinate Geomet	14
Mathematics Plane Geometry/Trigonometry Sub Score	9
Reading Score	20
Reading Social Studies/Sciences Sub Score	8
Reading Arts/Literature Sub Score	12
Science Score	26
Composite Score	23
Combined English/Writing Score	24
Writing Test Sub Score	12
Essay Comments	22,33,51

**ACT Scores Screen**

– Add a new ACT Attempt record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit ACT Scores

Home >> SIS >> Student >> Assessment >> ACT

### ACT Scores

From this screen, you can display, add, change and delete data pertaining to the ACT.

Testing Date:

English Score:

English Usage/Mechanics Sub Score:

English Rhetorical Skills Sub Score:

Mathematics Score:

Mathematics Pre-Algebra/Elementary Algebra Sub Score:

Mathematics Intermediate Algebra/Coordinate Geometry Sub Score:

Mathematics Plane Geometry/Trigonometry Sub Score:

Reading Score:

Reading Social Studies/Sciences Sub Score:

Reading Arts/Literature Sub Score:

Science Score:

Composite Score:

Combined English/Writing Score:

Writing Test Sub Score:

Essay Comments:   
 01 -  02 -  20 -  21 -

Save Save and New Cancel

### ACT Scores Screen (Details)

**Testing Date** (required) – Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

**ACT Scores and Sub Scores** (optional) – Enter the ACT scores and sub scores received for each test part for this student. All scores are optional.

**Essay Comments** (optional) – Choose the essay comments applicable to this ACT test.

## 3B. AP Exams



Navigation: Home - SIS - Student - Assessment - AP Exams

To view a student's AP Exam data, select the student and then select AP Exams under Assessment.

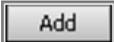
The screenshot shows the 'AP Exam Scores' screen with a table containing one record. The table has columns for 'Testing Date', 'Subject', and 'Score'. The record shows a testing date of 'Sep 01, 2010', the subject 'Biology', and a score of '4'. There are also 'Add', 'Edit', and 'Delete' icons for this record.

	Testing Date ^	Subject	Score
X	Sep 01, 2010	Biology	4

AP Exam Scores Screen

This screen has standard add record, edit record and delete record controls.

**Sorting** – You may sort by any column (Testing Date, Subject, Score) in ascending or descending order by clicking on the column header

 – Add a new AP Exam record. Multiple test occurrences can be added, but they must have different testing dates.

### Add/Edit AP Exam Scores

The screenshot shows the 'AP Exam Scores' screen with input fields for 'Subject', 'Testing Date', and 'Score'. The 'Subject' field is a drop-down menu, the 'Testing Date' field has a calendar icon, and the 'Score' field has a lightning bolt icon. There are 'Save', 'Save and New', and 'Cancel' buttons at the bottom.

AP Exam Scores Screen (Add/Edit Scores)

**Subject** (required) – Select the AP Exams subject from the drop-down list.

**Testing Date** (required) – Enter the date that the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Score** (required) – Enter the AP Exam score for this student.

### 3C. KRA-L



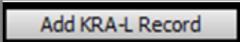
#### Navigation: Home - SIS - Student - Assessment - KRA-L

To view a student's KRA-L (Kindergarten Readiness Assessment - Literacy) data, select the student and then select KRA-L under Assessment.

Test Part	Test Date	Accomm	Score Not Reported	Total Score
✖ Reading	05/2009	NO	*	025

Kindergarten Readiness Assessment - Literacy Record Screen

This screen has standard add record, edit record and delete record controls.

 – Add a new KRA-L record. Multiple test occurrences can be added, but they must have different testing dates.

#### Add/Edit KRA-L Exam Scores

Kindergarten Readiness Assessment - Literacy Record Screen (Details)

**Test Date** – Date test taken by student in mm/yyyy format or use the calendar to select the date.

**Accommodations** – List of accommodation choices for students.

**Score Not Reported** – List of possible reasons for not taking the test as defined in Ohio EMIS.

**Total Score** – Total score for the assessment.

### 3D. OTELA



Navigation: Home - SIS - Student - Assessment - OTELA

To view a student's OTELA data, select the student and then select OTELA under Assessment.

Ohio Test of English Language Acquisition																		
From this screen, you can display, add, change and delete data pertaining to a student's OTELA assessment results.																		
Add OTELA Record																		
	Test Date	Grade	Acc	Reading		Writing		Listening		Speaking		Comp	Prod Level	Prod Scaled	Compos / Perf			
				Score Not Reported	Score	Acc	Score Not Reported	Score	Acc	Score Not Reported	Score	Acc	Score Not Reported	Score				
X	12/2012	09	NO	*	440	NO	*	560	NO	*	950	Y1	*	367	302	2	110	2

#### Ohio Test of English Language Acquisition Screen

This screen has standard add record, edit record and delete record controls.



– Add a new OTELA record. Multiple test occurrences can be added, but they must have different testing dates.

**Note:** As of 11.1.0.10050, the Comprehension Scaled Score and Composite Performance Level fields no longer display on the Add/Edit screen when new records are added and when existing records are modified for FY11 and beyond.

### Add/Edit OTELA Exam Scores

Ohio Test of English Language Acquisition	
From this screen, you can display, add, change and delete data pertaining to a student's OTELA assessment results.	
Required Test Type:	STR
Test Date:	12/2012
Grade Level at Time of Test:	09 - Ninth Grade
<b>Reading Scaled</b>	
Accommodations:	NO - Student did not receive accommodations on the STR test or took ALT
Score Not Reported:	* - Option Not Applicable, Student took Test
Score:	440
<b>Writing Scaled</b>	
Accommodations:	NO - Student did not receive accommodations on the STR test or took ALT
Score Not Reported:	* - Option Not Applicable, Student took Test
Score:	560
<b>Listening Scaled</b>	
Accommodations:	NO - Student did not receive accommodations on the STR test or took ALT
Score Not Reported:	* - Option Not Applicable, Student took Test
Score:	950
<b>Speaking Scaled</b>	
Accommodations:	NO - Student did not receive accommodations on the STR test or took ALT
Score Not Reported:	* - Option Not Applicable, Student took Test
Score:	367
Comprehension Scaled Score:	302
Production Performance Level:	2
Production Scaled Score:	110
Composite Performance Level:	2
<small>Note: Acceptable values are (000-999), ***, INV.                      Note: Acceptable values are 1-5, or enter * for Not Applicable.                      Note: Acceptable values are (000-999).                      Note: Acceptable values are 1-5, "I", or enter * for Not Applicable.</small>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

#### Ohio Test of English Language Acquisition Screen (Details)

**Test Date** (required) - Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

**Grade Level at Time of Test** (required) – Current grade level of student at time of test.

**Accommodations** (required) – Type of accommodations provided to student during this test

administration.

**Score Not Reported** – Applicable reasons for a student not taking the test. If there is a Reason Test Not Taken value, scores are not required.

**Reading Scaled Score, Writing Scaled Score, Listening Scaled Score, Speaking Scaled Score and Comprehension Scaled Score** – Scaled score for the assessment.

Some scaled score concerns unique to OTELA are:

- OTELA exam scores are saved successfully when a score not reported value is entered and one or all scaled scores are set to \*\*\*.
- An error is generated when OTELA exam scores are saved if a score not reported value is entered and all scaled scores are set to a valid number.

**Composite Performance Level** – Composite performance level score.

***Note:** Student OTELA Assessment Records in 07/08 and after will show the new Composite Performance Level field as above. Student OTELA Assessment Records in previous years will show the “old” Composite Scaled Score field.*

After clicking , the following banner message appears:

**The Ohio Test of English Language Acquisition Record was saved successfully**

The Transfer – Student Assessment (FA) feature generates one record for each entered scaled score. Records generated for valid scaled scores contain the score and a Score Not Reported value of \*\*. Records generated for \*\*\* scaled scores contain the scaled score of \*\*\* and Score Not Reported value of C.

### 3E. PLAN (Pre-ACT)



Navigation: Home - SIS - Student - Assessment - PLAN

To view a student's PLAN (pre-ACT) data, select the student and then select PLAN under Assessment.

	10/2/2009
English Score	30
English Usage/Mechanics Sub Score	18
English Rhetorical Skills Sub Score	12
Mathematics Score	30
Mathematics Pre-Algebra/Algebra Sub Score	18
Mathematics Geometry Sub Score	12
Reading Score	30
Science Score	30
Composite Score	30

PLAN (pre-ACT) Scores Screen

 – Add a new PLAN record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit PLAN (Pre-ACT) Exam Scores

PLAN (pre-ACT) Scores Screen (Details)

**Testing Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**PLAN Scores and Sub Scores** (optional) – Enter the PLAN scores and sub scores for this student. All scores are optional.

Valid scores:

**Main Score** = 1 – 36

**Subset Scores** = 1 – 18

## 3F. Preschool GGG

**Navigation: Home - SIS - Student - Assessment - Preschool GGG**

To view a student's Preschool GGG data, select the student and then select Preschool GGG under Assessment.

	Test Date	Accom	Score Not Reported	Picture Naming Score	Rhyming Score	Alliteration Score
	03/2012	NO	*	075	040	033

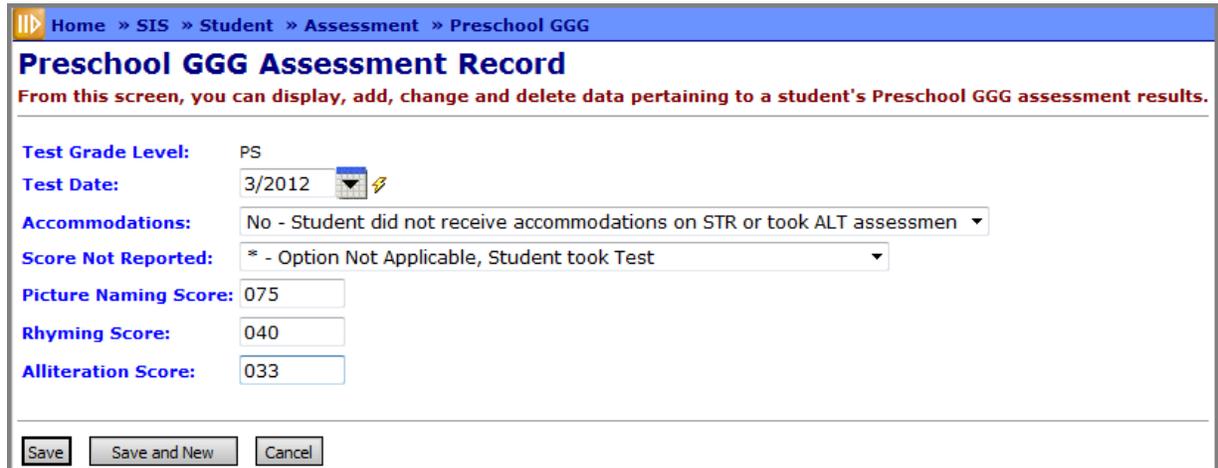
Preschool GGG Assessment Record Screen

### 3. Additional Assessment Tests

This screen has standard add record, edit record and delete record controls.

 – Add a new Preschool GGG record. Multiple tests occurrences can be added, but they must have different testing dates.

## Add/Edit Preschool GGG Scores



**Preschool GGG Assessment Record Screen (Details)**

**Test Date** – Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

**Accommodations** – Type of accommodation given to student, if applicable.

**Score Not Reported** – Reason for a student not taking the test, if applicable. If you select “U – Unable to answer sample items”, and you enter a value in the Picture Naming Score, Rhyming Score or Alliterative Score fields, StudentInformation only creates a GB record with a reason of “U” for the score with the value of “\*\*\*”.

**Picture Naming Score** – A value from 000 to 096. If the score is not applicable because the student did not take the test, enter “\*\*\*”.

**Rhyming Score** – A value from 000 to 048. If the score is not applicable because the student did not take the test, enter “\*\*\*”.

**Alliterative Score** – A value from 000 to 040. If the score is not applicable because the student did not take the test, enter “\*\*\*”.

### 3G. Preschool ASQ/SE



#### Navigation: Home - SIS - Student - Assessment - Preschool ASQ/SE

To view a student's Preschool ASQ/SE data, select the student and then Preschool ASQ/SE under Assessment.

Home » SIS » Student » Assessment » Preschool ASQ/SE

**Preschool ASQ/SE Assessment Record**

From this screen, you can display, add, change and delete data pertaining to a student's Preschool ASQ/SE assessment results.

Add Preschool ASQ/SE Record

	Test Date	Test Level	Score Not Reported	Score
	Mar 29, 2012	05	*	400

Preschool ASQ/SE Assessment Record Screen

This screen has standard add record, edit record and delete record controls.

– Add a new Preschool ASQ/SE record. Multiple test occurrences can be added, but they must have different testing dates.

### Add/Edit Preschool ASQ/SE Scores

Home » SIS » Student » Assessment » Preschool ASQ/SE

**Preschool ASQ/SE Assessment Record**

From this screen, you can display, add, change and delete data pertaining to a student's Preschool ASQ/SE assessment results.

Test Date: 3/29/2012 ( Please enter a test date to populate fields. )

Test Level: 05 - 5 Years (54 - 65 months)

Score Not Reported: \* - Option Not Applicable, Student took Test

Score: 400

Save Save and New Cancel

Preschool ASQ/SE Assessment Record Screen (Details)

**Test Date** – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Test Level** – Level of test given to student.

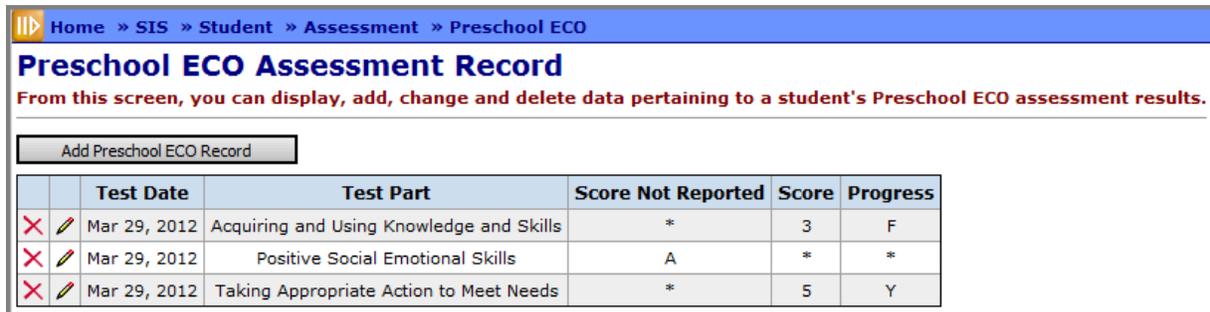
**Score Not Reported** – Any reason a student may not have taken a test part.

**Score** – A value from 000 to 495. If the score is not applicable because the student did not take the test, enter “\*\*\*”.

### 3H. Preschool ECO

**Navigation: Home - SIS - Student - Assessment - Preschool ECO**

To view a student's Preschool ECO (Early Childhood Outcome) data, select the student and select Preschool ECO under Assessment.



Home » SIS » Student » Assessment » Preschool ECO

**Preschool ECO Assessment Record**  
From this screen, you can display, add, change and delete data pertaining to a student's Preschool ECO assessment results.

Add Preschool ECO Record

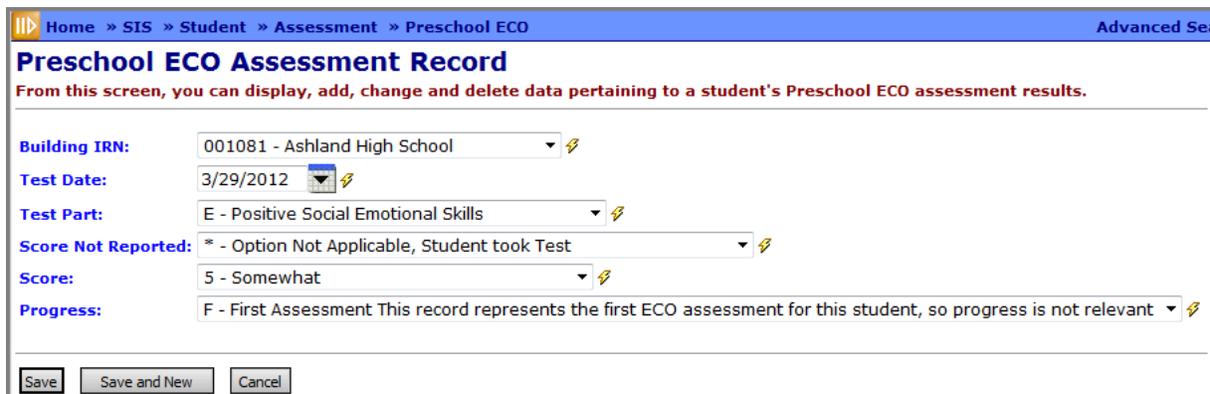
	Test Date	Test Part	Score Not Reported	Score	Progress
	Mar 29, 2012	Acquiring and Using Knowledge and Skills	*	3	F
	Mar 29, 2012	Positive Social Emotional Skills	A	*	*
	Mar 29, 2012	Taking Appropriate Action to Meet Needs	*	5	Y

**Preschool ECO Assessment Record Screen**

This screen has standard add record, edit record and delete record controls.

 – Add a new Preschool ECO record. Multiple test occurrences can be added, but they must have different testing dates.

### Add/Edit Preschool ECO Assessment Records



Home » SIS » Student » Assessment » Preschool ECO Advanced Search

**Preschool ECO Assessment Record**  
From this screen, you can display, add, change and delete data pertaining to a student's Preschool ECO assessment results.

Building IRN: 001081 - Ashland High School

Test Date: 3/29/2012

Test Part: E - Positive Social Emotional Skills

Score Not Reported: \* - Option Not Applicable, Student took Test

Score: 5 - Somewhat

Progress: F - First Assessment This record represents the first ECO assessment for this student, so progress is not relevant

Save Save and New Cancel

**Preschool ECO Assessment Record Screen (Details)**

**Building IRN** (required) – Choose the building IRN where the student was enrolled during the test administration. The field will default to the student's primary building IRN.

**Test Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Test Part** (required) – Choose one of the three ECO test parts.

**Score Not Reported** – Any reason a student may not have taken the test part.

**Score** – Level of age appropriate functioning exhibited by the child.

**Progress** – Whether the child has shown any new skills or behaviors since the last outcomes summary.

### 3I. PSAT/NMSQT



**Navigation: Home - SIS - Student - Assessment - PSAT/NMSQT**

To view a student's PSAT/NMSQT data, select the student and then select PSAT/NMSQT under Assessment.

Home » SIS » Student » Assessment » PSAT/NMSQT			
<b>Preliminary SAT / National Merit Scholarship Qualifying Test</b>			
From this screen, you can display, add, change and delete data pertaining to the PSAT/NMSQT.			
<input type="button" value="Add Attempt"/>			
	Test Date	Category / Score	
✕	Oct 01, 2009	Critical Reading Score	30
		Critical Reading Percentile	50
		Math Score	29
		Math Percentile	50
		Selection Index	99
		Selection Index Percentile	50
		Writing Skills Score	30
		Writing Skills Percentile	50

**Preliminary SAT/National Merit Scholarship Qualifying Test Screen**

– Add a new PSAT/NMSQT record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit PSAT/NMSQT

Home > SIS > Student > Assessment > PSAT/NMSQT

### Preliminary SAT / National Merit Scholarship Qualifying Test

From this screen, you can display, add, change and delete data pertaining to the PSAT/NMSQT.

Testing Date:

Grade at Time of Test:

Critical Reading Score:

Critical Reading Percentile:

Math Score:

Math Percentile:

Selection Index:

Selection Index Percentile:

Writing Skills Score:

Writing Skills Percentile:

**Preliminary SAT/National Merit Scholarship Qualifying Test Screen (Details)**

**Testing Date** (required) – Enter the date that the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Grade at Time of Test** (required) – Select grade from drop-down list.

**PSAT/NMSQT Scores, Percentiles, and Index** (optional) – Enter the PSAT/NMSQT scores, percentiles, and index for this student. All entries are optional.

## 3J. SAT Reasoning Test



**Navigation: Home - SIS - Student - Assessment - SAT Reasoning Test**

To view a student's SAT Reasoning Test data, select the student and then select SAT Reasoning Test under Assessment.

Home > SIS > Student > Assessment > SAT Reasoning Test

### SAT Reasoning Test Scores

From this screen, you can display, add, change and delete data pertaining to the SAT Reasoning Test.

	5/1/2010
Critical Reading Score	600
Math Score	650
Writing Score	620
Writing Multiple-Choice Sub Score	75
Essay Sub Score	10

**SAT Reasoning Test Scores Screen**

## Add/Edit SAT Reasoning Test Scores

**SAT Reasoning Test Scores Screen (Details)**

**Testing Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Grade at Time of Test** (required) – Select grade from drop-down list.

**SAT Reasoning Test Scores and Sub Scores** (optional) – Enter the SAT Reasoning Test scores and sub scores for this student. All scores are optional.

## 3K. SAT Subject Tests



**Navigation: Home - SIS - Student - Assessment - SAT Subject Tests**

To view a student's SAT Subject Test data, select the student and then select SAT Subject Tests under Assessment.

The SAT Subject Tests Scores screen should only be used by a school after that school has converted from using fixed transcript formats to custom transcript formats. The original fixed transcript formats only use assessment data from the MISC module, and will not import any data from the following screens.

	Testing Date ^	Grade at Test Time	Subject Test	Score
X ✎	May 01, 2010	11	Writing	650

**SAT Subject Test Scores Screen**

This screen has standard add record, edit record and delete record controls.

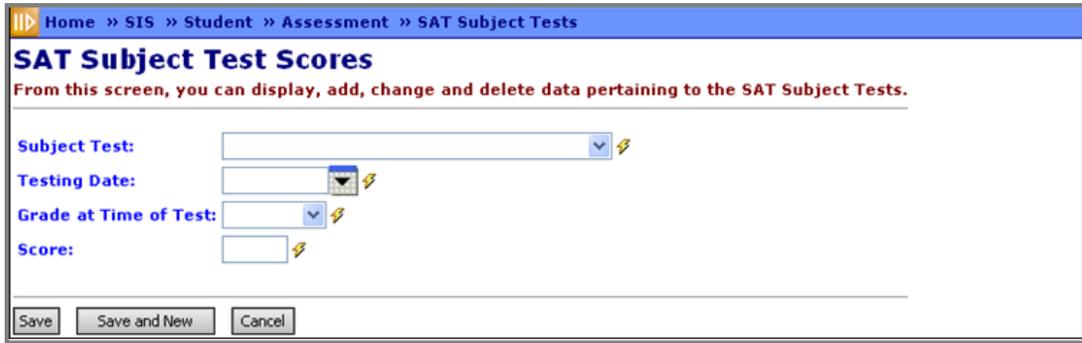
---

### 3. Additional Assessment Tests

**Sorting** – You may sort by any column (Testing Date, Grade at Test Time, Subject Test, Score) in ascending or descending order by clicking on the column header

 – Add a new SAT Subject Test record. Multiple test occurrences can be added, but they must have different testing dates.

## Add/Edit SAT Subject Test Scores



### SAT Reasoning Test Scores Screen (Details)

**Subject Test** (required) – Select the SAT Subject Test from the drop-down list.

**Testing Date** (required) – Enter the date the test was administered in the mm/dd/yyyy format or use the calendar to select the date.

**Grade at Time of Test** (required) – Select grade from drop-down list.

**Score** (required) – Enter the SAT Subject Test score for this student.

## 3L. Student Assessment List



Navigation: Home - SIS - Student - Assessment - Student Assessment List

The Student Assessment List screen allows users to view, edit, add and delete all student assessment records. Users can filter by test type or view all test types.

Home » SIS » Student » Assessment » Student Assessment List <span style="float: right;">Advanced Search   Feedback</span>										
<b>Student Assessment List</b>										
View, edit and delete student assessment records										
<a href="#">[Hide Filter]</a>										
Test Type: <input type="text" value="-Show All-"/>										
	Building IRN	Test Type	Test	Part	Testing Date	Raw Score	Scaled Score	Reported Score	Passing	
<input type="checkbox"/>	028910	STR	OGT	Math	03/2009	450	510.00	510	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	028910	STR	OGT	Reading	03/2009	370	444.00	444	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	028910	STR	OGT	Science	03/2009	400	456.00	456	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	028910	STR	OGT	Social Studies / Citizenship	03/2009	470	521.00	521	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	028910	STR	OGT	Writing	03/2009	290	413.00	413	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	8th Ach	Math	05/2007	390	469.00	469	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	8th Ach	Reading	05/2007	340	431.00	431	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	8th Ach	Science	05/2007	320	434.00	434	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	8th Ach	Social Studies / Citizenship	05/2007	320	429.00	429	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	7th Ach	Math	03/2006	400	467.00	467	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	7th Ach	Reading	03/2006	360	442.00	442	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	6th Prof	Math	03/2005	***	270.00	270	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	6th Prof	Reading	03/2005	***	235.00	235	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	6th Prof	Science	03/2005	***	231.00	231	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	6th Prof	Social Studies / Citizenship	03/2005	***	261.00	261	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	013508	STR	6th Prof	Writing	03/2005	***	70.00	070	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Student Assessment List Screen**

This screen has standard edit and delete record controls.

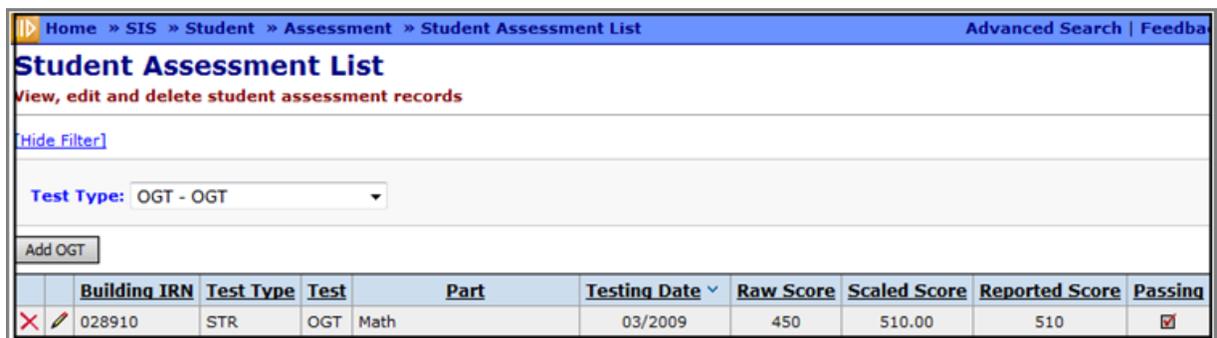
[\[Hide Filter\]](#) – Hide the Test Type filter; Toggles between [\[Hide Filter\]](#) and [\[Show Filter\]](#).

**Test Type** – Select -Show All- to display all assessment types student or select a specific assessment type in the drop-down list to filter the list.

### 3. Additional Assessment Tests

The Student Assessment List grid shows the following information:

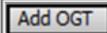
- Building IRN – The building IRN on the assessment record
- Test Type – STD (standard) or ALT (alternate)
- Test – Test taken
- Part – Test part taken
- Testing Date – The date the test was taken
- Raw Score – The raw score on the assessment record
- Scaled Score – The scaled score on the assessment record
- Reported Score – The reported score on the assessment record
- Passing – Will be checked if the student passed the specified assessment

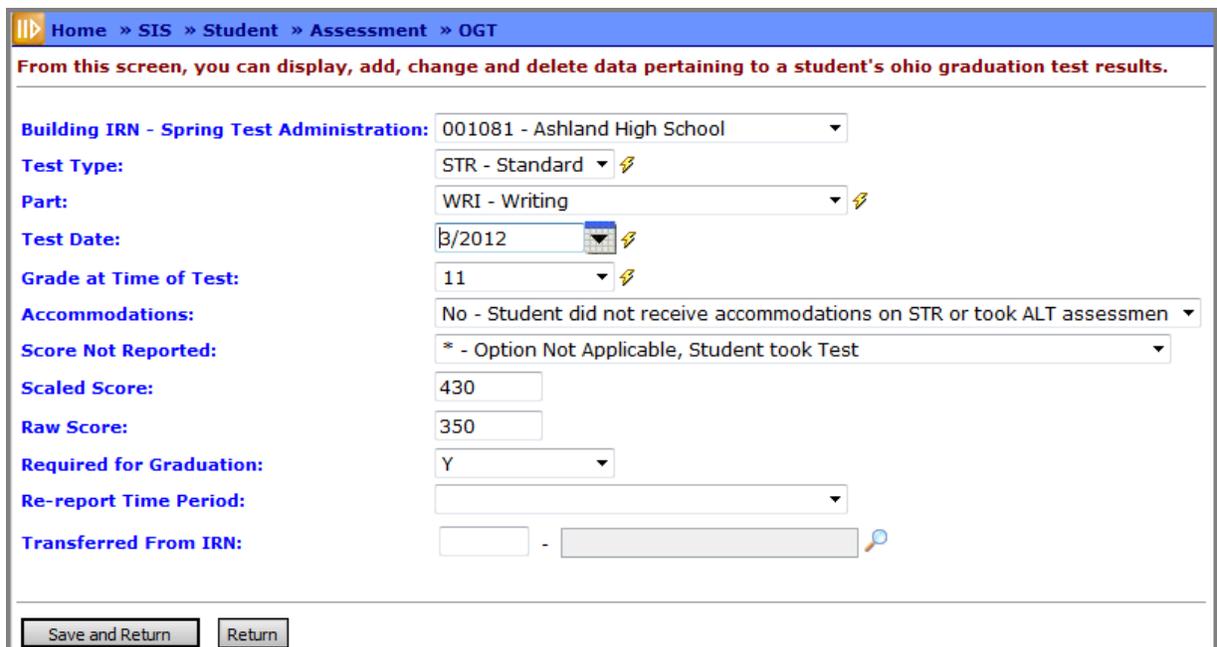


The screenshot shows the 'Student Assessment List' interface. At the top, there is a breadcrumb trail: Home » SIS » Student » Assessment » Student Assessment List. Below this is a title bar 'Student Assessment List' and a subtitle 'View, edit and delete student assessment records'. A filter dropdown is set to 'Test Type: OGT - OGT'. An 'Add OGT' button is visible. Below the filter is a table with the following data:

	Building IRN	Test Type	Test	Part	Testing Date	Raw Score	Scaled Score	Reported Score	Passing
 	028910	STR	OGT	Math	03/2009	450	510.00	510	<input checked="" type="checkbox"/>

**Student Assessment List Screen (OGT Test Type)**

When filtering on a specific test type, the Add button appears for the filtered test type. Click the Add button (in this case ) to go to the appropriate assessment maintenance screen where you can add a new assessment record for the filtered test type.



The screenshot shows the 'OGT' details screen. At the top, there is a breadcrumb trail: Home » SIS » Student » Assessment » OGT. Below this is a title bar 'From this screen, you can display, add, change and delete data pertaining to a student's ohio graduation test results.' The form contains the following fields:

- Building IRN - Spring Test Administration: 001081 - Ashland High School
- Test Type: STR - Standard
- Part: WRI - Writing
- Test Date: 3/2012
- Grade at Time of Test: 11
- Accommodations: No - Student did not receive accommodations on STR or took ALT assessmen
- Score Not Reported: \* - Option Not Applicable, Student took Test
- Scaled Score: 430
- Raw Score: 350
- Required for Graduation: Y
- Re-report Time Period: (empty dropdown)
- Transferred From IRN: (empty input) - (empty input)

At the bottom, there are two buttons: 'Save and Return' and 'Return'.

**Student Assessment List Screen (OGT Details)**

Enter the assessment information as needed.

**Save and Return** – Save the new assessment record and return to the Student Assessment List screen.

**Save and New** – Save the new assessment record and bring up the maintenance screen again so another new record can be added.

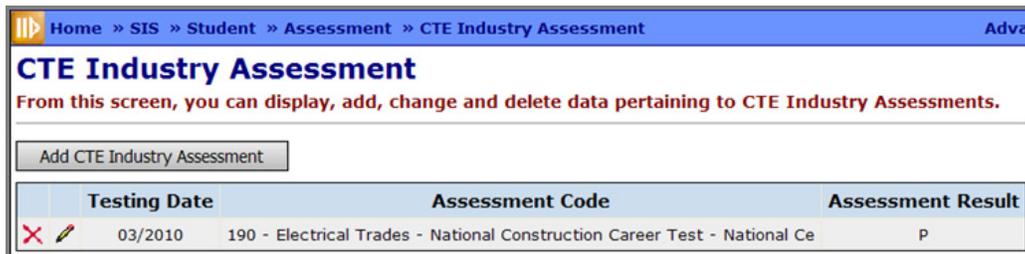
**Return** – Return to the Student Assessment List screen without saving a new assessment record. Same as cancel.

### 3M. CTE Industry Assessment

**Navigation: Home - SIS - Student - Assessment - CTE Industry Assessment**

To view a student's CTE Industry Assessment data, select the student and then select CTE Industry Assessment under Assessment.

Industry assessments are technical assessments developed by industry associations or state licensing agencies. A CTE Industry Assessment Record (GU) is to be reported for all students who have been reported as a CTE Concentrator and who took an industry assessment that is listed as an option for the Industry Assessment Element. All CTE Industry Assessment records transferred using the Transfer – Student Assessment (FA) feature are given a test date of January 1. Refer to the *ODE EMIS Manual* for additional details.



Home » SIS » Student » Assessment » CTE Industry Assessment				Adva
CTE Industry Assessment				
From this screen, you can display, add, change and delete data pertaining to CTE Industry Assessments.				
Add CTE Industry Assessment				
	Testing Date	Assessment Code	Assessment Result	
 	03/2010	190 - Electrical Trades - National Construction Career Test - National Ce	P	

**CTE Industry Assessment Screen**

This screen has standard add record, edit record and delete record controls.

**Add CTE Industry Assessment** – Add a new CTE Industry Assessment record for this student.

## Add/Edit CTE Industry Assessment

Home >> SIS >> Student >> Assessment >> CTE Industry Assessment

### CTE Industry Assessment

From this screen, you can display, add, change and delete data pertaining to CTE Industry Assessments.

Testing Date: 04/2014

CTE Industry Assessment Code: 420 - National Council Licensure Exam for Lic. Pract/Vocational Nurses (N)

CTE Industry Assessment Results: P - Student Passed the CTE Industry Assessment

CTE Industry Assessment Score Not Reported Value: \* - Option Not Applicable, Student took the test.

Save Save and New Cancel

CTE Industry Assessment Screen (Add/Edit Data)

**Testing Date** (required) – Enter the date the test was administered in the mm/yyyy format or use the calendar to select the date.

**CTE Industry Assessment Code** (required) – Indicates the CTE Industry Assessment the student took. The drop-down list is populated from EMIS code table GU060 options that are reported in Period N.

**CTE Industry Assessment Results** (required) – Indicates whether the student passed or did not pass the CTE Industry Assessment. The drop-down list is populated from EMIS code table GU070.

## 3N. CTE Student Assessment (OCTCA)



**Navigation: Home - SIS - Student - Assessment - CTE Student Assessment (OCTCA)**

To view a student's CTE Student Assessment data, select the student and then select CTE Student Assessment (OCTCA) under Assessment.

The State Board of Education has approved career-technical performance measures that require school districts to assess students in workforce development programs with a CTE Technical Assessment. One record per student should be reported for each student who takes the CTE Technical Assessment Test or Career Paths for the Teaching Professions Portfolio Assessment. CTE Assessment Records (GY) are reported during the Yearend Reporting Period (N). All CTE Student Assessment records transferred using the Transfer – Student Assessment (FA) feature are given a test date of January 1. Refer to the *ODE EMIS Manual* for additional details.

Home >> SIS >> Student >> Assessment >> CTE Student Assessment (OCTCA)

### CTE Student Assessment (OCTCA)

From this screen, you can display, add, change and delete data pertaining to CTE Student Assessments.

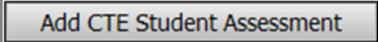
CTE Technical Score CTE Portfolio Score

Add CTE Technical Assessment

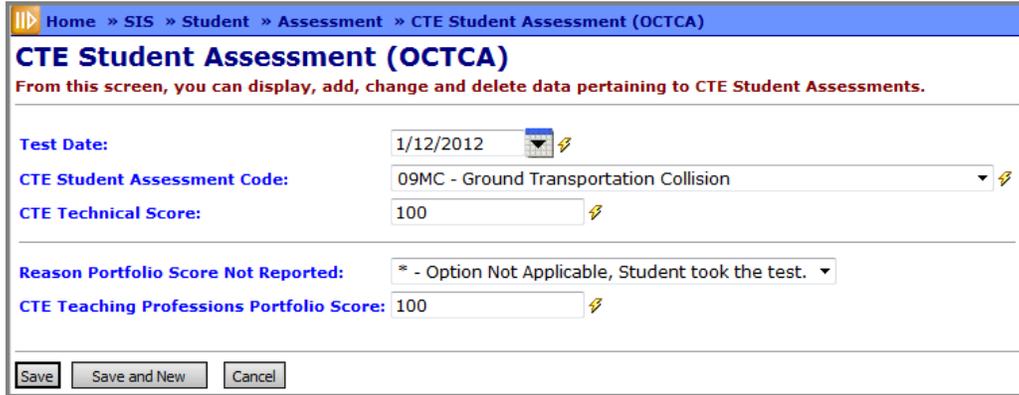
	Test Date	CTE Assessment Code	CTE Technical Score	CTE Technical Assessment Score Not Reported
X	01/04/2014	08DA - Animal Management Technician	056	*

CTE Student Assessment (OCTCA) Screen

This screen has standard add record, edit record and delete record controls.

 – Add a new CTE Student Assessment (OCTCA) record for this student.

## Add/Edit CTE Student Assessment (OCTCA)



The screenshot shows the 'CTE Student Assessment (OCTCA)' screen. At the top, there is a breadcrumb trail: Home » SIS » Student » Assessment » CTE Student Assessment (OCTCA). Below this is the title 'CTE Student Assessment (OCTCA)' and a red instruction: 'From this screen, you can display, add, change and delete data pertaining to CTE Student Assessments.' The form contains several fields: 'Test Date' with a date picker set to 1/12/2012; 'CTE Student Assessment Code' with a dropdown menu showing '09MC - Ground Transportation Collision'; 'CTE Technical Score' with a text input field containing '100'; 'Reason Portfolio Score Not Reported' with a dropdown menu showing '\* - Option Not Applicable, Student took the test.'; and 'CTE Teaching Professions Portfolio Score' with a text input field containing '100'. At the bottom of the form are three buttons: 'Save', 'Save and New', and 'Cancel'.

**CTE Student Assessment (OCTCA) Screen (Add/Edit Data)**

**CTE Student Assessment Code** (required) – Indicates the type of Career-Technical assessment the student took. The drop-down list is populated from EMIS code table GY760.

**CTE Technical Score** (required) – The actual score assigned to a student's performance on the CTE Technical Assessment being reported. Valid values from EMIS code table GY770 are 000 to 100. If the student did not take the CTE Technical Assessment being reported, enter “\*\*\*”.

**Reason Portfolio Score Not Reported** (required) – The reason the CTE Teaching Professions Portfolio score was not reported for the assessment.

*	Option not applicable, Student did not take the test
F	Other (reason not listed)

**CTE Teaching Professions Portfolio Score** (required) – The score for students enrolled in the 090011 Career Paths for the Teaching Professions course. A value from 000 to 100. If the score is not applicable because the student is not required to complete the portfolio assessment, enter “\*\*\*”.

This page intentionally left blank.

# Assessment Reports

The Assessment Reports module displays the details of the assessment records for the selected students. Each student that matches the student filter criteria is returned in the report. Each assessment record that matches the assessment filter criteria is returned in the report.

It is possible that a student does not have any assessment records. If the option to include students with no assessment records is chosen, these students are returned on the report so that users can see that a student is missing an assessment record.

The assessment detail report can be run for a single school or for all schools in the district. Students returned are those with an annual record for the school and school year in context. When a district is in context, students with an annual record in any of the district's selected schools are returned.

Please refer to *ProgressBook StudentInformation Getting Started Guide* for more detailed information about running and viewing reports.

The following information is described in this topic:

- [“Achievement Detail Report”](#)
- [“ASQ/SE \(Preschool\) Report”](#)
- [“ECO \(Preschool Early Childhood Outcome\) Report”](#)
- [“KRAL \(Kindergarten Readiness Assessment - Literacy\) Report”](#)
- [“Misc to AAT Conversion”](#)
- [“Ohio Graduation Test \(OGT\) Report”](#)
- [“OTELA \(Ohio Test of English Language Acquisition\) Report”](#)
- [“Preschool Report”](#)
- [“PROH Report”](#)
- [“Standardized Test Detail Report”](#)

# Achievement Detail Report

Navigation: Home - SIS - Assessment - Assessment Reports - Achievement Detail

Home
SIS
Teacher Menu
EZ Query
Management
EMIS
My Account

**DASL DATABASENAME**

This Screen does not use a Selected Student

**User Name**

Home » SIS » Assessment » Assessment Reports » Achievement Detail Advance

## Achievement Detail

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

Selection Criteria   Selection Summary   Load Settings

**School**

← →
⇄

ASHS - ASHLAND HIGH SCHOOL

ASJH - ASHLAND MIDDLE SCHOOL

ASED - EDISON ELEMENTARY SCHOOL

ASLI - LINCOLN ELEMENTARY

**Student Status**

← →
⇄

**Grade**

AG - AG

IN - Infant/Toddler (Ages 0-2)

PS - PS

KG - KG

← →
⇄

**Counselor**

← →
⇄

**Return Only Students With Achievements**

**Accelerated students:** Both

**Student Assessment Criteria:** Students With Any Test Part

**Assessment Testing Date:**   to  

**Assessment Test:**

**Test Part**

EMGWRT - Combined English/Writing S

COMP - Composite Score

ENGRHET - English Rhetorical Skills Sub

ENG - English Score

← →
⇄

**Display Student Disability Condition**

**Sorting Options**

Test Part (ASC)

Test Part (DESC)

Test Date (ASC)

Test Date (DESC)

← →
⇄

↑  
↓

**Delivery Method:** Pickup Set As Default

**Email Address:** DowdR@software-answers.com

**Report Format:** Adobe PDF

**Description:**

Submit

Achievement Detail Screen

**School** (required) – You can filter by selecting specific Schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report returns all students regardless of status. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) - If no grades are selected, the report returns all students regardless of grade. You can also filter by selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report returns all students regardless of assigned counselor. You can also filter by selecting specific counselors for your report.

**Return Only Students With Achievements** (optional) – When checked, only students that have at least one achievement record that matches the achievement filter criteria are returned in the report.

**Accelerated students** (optional) – Choose whether to display accelerated students on the report. Options are Both (default), Accelerated students only, or Non-accelerated students only.

**Student Assessment Criteria** (required) – Select the criteria for displaying students on the report based on the selected Test Parts. Choose from the following:

- Students With Any Test Part
- Students Passing All Test Parts
- Students Passing Any Test Part
- Students Failing/Missing All Test Parts
- Students Failing/Missing Any Test

This works in conjunction with the test part filter (refer to the following description). If the user selects three of the test parts in the test part filter and “Students passing All Test parts” in the Student Assessment Criteria, then only students that have a passing score in the three selected test parts are returned on the report.

**Assessment Testing Date** (optional) – Enter in a beginning and ending date to select achievement tests taken during that date range.

**Assessment Test** (required) – Select the specific achievement test that you wish to filter and display on the report.

**Test Part** (optional) – If no test parts are selected, the report will select all test parts. You can also filter by selecting specific test parts for your report. The Test Part dual select box is populated based on the assessment test (in this case achievement test) selected.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) is displayed in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** (required) – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example Achievement Detail report file.

<i>Report: Achievement</i>		<b>Elementary School</b>										
<i>Printed Tue, Sep 29, 2009, 9:53 AM</i>		2009-2010										
		<b>Achievement</b>										
<hr/>												
<b>School Name</b>												
Elementary School												
<hr/>												
<b>ID:</b> 1	<b>Student Name:</b>	, DYLAN		<b>Grade:</b>	<b>Status:</b> A	<b>Counselor:</b>						
<hr/>												
<b>Reporting Period:</b> 2009-2010 (K)												
<b>TEST DATE</b>	<b>TEST TYPE</b>	<b>TEST PART</b>	<b>Required Test</b>	<b>Grade at Test</b>	<b>WAIVER REASON</b>	<b>RAW SCORE</b>	<b>SCALED SCORE</b>	<b>Building IRN</b>	<b>Accommodations</b>	<b>P/F</b>	<b>Accel.</b>	
05/01/2009	OTA	MATH	STR	07	*	220	418	012808	NO	Pass	No	
05/01/2009	OTA	READ	STR	07	*	290	418	012808	NO	Pass	No	
05/01/2009	OTA	WRI	STR	07	*	220	410	012808	NO	Pass	No	
<hr/>												
<b>Totals</b>												
<b>Passing:</b> 3		<b>Failing:</b> 0										

**Sample Achievement Detail Report**

## ASQ/SE (Preschool) Report

Navigation: Home - SIS - Assessment - Assessment Reports - ASQ/SE

ASQ/SE Screen

**School** (required) – You can filter by selecting specific Schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report selects all student statuses. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report selects all counselors. You can also filter by selecting specific counselors for your report.

**Return Only Students With ASQ/SE Records** (optional) – When checked, only students that have at least one ASQ/SE record that matches the ASQ/SE filter criteria are returned in the report.

**Assessment Testing Date** (optional) – Enter in a beginning and ending date to select ASQ/SE assessments taken during that date range.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) is displayed in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** (required) – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) - If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example ASQ/SE report file.

Report: ASQSE							HIGH SCHOOL
Printed Thu, Sep 16, 2010, 11:45 AM							2010-2011
							ASQSE
<b>School Name</b>							
Elementary School							
ID: 22345	Student Name: Student70870, DREW		Grade: 01	Status: A	Counselor:		
TEST DATE	TEST TYPE	TEST PART	Required Test	Grade at Test	Waiver Reason	Score	
10/01/2007	PA3Q	SCOR	STR	04	*	000	
04/01/2008	PA3Q	SCOR	STR	05	*	000	
ID: 22159	Student Name: Student69874, LOGAN		Grade: 02	Status: B	Counselor:		
TEST DATE	TEST TYPE	TEST PART	Required Test	Grade at Test	Waiver Reason	Score	
10/01/2009	PA3Q	SCOR	STR	05	*	035	

Sample ASQ/SE Report

# ECO (Preschool Early Childhood Outcome) Report

Navigation: Home - SIS - Assessment - Assessment Reports - ECO

Home > SIS > Assessment > Assessment Reports > ECO

## ECO

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

Selection Criteria   Selection Summary   Load Settings

**School**

AGHS - ARLINGTON HIGH SCHOOL  
AGEL - ARLINGTON ELEMENTARY

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Grade**

PS - PS  
KG - KG  
KGA - KGA  
KGP - KGP

**Counselor**

Return Only Students With ECO Records

Assessment Testing Date:  to

**Test Part**

AKNS - Acquiring and Using Knowledge and  
PSES - Positive Social Emotional Skills  
TAMN - Taking Appropriate Action to Meet I

Display Student Disability Condition

**Sorting Options**

Test Part (ASC)  
Test Part (DESC)  
Test Date (ASC)  
Test Date (DESC)

**Delivery Method:** Pickup

**Email Address:** ABCD@EFGH.com

**Report Format:** Adobe PDF

**Description:**

### ECO Screen

**School** (required) – You can filter by selecting specific Schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report selects all student statuses. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by

selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report selects all counselors. You can also filter by selecting specific counselors for your report.

**Return Only Students With ECO Records** (optional) – When checked, only students that have at least one ECO record that matches the ECO filter criteria are returned in the report.

**Assessment Testing Date** (optional) – Enter in a beginning and ending date to select ECO assessments taken during that date range.

**Test Part** (optional) – If no test parts are selected, the report will select all test parts for the ECO. You can also filter by selecting specific ECO test parts for your report.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) is displayed in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** (required) – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example ECO report file.

Report: ECO		HIGH SCHOOL				
Printed Thu, Sep 16, 2010, 11:49 AM		2010-2011				
		ECO				
School Name						
Elementary School						
ID: 22345	Student Name: Student70870, DREW	Grade: 01	Status: A	Counselor:		
TEST DATE	TEST TYPE	TEST PART	Required Test	Waiver Reason	Score	Progress
11/01/2007	PECO	PSES	STR	*	5	F
11/01/2007	PECO	AJNS	STR	*	6	F
11/01/2007	PECO	TJNS	STR	*	4	F
04/01/2008	PECO	PSES	STR	*	6	Y

Sample ECO Report

# KRAL (Kindergarten Readiness Assessment - Literacy) Report

Navigation: Home - SIS - Assessment - Assessment Reports - KRAL

**KRAL Screen**

**School** (required) – You can filter by selecting specific schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report selects all student statuses. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report selects all counselors. You can also filter by selecting specific counselors for your report.

**Return Only Students With KRAL Records** (optional) – When checked, only students that have at least one KRAL record that matches the KRAL filter criteria are returned in the report.

**Assessment Testing Date** (optional) – Enter in a beginning and ending date to select KRAL

assessments taken during that date range.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) is displayed in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** (required) – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example KRAL report file.

The screenshot shows a report titled "Report: KRAL" printed on Thursday, September 16, 2010, at 11:51 AM. The report is for "HIGH SCHOOL 2010-2011 KRA-L". It lists "Elementary School" as the "School Name". The report contains two student entries:

ID	Student Name	Grade	Status	Counselor		
22516	Student70823, CAITLYN	01	B			
TEST DATE	TEST TYPE	TEST PART	Required Test	Waiver Reason	Total Score	Accommodations
09/01/2009	KRAL	READ	STR	*	018	NO
22364	Student70851, ZOEY	01	A			
TEST DATE	TEST TYPE	TEST PART	Required Test	Waiver Reason	Total Score	Accommodations
09/01/2009	KRAL	READ	STR	*	024	NO

Sample KRAL Report

---

## Misc to AAT Conversion

**Navigation: Home - SIS - Assessment - Assessment Reports - Misc to AAT Conversion**

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

Please refer to the *Assessment - Misc to AAT Conversion Procedural Checklist* for details on this process.

# Ohio Graduation Test (OGT) Report

Navigation: Home - SIS - Assessment - Assessment Reports - Ohio Graduation Test (OGT)

## Ohio Graduation Test (OGT) Screen

**School** (required) – You can filter by selecting specific schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report will select all student statuses. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report selects all counselors. You can also filter by selecting specific counselors for your report.

**Return Only Students With OGT Records** (optional) – When checked, only students that have at least one OGT record that matches the OGT filter criteria are returned in the report.

**Student Assessment Criteria** (required) – Select the criteria for displaying students on the report based on the selected test parts. Choose from the following:

- Students With Any Test Part
- Students Passing All Test Parts
- Students Passing Any Test Part
- Students Failing/Missing All Test Parts
- Students Failing/Missing Any Test

This works in conjunction with the Test Part filter (refer to the following description). If the user selects three of the test parts in the Test Part filter and “Students passing All Test parts” in the Student Assessment Criteria, then only students that have a passing score in the three selected test parts are returned on the report.

**Assessment Testing Date** (optional) – Enter in a beginning and ending date to select OGT assessments taken during that date range.

**Test Part** (optional) – If no test parts are selected, the report selects all test parts for the OGT. You can also filter by selecting specific OGT test parts for your report.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) is displayed in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** (required) – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example OGT report file.

Report: OGT		HIGH SCHOOL									
Printed Wed, Oct 07, 2009, 11:45 AM		2009-2010									
		Ohio Graduation Test									
<b>School Name</b>											
HIGH SCHOOL											
<b>ID:</b>	<b>Student Name:</b>	<b>Grade:</b>	<b>Status: A Counselor:</b>								
<b>Reporting Period: 2009-2010 (K)</b>											
TEST DATE	TEST TYPE	TEST PART	Required Test	Grade at Test	WAIVER REASON	RAW SCORE	SCALED SCORE	Building IRN	Accommodations	Req. for Graduation	P/F
09/2009	OGT	SSC	STR	10	*	240	429		NO	Yes	Pass
09/2009	OGT	MATH	STR	10	*	275	455		NO	Yes	Pass
09/2009	OGT	READ	STR	10	*	240	426		NO	Yes	Pass
09/2009	OGT	SCI	STR	10	*	255	429		NO	Yes	Pass
09/2009	OGT	WRI	STR	10	*	250	427		NO	Yes	Pass
<b>Totals</b>											
<b>Attempts: 1</b>		<b>Passing: 5</b>		<b>Failing: 0</b>							

Sample OGT Report

# OTELA (Ohio Test of English Language Acquisition) Report

Navigation: Home - SIS - Assessment - Assessment Reports - OTELA

OTELA Screen

**School** (required) – You can filter by selecting specific schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report selects all student statuses. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report selects all counselors. You can also filter by selecting specific counselors for your report.

**Return Only Students With OTELA Records** (optional) – When checked, only students that have at least one OTELA record that matches the OTELA filter criteria are returned in the report.

**Assessment Testing Date** (optional) – Enter in a beginning and ending date to select OTELA assessments taken during that date range.

**Test Part** (optional) – If no test parts are selected, the report selects all test parts for OTELA. You can also filter by selecting specific OTELA test parts for your report.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) will display on the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** (required) – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example OTELA report file.

Report: OTELA			TAFT ELEMENTARY SCHOOL					
Printed Wed, Dec 05, 2012, 3:12 PM			2012-2013					
			OTELA					
School Name								
TAFT ELEMENTARY SCHOOL								
ID:	Student Name:	Grade:	Status:	Counselor:				
190702	LAMBERT, STEPHEN	03	A					
TEST DATE	TEST TYPE	TEST PART	Required Test	Grade at Test	Waiver Reason	Scaled Score	Accommodations	
12/01/2012	OIEL	CDOM	SIR	03	A	450	NO	
12/01/2012	OIEL	PROL	SIR	03	A	3	NO	
12/01/2012	OIEL	LDOM	SIR	03	A	***	**	
12/01/2012	OIEL	EROS	SIR	03	A	300	NO	
12/01/2012	OIEL	PDOM	SIR	03	A	2	NO	
12/01/2012	OIEL	RDOM	SIR	03	*	550	NO	
12/01/2012	OIEL	SDOM	SIR	03	I	***	**	
12/01/2012	OIEL	WDOM	SIR	03	*	830	NO	

Sample OTELA Report

# Preschool Report

Navigation: Home - SIS - Assessment - Assessment Reports - Preschool

**Preschool Screen**

**School** (required) – You can filter by selecting specific schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report selects all student statuses. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report selects all counselors. You can also filter by selecting specific counselors for your report.

**Return Only Students With Preschool Records** (optional) – When checked, only students that have at least one Preschool record that matches the Preschool filter criteria are returned in the

report.

**Assessment Testing Date** (optional) – Enter in a beginning and ending date to select Preschool assessments taken during that date range.

**Test Part** (optional) – If no test parts are selected, the report selects all test parts for the Preschool assessment. You can also filter by selecting specific Preschool test parts for your report.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) is displayed on the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** (required) – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example Preschool report file.

Report: Preschool		Printed Thu, Sep 16, 2010, 11:56 AM		HIGH SCHOOL		2010-2011		Preschool	
School Name									
Elementary School									
ID:	Student Name:	Grade:	Status:	Counselor:					
21132	Student71895, DARCI	02	A						
TEST DATE	TEST TYPE	TEST PART	Required Test	Grade at Test	Waiver Reason	Score	Accommodations		
09/01/2007	PS	ALIT	STR	PS	*	***	Y2		
09/01/2007	PS	PICH	STR	PS	*	032	Y2		
09/01/2007	PS	RNDM	STR	PS	*	***	Y2		
10/01/2007	PS	ALIT	STR	PS	*	008	Y2		

**Sample Preschool Report**

# PROH Report

Navigation: Home - SIS - Assessment - Assessment Reports - PROHI

**PROH Screen**

This report lists the students' proficiency test records.

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc membership group to limit the report to the students in this group. All other selection criteria are ignored. Select the Public And Private check box to see memberships created by other users in your drop-down list.

**Test Grade** (optional) – If no test grades are selected, the report selects all test grades. You can

also filter by selecting specific test grades for your report.

**Test Part** (optional) – If no test parts are selected, the report selects all test parts. You can also filter by selecting specific test parts for your report.

**Student Status** (optional) – If no student statuses are selected, the report selects all student statuses. You can also filter by selecting specific student statuses for your report.

**Exempt Status** (optional) – If no exempt statuses are selected, the report selects all exempt statuses. You can also filter by selecting specific exempt statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by selecting specific grades for your report.

**Program** (optional) – If no programs are selected, the report selects all programs. You can also filter by selecting specific programs for your report.

**Membership Group** (optional) – If no membership groups are selected, the report selects all membership groups. You can also filter by selecting specific membership groups for your report.

**Membership** (optional) – If no memberships are selected, the report selects all memberships. You can also filter by selecting specific memberships for your report.

**Pass/Fail** (optional) – Choose all (blank), Pass, or Fail to limit results.

**Gender** (optional) – Choose all (blank), Male, or Female to limit results.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example PROH report file.

REPORT: DASL - PROH			HIGH SCHOOL							RUN AT 11:58 AM 9/16/2010			
PROH REPORT										PAGE 1 OF 27			
ID	GR	STUDENT NAME	TEST TYPE	P/F	TEST DATE	ATTEMPTS	TEST GRADE	SCALED SCORE	TEST PART	WAIVER REASON	ST	PR	GR
13837	10	Student74078, JASON	04P	P	03/01/2005	1	04	230	M	*	A		M
13837	10	Student74078, JASON	04P	P	03/01/2005	1	04	250	C	*	A		M
13837	10	Student74078, JASON	04P	P	03/01/2005	1	04	238	S	*	A		M

Sample PROH Report

# Standardized Test Detail Report

Navigation: Home - SIS - Assessment - Assessment Reports - Standardized Test Detail

**Standardized Test Detail Screen**

**Note:** The Standardized Test Detail report shows the information on the ACT, AP, PLAN, PSAT, SAT and SAT2 tests. The report uses the records in the Assessment module, not from the Miscellaneous (MISC) Data module. MISC Data will not print on this report. Only Assessment data will print on this report.

**School** (required) – You can filter by selecting specific schools for your report. At least one school must be selected.

**Student Status** (optional) – If no student statuses are selected, the report selects all student statuses. You can also filter by selecting specific student statuses for your report.

**Grade** (optional) – If no grades are selected, the report selects all grades. You can also filter by

selecting specific grades for your report.

**Counselor** (optional) – If no counselors are selected, the report selects all counselors. You can also filter by selecting specific counselors for your report.

**Return Only Students With Standardized Records** (optional) – When checked, only students that have at least one Standardized record that matches the Standardized filter criteria are returned in the report.

**Assessment Test** (required) – Select the specific Standardized Test that you wish to filter and display on the report. Options include: ACT, AP, PLAN, PSAT, SAT and SAT2.

**Test Part** (optional) – If no test parts are selected, the report selects all test parts. You can also filter by selecting specific test parts for your report. The Test Part dual select box is populated based on the Assessment Test (in this case Standardized Test) selected.

**Display Student Disability Condition** (optional) – If checked, the student's disability condition (from the student profile) is displayed in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, the description is displayed on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation Getting Started Guide* for further details.

## Sample Output

The following figure shows part of an example Standardized Test Detail report file.

Report: Standardized		HIGH SCHOOL	
Printed Thu, Sep 16, 2010, 12:01 PM		2010-2011	
<b>Standardized Test Detail</b>			
<b>Id:</b> 11542	<b>Student Name:</b> Student76916, FRISTEN	<b>Grade:</b> 12	<b>Status:</b> A
<b>Counselor:</b>			
Date	06/12/2010	Test	ACT
Category			Score
Composite Score			15
Reading Score			15
Mathematics Score			16
Writing Test Sub Score			06
Combined English/Writing Score			16
Science Score			12
English Score			17
# Test Parts Attempts: 7 # Total Attempts: 1			

**Sample Standardized Test Detail Report**

This page intentionally left blank.

---

# ProgressBook StudentInformation Attendance and Calendar Guide



# **ProgressBook Student Information Attendance and Calendar Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Attendance and Calendar Guide* document have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.6.7	<a href="#">“2A. Sub-Calendars”</a>	18	Added field description of new <b>Include in Attendance Calculation</b> option on add/edit version of <b>Sub-Calendar Maintenance</b> screen and updated image.
14.6.4	<a href="#">“2A. Sub-Calendars”</a>	18	Updated <b>Add/Edit Sub-Calendar</b> section to show newly updateable <b>Calendar Start Date</b> and <b>Calendar End Date</b> fields.
14.6.0	<a href="#">“3. Calendar Dates Wizard”</a>	31	Updated procedure and images to reflect new EMIS reporting fields on <b>Configure and Confirm Boundary Changes</b> and <b>Non-Attending Days</b> tabs.
14.5.0	<a href="#">“2A. Sub-Calendars”</a>	18	Updated add-edit section image and text to describe new <b>Attendance Pattern, All Grade Levels - **</b> and <b>Grade Levels</b> fields and new exception days sections.
14.5.0	<a href="#">“2B. Sub-Calendar Days”</a>	24	Updated section to show new <b>EMIS</b> section for adding/editing exception days.
14.4.0	<a href="#">“2A. Sub-Calendars”</a>	18	Updated add/edit section image and text to reflect new <b>EMIS</b> section.

This page intentionally left blank.

# Table of Contents

Change Log.....	i
Table of Contents.....	iii
Attendance and Calendar Overview.....	1
Attendance and Calendar Outline and Flow.....	4
Attendance and Calendar Documentation Key .....	7
1. Attendance System Maintenance.....	7
1A. Absence Types.....	7
1B. Absence Reasons Maintenance .....	9
1C. Absence Notes .....	10
1D. Absence Letter Rules .....	12
1D-1. Absence Letter Rule Criteria.....	14
1E. Lunch Type.....	16
2. Sub-Calendar Maintenance.....	17
2A. Sub-Calendars.....	18
2B. Sub-Calendar Days .....	24
2C. Sub-Calendar Students .....	31
3. Calendar Dates Wizard .....	31
4. Student Attendance Records .....	38
4A. Attendance Fast Entry/Update.....	38
4B. Attendance Fast Delete .....	43
4C. Daily Absence List – Daily Attendance.....	46
4D. Daily Absence List – Period Attendance.....	47
4E. Daily Attendance Completion List.....	49
4F. Period Attendance Completion List.....	50
4G. Lunch Counts .....	51
4H. Attendance Letter History .....	52
5. Student Attendance Menu.....	55
5A. Student’s School Absences – Daily .....	55
5B. Student’s School Absences – Period.....	57
5C. External Absence .....	61

5D. Student Attendance Letter History.....	63
6. Teacher Menu – Attendance .....	64
6A. Teacher Menu – Daily Attendance .....	64
6B. Teacher Menu – Period Attendance .....	64
7. Attendance Reports – General.....	65
7A. Perfect Attendance Report (PERF) .....	65
7B. Student Absence Search Summary (R309-B) .....	68
7C. Student Absence Search Detail (R309-A) .....	72
7D. Homeroom Attendance Register Detail (R310-A).....	77
7E. Homeroom Attendance Register Summary (R310-B).....	80
7F. Student Absence Statistics Report (R311).....	83
7G. Student ADM & ADA Report for ABSE Detail (R322-A) .....	85
7H. Student ADM & ADA Report for ABSE Summary (R322-B) .....	89
7I. Homeroom Attendance Report (R331) .....	91
7J. District-wide Membership Report (R500) .....	93
8. Attendance Reports – Daily.....	96
8A. Half/full Day Absence Office Report (R320Off).....	96
8B. Daily Office – Student Absences (R307) .....	100
8C. Half/full Day Absence Letter (R320) .....	103
9. Attendance Reports – Period .....	107
9A. Period Absence Office Report (R317Off).....	107
9B. Daily Report of Student Period Absences (R315).....	110
9C. Cumulative Report of Student Period Absences (R316) .....	113
9D. Period Absence Letter (R317) .....	115

# Attendance and Calendar Overview

---

There are two methods for reporting attendance, daily and period attendance. StudentInformation will collect two types of attendance input, teacher attendance and office attendance. Teacher attendance will allow the teacher to track a student's absence from class for each period of the day (period attendance) but may also be used as the basis for reporting office attendance (daily). For EMIS reporting purposes, absences must be accumulated into a total for full days absent with the smallest increment being half a day, regardless of how it is collected. Each of these collection processes will be explained later.

To begin taking attendance in StudentInformation the school/district must first have several code tables set up or converted from SIS, to have the capability to report attendance accurately. There must also be a "default calendar" as well as sub calendars defined for attendance purposes. This chapter will walk you through setup of those code tables that may be required, with an explanation of each of those applicable tables. There will also be an explanation of the calendars, how they are defined and the use of each type of calendar.

There are several reports that school personnel may create for their attendance reporting needs. Those will be listed at the end of the chapter with an explanation of each. There is also the option of producing absence letters to notify parents of their children's absences and/or tardies. If this application is used, there are two additional tables that would need to be defined.

## Understanding the Attendance & Calendar Module

---

The StudentInformation Attendance module will be used for the purpose of collecting student attendance to retain a history of the student's absences, tardies, early dismissal and late arrivals. The attendance application is an "exception" system, meaning that it keeps track of the times the student was not present and the duration of the absence, rather than the days the student was present. Days present are assumed and are calculated based on the days the student was enrolled minus any reported absences.

When absences are entered for a student, the date for each day is verified against a school calendar. Each school has a main or Master Calendar that defines the days that school is in session as well as sub-calendars for students that may not be marked as attending all day/every day. When reporting students as absent on any given day, the student must have a calendar that lists that day as an "attendance day" or he/she cannot be counted absent.

There are two main ways of taking attendance in StudentInformation – Daily Attendance and Period Attendance.

## **Daily Attendance**

Daily Attendance is taken once per day, or possibly twice per day as a school desires. The student is either present or absent for the entire day or half of the day. Presently, this is the most common method of recording attendance information. This is also the method of attendance that must be reported to the state for EMIS reporting requirements.

The Daily Attendance may be input in the office only, in the student's homeroom, or in a class period room by the classroom teacher. In addition to inputting the absence, other fields may also be entered – including an absence reason, absence notes, how the school was notified, and if the absence occurred in the morning, afternoon, or all day. These additional (optional) items are entered by office personnel on the official attendance record.

Daily Attendance is most commonly collected during the homeroom period if the students meet in their respective homerooms each day. Or it may be collected during a designated course period during the day. For instance, the high school may take attendance during the first period class each day and report that as the daily attendance for students. So if the student is not present during the designated time, the student will be marked as absent and the record (if left unchanged) will indicate that the student was absent for the entire day.

Daily Attendance only retains one set of database records, the official office attendance records. Once an absence record exists for a student, the record cannot be edited through the Teacher Menu's Daily Attendance screen unless the role of the teacher has the "Daily Attendance Extended Permissions" node in the sitemap active.

## **Period Attendance**

Period Attendance requires that teachers take attendance each class period. Those attendance records will then be sent to the office to become the office attendance. Changes to the official attendance may be resubmitted by the teacher each period of the day and once the office receives notification of the change, they can decide whether to accept or reject the changes.

Schools configured to collect period attendance must also set configuration options to indicate the number of period absences that equate to half and full day absences. Period attendance must be translated to whole and half day absences for the required state reporting of attendance data via EMIS. When configuring Period Attendance, thresholds are used to convert period attendance to daily attendance. If the half-day Period Threshold is set to 4, and the full-day threshold is set to 7, the student will be given a half-day absence following their fourth period absence. The absence will be updated to a full day absence following their seventh period absence. With this example, the Unexcused Period Thresholds could be set to 3 and 5. When the fourth period is missed, and the system is creating a half-day absence record, if three of the four periods missed are unexcused, then the half-day absence would be unexcused, otherwise it would be excused. When the 7th period is missed, the system will

determine if at least 5 of the period absences are unexcused, and set the unexcused/excused setting appropriately for the full-day absence.

Teachers have the capability to keep period attendance in StudentInformation even if the school is configured for daily attendance. If a course period is designated as the course period for taking the daily attendance, and the teacher wished to maintain his own period attendance records, the teacher will be required to take the daily attendance and his/her own attendance separately due to the school's desire for daily attendance and the teacher choosing to maintain period attendance separately.

There are 2 sets of period attendance database records: Teacher and Office. Only teachers are able to see and update the teacher records, and teachers are not allowed to modify office records.

When a teacher first loads the Period Attendance screen and submits attendance, any students marked as tardy or absent will have 2 records created: one for the teacher and one for the office.

If an office record (tardy or absent) already exists for a student, but no teacher record exists, the "Present" option will be disabled on the Teacher Menu Period Attendance Entry screen. This is because the office has marked the student as not present and the teacher cannot override this. The teacher can select the student as either "Tardy" or "Absent". When the teacher saves the attendance, a teacher record will be created for this student's absence -- this is now separate from the office record for the student.

If a teacher record (tardy or absent) already exists for a student, regardless of whether or not an office record exists, all three choices will be available on the Teacher Menu Period Attendance Entry screen: "Present", "Tardy" & "Absent":

- If Tardy or Absent is selected, the teacher record will be updated. If an office record exists for this student, it will not be modified. If there was no office record, one will be created to match the teacher record.
- If Present is selected, the teacher record for this student will be removed. If an office record exists for this student, it will not be modified. The student's status subsequently changes to reflect the office absence record on the Period Attendance screen.

When a student's absence records are updated through the office screen, teacher records are not modified. If a teacher marks a student as tardy or absent, and the office deletes the absence record, the teacher's screen will still show the student as tardy or absent. If the teacher changes the student to Present, and the teacher's record is then removed, the student will show as present because no office or teacher absence record exists for the student.

# Attendance and Calendar Outline and Flow

---

## 1. Attendance System Maintenance

- A. Absence Types** – How the absence is characterized – i.e. Excused, Tardy, Unexcused, etc.
- B. Absence Reasons** – The reason for a specific absence – i.e. sick, doctor appointment, funeral, etc.
- C. Absence Notes** (optional) – Notes that can be added to each absence occurrence to provide further detail.
- D. Absence Letter Rules** (optional) – Absence Letter Rules determine when an attendance letter will be created for students.
- E. Lunch Type** (optional) – Lunch Type Codes will display on the Teacher Menu – Daily Attendance and Teacher Menu – Period Attendance screens.

## 2. Sub-Calendar Maintenance

- A. Sub-Calendars – Creating Attendance Sub-Calendars that are different from the Master Calendar.**
- B. Sub-Calendar Days – Updating Days on specific Sub-Calendars.**
- C. Sub-Calendar Students – Linking students to specific Sub-Calendars.**

## 3. Calendar Dates Wizard

## 4. Student Attendance Records

- A. Attendance Fast Entry/Update** – Used to quickly add an absence for a student or a group of students using default absence types, reasons, and notes, or update existing absences.
- B. Attendance Fast Delete** – Used to quickly remove one or several absence events.
- C. Daily Absence List – Daily Attendance** – Will display a list of all students absent for a selected day.
- D. Daily Absence List – Period Attendance** – Will display a list of all students absent for a selected day and period (if using period attendance).
- E. Daily Attendance Completion List** – Will display whether homeroom teachers have submitted their daily attendance.
- F. Lunch Counts** – Will display the Lunch Counts from each teacher and total Lunch Count for the building.

## 5. Student Attendance Menu

- A. **Student's School Absences – Daily Attendance** – Will display a summary of a student's absence events for a range of dates and give the ability to add, edit or delete daily absence events.
- B. **Student's School Absences – Period Attendance** – Will display a summary of a student's absence events for a range of dates and give the ability to add, edit or delete period absence events.
- C. **External Absence** – Display, add, edit or delete student absences for a previous school or JVS.
- D. **Student Attendance Letter History** – Display information about attendance letters sent for a specific student.

## 6. Teacher Menu

- A. **Daily Attendance** – Gives teachers the ability to enter daily attendance for their homeroom class.
- B. **Period Attendance** – Gives teachers the ability to enter period attendance for their classes.

## 7. Attendance Reports – General

- A. **Perfect Attendance Report (PERF)** – This report displays students who meet the specified selection criteria and have had zero (0) total absences during the specified date range. The user may specify that partial absences do not disqualify students from perfect attendance.
- B. **Student Absence Search Summary (R309-B)** – This report will generate a list of selected students and show the total of their absences for the date range selected.
- C. **Student Absence Search Detail (R309-A)** – This report will generate a list of selected students and show the detail of their absences for the date range selected.
- D. **Homeroom Attendance Register Detail (R310-A)** – This report shows student attendance detail grouped by homeroom and month.
- E. **Homeroom Attendance Register Summary (R310-B)** – This report shows student attendance summary grouped by homeroom and month.
- F. **Student Absence Statistics Report (R311)** – This report will show student absence statistics by Type/Reason and by Type for a given date range.
- G. **Student ADM/ADA for ABSE Detail (R322-A)** – This report is used to analyze student absence data by pulling data stored in ABSE – Student Absence.
- H. **Student ADM/ADA for ABSE Summary (R322-B)** – This report is used to analyze student absence data (totals by grade) by pulling data stored in ABSE – Student Absence.

- I. **Attendance by Calendar Report (R330)** – This report shows attendance data for each attendance calendar.
- J. **Homeroom Attendance Report (R331)** – This report is used to generate a bi-weekly attendance report by homeroom based on student absence records within the Attendance substructure. Students are displayed within their homeroom with any absence records corresponding to the two week period specific.
- K. **District-wide Membership Report (R500)** – The report shows Attendance information by Membership (programs) and/or grade level.

#### 8. Attendance Reports – Daily

- A. **Half/Full Day Absence Office (R320Off)** – This report will print Half and Full Day Absence Letters for office use.
- B. **Daily Office – Student Absences (R307)** – This report is used to generate a list of students absent on a specified date grouped by Absence Type and Grade.
- C. **Half/Full Day Absence Letter (R320)** – This report generates Half and Full Day Absence Letters based on Absence Letter Templates and Absence Letter Rules.

#### 9. Attendance Reports – Period

- A. **Period Absence Office (R317Off)** – This report is used to generate an office search report to identify students who have an attendance problem.
- B. **Daily – Student Period Absences (R315)** – This report is used to generate a list of all students absent on a specified date for at least one period.
- C. **Cumulative Student Period Absence (R316)** – This report is used to generate a report listing the cumulative number of periods a student has been absent and/or late within a specified date range.
- D. **Period Absence Letter (R317)** – This report is used to generate absence letters to parents of students who have met specified absence criteria.

# Attendance and Calendar Documentation Key



Defined at the Building level



Defined at the Teacher level



Defined at the Student level



Important Information



Report

## 1. Attendance System Maintenance

### 1A. Absence Types



**Navigation: Home – Management – School Administration – Attendance Administration – Absence Types**

An Absence Type indicates how the absence is characterized. Examples could be “E” for “excused”, “T” for “tardy” or “N” for “not absent but not in attendance” – i.e. a field trip. Absence Types are school and school year specific.

Home » Management » School Administration » Attendance Administration » Absence Types Advanced Search

### Absence Type Maintenance

From this screen, you can display, add, change and delete data pertaining to absence types.

	Code	Name ^	Description	Qualifier	Is Excused	Use for Daily Attendance	Use for Period Attendance	Report to EMIS	Active
	E	EXCUSED	EXCUSED ABSENCE	Absent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	I	ISS	IN-SCHOOL SUSPENSION	Non-absence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	O	OTHER	OTHER APPROVED/JDC	Non-absence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	P	PARENT/CP	PARENT CALL PENDING	Absent	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	S	SCHOOL REL	SCHOOL RELATED/FIELD TRIP	Non-absence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	T	TARDY	TARDY ARRIVAL	Late/Tardy	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	U	UNEXCUSED	UNEXCUSED ABSENCE	Absent	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Show Active Only

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Modifier, Is Excused, Use for Daily Attendance, Use for Period Attendance, Report to EMIS, Active) in ascending or descending order by clicking on the column header

## Add/Edit Absence Type

The screenshot shows a web application interface for 'Absence Type Maintenance'. At the top, there is a breadcrumb trail: Home » Management » School Administration » Attendance Administration » Absence Types. Below this is the title 'Absence Type Maintenance' and a red instruction: 'From this screen, you can display, add, change and delete data pertaining to absence types.' The form contains several fields: 'Code' with the value 'E', 'Name' with 'EXCUSED', and 'Description' with 'EXCUSED ABSENCE'. A 'Qualifier' dropdown menu is set to 'Absent'. Below these are five checkboxes, all of which are checked: 'Is Excused', 'Use for Daily Attendance', 'Use for Period Attendance', 'Report to EMIS', and 'Is Active'. At the bottom left, there are 'Save' and 'Cancel' buttons.

**Code** (required) – Enter up to 4 characters alphanumeric Absence Type Code. If you try to use an existing inactive Absence Type Code, you will be prompted to reactivate this inactive Absence Type Code if you wish.

**Name** (required) – Enter Name of Absence Type (30 characters)

**Description** (optional) – Enter Description of Absence Type (200 characters)

**Qualifier** (required) – Indicate whether the Absence Type is considered Late/Tardy, Absent or a Non-Absence

**Is Excused** (optional) – A check indicates that the Absence Type is considered excused.

**Use for Daily Attendance** (optional) – A check indicates that the Absence Type is valid for daily attendance reporting and calculations

**Use for Period Attendance** (optional) – A check indicates that the Absence Type is valid for period attendance reporting and calculations

**Report to EMIS** (optional) – A check indicates that the Absence Type will be reported to EMIS

# 1B. Absence Reasons Maintenance



Navigation: Home – Management – School Administration – Attendance Administration – Absence Reasons

Absence Reasons are used to define the reason that the absence has taken place. Absence reasons are school and school year specific.

Home » Management » School Administration » Attendance Administration » Absence Reasons

### Absence Reason Maintenance

From this screen, you can display, add, change and delete Absence Reason codes.

Add Absence Reason Code

	Code	Name ^	Description	Use for daily attendance	Use for period attendance	Active
	A	ABSENCE	ABSENCE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	C	COL. VISIT	COL. VISIT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	D	DOC/DENT	DOC/DENT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	E	EXCUSED	EXCUSED	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	F	FUNERAL	FUNERAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	H	HOSPITAL	HOSPITAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	I	INJURY	INJURY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	J	JUVENILE	JUVENILE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	O	OTHER	OTHER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Z	OUT SUSP	OUT SUSP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	S	SICK	SICK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	X	SKIP	SKIP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Y	TRUANCY	TRUANCY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	U	UNEXCUSED	UNEXCUSED	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	V	VAC	VAC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Show Active Only

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Use for daily attendance, Use for period attendance, Active) in ascending or descending order by clicking on the column header

## Add/Edit Absence Reason

Home » Management » School Administration » Attendance Administration » Absence Reasons

### Absence Reason Maintenance

From this screen, you can display, add, change and delete Absence Reason codes.

**Code:**  ⚡

**Name:**  ⚡

**Description:**

**Use for daily attendance:**

**Use for period attendance:**

**Is Active:**

**Code** (required) – Enter up to 4 characters alphanumeric Absence Reasons Code. If you try to use an existing inactive Absence Reasons Code, you will be prompted to reactivate this inactive Absence Reasons Code if you wish.

**Name** (required) – Enter Name of Absence Reason (30 characters)

**Description** (optional) – Enter Description of Absence Reason (200 characters)

**Use for daily attendance** (optional) – Yes or No; This Absence Reason will be available for Daily Attendance.

**Use for period attendance** (optional) – Yes or No; This Absence Reason will be available for Period Attendance.

## 1C. Absence Notes



**Navigation: Home – Management – School Administration – Attendance Administration – Absence Notes**

Absence Notes are optional but may be used to give even more detail to an absence event. Absence Notes are school and school year specific.

Home » Management » School Administration » Attendance Administration » Absence Notes

## Absence Note Maintenance

From this screen, you can display, add, change and delete Absence Note codes.

Add Absence Note Code

	Code	Name ^	Description	Use for daily attendance	Use for period attendance	Active
 	F	FOLLOWUP	FOLLOWUP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	N	NEED HMWRK	NEED HMWRK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	P	PARNTCALL	PARNTCALL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
 	S	SCHOCALL	SCHOCALL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Show Active Only

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Use for daily attendance, Use for period attendance, Active) in ascending or descending order by clicking on the column header.

### Add/Edit Absence Note

Home » Management » School Administration » Attendance Administration » Absence Notes

## Absence Note Maintenance

From this screen, you can display, add, change and delete Absence Note codes.

Code:

Name:

Description:

Use for daily attendance:

Use for period attendance:

Is Active:

Save Save and New Cancel

**Code** (required) – Enter up to 4 characters alphanumeric Absence Note Code. If you try to use an existing inactive Absence Note Code, you will be prompted to reactivate this inactive Absence Note Code if you wish.

**Name** (required) – Enter Name of Absence Note (30 characters).

**Description** (optional) – Enter Description of Absence Note (200 characters).

**Use for daily attendance** (optional) – Yes or No; This Absence Note will be available for Daily Attendance.

**Use for period attendance** (optional) – Yes or No; This Absence Note will be available for Period Attendance.

## 1D. Absence Letter Rules



### Navigation: Home – Management – School Administration – Attendance Administration – Absence Letter Rules

Schools regularly send absence letters through the mail to notify parents of their children’s absences and/or late arrival to school. StudentInformation will give the schools the ability to generate absence letters for students meeting specified criteria. Absence letters will be generated when students have a number of absences that break a threshold level defined by the building administrators. The application will also record each absence letter that the student receives. To perform the creation of attendance letters, the school must first set up various maintenance screens that will define rules to be used in the creation of those letters – Absence Letter Templates and Absence Letter Rules – and to determine when the letters are produced and to whom they will be sent.

Home » Management » School Administration » Attendance Administration » Absence Letter Rules						
<b>Absence Letter Rule Maintenance</b>						
From this screen, you can display, add, change and delete data pertaining to absence letter rules.						
Add Absence Letter Rule						
	Code	Name ^	Description	Type	Is Active	
	Cum	Cumulative Absences Letters	Letters for students that have been absent for 5, 10 or 15 days total.	Daily Cumulative		
	Seq	Sequential Absences Letters	Letters for students that have been absent 5, 10 or 15 days in a row.	Daily Interval		
<input checked="" type="checkbox"/> Show Active Only						

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Type, Is Active) in ascending or descending order by clicking on the column header

– View Rule Criteria

## Add/Edit Absence Letter Rule

Home » Management » School Administration » Attendance Administration » Absence Letter Rules

### Absence Letter Rule Maintenance

From this screen, you can display, add, change and delete data pertaining to absence letter rules.

**Code:**  

**Name:**  

**Description:**

**Rule Type:** Daily Cumulative  

**Is Active:**

**Code** (required) – Enter up to 4 characters alphanumeric Absence Letter Rule Code. If you try to use an existing inactive Action Code, you will be prompted to reactivate this inactive Action Code if you wish.

**Name** (required) – Enter Name of Absence Letter Rule (30 characters)

**Description** (optional) – Enter Description of Absence Letter Rule (200 characters)

**Rule Type** (required) – Choose Daily Interval, Daily Cumulative, Period Interval or Period Cumulative.

Rule Type	Description
Daily Interval	A specified minimum number of daily absences (threshold) within a specified number of days (interval)
Daily Cumulative	A specified minimum number of daily absences (threshold) over the entire date range (cumulative)
Period Interval	A specified minimum number of period absences (threshold) within a specified number of days (interval)
Period Cumulative	A specified minimum number of period absences (threshold) over the entire date range (cumulative)

# 1D-1. Absence Letter Rule Criteria



**Navigation: Home – Management – School Administration – Attendance Administration – Absence Letter Rules**

Each Absence Letter Rule has one or more Absence Letter Rule Criteria. The criteria define how the specific Absence Letter Rule will function and when it will print out Absence Letters.

Home » Management » School Administration » Attendance Administration » Absence Letter Rules

### Absence Letter Rule Maintenance

From this screen, you can display, add, change and delete data pertaining to absence letter rules.

Add Absence Letter Rule

		Code	Name ^	Description	Type	Is Active
		Cum	Cumulative Absences Letters	Letters for students that have been absent for 5, 10 or 15 days total.	Daily Cumulative	
		Seq	Sequential Absences Letters	Letters for students that have been absent 5, 10 or 15 days in a row.	Daily Interval	

Show Active Only

Click to View the Criteria of a specific Absence Letter Rule.

Home » Management » School Administration » Attendance Administration » Absence Letter Rule Criterion

### Absence Letter Rule Criterion: Cumulative Absences Letters

From this screen, you can display, add, change and delete data pertaining to absence letter rule criteria.

Add Criteria

		Absence Types	Threshold	Interval	Period Type	Supp. Multi Letters	Precedence ^	Is Active
		U - A - O	15			<input checked="" type="checkbox"/>	1	
		U - A - O	10			<input checked="" type="checkbox"/>	2	
		U - A - O	5			<input checked="" type="checkbox"/>	3	

Show Active Only

Return to Letter Rules

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by the Threshold, Interval, Period Type or Is Active columns in ascending or descending order by clicking on the column header.

## Add/Edit Absence Letter Rule Criterion

Home » Management » School Administration » Attendance Administration » Absence Letter Rule Criterion

### Absence Letter Rule Criterion: Cumulative Absences Letters

From this screen, you can display, add, change and delete data pertaining to absence letter rule criteria.

**Absence Types:**

Available	Selected
A - Absent E - Excused O - Other T - Tardy U - Unexcused	

Absence types in available list:  Excused  Unexcused

**Threshold:** 5

**Interval:**

**Period Type:**

**Suppress Multiple Letters:**

**Precedence:**

**Is Active:**

Save Save and New Cancel

**Absence Types** (required) – Move the Absence Types for this rule from the Available column to the Selected column using the arrows.

**Absence types in available list: Excused/Unexcused** – If Excused is checked, you will see Excused Absence Types in Available list. If Unexcused is checked, you will see Unexcused Absence Types in Available list. If both are checked you will see all Absence Types in Available list.

**Threshold** (required) – The minimum number of occurrences of the specified Absence Types that will cause an Absence Letter to be created. This value increments by .5.

**Interval** (optional for Period Interval Rules and Daily Interval Rules only) – Enter the number of days over which to evaluate whether a student has reached the threshold.

**Period Type** (required for Period Cumulative Rules and Period Interval Rules only) – choose whether to count the Threshold or Interval based on Calendar Periods or Course Section Meeting Times (which may span multiple periods).

**Suppress Multiple Letters** (optional) – If checked, this rule will suppress multiple absence letters for the same student if the student meets more than one criterion. If not checked, a specific student could get multiple letters depending on the criteria met. Precedence is used to determine which criterion counts.

**Precedence** (required) – If a student meets multiple criteria for a rule, the student may get multiple letters. If Suppress Multiple Letters is checked, the student will only get a letter for the criterion with the lowest Precedence value. So, for example, if a student is absent 10 days, and the 5-day criterion is Precedence 2, and the 10-day criterion is Precedence 1, the student will only receive a letter for the 10-day criterion.



# 1E. Lunch Type

**Navigation: Home – Management – School Administration – Attendance Administration – Lunch Type**

Lunch Type Codes will display on the Teacher Menu – Daily Attendance and Teacher Menu – Period Attendance screens and are used by the Teacher to collect lunch count and send to the office. The Lunch Type Codes can be customized by building.

Home » Management » School Administration » Attendance Administration » Lunch Type

### Lunch Type Maintenance

From this screen, you can display, add, change and delete Lunch Type codes.

Add Lunch Type Code

	Code	Name	Field Length	Sort Order ^	Active
 	Tray	Tray Lunch	3	1	

Show Active Only

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Field Length, Sort Order, Active) in ascending or descending order by clicking on the column header.

## Add/Edit Lunch Type

Home » Management » School Administration » Attendance Administration » Lunch Type

### Lunch Type Maintenance

From this screen, you can display, add, change and delete Lunch Type codes.

Code:  

Name:  

Field Length:  

Sort Order:  

Is Active:

Save Save and New Cancel

**Code** (required) – Enter up to 4 characters alphanumeric Lunch Type Code. If you try to use an existing inactive Lunch Type Code, you will be prompted to reactivate this inactive Lunch Type Code if you wish.

**Name** (required) – Enter Name of Lunch Type Code. Do not use the hyphen or dash character in Lunch Type names. If any names are not displaying on the Teacher Menu – Daily Attendance screen, shorten names as much as possible.

**Field Length** (required) – Field Length must be between 1 and 50

**Sort Order** (required) – Enter the order (between 1 and 100) that the Lunch Type will be shown on the screen. The lowest sort order will start on the left and will proceed to the right with the next highest sort order.

## 2. Sub-Calendar Maintenance

---

A special sub-calendar is automatically created during the Master Calendar creation process. This sub-calendar will apply (by default) to all students registering in that school unless the student is manually assigned a different sub-calendar. The primary sub-calendar must be created initially because students are never directly assigned to the master calendar; they are only assigned to the sub-calendars. All changes that need to be made to the Master Calendar would then affect all sub-calendars. The Master Calendar and Sub-Calendars then determine what days of attendance the student will be present or absent for their expected attendance pattern.

Some examples of special attendance patterns requiring separate sub-calendars are: part-time or part-week Kindergarten; students that attend JVS part-time; students that attend classes at other schools in the district; or students that attend other institutions. Additionally, a sub-calendar may be defined that designates alternate beginning and ending days of the school year – i.e. Kindergarten classes that start later in the fall or an early end date for High School seniors.

Each school may define as many sub-calendars as are needed to meet all the students' reporting needs. The majority of students will be assigned to the default sub-calendar, which can be any sub-calendar that the school designates as the default. If no default has been designated, then the sub-calendar created by the Master Calendar process will become the default for all students.

Set up and creation of the Master Calendar is explained in detail in the School Setup and Initialization documentation. The sub-calendars are created for attendance purposes and are described in this documentation.

## 2A. Sub-Calendars



### Navigation: Home – Management – School Administration – Scheduling Administration – Sub-Calendars

Attendance sub-calendars are defined by indicating the day and the periods that students assigned to the sub-calendar are expected to be in attendance. Each attendance sub-calendar will be defined by a code, name and description.

Each sub-calendar is a subset of the school's master calendar. Each sub-calendar defines additional non-attending days that are not present in the Master calendar for the group of students assigned to that particular sub-calendar. Each sub-calendar may also designate specific periods of the day that the student is not expected to be in attendance at the school, for example kindergarten students may only have sub-calendars specifying morning or afternoon, for half day kindergarten classes.

Sub-calendars only define attendance exceptions to the Master Calendar. If the Master Calendar is altered to add or remove a day, that day extends to all students regardless of their sub-calendar assignment. For example, if the Master Calendar is altered to indicate a day as a non-attending due to a calamity circumstance (snow day), all students in the school are expected to not be in attendance that day without regard to their sub-calendar. Likewise if a day is added to the Master Calendar, all students in the school are expected to be in attendance that day unless the sub-calendar to which the student is assigned is modified to indicate an attendance exception for the newly added.

This configuration works very well for the following example:

- School has a two hour delay due to bad weather and morning KG classes are cancelled. This day is a regular attendance day for all students, but the morning KG attendance calendar can be modified to show this as a non-attending day for this group of students. Now their attendance will not include this day for this group of students. Now their attendance will not include this day in attendance calculations, but will include the day for all other students.

Each sub-calendar day is related to a Master Calendar day that shares the common date, and each sub-calendar day will designate if the non-attendance exception day is for the entire day or only for a portion of the day. If the exception day is only for a portion of the day, the sub-calendar day will indicate the periods of the day that the students assigned to that particular sub-calendar are expected to be in attendance. The arrival and departure time properties may be used in lieu of designating specific periods of the day for the schools where each day has an identical number of physical periods defined. Students on that sub-calendar (denoting arrival and departure times) are then expected to be in attendance the first full period of the day beginning after the arrival times specified. Each sub-calendar day must also indicate the attendance level to be counted (full or partial day of attendance) and the maximum absence that may be reported for absences for students on that day.

**Note:** *Sub-Calendar 1 (default calendar) is created automatically from the Master Calendar and cannot be deleted.*

**School Year Initialization and Sub-Calendars** – Sub-Calendars are copied from the current school year to the new school year as part of the School Year Initialization process. However, the Code, Name and Max Absence Level copy – the actual exceptions do not copy.

**Non-Attending Days** – Non-attending days are days when school is not in session. Any day students aren't physically in the building is considered a non-attending day.

**Summary – What are sub-calendars and why are they needed?**

- Sub-calendars are for students whose attendance differs from the Master Calendar.
- Kindergarten students who attend only in the morning would need a sub-calendar created since the Master Calendar is typically set up for full days.
- Sub-calendars ensure accurate attendance is calculated for students who attend part-time or not at all.
- Each school will have at least two calendars, the default and non-attending.
- The sub-calendars from the prior year were copied up in School Year Initializations. Before school starts, each sub-calendar will need to be edited and the exceptions to the Master Calendar entered.
- If a new attendance situation arises that doesn't fit into the current sub-calendars, a new sub-calendar will need created.

	Code	Name ^	Max Absence Level	Apply Percent of Time to Days Attended	Apply Percent of Time to Absences	Active
	am	am calendar	0.50			
	DFLT	Default Master Calendar	1.00			
	DNAC	non-attending	0			
	pm	pm calendar	0.50			

Show Active Only

This screen will be used to display and edit data pertaining to the attendance Sub-Calendars. The screen will display all active attendance Sub-Calendars defined for the school.

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Max Absence Level, Apply Percent of Time to Days Attended, Apply Percent of Time to Absences, Active) in ascending or descending order by clicking on the column header

– Cannot delete or edit this sub-calendar as this is the default calendar and is controlled by the Master Calendar. Additional sub-calendars that you create will not have locks.

-  – View Sub-Calendar Days - see Section 2B. Sub-Calendar Days
-  – View Sub-Calendar Students – see Section 2C. Sub-Calendar Students

# Add/Edit Sub-Calendar

StudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendar

## Sub-Calendar Maintenance

From this screen, you can display, add, change and delete data pertaining to Sub-Calendar.

### General

Code:  ⚡

Name:  ⚡

Max Absence Level:  ⚡

Apply Percent of Time to Days Attended:

Apply Percent of Time to Absences:

Is Active:

### EMIS

(Current Master Calendar Start Date: 8/19/2014)  
 Calendar Start Date:  ⚡

(Current Master Calendar Stop Date: 5/28/2015)  
 Calendar End Date:  ⚡

Attendance Pattern:  ⚡

All Grade Levels - \*\*:

Grade Levels:

To Be Reported:  Days  Hours

Hours Per Day:

Include in Attendance Calculation:

Date of Spring Administration - Math Test:  ⚡  
 (Save a blank date to report the Date of Spring Administration as "00000000".)

Not expected to be in attendance between the first and last day of school on every:

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Expected to be in attendance between the first and last day of school on every:

Saturday:

Sunday:

Report to EMIS:

## **General Section:**

**Code** (required) – Enter up to 4 characters alphanumeric Sub-Calendar Code that makes sense to you and your school. If you try to use an existing inactive Sub-Calendar Code, you will be prompted to reactivate this inactive Sub-Calendar Code if you wish.

**Name** (required) – Enter the name of the sub-calendar that makes sense to you and your school.

**Max Absence Level** (required) – Enter maximum Absence Level – Full Absence, Half Day Absence or Non-Attending. Half Day Absence is used for students on half-day calendars, so that they can be marked with a "Full Absence" that only counts towards .5 days for attendance totaling for EMIS reporting purposes. Non-Attending is used for non-attending calendars, so that any erroneous attendance records are not recorded as absence for this student.

**Apply Percent of Time to Days Attendance** (optional) – If this is checked, the student's FTE will be used in the attendance calculation. If not checked, then attendance will be reported as calculated based on the calendar and max absence level assigned to the calendar. This check box was formerly on the ATTUPDEMIS submission screen.

**Apply Percent of Time to Absences** (optional) - If this is checked, the student's FTE will be used in the attendance calculation. If not checked, then attendance will be reported as calculated based on the calendar and max absence level assigned to the calendar. This check box was formerly on the ATTUPDEMIS submission screen.

**Note:** *The **Apply Percent of Time to Absences** boxes should be checked for every sub-calendar except:*

**A.** Sub-calendars that have a mixture of full and half days.

Example: KG students who go all day on Monday and Wednesday and a half day on Friday. The school would need to set up a sub-calendar with a Max Absence Level of 1 for these KG students. Exceptions would need created to make all Tuesdays and Thursdays non-attending days and each Friday a school half day. For this type of calendar both of the Apply % of Time boxes would be unchecked.

**B.** Sub-calendars for students who are 50% of time but go three full days.

Example: KG students who are 50% of time but go three full days - all day on Monday, Wednesday and Friday. For this type of calendar both of the Apply % of Time boxes would be unchecked.

**C.** Sub-calendars for preschool itinerant students who attend one day.

Example: PS students who are 50% of time but attend one day per week. For this type of calendar both of the Apply % of Time boxes would be unchecked.

**Override Default Period Attendance Settings** (optional) – This option only appears for period attendance schools. If this option is checked, it opens up the Default Period Attendance Settings which are originally entered on the DASL Options – Attendance tab. For this sub-calendar only, you can then override the default period attendance settings. For a detailed explanation of these fields, see the *ProgressBook*

Student Information School Setup and Configuration Guide, section “1D-3. DASL Options, Period Attendance Configuration.”

<input checked="" type="checkbox"/> <b>Override Default Period Attendance Settings:</b>		
<b>Default Thresholds:</b>	<b>Half-Day Absence</b>	<b>Full-Day Absence</b>
Period Threshold:	6 <input type="text"/> ⬆️ ⚡	7 <input type="text"/> ⬆️ ⚡
Unexcused Period Threshold:	6 <input type="text"/> ⬆️ ⚡	7 <input type="text"/> ⬆️ ⚡
<b>Period to Daily Conversions:</b>	<b>Half-Day Absence</b>	<b>Full-Day Absence</b>
Default Daily Absence Type:	Excused <input type="text"/> ⬇️ ⚡	Excused <input type="text"/> ⬇️ ⚡
Default Daily Absence Type (Unexcused):	Unexcused <input type="text"/> ⬇️ ⚡	Unexcused <input type="text"/> ⬇️ ⚡
Default Absence Reason:	<input type="text"/> ⬇️	<input type="text"/> ⬇️
Default Absence Note:	<input type="text"/> ⬇️	<input type="text"/> ⬇️
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

**EMIS Section** (only visible when the year in context is 2014-2015 or later):

**Calendar Start Date** – By default, this field displays the first school day of the master calendar. You can update the date for this sub-calendar.

**Calendar End Date** – By default, this field displays the last school day of the master calendar. You can update the date for this sub-calendar.

**Attendance Pattern** – Select the attendance pattern of students tied to this sub-calendar. If all students on this sub-calendar attend the same days, leave the default selection of “\*\* - Not Applicable.”

**All Grade Levels - \*\*** – If this sub-calendar applies to all grade levels, select this check box. This value is then reported to EMIS as “\*\*.”

**Grade Levels** – If this sub-calendar applies only to specific grade levels, select the grade levels by moving them from the multi-select list on the left to the list on the right.

**To Be Reported** – Indicate if you are reporting calendar information by “Days” (default) or “Hours.” Districts that have a continuing contract defining the school year in days may use the “Days” option; all others should report “Hours.” (For more information, see ODE’s EMIS Manual).

**Hours Per Day** – Indicate the number of hours in your school day.

**Include in Attendance Calculation** – Indicate if you want to include this sub-calendar in attendance calculations.

**Date of Spring Administration – Math Test** – Enter or select the date on which you will administer the spring OAA math test. (To report the date as “00000000,” leave this field blank.)

**Not expected to be in attendance between the first and last day of school on every: section** – Select the check box beside any recurring weekday(s) on which students following this sub-calendar do not attend school (for example, Kindergarteners who do not attend on Fridays).

*Note: You still need to create exceptions on the sub-calendars.*

**Expected to be in attendance between the first and last day of school on every: section** – Select the check box beside any recurring weekend day(s) on which students following this sub-calendar attend school (for example, schools whose students attend every Saturday or Sunday of the school year).

**Report to EMIS** – If you need to report this sub-calendar information to EMIS as part of calendar reporting period “C,” keep this check box selected (which is the default setting).

## 2B. Sub-Calendar Days



**Navigation: Home – Management – School Administration – Scheduling Administration – Sub-Calendars**

Home » Management » School Administration » Scheduling Administration » Sub-Calendars Advanced Search | Feedback

### Sub-Calendar Maintenance

From this screen, you can display, add, change and delete data pertaining to Sub-Calendars.

	Code	Name ^	Max Absence Level	Apply Percent of Time to Days Attended	Apply Percent of Time to Absences	Active
	am	am calendar	0.50			
	DFLT	Default Master Calendar	1.00			
	DNAC	non-attending	0			
	pm	pm calendar	0.50			

Show Active Only

Click to view Sub-Calendar Days.

OR

**Navigation: Home – Management – School Administration – Scheduling Administration – Sub-Calendar Days**

Home » Management » School Administration » Scheduling Administration » Sub-Calendar Days

## Sub-Calendar Day Maintenance - non attending calendar

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

Create Exception(s) View Sub-Calendars

	Date ^	Rotation Day	Time	Day Type
	Aug 23, 2005	Tuesday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day
	Aug 24, 2005	Wednesday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day
	Aug 25, 2005	Thursday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day
	Aug 26, 2005	Friday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day
	Aug 27, 2005			Non Attending Day
	Aug 28, 2005			Non Attending Day
	May 20, 2006			Non Attending Day
	May 21, 2006			Non Attending Day
	May 22, 2006	Monday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day
	May 23, 2006	Tuesday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day
	May 24, 2006	Wednesday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day
	May 25, 2006	Thursday	1, 2, 3, 4, 5, 6, 7, 8, 9	Non Attending Day

Include Master Calendar Days

276 Records Displayed [Back To Top](#)

This screen has standard edit record and delete record controls.

**Sorting** – You may sort by any column (Date, Rotation Day, Time, Day Type) in ascending or descending order by clicking on the column header.

**Create Exception(s)**– Add exceptions to Master Calendar day on this specific Sub-Calendar.

**View Sub-Calendars** – Go back to Sub-Calendar Maintenance list.

– Cannot edit or delete this Sub-Calendar Day as it is controlled by the Master Calendar. Each day marked with a lock is the same day type as the Master Calendar. The lock means the sub-calendar day was not disassociated from the Master Calendar. Since the sub-calendar day wasn't disassociated, anytime you change a day on the Master Calendar, it automatically changes the day on the sub-calendar.

**Include Master Calendar Days** – If checked, will include Master Calendar Days on this specific Sub-Calendar listing.

### Add Sub-Calendar Exception Days

Click **Create Exception(s)** to Create Exceptions to the calendar and add a Sub-Calendar Exception Day. Exceptions are days that differ from what was set up originally when the Calendar Wizard was run during School Year Initialization.

## Single Day

StudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendar Days

### Sub-Calendar Day Maintenance - Default

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

#### General

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

**Arrival Time:**

**Departure Time:**

**Periods of the Day:**  1  2  3  4  5A  5B  6A  6B  7  8  9

**Day Type:**

**Single Day**  **Recurring Pattern**

**Date:**

#### EMIS

The EMIS Exception is used to override the Master Calendar EMIS Exception. The Sub-Calendar EMIS Exception will be used even if the Master Calendar EMIS Exception is updated.

Exception Type	Hours
There are no records to display	

## Recurring Pattern

StudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendar Days

**Sub-Calendar Day Maintenance - Default**

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

### General

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

**Arrival Time:**

**Departure Time:**

**Periods of the Day:**  1  2  3  4  5A  5B  6A  6B  7  8  9

**Day Type:**

Single Day  Recurring Pattern

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

**Begin:**  - **Until:**

**Days of the Week:**  STD

**Replace Existing Exceptions:**

### EMIS

The EMIS Exception is used to override the Master Calendar EMIS Exception. The Sub-Calendar EMIS Exception will be used even if the Master Calendar EMIS Exception is updated.

Exception Type	Hours
There are no records to display	

### General Section:

**Arrival Time** (optional) – The expected Arrival Time designated for students that day.

**Departure Time** (optional) – The expected Departure Time designated for students that day.

**Periods of the Day** (optional) – The physical Periods of the Day the student is expected to be in attendance. For AM only – choose the first 4 or 5 Periods of the Day. For PM only – choose the last 4 or 5 Periods of the Day. For Full Day, click all Periods. Please note that StudentInformation requires you to put in either an Arrival Time/Departure Time or mark Periods of the Day.

**Note:** *Either the arrival and departure time must be specified or the periods of the day must be specified.*

**Day Type** (optional) – Choose a Day Type from the drop-down list. If no selection is made, the Day Type will default to Use Master Calendar Actual Day Type.

**Single Day/Recurring Pattern** (required) – Choose either Single Day or Recurring Pattern.

**Date** (required – Single Day) – Choose the date that you wish to add to this specific Sub-Calendar. Must be a Master Calendar date.

## If Recurring Pattern is chosen

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

**Begin/Until** (required – Recurring Pattern) – Choose the date range that you wish to add to this specific Sub-Calendar. The Until date must be later than the Begin date.

**Days of the Week** (required – Recurring Pattern) – Choose the days of the week that you wish added to this specific Sub-Calendar within the date range specified.

**Replace Existing Days** (required – Recurring Pattern) – If checked, this recurring pattern will replace any existing days on this specific Sub-Calendar. Replace Existing Days should be checked if you would like the Master Calendar Days removed from a specific Sub-Calendar.

Click **Save** or **Save and New** to save this Sub-Calendar Exception day.

A confirmation message displays and asks if you want to add EMIS exception types. Click **Yes** to enable the **EMIS** section.

StudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendar Days

### Sub-Calendar Day Maintenance - Default

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

The Sub-Calendar Day Exception was saved successfully

Would you like to add EMIS Exception Types?

## EMIS Section:

### EMIS

The EMIS Exception is used to override the Master Calendar EMIS Exception. The Sub-Calendar EMIS Exception will be used even if the Master Calendar EMIS Exception is updated.

Exception Type	Hours
There are no records to display	

**Add New** – Add a new EMIS exception type.

## EMIS

The EMIS Exception is used to override the Master Calendar EMIS Exception. The Sub-Calendar EMIS Exception will be used even if the Master Calendar EMIS Exception is updated.

**Exception Types:** Weather Related Shortened Day ▾

**Hours:** 2.0

**Exception Types** – Select the EMIS-defined exception type category.

**Hours** – Indicate the number of hours attributed to the exception on the indicated day.

**Add** – Saves the EMIS exception type.

***Note:** The Sub-Calendar Date can now be deleted and edited from the Sub-Calendar as notated below. The Sub-Calendar days without locks are now disassociated from the Master Calendar. If the Master Calendar day type for this date is updated, it will not affect disassociated dates on Sub-Calendar.*

		Nov 13, 2014	Standard Day		School Day
		Nov 14, 2014	Standard Day	1, 2, 3, 4, 5A, 5B, 6A, 6B, 7, 8, 9	School Day
		Nov 15, 2014			Non Attending Day

## Edit Sub-Calendar Exception Days

StudentInformation > Management > School Administration > Scheduling Administration > Sub-Calendar Days

### Sub-Calendar Day Maintenance - Default

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

**General**

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

**Date:** 11/14/2014  
**Master Calendar Actual Day Type:** School Day  
**Arrival Time:**    
**Departure Time:**    
**Periods of the Day:**  1  2  3  4  5A  5B  6A  6B  7  8  9  
**Day Type:**

**EMIS**

The EMIS Exception is used to override the Master Calendar EMIS Exception. The Sub-Calendar EMIS Exception will be used even if the Master Calendar EMIS Exception is updated.

		Exception Type	Hours
✕	✎	Weather Related Shortened Day	2.00

**Date** – Displays the date selected for editing.

**Master Calendar Actual Day Type** – Displays the day type that the master calendar has selected for the displayed date.

(Other fields as described under “Add Sub-Calendar Exception Days.”)

## 2C. Sub-Calendar Students



Navigation: Home – Management – School Administration – Scheduling Administration – Sub-Calendar Students

Home » Management » School Administration » Scheduling Administration » Sub-Calendar Students Advanced Search | Feedback

### Sub-Calendar Maintenance

From this screen, you can display, add, change and delete data pertaining to Sub-Calendar Students.

	Code	Name ^	Max Absence Level	Apply Percent of Time to Days Attended	Apply Percent of Time to Absences	Active
	am	am calendar	0.50			
	DFLT	Default Master Calendar	1.00			
	DNAC	non-attending	0			
	pm	pm calendar	0.50			

Show Active Only

Click to view Sub-Calendar Students

OR

Navigation: Home – Management – School Administration – Scheduling Administration – Sub-Calendar Students

Home » Management » School Administration » Scheduling Administration » Sub-Calendar Students

### Sub-Calendar Students - am calendar

From this screen, you can view and delete Sub-Calendar students. Also, you can add the current student in context to the Sub-Calendar.

Effective Date:

	Name	Student Number	Grade Level
	Jones, Raymond (Ray)	48652419	09

**Effective Date** (required) – Enter date view Sub-Calendar Students, then click "Go" to refresh the list of students.

**View Sub-Calendar Students** – Go back to Sub-Calendar Maintenance list.

– Delete Student from this specific Sub-Calendar.

**Name** – Name of Student on this Sub-Calendar.

**Student Number** – Student Number of Student on this Sub-Calendar.

**Grade Level** – Grade Level of Student on this Sub-Calendar.

## 3. Calendar Dates Wizard



Navigation: Student Information – Management – School Administration – School Building Administration – Calendar Dates Wizard

The Calendar Dates Wizard enables you to modify the start and/or end dates for the school year and the stop dates for the schedule terms.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

### Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | **Configure and Confirm Boundary Changes** | Schedule Term Dates | Non-Attending Days | Master Calendar Review

To change the boundaries of your calendar, change the date(s) and click the next button.

Start Date: 08/17/2014    Change in start date is planned

End Date: 6/3/2015    Change in end date is planned

< Back    Next >    Cancel

## Modify School Year Start and End Dates

When you modify the start and/or end dates for the school calendar, StudentInformation also updates the course terms and teacher history on the course sections where the start or end dates match the modified calendar start or end date.

To modify the school year start and end dates:

1. On the Calendar Boundaries tab on the Calendar Dates Wizard screen, enter a new **start date** in the Start Date field to change the start date for the calendar.

**Note:** The *Change in start date is planned* check box is currently nonfunctional.

2. Enter or select a new **end date** in the End Date field to change the end date for the calendar.

**Note:** The *Change in end date is planned* check box is currently nonfunctional.

3. Click **Next**.

If school days are deleted from the calendar as a result of the change in the start or end date, the following message displays on the Configure and Confirm Boundary Changes tab.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

### Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | **Configure and Confirm Boundary Changes** | Schedule Term Dates | Non-Attending Days | Master Calendar Review

Please confirm and configure any changes to the start and end of your calendar.

**You are attempting to delete days from the end of the calendar. This will also delete all attendance records and EMIS Calendar Exceptions for these days.**

< Back    Next >    Cancel

4. If school days are added to the calendar as a result of the change in the start or end date, perform the following steps for each date added:
  - a. In the **Rotation Day Type** drop-down list, select the rotation day you want to apply to the date.
  - b. In the **School Day Type** drop-down list, select the school day type.  
The **Student Att. Day Count** and **Staff Att. Day Count** fields display the default attendance value for the school day type you selected.
  - c. Optional: To override the default student attendance value for the school day, modify the value in the **Student Att. Day Count** field.
  - d. Optional: To override the default staff attendance value for the school day, modify the value in the **Staff Att. Day Count** field.
  - e. In the **EMIS Exception Type** drop-down list, select the exception type required for EMIS reporting purposes to report this day.
  - f. In the **EMIS Exception Hours** field, enter the number of hours that apply to this exception type.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

### Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | Configure and Confirm Boundary Changes | **Schedule Term Dates** | Non-Attending Days | Master Calendar Review

Please confirm and configure any changes to the start and end of your calendar.

You are attempting to add days to the start of the calendar. Please configure and save.

Calendar Date	Day	Rotation Day Type	School Day Type	EMIS Exception Type	EMIS Exception Hours	Student Att. Day Count	Staff Att. Day Count
8/17/2014	Sunday		Non Attending Day	Staff Professional Day	5.0	0	0
8/18/2014	Monday	Standard Day	School Day	Planned Full Day	7.0	1.00	1.00

5. Click **Next**.  
If you are adding school days, StudentInformation adds the defined days to the calendar.
6. If you need to modify any of the schedule term stop dates as a result of the change in the school calendar, proceed to *“Modify Schedule Term Dates”*.
7. If you do not need to modify the schedule term stop dates, click **Next** on the Schedule Term Dates tab without changing any of the stop dates.

The Non-Attending Days tab displays listing the days in the school calendar that are set as days in which school is not in session.

**Note:** The Change in Non attending dates are Planned check box is currently nonfunctional.

8. Optional: To change the EMIS required reporting information for a specific non-attending date:
  - a. In the **Date** and **Thru** fields, enter the date whose EMIS information you want to report.
  - b. In the **Day Type** drop-down list, select the non-attending day type.
  - c. In the **EMIS Exception Type** drop-down list, select the exception type required for EMIS reporting purposes to report this non-attending day.
  - d. In the **Hours** field, enter the number of hours that apply to this exception type.
  - e. Click **Save**.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

### Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | Configure and Confirm Boundary Changes | Schedule Term Dates | **Non-Attending Days** | Master Calendar Review

This tab shows only the non-attending days in your calendar.  
Use the date controls to configure a single date or a range of dates.  
Click save to commit your changes.  
Note: To remove a date from the non attending list, choose the date and any attending day type and the date will be removed from the list

Please indicate the days of the week that students attend school. Only these days will be returned in the non-attending list.  
 Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Date:  Thru:  Day Type:  Note:   Change in Non attending dates are Planned

EMIS Exception Type:  Hours:

Date	Non-Attending Type	Note	EMIS Exceptions - Hours
Aug 17, 2014	Non Attending Day	Calendar Day added by extending the school year	• Staff Professional Day - 5.00
Aug 24, 2014	Non Attending Day		
Aug 31, 2014	Non Attending Day		
Sep 07, 2014	Non Attending Day		
Sep 14, 2014	Non Attending Day		
Sep 21, 2014	Non Attending Day		
Sep 28, 2014	Non Attending Day		
Oct 05, 2014	Non Attending Day		
Oct 12, 2014	Non Attending Day		
Oct 19, 2014	Non Attending Day		
Oct 26, 2014	Non Attending Day		
Nov 02, 2014	Non Attending Day		
Nov 09, 2014	Non Attending Day		

9. When you are finished viewing the non-attending days, click **Next**.  
The Master Calendar Review tab displays listing the adjusted master schedule with the new start and end dates for the school calendar.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

## Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | **Configure and Confirm Boundary Changes** | Schedule Term Dates | Non-Attending Days | Master Calendar Review

Date	Planned Event	Actual Event	Planned Rotation Day	Actual Rotation Day
Aug 18, 2014	First Day	First Day	Standard Day	Standard Day
Aug 18, 2014	Quarter 1 - First Day	Quarter 1 - First Day	Standard Day	Standard Day
Oct 24, 2014	Quarter 1 - Last Day	Quarter 1 - Last Day	Standard Day	Standard Day
Oct 27, 2014	Quarter 2 - First Day	Quarter 2 - First Day	Standard Day	Standard Day
Jan 16, 2015	Quarter 2 - Last Day	Quarter 2 - Last Day	Standard Day	Standard Day
Jan 19, 2015	Quarter 3 - First Day	Quarter 3 - First Day	Standard Day	Standard Day
Mar 20, 2015	Quarter 3 - Last Day	Quarter 3 - Last Day	Standard Day	Standard Day
Mar 23, 2015	Quarter 4 - First Day	Quarter 4 - First Day	Standard Day	Standard Day
Jun 03, 2015	Quarter 4 - Last Day	Quarter 4 - Last Day	Standard Day	Standard Day
Jun 03, 2015	Last Day	Last Day	Standard Day	Standard Day

< Back    Next >    Finish

10. When you are finished viewing the master schedule, click **Finish**.

## Modify Schedule Term Dates

When you modify the schedule term dates, StudentInformation also updates the course terms and teacher history on the course sections where the end dates match the modified schedule term stop date.

Additionally, when the stop date is modified for a term, the start date for the next sequential term is also adjusted in the teacher history for the course. For example, if the stop date for the second 9-week reporting period is 1/18/20xx and you set it to 1/20/20xx, then the start date for the next 9-week reporting period will be set to 1/23/20xx (the next school day after the stop date of the previous period).

To modify the schedule term dates:

1. On the Calendar Boundaries tab on the Calendar Dates Wizard screen, click **Next** without modifying the dates in the Start or End Dates fields.

The Schedule Term Dates tab displays with a grid that lists the reporting terms, the corresponding course terms and the term stop dates for the building in context.

**Note:** If you modified the school calendar start and/or end dates, the Schedule Terms tab displays after you click Next on the Configure and Confirm Boundary Changes tab.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

## Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | **Configure and Confirm Boundary Changes** | Schedule Term Dates | Non-Attending Days | Master Calendar Review

The Schedule Terms Dates tab allows users to edit the stop dates of each schedule term configured for the master calendar. Schedule Terms are units of the calendar where course terms may be scheduled. Schedule Term also make up the units of reporting terms. On this screen, Schedule Terms are listed from first to last in order of their stop dates. Some Schedule Terms have stop dates that are shared with course terms and/or reporting terms. Schedule Terms will not have course terms listed when they do not share a stop date. Schedule Terms will not have reporting terms listed when they do not share a stop date.

#	Reporting Terms	Course Terms	Stop Date
1.	Quarter 1		10/24/2014  
2.	Quarter 2		1/16/2015  
3.	Quarter 3		3/20/2015  
4.	Quarter 4		6/3/2015  

Changes to Stop Dates are Planned

< Back    Next >    Cancel

2. Enter or select the new **stop date** in the Stop Date field for the schedule term you want to change.

**Note:** The Change to Stop Dates are Planned check box is currently nonfunctional.

3. When you are finished modifying the stop dates for all of the terms you want to change, click **Next**.

The Non-Attending Days tab displays listing days in the school calendar that are set as days in which school is not in session.

**Note:** The Change in Non attending dates are Planned check box is currently nonfunctional.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

### Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | Configure and Confirm Boundary Changes | Schedule Term Dates | Non-Attending Days | **Master Calendar Review**

This tab shows only the non-attending days in your calendar.  
 Use the date controls to configure a single date or a range of dates.  
 Click save to commit your changes.  
 Note: To remove a date from the non attending list, choose the date and any attending day type and the date will be removed from the list

Please indicate the days of the week that students attend school. Only these days will be returned in the non-attending list.  
 Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Date:  Thru:  Day Type:  Note:   Change in Non attending dates are Planned

EMIS Exception Type:  Hours:

Date	Non-Attending Type	Note	EMIS Exceptions - Hours
Aug 17, 2014	Non Attending Day	Calendar Day added by extending the school year	• Staff Professional Day - 5.00
Aug 24, 2014	Non Attending Day		
Aug 31, 2014	Non Attending Day		
Sep 07, 2014	Non Attending Day		
Sep 14, 2014	Non Attending Day		
Sep 21, 2014	Non Attending Day		
Sep 28, 2014	Non Attending Day		
Oct 05, 2014	Non Attending Day		
Oct 12, 2014	Non Attending Day		
Oct 19, 2014	Non Attending Day		
Oct 26, 2014	Non Attending Day		
Nov 02, 2014	Non Attending Day		
Nov 09, 2014	Non Attending Day		

4. When you are finished viewing the non-attending days, click **Next**.

The Master Calendar Review tab displays listing the adjusted master schedule, which includes the new stop date for the term you changed and the new start date for the following term.

StudentInformation > Management > School Administration > School Building Administration > Calendar Dates Wizard

### Calendar Dates Wizard

From this screen, you can modify master calendar dates using a step-by-step wizard approach.

Calendar Boundaries | Configure and Confirm Boundary Changes | Schedule Term Dates | Non-Attending Days | **Master Calendar Review**

Date	Planned Event	Actual Event	Planned Rotation Day	Actual Rotation Day
Aug 18, 2014	First Day	First Day	Standard Day	Standard Day
Aug 18, 2014	Quarter 1 - First Day	Quarter 1 - First Day	Standard Day	Standard Day
Oct 24, 2014	Quarter 1 - Last Day	Quarter 1 - Last Day	Standard Day	Standard Day
Oct 27, 2014	Quarter 2 - First Day	Quarter 2 - First Day	Standard Day	Standard Day
Jan 16, 2015	Quarter 2 - Last Day	Quarter 2 - Last Day	Standard Day	Standard Day
Jan 19, 2015	Quarter 3 - First Day	Quarter 3 - First Day	Standard Day	Standard Day
Mar 20, 2015	Quarter 3 - Last Day	Quarter 3 - Last Day	Standard Day	Standard Day
Mar 23, 2015	Quarter 4 - First Day	Quarter 4 - First Day	Standard Day	Standard Day
Jun 03, 2015	Quarter 4 - Last Day	Quarter 4 - Last Day	Standard Day	Standard Day
Jun 03, 2015	Last Day	Last Day	Standard Day	Standard Day

< Back   Next >   Finish

5. When you are finished viewing the master schedule, click **Finish**.

## 4. Student Attendance Records

There are several methods that may be used to enter attendance records for students. When an attendance record is entered for a student, the date is checked against the calendar specified for the student to ensure that it is a valid date on the calendar. If it is not a valid date, the attendance record may not be entered. If the date on the calendar is defined as a half-day, then only a half-day of absence may be entered with the proper AM/PM designation.

### 4A. Attendance Fast Entry/Update



#### Navigation: Home – SIS – Attendance – Attendance Fast Entry/Update

The Attendance Fast Entry screen can be used to quickly add an absence for a student or a group of students using default absence types, reasons and notes. This method can be used by the office personnel when parents call in to report a student's absence before school starts in the morning. This can also be used for adding absences for a group of students who would have the same absence type, reason, and note – i.e. a field trip.

The screenshot shows the 'Attendance Fast Entry/Update' web application interface. At the top, there is a navigation breadcrumb: 'Home » SIS » Attendance » Attendance Fast Entry/Update'. Below this is a blue header bar with the title 'Attendance Fast Entry/Update' and a sub-header 'From this screen, you can quickly enter absence events for groups of students.' The main content area is divided into two sections: '[Hide Event Details]' and '[Hide Student Criteria]'. The '[Hide Event Details]' section contains several input fields: 'Absence Event Type' (set to 'Daily'), 'Date' (set to '2/10/2009'), 'Absence Type Code' (set to 'A - ABSENT'), 'Absence Level' (set to 'Full Absence'), 'Absence Reason', 'Absence Note', 'Time In', and 'Time Out'. There is also a 'Comment' text area and a 'Show Defaults' button. The '[Hide Student Criteria]' section contains search criteria: 'Search Mode' (radio buttons for 'Search for students' and 'Enter student Ids'), 'Grade', 'Teacher', 'Course Section', 'District of Residence IRN', 'Membership Group', 'Membership', 'Homeroom', 'Attending Building IRN', and 'Home School IRN'. There are also checkboxes for 'Include students with absences' and 'Vary Absence Types by Student', and a 'Preview Students' button.

**Hide Event Details/Show Event Details** – Toggles between hiding and showing event details (top half of screen).

**Hide Student Criteria/Show Student Criteria** – Toggles between hiding and showing student search criteria (bottom half of screen)

## Event Details

Home » SIS » Attendance » Attendance Fast Entry/Update

### Attendance Fast Entry/Update

From this screen, you can quickly enter absence events for groups of students.

[Hide Event Details]

**Absence Event Type:** Daily  
**Date:** 11/30/2006  
**Absence Type Code:** A - Absent  
**Time In:**  
**Comment:**

**Absence Level:** Full Absence  
**Absence Reason:**  
**Absence Note:**  
**Time Out:**

Retain Values  Show Defaults

Home » SIS » Attendance » Attendance Fast Entry/Update

### Attendance Fast Entry/Update

From this screen, you can quickly enter absence events for groups of students.

[Hide Event Details]

**Absence Event Type:** Period  
**Date:** 11/30/2006  
**Absence Type Code:** A - ABSENT  
**Absence Reason:**  
**Absence Note:**

**Periods Present:**  
 1  
 2  
 3  
 3A  
 4  
 5

**Periods Absent:**

Retain Values  Show Defaults

**Absence Event Type** (required) – Choose Period or Daily. The screen will refresh and present only the fields that need to be entered based on the Absence Event Type. This field will be disabled if the School is using a Daily Attendance configuration.

**Date** (required) – Enter the date of the absence event. Will default to today's date if an attendance day or the most recent attendance day per the calendar.

**Absence Type Code** (required) – Choose the correct Absence Type Code from the drop down list – defined in Attendance Administration

**Absence Level** (required, Daily only) – Select Full Absence, AM Absence, PM Absence, or Non-Absence.

**Absence Reason** (optional) – Select an Absence Reason from the drop-down box. This list is populated with items specified on the Absence Reason Maintenance screen.



**Important:** If Period is selected as the Absence Event Type, this field will only display if the “Collect Reasons” check-box is checked in the DASL Options screen, Attendance Tab, Period Attendance option.



**Absence Note** (optional) – Select an Absence Note from the drop-down box. This list is populated with items specified on the Absence Note Maintenance screen.

**Important: If Period is selected as the Absence Event Type, this field will only display if the “Collect Notes” check-box is checked in the DASL Options screen, Attendance Tab, Period Attendance option.**

**Time In** (optional, Daily only) – Enter the time that the student arrived.

**Time Out** (optional, Daily only) – Enter the time that the student left.

**Periods Present / Periods Absent** (required, Period only) – Choose the Periods of the absence event by clicking on a period in the Periods Present box to highlight, then clicking the right single arrow between the Periods Present / Periods Absent boxes to move the period to the Periods Absent box. Highlighting a period in the Periods Absent box and clicking the left single arrow will return the period to the Periods Present box. Clicking the double arrows will move all items to the appropriate Period box.

**Comment** (optional) – Enter a comment concerning this Absence Event

**Retain Values** – Check this box to keep entered values for all Event Details fields (except Reason and Note for Period events). These values will be retained for the remainder of your current StudentInformation session.

**Show Defaults** – Erase any data entered in this section and replace with default values.

## Search Mode – Enter Student IDs

[Hide Student Criteria]

Search Mode:  Search for students  Enter student Ids

Student ID: (comma separated)

Include students with absences

Vary Absence Types by Student

**Student ID** (required) – Enter student Ids separated by commas.

## Search Mode – Search for Students

[Hide Student Criteria]

Search Mode:  Search for students  Enter student Ids

Grade:

Membership Group:

Course Section:   ...

District of Residence IRN:

Include students with absences

Teacher:

Membership:

Homeroom:

Attending/Home IRN:

Vary Absence Types by Student

**Grade** (optional) – Search for students in a specific Grade – choose from drop-down list.

**Teacher** (optional) – Search for students that have a specific Teacher – choose from drop-down list.

**Membership Group** (optional) – Search for students in a specific Membership Group – choose from drop-down list.

**Membership** (optional) – Search for students in a specific Membership – choose from drop-down list.

**Homeroom** (optional) – Search for students in a specific Homeroom – choose from drop-down list

**Course Section** (optional) – Search for students in a specific Course Section (click the  icon to open the Course Selection Wizard).

**District of Residence IRN** (optional) – Search for students living in a specific District. The  icon links to the Ohio Department of Education’s IRN Search screen.

**Attending/Home IRN** (optional) – Search for students with a particular Attending/Home school. The  icon links to the Ohio Department of Education’s IRN Search screen.

**Include students with absences** – Check this box to include students who already have absence events in the list. This can be used to update student absences. This will also display existing absence types and levels in the list.

Vary Absence Types by Student  – When this check box is selected, you can enter a separate Absence Type for each student. Each student’s Absence Type will default to the Absence Type selected in the Event Details. If this is not checked, all students will default to the Absence Type selected in the Event Details.

**Preview Students** – View students that match the current search criteria.

[\[Hide Student Preview\]](#)

Save

<input type="checkbox"/>	Student Name	Student Number	Grade Level	Absence Type
<input type="checkbox"/>	Banana, Hannah	48652258	09	E - EXCUSED
<input type="checkbox"/>	CONTRARY, MARY M.	00005001	09	E - EXCUSED
<input type="checkbox"/>	Contrary, Jesse	48652281	09	E - EXCUSED
<input type="checkbox"/>	EYE, CORY ROBERT	00006001	09	E - EXCUSED
<input type="checkbox"/>	EYE, PRIVA	00122445	09	E - EXCUSED

Save

[\[Hide Student Preview\]](#) / [\[Show Student Preview\]](#) – toggle between hiding and showing the students selected by the search criteria.

– If checked, will add this Absence Event to the student records selected. Uncheck any student who should not have this Absence Event added. Checking the check box to the left of the Student Name column header will check all individual students’ check boxes.

**Save** – Update the student records with these Absence Events.

If you did not have Vary Absence Types by Student checked, the Student Preview will look like this instead:

[Hide Student Preview]

Save

<input type="checkbox"/>	Student Name	Student Number	Grade Level
<input type="checkbox"/>	Banana, Hannah	48652258	09
<input type="checkbox"/>	CONTRARY, MARY M.	00005001	09
<input type="checkbox"/>	Contrary, Jesse	48652281	09
<input type="checkbox"/>	EYE, CORY ROBERT	00006001	09
<input type="checkbox"/>	EYE, PRIVA	00122445	09

Save

In either case, you will receive a confirmation message when the Absence Entries have been recorded.

The absence event was successfully created for the student(s).

If "Include students with absences" was checked, existing events will be displayed.

[Hide Student Preview]

Save

<input type="checkbox"/>	Student Name	Student Number	Grade Level	Absence Type	Absence Level
<input type="checkbox"/>	Banana, Hannah	48652258	09	E - EXCUSED	1.00
<input type="checkbox"/>	CONTRARY, MARY M.	00005001	09		
<input type="checkbox"/>	Contrary, Jesse	48652281	09		
<input type="checkbox"/>	EYE, CORY ROBERT	00006001	09		
<input type="checkbox"/>	EYE, PRIVA	00122445	09		

Save

 – View Details of this Absence Event

<input type="checkbox"/>	Student Name	Student Number	Grade Level	Absence Type	Absence Level
<input type="checkbox"/>	CONTRARY, JASON WILLIAM	00007001	10		
<input type="checkbox"/>	Entby, Theresa	48652304	10	E - EXCUSED	1.00
<input type="checkbox"/>	LEE, HARPER (LEE)	00001224	10		
<input type="checkbox"/>	PERRY, RICHARD MATTHE (RICH)	00007002	10		
<input type="checkbox"/>	RING, NICOLE SUZANNE	00007003	10		
<input type="checkbox"/>	SARGENT, LEANN JEAN	00007004	10		
<input type="checkbox"/>	WILLIAMSON, RYAN SETH	00007005	10		

**Absence Type:** E - EXCUSED  
**Absence Reason:** Appt - APPT  
**Absence Note:** M - MED EXCUSE  
**Absence Interval:** Full Absence  
**Time In:**  
**Time Out:**  
**Comments:**

# 4B. Attendance Fast Delete



Navigation: Home – SIS – Attendance – Attendance Fast Delete

The Attendance Fast Delete screen can be used to quickly remove absences for a student or a group of students.

Home » SIS » Attendance » Attendance Fast Delete Advanced Search

### Attendance Fast Delete

From this screen, you can quickly delete absence events for groups of students.

[Hide Student Criteria]

Search Mode:  Search for students  Enter student Ids

Grade:	<input type="text"/>	Membership Group:	<input type="text"/>
Teacher:	<input type="text"/>	Membership:	<input type="text"/>
Course Section:	<input type="text"/> <input type="text"/> <input type="button" value="..."/>	Homeroom:	<input type="text"/>
District of Residence IRN:	<input type="text"/>	Attending Building IRN:	<input type="text"/>
		Home School IRN:	<input type="text"/>

Absence Event Type:

Date:

Absence Type Code:

Absence Level:

Absence Interval:

Absence Reason:

Absence Note:

Home » SIS » Attendance » Attendance Fast Delete

### Attendance Fast Delete

From this screen, you can quickly delete absence events for groups of students.

[Hide Student Criteria]

Search Mode:  Search for students  Enter student Ids

Student ID:  
(comma separated)

Absence Event Type:

Date:

Absence Type Code:

Absence Level:

Absence Interval:

Absence Reason:

Absence Note:

**Hide Student Criteria/Show Student Criteria**– Toggle between hiding and showing student search criteria.

**Search Mode** (required) – Choose “Search for students” or "Enter student Ids". Displayed criteria fields will be different depending which mode is selected. The fields listed below display for "Search for students" mode unless noted otherwise.

**Student ID** (required, "Enter student Ids" search mode only) – Enter student IDs separated by commas.

**Grade** (optional) – Search for Absence Events for students in a specific Grade – choose from drop-down list.

**Teacher** (optional) – Search for Absence Events for students that have a specific Teacher – choose from drop-down list.

**Membership Group** (optional) – Search for Absence Events for students in a specific Membership Group – choose from drop-down list.

**Membership** (optional) – Search for Absence Events for students in a specific Membership – choose from drop-down list.

**Course Section** (optional) – Search for Absence Events for students in a specific Course Section – search using .

**Homeroom** (optional) – Search for Absence Events for students in a specific Homeroom – choose from drop-down list.

**District of Residence IRN** (optional) – Search for Absence Events for students living in a specific District. The  links to the Ohio Department of Education’s IRN Search screen.

**Attending/Home IRN** (optional) – Search for Absence Events for students with a particular Attending/Home school. The  links to the Ohio Department of Education’s IRN Search screen.

#### **Fields Displayed for Both Search Modes:**

**Absence Event Type** – Select Daily or Period from the drop-down menu to view/delete Absence Events of that type. This field will be disabled if the School is using a Daily Attendance configuration.

**Date** (required) – Enter a date for the Absence Events to view/delete.

**Absence Type Code** (optional) – Select an absence type code to only view/delete Absence Events of that type.

**Absence Level** (optional) – Select an absence level (Full Absence, Non-Absence) to only view/delete Absence Events of that level.

**Absence Interval** (optional) – Select an absence interval (AM, PM) to only view/delete Absence Events in that interval.

**Absence Reason** (optional) – Select an absence reason to only view/delete Absence Events with that reason.

**Absence Note** (optional) – Select an absence note to only view/delete Absence Events with that note.

Home » SIS » Attendance » Attendance Fast Delete Advanced Search | Feedback

### Attendance Fast Delete

From this screen, you can quickly delete absence events for groups of students.

[Hide Student Criteria]

Search Mode:  Search for students  Enter student Ids

Grade:  Membership Group:

Teacher:  Membership:

Course Section:  Homeroom:

District of Residence IRN:  Attending Building IRN:

Home School IRN:

Absence Event Type:  Daily

Date:  11/10/2008

Absence Type Code:

Absence Level:

Absence Interval:

Absence Reason:

Absence Note:

[Hide Student Preview]

<input type="checkbox"/>	Student Name	Student Number	Date	Grade Level	Absence Type	Absence Reason	Absence Note	Comments
<input type="checkbox"/>	Student65563, FREDERICK	00024317	Nov 10, 2008	10	U - UNEXCUSED	U - UNEXCUSED		Expelled
<input type="checkbox"/>	Student66389, BILLIE JEAN	00010000	Nov 10, 2008	09	U - UNEXCUSED	U - UNEXCUSED		waiting for withdrawal papers

**Hide Student Preview/Show Student Preview** – toggle between hiding and showing the students selected by the search criteria.

**Delete Event**  – If checked, will delete this Absence Event from the student records. Checking the box at the top of the column checks all boxes in the column for all Absence Events listed.

**Delete** – Delete the selected Absence Events. You will see a confirmation screen.

**Note:** You cannot undo this process once confirmed.

Home » SIS » Attendance » Attendance Fast Delete

### Attendance Fast Delete

From this screen, you can quickly delete absence events for groups of students.

**Are you sure you want to delete the 2 selected absences? This action cannot be undone!**  
Clicking Ok will permanently delete the selected absences.

**Ok** – Process the absence event deletion.

**Note:** You cannot undo this process once confirmed.

**Cancel** – Do not process the absence event deletion.

Once deleted, you will return to the Attendance Fast Delete screen, and see a confirmation message and the student preview missing the events you deleted.

**The absences were successfully deleted.**



## 4C. Daily Absence List – Daily Attendance

**Navigation: Home – SIS – Attendance – Daily Absence List – Daily Attendance tab**

The Daily Absence List (Daily Attendance tab) will display a list of all students absent for a selected day.

Home » SIS » Attendance » Daily Absence List Advanced Search | Feedback | Mgmt | Help | Version | Print

**Daily Absence List**  
From this screen, you can view all students absent for a selected day or period.

From Date: 3/1/2010 To Date: 3/1/2010

Show Home School

Daily Attendance

[\[Show Attendance Statistics\]](#)

73 Records Found All Rows

	Name	ID	Absence	Date	HR	GR	Type ^	Reason	Note	Comments	In	Out	Home Phone	Home School
<input type="checkbox"/>	Student91048, VICTOR	00013492	PM Absence	03/01/2010	09	E - EXCUSED	I - ILLNESS	Y - STUD CALL				09:01 AM	(555) 555-5555	
<input type="checkbox"/>	Student91052, HAYLEY	00013490	Full Absence	03/01/2010	09	E - EXCUSED	I - ILLNESS	P - PRNT CALL					(555) 555-5555	
<input type="checkbox"/>	Student91060, ADRIENNE	00013486	Full Absence	03/01/2010	09	E - EXCUSED	I - ILLNESS	P - PRNT CALL					(555) 555-5555	
<input type="checkbox"/>	Student91088, ALEXANDER	00013472	PM Absence	03/01/2010	09	E - EXCUSED	I - ILLNESS	Y - STUD CALL				09:10 AM	(555) 555-5555	

**From Date / To Date (required)** – Enter the date or range of dates for which to display absence records. Both fields will default to today’s date.

**Include Absences Outside of Admission Dates** – Check if you would like the grid to contain student absences outside of student admission dates.

**Go** – View the Daily Absence List.

**Show Home School** – Check this box to include the Home School in the display grid.

**Show Attendance Statistics/Hide Attendance Statistics** – Toggle the display of Attendance Statistics for the selected date or date range. Attendance statistics include totals by absence level, absence type, grade level, absence reason and absence note.

[\[Hide Attendance Statistics\]](#)

Absence Event	Count	Absence Type	Count	Grade Level	Count	Reason	Count	Note	Count
Full	49	OTHER	1	09	5	No Reason	13	No Note	13
AM	0	EXCUSED	49	10	6	ILL	37	PRNT CALL	37
PM	0			11	6				
Period To Half	0			12	33				
Non-Absence	1								
<b>Total</b>	<b>50</b>								

**50 Records Found**  Rows – Displays how many total records are included, and allows you to select how many records display per screen. Use the controls on the left side of the screen to navigate between screens of records. The default is set to All Rows.

**Sorting** – You may sort by several columns (Name, ID, Absence, Date, HR, GR, Type, Reason and Note) in ascending or descending order by clicking on the column header

**Name** – Name of student who was absent or tardy on selected date.

**ID** – Student Number of student who was absent or tardy on selected date.

**Absence** – Specifies Full Day, AM Absence, PM Absence, or Non-Absence.

**Date** – Specifies the date of the absence event.

**HR** – Student’s Homeroom on selected date.

**GR** – Grade Level of student.

**Type** – Absence Type of student’s absence on selected date.

**Reason** – Absence Reasons of student’s absence on selected date.

**Note** – Note of student’s absence on selected date.

**Comments** – Displays any absence comments entered during absence entry for this student’s absence.

**Time In** – Displays time of arrival for partial day absences.

**Time Out** – Displays time of departure for partial day absences.

**Home Phone** – Displays Phone Number on file for student.

 – Edit this Absence record (see section 4A. Student’s School Absences – Daily for more information on editing absence records).

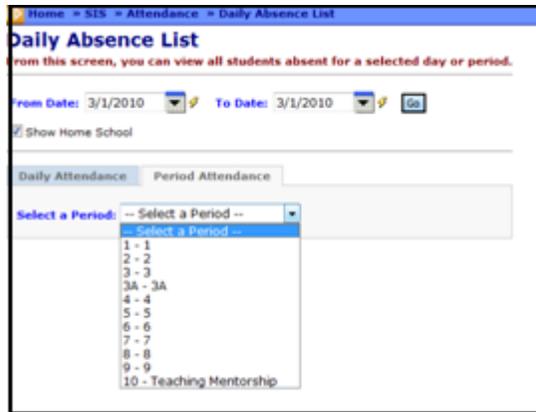
– Check these boxes beside any records you wish to remove (or check the box at the top of the column to check all), and then click the **Delete Selected** button to remove those absence records.

## 4D. Daily Absence List – Period Attendance



**Navigation: Home – SIS – Attendance – Daily Absence List – Period Attendance tab**

The Daily Absence List (Period Attendance tab) will display a list of all students absent for a selected day and period. This option is only available for use with schools configured to do period attendance.



**From Date/To Date** (required) – Enter a date or range of dates for which to view absence records. This defaults to today's date.

**Select a Period** – Choose the Period for which you wish to view the Daily Absence List.  
– View the Daily Absence List

**Show Home School** – Check this box to include the Home School in the display grid.

**Show Attendance Statistics/Hide Attendance Statistics** – Toggle the display of Attendance Statistics for the selected date or date range. Attendance statistics include total students listed, total absence events, and totals by absence type.

[Hide Attendance Statistics]

Absences	Count	Absence Type	Count
Students	623	ABSENT	138
Period Events	1050	TARDY	2
		PARENT/CP	44
		EXCUSED	394
		SCHOOL REL	393
		UNEXCUSED	79

**50 Records Found** 25 Rows – Displays how many total records are included, and allows you to select how many records display per screen. Use the controls on the left side of the screen to navigate between screens of records. The default is set to All Rows.

Home » SIS » Attendance » Daily Absence List Advanced Search | Feedback | Mgmt | Help | Version | Print

**Daily Absence List**  
From this screen, you can view all students absent for a selected day or period.

From Date: 3/1/2010 To Date: 3/1/2010

Show Home School

Daily Attendance

Select a Period: 1 - 1  
[\[Show Attendance Statistics\]](#)

272 Records Found All Rows

	Name	ID	Teacher	CRSE/SEC	Date	GR	Type ^	Comment	Home School
<input type="checkbox"/>	Student31988, Seth	00838095	Teacher1037 Janet	349 - 1	03/01/2010	11	A - Absent		High School High School
<input type="checkbox"/>	Student32021, Taylor	00838068	Teacher542 Heather	367 - 1	03/01/2010	11	A - Absent		High School
<input type="checkbox"/>	Student32111, Valorie	00837991	Teacher530 Gera	261 - 1	03/01/2010	11	A - Absent		High School

**Include Absences Outside of Admission Dates** – Check if you would like the grid to contain student absences outside of student admission dates

**Sorting** – You may sort by any column (Name, ID, Teacher, CRSE/SEC, Date, GR, Type, Comment) in ascending or descending order by clicking on the column header.

**Name** – Name of student.

**ID** – Student Number of student.

**Teacher** – Teacher of course section student attends at the selected period.

**CRSE/SEC** – Course section student attends at the selected period.

**Date** – Date of absence event.

**GR** – Student's grade level.

**Type** – Absence Type of absence event.

**Comment** – Comments related to period absence for student.

 – Edit this Absence record (see section 4B. Student's School Absences – Period for more information on editing absence records).

– Check these boxes beside any records you wish to remove (or check the box at the top of the column to check all), then click the **Delete Selected** button to remove those absence records.

## 4E. Daily Attendance Completion List



---

**Navigation: Home – SIS – Attendance – Daily Attendance Completion List**

The Daily Attendance Completion List will display whether homeroom teachers have submitted their daily attendance. This screen is typically used in the morning by the attendance secretary.

Home » SIS » Attendance » Daily Attendance Completion List

## Daily Attendance Completion List

From this screen, you can view attendance collection completion.

Date: 11/14/2005

Collection: Adm. Homeroom

Teacher	Location	Course	Submitted
AUSTIN, SHARRI	A104	Hr	No
BERRY, DONALD	A103	Hr	No
CASTLE, RONALD	A106	Hr	No
CLARK, SUSAN	A108	Hr	No
COUSINS, DAVID	A105	Hr	No
LAYMAN, LAURA	A110	Hr	No
WALTERS, LINDA	A107	Hr	No
WEBBER, MICHAEL	A109	Hr	Yes

**Date** – Date to view Daily Completion Attendance Completion List – will default to today’s date.

**Collection** – Displays the type of Daily Attendance Collection.

**Teacher** – Displays the homeroom teacher.

**Location** – Displays the room or location of the homeroom teacher.

**Course** – Displays the Course ID.

**Submitted** – Has Attendance been submitted – Yes or No. Notice that Submitted – Yes will be displayed in white and at the end of the list. Submitted – No will be displayed in red and at the top of the list.

## 4F. Period Attendance Completion List



### Navigation: Home – SIS – Attendance – Period Attendance Completion List

The Period Attendance Completion List will display whether homeroom teachers have submitted their period attendance. This screen is typically used by the attendance secretary.

Home » SIS » Attendance » Period Attendance Completion List

## Period Attendance Completion List

From this screen, you can view period attendance collection completion.

Date: 5/24/2010   Period: 1 - 1  

Teacher	Location	Course Section	Submitted
[redacted], Ryan	145 - 145	227 #1	No
[redacted], Cindy	111 - 111	693 #11	No
[redacted], Martie	- Multiple -	- Multiple -	No

**Date** – Date to view Period Completion Attendance Completion List – will default to today's date.

**Period** – Displays the period that the Period Attendance was collected.

**Teacher** – Displays the homeroom teacher.

**Location** – Displays the room or location of the homeroom teacher.

**Course Section** – Displays the course section.

**Submitted** – Has Attendance been submitted – Yes or No. Notice that Submitted – Yes will be displayed in white and at the end of the list. Submitted – No will be displayed in red and at the top of the list.

[redacted], MARGRET	- Multiple -	- Multiple -	No
ZZZZ, ZZZZ	- Multiple -	- Multiple -	Yes

8 Records Displayed [Back To Top](#)

**Note:** If the School is using a Daily Attendance configuration, the following message will display upon accessing this screen:

Home » SIS » Attendance » Period Attendance Completion List

## Period Attendance Completion List

From this screen, you can view period attendance collection completion.

School is not configured to take period attendance

## 4G. Lunch Counts



### Navigation: Home – SIS – Attendance – Lunch Counts

The Lunch Counts screen will display each teacher's lunch count and a total lunch count by building. This screen is typically used in the morning by the attendance secretary or by cafeteria personnel.

Home » SIS » Attendance » Lunch Counts				
Daily Lunch Counts				
Date:	2/24/2005			Go
Staff Name	Course	Tray	Salad	Salad Names
Miller, Mrs. R.	74			
Sautbine, Mrs. B	75			
Anderson, Mrs. C.	62	18	0	
Fortener, Mrs. J.	56	8		
Jutte, Mrs. K. S	58	5	1	small -Jutte
Kaup, Mrs. B.	61	17		
Keller, Mrs. C.	TA13	2	1	Keller
Leugers, Mr. N.	89	20		
McClung, Mrs. D.	88	11		
McClurg, Mrs. J.	SH13	19		
Monroe, Mrs. B.J.	78	5		
Patch, Mr. B.	82	15	1	Brian Patch
Perkeybile, Mrs. C.	87	13		
Ranly, Mrs. C	61	22		
Schmitz, Mrs. M.	PR/SS	10		
Vaughn, Mr. Aaron	73	15		
<b>TOTAL</b>		<b>180</b>	<b>3</b>	<b>0</b>

**Date** – Date to view Daily Lunch Counts – will default to today’s date.

**Staff Name** – Staff submitting their Lunch Count through Daily Attendance or Period Attendance.

**Course** – Staff’s Course Number for which Lunch Count was taken.

**Tray, Salad, Salad Names** – Lunch Type columns defined by building. See 1F Lunch Type for more information defining Lunch Types. These values are entered by the Staff using Daily Attendance or Period Attendance.

**Totals** – Numeric values entered in the Lunch Type columns will be totaled.

## 4H. Attendance Letter History



### Navigation: Home – SIS – Attendance – Letter History

The Attendance Letter History screen displays a list of all attendance letters generated within a specified range of dates that meet the selected criteria. From this screen, you can also hide letters (which will cause the student to receive another letter for the same absence dates, if the student still matches the criteria for a letter).

Home » SIS » Attendance » Letter History

## Attendance Letter History

From this screen, you can view the history of attendance letter generation for a set of search criteria.

**Start Date:** 8/22/2006     
**End Date:** 8/13/2007     
**Rule Type:**    
**Letter Rule:**    
**Grade Level:**

<input type="checkbox"/>	<b>Student</b> ^	<b>Student Number</b>	<b>Grade</b>	<b>Date Generated</b>	<b>Rule Code</b>	<b>Threshold Broken</b>	<b>Violation Date</b>	<b>Active</b>
<input type="checkbox"/>	Banana, Hannah	48652258	12	Aug 13, 2007	5-15	5	Jan 17, 2007	<input type="button" value="💡"/>

Show Active Only

**Start Date / End Date** (required) – Enter a range of dates to view all letters that meet the other filter criteria that were generated within the date range.

**Rule Type** (optional) – Select a Rule Type (Daily Interval, Daily Cumulative, Period Interval, Period Cumulative) to only view letters for students violating that Rule Type.

**Letter Rule** (optional) – Select a Letter Rule to only view letters for students violating that Rule.

**Grade Level** (optional) – Select a Grade Level to only view letters for students in that grade level.

**Search** – Refresh the letter list after changing date range or filter criteria.

– Check this box (or check the box at the top of the column to check all boxes), and then click the **Hide/Unhide Selected Records** button to hide the selected letters. If a student has a hidden letter, they will receive another letter for the same violation if absence letters are later run again. If viewing Inactive (hidden) Records, check this box and click the button to un-hide the selected letters, making the student no longer able to receive additional letters for the same violation.

**Sorting** – You may sort by any column (Student, Student Number, Grade, Date Generated, Rule Code, Threshold Broken, Violation Date, Active) in ascending or descending order by clicking on the column header.

**Threshold Broken** – This indicates which Rule Criterion the student broke to receive the letter. Note that if a student broke multiple thresholds, only the threshold with the highest Priority will display.

**Violation Date** – This indicates the date on which the student received the absence event that broke the Threshold.

Show Active Only – Un-check this box to view inactive/hidden attendance letters. You must uncheck this box if you wish to unhide letters.

Hiding letters will result in a confirmation screen:

Home » SIS » Attendance » Letter History Advanced Search | Feedback | Mgmt | Help | Print

## Attendance Letter History

From this screen, you can view the history of attendance letter generation for a set of search criteria.

**Are you sure you want to hide/unhide the selected attendance letter history record?**

Clicking Ok will hide or unhide the selected attendance letter history records. Hiding a record may allow subsequent attendance letters to be generated for this student that would otherwise be suppressed. Unhiding a record may cause letters to be suppressed. You may view hidden history records by deselecting 'Show Active Only' on this screen. These records can be reactivated by selecting the hidden record and clicking 'Hide/Unhide Selected Records'.

You will need to uncheck the Show Active Only check box to view and/or un-Hide inactive letters.

Home » SIS » Attendance » Letter History

## Attendance Letter History

From this screen, you can view the history of attendance letter generation for a set of search criteria.

All selected records were hidden/unhidden successfully

**Start Date:**     
**End Date:**

**Rule Type:**    
**Letter Rule:**

**Grade Level:**

<input type="checkbox"/>	<u>Student</u> ^	<u>Student Number</u>	<u>Grade</u>	<u>Date Generated</u>	<u>Rule Code</u>	<u>Threshold Broken</u>	<u>Violation Date</u>	<u>Active</u>
<input type="checkbox"/>	Banana, Hannah	48652258	12	Aug 13, 2007	5-15	5	Jan 17, 2007	<input type="checkbox"/>

Show Active Only

## 5. Student Attendance Menu

### 5A. Student's School Absences – Daily



#### Navigation: Home – SIS – Student – Attendance – School Absences

The Student Absence screen will display a summary of a student's absence events for a range of dates. You can then Add, Edit, or Delete a specific Student Absence. You must have a student selected in the Student Context area to view Student Absences.

<b>DASL</b>	Banana, Hannah	ID: 48652258	Counselor:
DASL User	DASL HIGH SCHOOL 2006-2007	Gender: F	Homeroom: A109
	Calendar: 1	Grade: 12	Status: A

Home » SIS » Student » Attendance » School Absences

### Student's School Absences

From this screen, you can display, add, change and delete data pertaining to student absences.

Start Date:

End Date:

[\[Show Full Year Attendance Statistics\]](#)

	Date	Calendar	Absence Level	Absence Type	Reason	Note	Time In	Time Out	Comment
<input type="checkbox"/>	Dec 20, 2006	1 - 1	Full Absence	E - EXCUSED	III - ILL	P - PRNT CALL			
<input type="checkbox"/>	Dec 19, 2006	1 - 1	Full Absence	E - EXCUSED	III - ILL	P - PRNT CALL			
<input type="checkbox"/>	Dec 18, 2006	1 - 1	Full Absence	E - EXCUSED	III - ILL	P - PRNT CALL			
<input type="checkbox"/>	Sep 05, 2006	1 - 1	Full Absence	E - EXCUSED	III - ILL	P - PRNT CALL			

Include Absences Outside of Admission Dates

**Start Date / End Date** (required) – Enter a range of dates for which to view absence records for the student.

**Go** – Refresh the screen with absence data using the new date range entered.

**Note:** *The Period Attendance tab will be disabled if the School is using a Daily Attendance configuration.*

**Show Full Year Attendance Statistics/Hide Full Year Attendance Statistics** – Toggle the display of attendance statistics for the entire year for this student. Attendance statistics include totals by absence level and absence type.

[Hide Full Year Attendance Statistics]			
Absence Event	Count	Absence Type	Count
Full	4	EXCUSED	4
AM	0		
PM	0		
Period To Half	0		
Non-Absence	0		
<b>Total</b>	<b>4</b>		

This screen has standard add record and edit record controls.

**Sorting** – You may sort by any column (Date, Calendar, Absence Level, Absence Type, Reason, Note, Time In, Time Out, Comment) in ascending or descending order by clicking on the column header.

– Check these boxes beside any records you wish to remove (or check the box at the top of the column to check all), then click the **Delete Selected Absences** button to remove those absence records.

 – Edit this Student Absence

**Include Absences Outside of Admission Dates** – Check this box to display all absence records for the student, even if they were entered (or imported) with an incorrect date outside of the range of dates the student was enrolled.

## Add/Edit Daily Absence Event

 Home » SIS » Attendance » Absence Event Maintenance

**From this screen, you can modify an existing absence event.**

**Absence Event Type:**

**Date:**  

**Absence Type Code:**  

**Absence Level:**

**Collection Period:**  

**Absence Reason:**

**Absence Note:**

**Time In:**

**Time Out:**

**Comment:**

**Retain Values**

**Absence Event Type** (required; display-only if editing) – Choose Daily or Period (defaults to Daily if on Daily tab and to Period if on Period tab).

**Date** (required) – Enter Date of Student Absence (defaults to today's date).

**Absence Type Code** (required) – Choose an Absence Type Code that you defined for your school in System Maintenance.

**Absence Level** (required) – Choose an Absence Level (defaults to Full Day). Options are dependent on the Max Absence Level setting on the student's Calendar for the selected date.

**Collection Period** (required) – Choose a Collection Period when the school is configured for daily attendance at a frequency of twice per day (on Attendance tab of StudentInformation Options screen) and a non-absence level, Absence Type Code is selected.

**Absence Reason** (optional) – Choose an Absence Reason that you defined for your school in System Maintenance.

**Absence Note** (optional) – Choose an Absence Note that you defined for your school in System Maintenance.

**Time In** (optional) – Enter time of arrival for partial day absences.

**Time Out** (optional) – Enter time of departure for partial day absences.

**Comment** (optional) – Enter a comment related to this absence.

**Retain Values** – If you check this box, when you click "Save and New", the new absence event entry screen will keep the same values you entered for all fields except Absence Level. These values will only be retained for the current user and only for the duration of the current active session.

**Show Defaults** – Clear and restore all fields to the default data.

## 5B. Student's School Absences – Period



---

**Navigation: Home – SIS – Student – Attendance – School Absences**

The Student Absence screen will display a summary of a student's absence events for a range of dates. You can then Add, Edit, or Delete a specific Student Absence. You must have a student selected in the Student Context area to view Student Absences.

<b>DASL</b>	<a href="#">CONTRARY, MARY M.</a>	<b>ID:</b> 00005001	<b>Counselor:</b> [X]	<b>DASL H</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2006-2007	<b>Gender:</b> F	<b>Homeroom:</b> A109	<b>[Find St</b>
	<b>Calendar:</b> 1	<b>Grade:</b> 12	<b>Status:</b> A	\$

Home » SIS » Student » Attendance » School Absences

### Student's School Absences

From this screen, you can display, add, change and delete data pertaining to student absences.

**Start Date:** 9/5/2006 [v] [🔍]

**End Date:** 6/8/2007 [v] [🔍] **Go**

**Daily Attendance** | **Period Attendance**

[\[Show Full Year Attendance Statistics\]](#)

-- View All Periods -- [v]

<input type="checkbox"/>	Date v	Period	Absence Type	Absence Reason	Absence Note	Comment
<input type="checkbox"/>	Jun 04, 2007	5	S - SCHOOL REL			library or comp-lab
<input type="checkbox"/>	May 18, 2007	1	E - EXCUSED	VAC - VACATION	APPR - APPROV/ADM	
<input type="checkbox"/>	May 18, 2007	2	E - EXCUSED	VAC - VACATION	APPR - APPROV/ADM	
<input type="checkbox"/>	May 18, 2007	3	E - EXCUSED	VAC - VACATION	APPR - APPROV/ADM	
<input type="checkbox"/>	May 18, 2007	3A	E - EXCUSED	VAC - VACATION	APPR - APPROV/ADM	

<input type="checkbox"/>	Sep 21, 2006	5	A - ABSENT			
<input type="checkbox"/>	Sep 15, 2006	6	A - ABSENT			
<input type="checkbox"/>	Sep 15, 2006	9	A - ABSENT			

Include Absences Outside of Admission Dates

**95 Records Displayed** [Back To Top](#)

**Start Date / End Date** (required) – Enter a range of dates for which to view absence records for the student.

**Go** – Refresh the screen with absence data using the new date range entered.

**Show Full Year Attendance Statistics/Hide Full Year Attendance Statistics** –

Toggle the display of attendance statistics for the entire year for this student.

Attendance statistics include total period events and totals by absence type and by period.

[Hide Full Year Attendance Statistics]

Absences	Count	Absence Type	Count	Period	Count
Period Events	95	ABSENT	5	1	9
		TARDY	1	2	8
		EXCUSED	31	3	8
		SCHOOL REL	58	3A	7
				4	6
				5	39
				6	5
				7	4
				8	4
				9	5

This screen has standard add record and edit record controls.

**Sorting** – You may sort by any column (Date, Period, Absence Type, Absence Reason, Absence Note, Comment) in ascending or descending order by clicking on the column header.

Note that, when Date is selected for Sorting, the screen also has a secondary sort by Period, ascending.

**View All Periods** – Select a period by which to filter the list of student period absences, or leave "-- View All Periods --" selected to view all period absence events.

Add Absence 2 - 2

<input type="checkbox"/>	Date	Period	Absence Type	Absence Reason	Absence Note	Comment
<input type="checkbox"/>	 May 18, 2007	2	E - EXCUSED	VAC - VACATION	APPR - APPROV/ADM	
<input type="checkbox"/>	 May 17, 2007	2	E - EXCUSED	VAC - VACATION	APPR - APPROV/ADM	
<input type="checkbox"/>	 Apr 30, 2007	2	E - EXCUSED	I - ILL	PR/N - PRNT NOTE	

– Check these boxes beside any records you wish to remove (or check the box at the top of the column to check all), then click the **Delete Selected Absences** button to remove those absence records.

 – Edit this Student Absence

**Include Absences Outside of Admission Dates** – Check this box to display all absence records for the student, even if they were entered (or imported) with an incorrect date outside of the range of dates the student was enrolled.

## Add/Edit Period Absence Event

The screenshot shows a web browser window with the following content:

- Navigation bar: Home » SIS » Attendance » Absence Event Maintenance
- Section Header: **Absence Event Maintenance**
- Instruction: From this screen, you can modify an existing absence event.
- Form Fields:
  - Absence Event Type:** Period (dropdown)
  - Date:** 1/11/2007 (calendar icon)
  - Absence Type Code:** A - ABSENT (dropdown)
  - Period:** A dual-select box with a list on the left containing 1, 2, 3, 3A, 4, 5, 6, 7, 8, 9 and an empty box on the right. Arrows indicate movement between the two boxes.
  - Include Periods with Absences:**
  - Absence Reason:** (dropdown)
  - Absence Note:** (dropdown)
  - Comment:** (text area)
- Buttons: Save, Save and New, Cancel,  Retain Values, Show Defaults

**Absence Event Type** (required; display-only if editing) – Choose Daily or Period (defaults to Period if on Period tab and to Daily if on Daily tab).

**Date** (required) – Enter Date of Student Absence (defaults to today's date).

**Absence Type Code** (required) – Choose an Absence Type Code that you defined for your school in System Maintenance.

**Period** (required) – This dual-select box shows periods of the selected day on the left side. Pull those periods to the right side during which the student was absent.

**Include Periods with Absences** – Check this box to include periods during which the student already has a Period Absence in the Period dual-select box.

**Absence Reason** (optional) – Choose an Absence Reason that you defined for your school in System Maintenance.

**Absence Note** (optional) – Choose an Absence Note that you defined for your school in System Maintenance.

**Comment** (optional) – Enter a comment related to this absence.

**Retain Values** – If you check this box, when you click "Save and New", the new absence event entry screen will keep the same values you entered for all fields except Period (which also requires you to change the date to refresh it).



**Important: These values will only be retained for the current user and only for the duration of the current active session.**

**Show Defaults**– Clear and restore all fields to the default data.

## 5C. External Absence



### Navigation: Home – SIS – Student – Attendance – External Absences

Students that attend a school part-time such as JVS students or students that transfer from other schools where complete attendance records may not be available, must have their attendance information exported from the JVS (Management > Import/Export Home School Export) and then imported into the home or new school (Management > Import/Export > Home School Import). This allows both the external and home school absences to be printed on the student's transcript. External absences are not used by the Student Attendance (ATTUPEMIS) process when calculating attendance.

	School Year	School ^	Days Attended	Absent Excused	Absent Unexcused	Days Tardy
✕ ✎	2011-2012	Ashland County-West Holmes JVS	10.00	0.50	0.00	1.00

This screen has standard add record, edit record and delete record controls.

**Sorting** – You may sort by any column (School Year, School, Days Attended, Absent Excused, Absent Unexcused, Days Tardy) in ascending or descending order by clicking on the column header.

**Note:** ABHI records from years a student attended a school while it was on SIS will also show up as External Absences. For some imported records, Days Attended may be 0. These records need Days Present added, as the StudentInformation Load or Import process which created these records was unable to calculate Days Present (which StudentInformation normally performs by subtracting Days Absent Excused and Days Absent Unexcused from total possible days). Contact your ITC personnel for more information.

 – This record is from a previous school year and is locked. Change context to the previous school year to edit absence values in this record.

## Add/Edit External Absence

Home » SIS » Student » Attendance » External Absences

### Student's External Absences

From this screen, you can display, add, change and delete data pertaining to student external absences.

School IRN:  🔍

Other School Name:

Days Attended:  ⬆️ ⬇️ ⚡

Days Absent Excused:  ⬆️ ⬇️ ⚡

Days Absent Unexcused:  ⬆️ ⬇️ ⚡

Days Tardy:  ⬆️ ⬇️ ⚡

Comments:

**School IRN** (required) – Enter a valid 6 digit School IRN code. The School Name will be retrieved using the School IRN. Use the 🔍 icon to access ODE's IRN Search screen.

**Other School Name** – This field will display the name of the school with the entered IRN. If you enter 999999 for School IRN, this field displays "POST SECONDARY/OUT OF STATE" and becomes editable and required.

**Days Attended** (required) – Enter the number of days attended at this particular school. Can be entered manually or incremented/decremented by .5 with the arrow buttons.

**Days Absent Excused** (required) – Enter the number of days Absent (Excused) at this particular school. Can be entered manually or incremented/decremented by .5 with the arrow buttons.

**Days Absent Unexcused** (required) – Enter the number of days Absent (Unexcused) at this particular school. Can be entered manually or incremented/decremented by .5 with the arrow buttons.

**Days Tardy** (required) – Enter the number of days Tardy at this particular school. Can be entered manually or incremented/decremented by .5 with the arrow buttons.

**Comments** (optional) – Enter attendance comments for this student at this particular school. Many StudentInformation import processes will list their names here as a record.

## 5D. Student Attendance Letter History



### Navigation: Home – SIS – Student – Attendance – Attendance Letter History

The Attendance Letter History screen will display a history of all attendance letters generated for the selected student. You must have a student selected in the Student Context area to view Attendance Letter History. The user will be able to view a list of any letters that were generated including detail information as to why the letters were generated.

<b>DASL</b>	Banana, Hannah	ID: 48652258	Counselor:	<input type="text"/>	<b>DASL HIGH SCHOOL</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2006-2007	Gender: F	Homeroom: A109	<input type="text"/>	[Find Students] Find
	Calendar: 1	Grade: 12	Status: A		

Home » SIS » Student » Attendance » Attendance Letter History Adva

### Student's Attendance Letter History

From this screen, you can view attendance letter history records for the current student.

Start Date:  End Date:

<input type="checkbox"/>	Date Generated	Rule Code	Rule Name	Rule Type	Threshold	Interval	Violation Date	Active
<input type="checkbox"/>	Aug 13, 2007	5-15	5, 10 and 15 day letter	Daily Cumulative	5		Jan 17, 2007	

Show Active Only

**Start Date / End Date** (required) – Enter a range of dates to view all letters that were generated within the date range.

**Search** – Refresh the letter list after changing date range.

– Check this box (or check the box at the top of the column to check all boxes), and then click the **Hide/Unhide Selected Records** button to hide the selected letters. If a student has a hidden letters, they will receive another letter for the same violation if absence letters are later run again. If viewing Inactive (hidden) Records, check this box and click the button to un-hide the selected letters making the student no longer able to receive additional letters for the same violation.

**Sorting** – You may sort by any column (Date Generated, Rule Code, Rule Name, Rule Type, Threshold, Interval, Violation Date, Active) in ascending or descending order by clicking on the column header.

**Threshold / Interval** – This indicates which Rule Criterion the student broke to receive the letter. Note that if a student broke multiple thresholds, only the threshold with the highest Priority will display.

**Violation Date** – This indicates the date on which the student received the absence event that broke the Threshold.

**Show Active Only** – Un-check this box to view inactive/hidden attendance letters. You must uncheck this box if you wish to unhide letters.

Hiding letters will result in a confirmation screen:

Home » SIS » Attendance » Letter History Advanced Search | Feedback | Mgmt | Help | Print

## Attendance Letter History

From this screen, you can view the history of attendance letter generation for a set of search criteria.

**Are you sure you want to hide/unhide the selected attendance letter history record?**

Clicking Ok will hide or unhide the selected attendance letter history records. Hiding a record may allow subsequent attendance letters to be generated for this student that would otherwise be suppressed. Unhiding a record may cause letters to be suppressed. You may view hidden history records by deselecting 'Show Active Only' on this screen. These records can be reactivated by selecting the hidden record and clicking 'Hide/Unhide Selected Records'.

You will need to uncheck the Show Active Only check box to view and/or un-Hide inactive letters.

<b>DASL</b>	Banana, Hannah DASL HIGH SCHOOL 2006-2007	ID: 48652258 Gender: F	Counselor: Homeroom: A109	DASL HIGH SCHOOL
DASL User	Calendar: 1	Grade: 12	Status: A	[Find Students] Find

Home » SIS » Student » Attendance » Attendance Letter History Adva

## Student's Attendance Letter History

From this screen, you can view attendance letter history records for the current student.

All selected records were hidden/unhidden successfully

Start Date:  End Date:

<input type="checkbox"/>	Date Generated	Rule Code	Rule Name	Rule Type	Threshold	Interval	Violation Date	Active
<input type="checkbox"/>	Aug 13, 2007	5-15	5, 10 and 15 day letter	Daily Cumulative	5		Jan 17, 2007	

Show Active Only

## 6. Teacher Menu – Attendance

Please see the Teacher Menu documentation for more detailed information about using the Daily Attendance and Period Attendance.

### 6A. Teacher Menu – Daily Attendance



#### Navigation: Home – Teacher Menu – Daily Attendance

Please see the Teacher Menu documentation for more detailed information about using the Teacher Menu – Daily Attendance.

### 6B. Teacher Menu – Period Attendance



#### Navigation: Home – Teacher Menu – Period Attendance

Please see the Teacher Menu documentation for more detailed information about using the Teacher Menu – Period Attendance.

## 7. Attendance Reports – General

---

Please see the Batch/Report Management documentation for more detailed information about running and viewing reports.

### 7A. Perfect Attendance Report (PERF)



**Navigation: Home – SIS – Attendance – Attendance Reports – Perfect Attendance Report (PERF)**

This report displays students who meet the specified selection criteria and have had zero (0) total absences during the specified date range. The user may specify that partial absences do not disqualify students from perfect attendance. The report will total by students and gender.

## Perfect Attendance Report (PERF)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Date Range: 8/26/2008 to 7/28/2008  
 Homeroom Date: 7/28/2008

**Grade**

09 - 09	← →	
10 - 10	← →	
11 - 11	← →	
12 - 12	← →	

**Student Status**

A - ACTIVE RES	← →	
D - DELETED	← →	
I - INACTIVE	← →	
JVS - Student Attending JVS	← →	

**Administrative Homeroom**

A103 - BERRY (Full Year Term)	← →	
A104 - AUSTIN (Full Year Term)	← →	
A105 - COUSINS (Full Year Term)	← →	
A106 - CASTLE (Full Year Term)	← →	

**Membership Group**

10 - Regular Programs	← →	
11 - Intervention	← →	
12 - Post-secondary Enrollment Options F	← →	
13 - Other Regular Programs	← →	

**Membership**

60 - Stdnt enrolled in Dist result displacem	← →	
60 - Stdnt enrolled in Dist result displacem	← →	
Academic Intracurricular Descriptions (Voc	← →	
Academic Intracurricular Descriptions (Voc	← →	

**Gender**

M	← →	
F	← →	

Include Partial Absences:

**Sorting Options**

StudentNumber (ASC)	← →	StudentName (ASC)	↑ ↓
StudentNumber (DESC)	← →		
StudentName (DESC)	← →		
Gender (ASC)	← →		

Delivery Method: Pickup   Set As Default  
 Email Address: chris@noacsc.org  
 Report Format: Adobe PDF

Description:

Submit

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date Range** (optional) – Specify the date ranges to look for absences. The beginning date will default to the first day of school for the active school for the active school year. The ending date will default to the current date.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. The date will default to the current date, or the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Membership Groups** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Memberships** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Gender** (optional) – Filter by gender or leave blank to not filter by gender.

**Include Partial Absences** (optional) – Check if a student with partial absences can still be considered to have perfect attendance.

**Sorting Options** (optional) – Choose one or more sort options for your report

**Delivery Method** (required) – See Batch/Report Management documentation.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, shows on Batch/Report Management screen.

**Submit** – Submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Perfect Attendance Report

Student Number	Student Name	Gender	Counselor	Homeroom	Homeroom Teacher
Grade: 10					
4002	FONT, ELLA JANE	F		A105	DAVID COUSINS
4003	JOHNSON, GEORGE	M		A105	DAVID COUSINS
4004	POTTS, JORDAN	M		A105	DAVID COUSINS
4005	WELLS, JOBETH	F		A105	DAVID COUSINS
Sub Totals For Grade: 10		Male Students: 2		Female Students: 2	Total Students: 4

## 7B. Student Absence Search Summary (R309-B)



### Navigation: Home – SIS – Attendance – Attendance Reports – Student Absence Search Summary (R309-B)

Formerly known as R309-B in SIS. This report will generate a list of selected students and show the total of their absences for the date range selected.

**WARNING: You are working with a Past School Year**

**Student Absence Search Summary (R309-B)**  
 From this screen, you can select parameters to generate a report.

Selection Criteria   Selection Summary   Load Settings

**Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.**

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

**If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.**

Date Range: 8/25/2008 to 6/1/2009

Homeroom Date: 6/1/2009

'Students with Absence Type' filters for students that have at least one of the absence type(s) chosen. Leave 'Students with Absence Type' blank to return both students with and without absence records. Select all absence types to return every student with at least one absence.

**Absence Type**

ABSENT  
  EXCUSED  
  OTHER  
  TARDY

**Absence Reason**

(No Absence Reason)  
  A - FARMING  
  B - SICK  
  C - COLLEGE

**Grade**

07 - 07  
  08 - 08  
  09 - 09  
  10 - 10

**Program**

AOC - ALTERNATIVE OPPORTUNITY CENTER  
  AUT - AUTISM STUDENTS  
  MH - MULTI-HANDICAPPED STUDENTS  
  MS - MILLSTREAM STUDENTS

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Disability Code**

\*\* - Not Applicable  
01 - Multiple Disabilities (other than Deaf-Blind)  
02 - Deaf-Blindness  
03 - Deafness (Hearing Impairments)

**Homeroom Code**

AUT - Teacher1173 (Full Year Term)  
IN01 - Teacher1102 (Full Year Term)  
IN02 - Teacher1126 (Full Year Term)  
IN03 - Teacher1163 (Full Year Term)

**Home School**

In order to include students with zero days absent or zero partial absences, you must not have any 'students with absence types' selected above.

**Number Of Days Absent:**  to

And  Or

**Number Of Partial Absences:**  to

And  Or

In order to use the Filter by Number of Absence Types, at least one 'students with absence type' must be selected above.

**Number Of Filtered Absence Types:**  to

**Hide disability code:**

**Group report by:** Grade level

**Sorting Options**

Gender (ASC)  
Gender (DESC)  
Grade Level (ASC)  
Grade Level (DESC)

**Delivery Method:** Pickup

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

**Description:**

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date Range** (optional) – Specify the date ranges to look for absences. This will default to the starting date on the calendar for the Start Date and to today's date for the End Date.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report. Note: This filters for students that have at least one of the absence types chosen. Leave the filter blank (select no absence types) to return both students with and without absence records. Select all absence types to return every student with at least one absence.

**Absence Reason** (optional) – If no Absence Reasons are selected, the report will select all Absence Reasons. You can also filter by selecting specific Absence Reasons for your report.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Disability Code** (optional) – If no Disability Codes are selected, the report will select all Disability Codes. You can also filter by selecting specific Disability Codes for your report.

**Homeroom Code** (optional) – If no Homeroom Codes are selected, the report will select all Homeroom Codes. You can also filter by selecting specific Homeroom Codes for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Grades. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Number of Days Absent** (optional) – Limit the selection of students to those who have number of full days absent within the range specified (counting full day absences as 1.0 and half day absences as 0.5). You may filter using decimal points, such as “1.5” to “3.5”. Note: In order to include students with zero days absent, you must not have any Absence Types selected above.

**And/Or** – Select “And” to display students with the specified Number of Days Absent and specified Number of Partial Absences. Select “Or” to display students with the specified Number of Days Absent or the specified Number of Partial Absences.

**Number of Partial Absences** (optional) – Limit the selection of students to those who have number of late/tardy absence events within the range specified. You may filter using decimal points, such as “1.5” to “3.5”. Note: In order to include students with zero days of partial absences, you must not have any Absence Types selected above.

**And/Or** – Select “And” to display students with the specified Number of Partial Absences and specified Number of Filtered Absence Types. Select “Or” to display students with the specified Number of Partial Absences or the specified Number of Filtered Absence Types.

**Number of Filtered Absence Types** (optional) – Limit the selection of students to those who have a number of absences of all types selected above in the Absence Types filter within the range specified (counting full day absences as 1.0, half day absences as 0.5, late/tardy absence events as 1.0 and other non-absence absence events as 1.0, provided the absences or absence events have the selected Absence Types). You may filter using decimal points, such as “1.5” to “3.5”. Note that this filter is only effective if you have selected at least one Absence Type from the Absence Types filter.

**Hide Disability Code?** (optional) – If checked, Disability Code will be hidden and not display on the report.

**Group report by** (required) – Choose to group by Disability, Gender, Grade Level, Home Room, Home School, Program, Student Status. The default grouping is by Grade Level.

**Sorting Options** (optional) – Choose one or more sort options for your report

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R309B											HIGH SCHOOL	
Printed Tue, Jul 28, 2009, 8:45 AM											2008-2009	
											Student Absence Search Summary	
Id	Student Name	Gender	Grade	Status	Program	Homeroom	Disability	Home School	Telephone	Days Absent	Part Absence	
00010839	Student24476, BRITTANY (BRITTANY)	F	11	A		IN19	**		(555) 555-5555	4.5	0.0	
00010838	Student24477, BREANNE	F	11	A		IN19	**		(555) 555-5555	1.0	0.0	
00010837	Student24478, BRENT (BRENT)	M	11	A		IN18	**		(555) 555-5555	7.5	0.0	
00010836	Student24479, MOLLY (MOLLY)	F	11	A		IN18	**		(555) 555-5555	9.0	3.0	
00010835	Student24480, STEPHANIE (STEPHANIE)	F	11	A		MILL	**		(555) 555-5555	6.0	0.0	
00010834	Student24481, CALVIN (CALVIN)	M	11	A		IN17	**		(555) 555-5555	6.5	0.0	
00010833	Student24482, BRIAN (BRIAN)	M	11	A		IN17	**		(555) 555-5555	8.5	4.0	
00010832	Student24484, BRITTNEE (BRITTNEE)	F	11	A		MILL	**		(555) 555-5555	0.5	0.0	

# 7C. Student Absence Search Detail (R309-A)



Navigation: Home – SIS – Attendance – Attendance Reports – Student Absence Search Summary (R309-A)

Formerly known as R309-A in SIS. This report will generate a list of selected students and show the detail of their absences for the date range selected.

Home » SIS » Attendance » Attendance Reports » Student Absence Search Detail (R309-A)
Advanc

WARNING: You are working with a Past School Year

## Student Absence Search Detail (R309-A)

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

Selection Criteria
Selection Summary
Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

**Ad-Hoc Membership:** -- Select an Ad-Hoc Membership --

Public And Private

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Date Range:** 8/25/2008 to 5/29/2009

**Homeroom Date:** 5/29/2009

'Students with Absence Type' filters for students that have at least one of the absence type(s) chosen. Leave 'Students with Absence Type' blank to return both students with and without absence records. Select all absence types to return every student with at least one absence.

**Students with Absence Type**

ABSENT  
EXCUSED  
OTHER  
TARDY

⇄ ⇄  
⇄ ⇄

Show all student absences types in the report   
  Show only selected student absence types in the report

**Absence Reason**

(No Absence Reason)  
A - FARMING  
B - SICK  
C - COLLEGE

⇄ ⇄  
⇄ ⇄

**Grade**

07 - 07  
08 - 08  
09 - 09  
10 - 10

⇄ ⇄  
⇄ ⇄

**Program**

AOC - ALTERNATIVE OPPORTUNITY CENTER  
AUT - AUTISM STUDENTS  
MH - MULTI-HANDICAPPED STUDENTS  
MS - MILLSTREAM STUDENTS

⇄ ⇄  
⇄ ⇄

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Disability Code**

\*\* - Not Applicable  
01 - Multiple Disabilities (other than Deaf-Blind)  
02 - Deaf-Blindness  
03 - Deafness (Hearing Impairments)

**Homeroom Code**

AUT - Teacher1173 (Full Year Term)  
IN01 - Teacher1102 (Full Year Term)  
IN02 - Teacher1126 (Full Year Term)  
IN03 - Teacher1163 (Full Year Term)

**Home School**

In order to include students with zero days absent or zero partial absences, you must not have any 'students with absence types' selected above.

**Number Of Days Absent:** [ ] to [ ]

And  Or

**Number Of Partial Absences:** [ ] to [ ]

In order to use the Filter by Number of Absence Types, at least one 'students with absence type' must be selected above.

And  Or

**Number Of Filtered Absence Types:** [ ] to [ ]

---

**Printing Options:**

Print no more than one student per page ⚡

Avoid splitting students across pages unless unavoidable

Fit as much data per page as possible

**Print Comments:**

**Hide disability code:**

---

**Sorting Options**

Gender (ASC)  
Gender (DESC)  
Grade Level (DESC)  
Disability Condition (ASC)

Grade Level (ASC)  
Student Name (ASC)

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address

Use custom address text [ ]

**Include Copied On Correspondence:**  Yes  No

---

**Delivery Method:** Pickup [ Set As Default ]

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

---

**Description:** [ ]

[ Submit ]

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date Range** (required) – Specify the date ranges to look for absences. This will default to the starting date on the calendar for the Start Date and to today's date for the End Date.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date.

**Students with Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report. Note: This filters for students that have at least one of the absence types chosen. Leave the filter blank (select no absence types) to return both students with and without absence records. Select all absence types to return every student with at least one absence.

**Show all student absences types in the report** – Select to show absences of any absence type for students selected by the filters, even if students are selected based on an absence type filter. For example, if you filter for students with Tardies and select this option, only students with Tardies will show but all absences for any type for those students will show – not just Tardies.

**Show only selected student absence types in the report** – Select to show absences of just the selected absent type. For example, if you filter for students with Tardies and select this option, only students with Tardies will show and only their Tardy absences will show.

**Absence Reason** (optional) – If no Absence Reasons are selected, the report will select all Absence Reasons. You can also filter by selecting specific Absence Reasons for your report.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Disability Code** (optional) – If no Disability Codes are selected, the report will select all Disability Codes. You can also filter by selecting specific Disability Codes for your report.

**Homeroom Code** (optional) – If no Homeroom Codes are selected, the report will select all Homeroom Codes. You can also filter by selecting specific Homeroom Codes for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Grades. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Number of Days Absent** (optional) – Limit the selection of students to those who have a number of full days absent within the range specified (counting full day absences as 1.0 and half day absences as 0.5). You may filter using decimal points, such as “1.5” to “3.5”. Note: In order to include students with zero days absent, you must not have any Absence Types selected above.

**And/Or** – Select “And” to display students with the specified Number of Days Absent and specified Number of Partial Absences. Select “Or” to display students with the specified Number of Days Absent or the specified Number of Partial Absences.

**Number of Partial Absences** (optional) – Limit the selection of students to those who have a number of late/tardy absence events within the range specified. You may filter using decimal points, such as “1.5” to “3.5”. Note: In order to include students with zero partial absences, you must not have any Absence Types selected above.

**And/Or** – Select “And” to display students with the specified Number of Partial Absences and specified Number of Filtered Absence Types. Select “Or” to display students with the specified Number of Partial Absences or the specified Number of Filtered Absence Types.

**Number of Filtered Absence Types** (optional) – Limit the selection of students to those who have a number of absences of all types selected above in the Absence Types filter within the range specified (counting full day absences as 1.0, half day absences as 0.5, late/tardy absence events as 1.0 and other non-absence absence events as 1.0, provided the absences or absence events have the selected Absence Types). You may filter using decimal points, such as “1.5” to “3.5”. Note: This filter is only effective if you have selected at least one Absence Type from the Absence Types filter.

**Printing Options:** (required)

- **Print no more than one student per page** - will only show one student per page, unless the student overflows the page and has to continue to multiple pages (this is the same as “Break on student”). A page break will be done after the student’s data is complete, so that no more than one student’s data is on each page
- **Avoid splitting students across pages unless unavoidable** - will attempt to fit all of the student’s data, including header and footer, on the remainder of the current page. If it won’t fit, it does a page break and continues at the start of the next page (this is the same as not checking “Break on student”).
- **Fit as much data per page as possible** – will fit as much data as possible on each page, splitting student data whenever necessary. This results in the fewest pages being used for the report.

**Print Comments** (optional) – If checked, will print student absence comments

**Hide Disability Code?** (optional) – If checked, Disability Code will be hidden and not display on the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the drop-down list.

**Address** – Select the address to use for labels. If you check "Use custom address text", the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked "Copied on Correspondence".

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Student Absence Search Detail**

Id		Student Name			Gender	Grade	Homeroom	Program	Disability	Home School	Telephone	
00012846		Student24094, KATHRYN			F	09	IN06		**		(555) 555-5555	
Date	Rot. Day	Abs. Type	In	Out	Reason	Note	Days Absent	Part Absence				
09/16/2008	T	OTHER		2:35 PM	DOC/DENT	PRNT CALL	0.0					
11/07/2008	F	OTHER		2:30 PM	DOC/DENT	PRNT CALL	0.0					
12/16/2008	T	OTHER		2:10 PM	DOC/DENT	PRNT CALL	0.0					
01/05/2009	M	EXCUSED		12:30 PM	ILL/SNT HM	SCH CALL	0.5					
01/08/2009	R	EXCUSED		11:06 AM	ILL/SNT HM	SCH CALL	1.0					
05/01/2009	F	TARDY	9:21 AM		DOC/DENT	PRNT CALL	0.0	1.0				
<b>Absence Count:</b>									6	<b>Total:</b>	1.5	1.0

Id		Student Name			Gender	Grade	Homeroom	Program	Disability	Home School	Telephone	
00012845		Student24095, BROOKE			F	09	IN07		**		(555) 555-5555	
Date	Rot. Day	Abs. Type	In	Out	Reason	Note	Days Absent	Part Absence				
11/10/2008	M	EXCUSED		12:25 PM	ILL/SNT HM	SCH CALL	0.5					
11/11/2008	T	EXCUSED			SICK	PRNT CALL	1.0					
12/12/2008	F	EXCUSED			VACATION	ADVANCED	1.0					
12/15/2008	M	EXCUSED			VACATION	ADVANCED	1.0					
02/13/2009	F	OTHER	10:48 AM	9:15 AM	DOC/DENT	PRNT CALL	0.0					
02/23/2009	M	EXCUSED			SICK	PRNT CALL	1.0					
03/16/2009	M	EXCUSED	11:25 AM		SICK	PRNT CALL	1.0					
03/26/2009	R	EXCUSED			SICK	PRNT CALL	1.0					
03/27/2009	F	EXCUSED			SICK	PRNT CALL	1.0					
04/14/2009	T	OTHER	1:25 PM	11:00 AM	DOC/DENT	PRNT CALL	0.0					
04/22/2009	W	EXCUSED		11:40 AM	DOC/DENT	NOTE	0.5					
04/30/2009	R	OTHER	11:30 AM	9:15 AM	PER/LIC	PRNT CALL	0.0					
05/14/2009	R	EXCUSED	11:15 AM		DOC/DENT	PRNT CALL	0.5					
<b>Absence Count:</b>									13	<b>Total:</b>	8.5	0.0

## 7D. Homeroom Attendance Register Detail (R310-A)



**Navigation: Home – SIS – Attendance – Attendance Reports – Homeroom Att Register Detail (R310-A)**

Formerly known as R310-A in SIS. This report shows student attendance detail grouped by homeroom and month.

Home » SIS » Attendance » Attendance Reports » Homeroom Att Register Detail (R310-A)

## Homeroom Attendance Register Detail (R310-A)

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

Selection Criteria   Selection Summary   Load Settings

**Date Range:** 8/26/2008 to 7/28/2008

**Homeroom Date:** 7/28/2008

**Administrative Homeroom**

A103 - BERRY (Full Year Term)  
A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)  
A106 - CASTLE (Full Year Term)

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
JVS - Student Attending JVS

**Membership Group**

Ad-Hoc Memberships  
10 - Regular Programs  
11 - Intervention  
12 - Post-secondary Enrollment Options P

**Membership Groups To Be Excluded**

**Number of Absences:** to

And  Or

**Number of Lates:** to

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

**Date Range** (optional) – Specify the date ranges to look for absences. This will default to the starting date on the calendar for the Start Date and to today’s date for the End Date.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom – will always default to today’s date

**Administrative Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Membership Group** (optional) – If no Membership Groups are excluded, the report will select all Programs. You can also exclude specific Membership Groups for your report.

**Number of Absences** (optional) – Limit the selection of students to those who have number of absences within the range specified.

**Number of Lates** (optional) – Limit the selection of students to those who have number of half days absent within the range specified.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

## Homeroom Detail

REPORT: DASL - R310-A		DASL HIGH SCHOOL		RUN AT 10:01 AM 12/12/2007			
HOMEROOM ATTENDANCE REGISTER DETAIL							
HOMEROOM: A109	MICHAEL WEBBER		PAGE 17 OF 27				
YEAR/MONTH: 2007 / 09	SCHOOLYEAR: 2007-2008		FROM: 08/27/2007 TO: 12/12/2007				
STUDENT NAME	ID	GN	GR	DAYS ABSENT	NO OF PARTIAL ABSENCES	A B S E N C E S B Y D A T E (A=AM, P=PM, BLANK=AM AND PM)	
Banana, Hannah	48652258	F	09	7.0	0.0	5 6 7 11 12 13 17	
Contrary, Jesse	48652281	M	09	1.0	0.0	17	
CONTRARY, MARY M.	5001	F	09	1.0	0.0	17	
EYE, CORY ROBERT	6001	M	09	1.0	0.0	17	
Frog, Hermit	48652304	M	12				
James, Steven	48652327	M	12				
JONES, WHITNEY ANN	6003	F	12				
MAY, DAISY LEE	6005	F	12				
FERRY, MICHAEL JAY	5002	M	12				
SAWYER, THOMAS (JACK)	4008	M	12				
SPRAT, JACK JOSEPH	5004	M	12				
WELLS, JONA RENEE	5005	F	12				
SUMMARY FOR HOMEROOM	A109	YEAR	2007	MONTH	09	NO OF MALE STUDENTS: 7	DAYS IN SESSION: 19.0
						NO OF FEMALE STUDENTS: 5	TOTAL STUDENTS DAYS POSSIBLE: 228.0
					(AT END OF DATE RANGE)		TOTAL STUDENTS DAYS ABSENT: 10.0
							TOTAL STUDENT DAYS PRESENT: 218.0
							TOTAL NO OF PARTIAL ABSENCES: 0.0

## Report Summary

REPORT: DASL - R310-A		DASL HIGH SCHOOL		RUN AT 10:01 AM 12/12/2007		
HOMEROOM ATTENDANCE REGISTER DETAIL						
HOMEROOM: A110	LAURA LAYMAN			PAGE 26	OF 27	
YEAR/MONTH: 2007 / 11	SCHOOLYEAR: 2007-2008			FROM: 08/27/2007 TO: 12/12/2007		
STUDENT NAME	ID	GN	GR	DAYS ABSENT	NO OF PARTIAL ABSENCES	ABSENCES BY DATE (A=AM, P=PM, BLANK=AM AND PM)
<p>SUMMARY FOR ALL HOMEROOMS      Year: 2007      Month: 8</p> <p>NO OF MALE STUDENTS: 15      DAYS IN SESSION: 5.0</p> <p>NO OF FEMALE STUDENTS: 13      TOTAL STUDENT DAYS POSSIBLE: 140.0</p> <p>TOTAL STUDENT DAYS ABSENT: 0.0</p> <p>TOTAL STUDENT DAYS PRESENT: 140.0</p> <p>TOTAL NO PARTIAL ABSENCES: 0.0</p>						
<p>SUMMARY FOR ALL HOMEROOMS      Year: 2007      Month: 9</p> <p>NO OF MALE STUDENTS: 15      DAYS IN SESSION: 19.0</p> <p>NO OF FEMALE STUDENTS: 13      TOTAL STUDENT DAYS POSSIBLE: 532.0</p> <p>TOTAL STUDENT DAYS ABSENT: 17.0</p> <p>TOTAL STUDENT DAYS PRESENT: 515.0</p> <p>TOTAL NO PARTIAL ABSENCES: 0.0</p>						

## 7E. Homeroom Attendance Register Summary (R310-B)



**Navigation: Home – SIS – Attendance – Attendance Reports – Homeroom Att Register Summary (R310-B)**

Formerly known as R310-B in SIS. This report shows student attendance summary grouped by homeroom and month.

Home » SIS » Attendance » Attendance Reports » Homeroom Att Register Summary (R310-B)

## Homeroom Attendance Register Summary (R310-B)

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

Selection Criteria   Selection Summary   Load Settings

**Date Range:** 8/26/2008 to 7/28/2008

**Homeroom Date:** 7/28/2008

**Administrative Homeroom**

A103 - BERRY (Full Year Term)  
A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)  
A106 - CASTLE (Full Year Term)

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
JVS - Student Attending JVS

**Membership Groups**

Ad-Hoc Memberships  
10 - Regular Programs  
11 - Intervention  
12 - Post-secondary Enrollment Options P

**Membership Groups To Be Excluded**

**Number of Absences:** [ ] to [ ]

And  Or

**Number of Lates:** [ ] to [ ]

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:** [ ]

**Date Range** (optional) – Specify the date ranges to look for absences. This will default to the starting date on the calendar for the Start Date and to today’s date for the End Date.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom – will always default to today’s date.

**Administrative Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Student Status** (optional) – If no Student Status is selected, the report selects all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Membership Group** (optional) – If no Membership Groups are excluded, the report will select all Programs. You can also exclude specific Membership Groups for your report.

**Number of Absences** (optional) – Limit the selection of students to those who have number of full days absent within the range specified.

**Number of Lates** (optional) – Limit the selection of students to those who have number of half days absent within the range specified.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

## Homeroom Summary

REPORT: DASL - R310-A		DASL HIGH SCHOOL		RUN AT 10:08 AM 12/12/2007					
HOMEROOM ATTENDANCE REGISTER SUMMARY									
				PAGE	17	OF	27		
SUMMARY FOR HOMEROOM	A109	YEAR	2007	MONTH	09	NO OF MALE STUDENTS:	7	DAYS IN SESSION:	19
						NO OF FEMALE STUDENTS:	8	TOTAL STUDENTS DAYS POSSIBLE:	228.0
						(AT END OF DATE RANGE)		TOTAL STUDENTS DAYS ABSENT:	10.0
								TOTAL STUDENT DAYS PRESENT:	218.0
								TOTAL NO OF PARTIAL ABSENCES:	0.0

## Summary for All Homerooms

REPORT: DASL - R310-A		DASL HIGH SCHOOL		RUN AT 10:08 AM 12/12/2007					
HOMEROOM ATTENDANCE REGISTER SUMMARY									
				PAGE	27	OF	27		
SUMMARY FOR ALL HOMEROOMS		08/27/2007	TO	12/12/2007		DAYS IN SESSION:	73.0	TOTAL STUDENT DAYS POSSIBLE:	2,050.0
						NO OF MALE STUDENTS:	15	TOTAL STUDENT DAYS ABSENT:	19.0
						NO OF FEMALE STUDENTS:	16	TOTAL STUDENT DAYS PRESENT:	2,031.0
								TOTAL NO PARTIAL ABSENCES:	1.0

# 7F. Student Absence Statistics Report (R311)



Navigation: Home – SIS – Attendance – Attendance Reports – Student Absence Statistics Report (R311)

Formerly known as R311 in SIS. This report will show student absence statistics by Type/Reason and by Type for a given date range.

Home » SIS » Attendance » Attendance Reports » Student Absence Statistics Report (R311)

## Student Absence Statistics Report (R311)

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

Selection Criteria   Selection Summary   Load Settings

Date Range: 8/26/2008 to 7/28/2008

**Absence Type**

EXCUSED  
ISS  
OTHER  
PARENT/CP

**Absence Reason**

Appt - APPT  
Coll - COLLEGE  
Crt - COURT  
Dth - DEATH

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Sorting Options**

Absence Reason (ASC)  
Absence Reason (DESC)

**Delivery Method:** Pickup   Set As Default

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Submit

**Date Range** (optional) – Specify the date ranges to look for absences. This will default to the starting date on the calendar for the Start Date and to today’s date for the End Date.

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report.

**Absence Reason** (optional) – If no Absence Reasons are selected, the report will select all Absence Reasons. You can also filter by selecting specific Absence Reasons for your report.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Type		UNEXCUSED		ABSENT		SCHOOL REL		EXCUSED		ISS		OTHER		PARENT/CP		TARDY	
Reason		Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.
APPT		0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
COLLEGE		0	0.0	0	0.0	0	0.0	9	9.0	0	0.0	0	0.0	0	0.0	0	0.0
COURT		0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
DEATH		0	0.0	0	0.0	0	0.0	1	1.0	0	0.0	0	0.0	0	0.0	0	0.0
emergency removal		0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Family Ill		0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
FIELD TRIP		0	0.0	0	0.0	9	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
HOSPITAL		0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
ILL		6	6.0	32	32.0	0	0.0	14	14.0	0	0.0	0	0.0	0	0.0	0	0.0

Type	UNEXCUSED		ABSENT		SCHOOL REL		EXCUSED		ISS		OTHER		PARENT/CP		TARDY	
Reason	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.	Num.	Abs.
OUT/PARENT	0	0.0	0	0.0	0	0.0	2	2.0	0	0.0	0	0.0	0	0.0	0	0.0
RELIGION	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
TRANS	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
TRUANT	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
VACATION	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
withdraw	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
None	2	2.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Totals:</b>	15.0	15.0	32.0	32.0	9.0	0.0	26.0	26.0	0.0	0.0	0.0	0.0	0.0	0.0	10.0	0.0

## 7G. Student ADM & ADA Report for ABSE Detail (R322-A)



**Navigation: Home – SIS – Attendance – Attendance Reports – Student ADM/ADA for ABSE Detail (R322-A)**

Formerly known as R322-A in SIS. This report is used to analyze student absence data by pulling data stored in ABSE – Student Absence.

## Student ADM & ADA Report for ABSE Detail(R322-A)

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

Selection Criteria    Selection Summary    Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Absence Date Range:** 6/1/2007 to 7/1/2008

**Homeroom Date:** 7/1/2008

**Grade**

09 - 09 11 - 11 12 - 12 GR - GR	10 - 10
--	---------

**Student Status**

A - ACTIVE RES D - DELETED I - INACTIVE JVS - Student Attending JVS	
--	--

**Administrative Homeroom**

A103 - BERRY (Full Year Term) A104 - AUSTIN (Full Year Term) A105 - COUSINS (Full Year Term) A106 - CASTLE (Full Year Term)	
--	--

**Program**

JAB - Jr Auto Body JAG - Jr AG Mechanics JCOS - Jr Cosmetology SAB - Sr Auto Body	
--	--

**Home School**

044222 - Lima City SD (Dist)	
------------------------------	--

**Absence Type**

E - EXCUSED I - ISS O - OTHER P - PARENT/CP	
--	--

**Gender**

M F	
--------	--

The screenshot shows a web-based form for configuring a report. It includes the following sections:

- Number Of Absences:** Two input boxes with a 'to' label between them.
- And Or:** Radio buttons for 'And' (selected) and 'Or'.
- Number of Lates:** Two input boxes with a 'to' label between them.
- Group Totals By:** A dropdown menu and a note: "If you select a group by option, make sure it is also the top sort by option."
- Sorting Options:** A list of sorting criteria on the left: "Student Name (DESC)", "Homeroom (ASC)", "Homeroom (DESC)", and "Gender (ASC)". A central box shows "Student Name (ASC)" selected. Arrows indicate movement between the lists.
- Delivery Method:** A dropdown menu set to "Pickup" and a "Set As Default" button.
- Email Address:** A text input field containing "chris@noacsc.org".
- Report Format:** A dropdown menu set to "Adobe PDF".
- Description:** A large empty text area.
- Submit:** A button at the bottom left.

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Absence Date Range** (required) – Specify the date ranges to look for absences. This will default to the starting date on the calendar for the Start Date and to today’s date for the End Date.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom – will always default to today’s date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Grades. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report.

**Gender** (optional) – If no Gender is selected, the report will run for both Gender types. You can filter by selecting a specific Gender for your report.

**Number of Absences** (optional) – Limit the selection of students to those who have number of days absent within the range specified. Please notice the and/or logic used with Number of Lates.

**Number of Lates** (optional) – Limit the selection of students to those who have number of days late within the range specified. Please notice the and/or logic used with Number of Absences.

**Group Totals By** (optional) – You can select to group the report by District of Residence, Program, Homeroom, Home School, Grade Level or Gender.



When using the “**Group Totals By**” functionality, you must make sure that your first **Sorting Option** is the same as your “**Group Totals By**” selection.

**Sorting Options** (optional) – Choose one or more sort options for your report

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R322A		DASL HIGH SCHOOL 2007-2008												
Printed Wed, Dec 12, 2007, 1:14 PM		Student ADM & ADA Report Detail												
Student Number	Student Name	Status	Grade	Gender	Homeroom	Home District	Total Present	Avg Daily Att	Total Memb	Avg Daily Memb	% of Att	Days in Session	Total Absent	Total Late
5005	WELLS, JONA RENEE	A	12	F	A109	043877	73.00	1.00	73.00	1.00	100.00	73.00	0.00	0.00
7005	WILLIAMSON, RYAN SETH	A	11	M	A107	043877	73.00	1.00	73.00	1.00	100.00	73.00	0.00	0.00
Final Totals		Students:	31.00				2,031.00	0.99	2,050.00	0.91	99.07	2,263.00	19.00	1

Report: R322A		DASL HIGH SCHOOL 2007-2008												
Printed Wed, Dec 12, 2007, 1:14 PM		Student ADM & ADA Report Detail												
Student Number	Student Name	Status	Grade	Gender	Homeroom	Home District	Total Present	Avg Daily Att	Total Memb	Avg Daily Memb	% of Att	Days in Session	Total Absent	Total Late
48652258	Banana, Hannah	A	09	F	A109	044222	66.00	0.90	73.00	1.00	90.41	73.00	7.00	0.00
48652442	Bird, Kelsey	A	09	F		043877	2.00	1.00	2.00	0.03	100.00	73.00	0.00	0.00
7001	CONTRARY, JASON WILLIAM	A	11	M	A107	043877	73.00	1.00	73.00	1.00	100.00	73.00	0.00	0.00
48652281	Contrary, Jesse	A	09	M	A109	043877	72.00	0.99	73.00	1.00	98.63	73.00	1.00	0.00
5001	CONTRARY, MARY M.	A	09	F	A109	043877	70.00	0.96	73.00	1.00	95.89	73.00	3.00	1.00
48652396	Daniels, Pam	O	U	F		043877	2.00	1.00	2.00	0.03	100.00	73.00	0.00	0.00

# 7H. Student ADM & ADA Report for ABSE Summary (R322-B)



**Navigation: SIS – Attendance – Attendance Reports – Student ADM/ADA for ABSE Summary (R322-B)**

Formerly known as R322-B in SIS. This report is used to analyze student absence data (totals by grade) by pulling data stored in ABSE – Student Absence.

Home » SIS » Attendance » Attendance Reports » Student ADM/ADA for ABSE Summary(R322-B)

## Student ADM & ADA Report for ABSE Summary (R322-B)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Absence Date Range: 8/26/2008 to 7/28/2008

Homeroom Date: 7/28/2008

**Grade**

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

**Student Status**

A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 JVS - Student Attending JVS

**Administrative Homeroom**

A103 - BERRY (Full Year Term)  
 A104 - AUSTIN (Full Year Term)  
 A105 - COUSINS (Full Year Term)  
 A106 - CASTLE (Full Year Term)

**Program**

JAB - Jr Auto Body  
 JAG - Jr AG Mechanics  
 JCOS - Jr Cosmetology  
 SAB - Sr Auto Body

**Home School**

044222 - Lima City SD (Dist)

**Absence Type**

E - EXCUSED  
 I - ISS  
 O - OTHER  
 P - PARENT/CP

**Gender**

M  
 F

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Absence Date Range** (required) – Specify the date ranges to look for absences. This will default to the starting date on the calendar for the Start Date and to today’s date for the End Date.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom – will always default to today’s date

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report.

**Gender** (optional) – If no Gender is selected, the report will run for both Gender types. You can filter by selecting a specific Gender for your report.

**Number of Absences** (optional) – Limit the selection of students to those who have number of days absent within the range specified. Please notice the and/or logic used with Number of Lates.

**Number of Lates** (optional) – Limit the selection of students to those who have number of days late within the range specified. Please notice the and/or logic used with Number of Absences.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

<i>Report: R322B</i>		<b>DASL HIGH SCHOOL</b>							
<i>Printed Wed, Dec 12, 2007, 1:17 PM</i>		2007-2008							
<b>Student ADM &amp; ADA Report For Absence Summary</b>									
		Total Present	Avg Daily Att	Total Memb	Avg Daily Memb	% of Att	Days in Session	Total Absent	Total Late
Totals For Grade: 09	7.00	356.00	0.96	369.00	0.72	96.48	511.00	13.00	1
Totals For Grade: 10	5.00	359.00	0.98	365.00	1.00	98.36	365.00	6.00	0
Totals For Grade: 11	6.00	438.00	1.00	438.00	1.00	100.00	438.00	0.00	0
Totals For Grade: 12	12.00	876.00	1.00	876.00	1.00	100.00	876.00	0.00	0
Totals For Grade: UG	1.00	2.00	1.00	2.00	0.03	100.00	73.00	0.00	0
Final Totals	31.00	2,031.00	0.99	2,050.00	0.91	99.07	2,263.00	19.00	1

## 7I. Homeroom Attendance Report (R331)



**Navigation: Home – SIS – Attendance – Attendance Reports – Homeroom Attendance Report (R331)**

Formerly known as R331 in SIS. This report is used to generate a bi-weekly attendance report by homeroom based on student absence records within the Attendance by Day substructure. Students are displayed within their homeroom with any absence records corresponding to the two week period specific. The report now groups by Homeroom, Week, and lastly by Student Last Name.

Home » SIS » Attendance » Attendance Reports » Homeroom Attendance Report (R331)

WARNING: You are working with a Pa

## Homeroom Attendance Report (R331)

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

Selection Criteria   Selection Summary   Load Settings

**Start Date:** 8/25/2008   **End Date:** 6/1/2009

**Homeroom Date:** 7/10/2009

**Grade**

07 - 07	↔	
08 - 08	↔	
09 - 09	↔	
10 - 10	↔	

**Administrative Homeroom**

AUT - Teacher1173 (Full Year Term)	↔	
IN01 - Teacher1102 (Full Year Term)	↔	
IN02 - Teacher1126 (Full Year Term)	↔	
IN03 - Teacher1163 (Full Year Term)	↔	

**Student Status**

A - ACTIVE RES	↔	
D - DELETED	↔	
I - INACTIVE	↔	
N - NON-RES	↔	

**Sorting Options**

Student Name (ASC)	↔	
Student Name (DESC)	↔	
Student Number (ASC)	↔	
Student Number (DESC)	↔	

**Delivery Method:** Pickup  

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

**Description:**

**Start Date / End Date** (required) – Specify the date range to use when looking for absences. The Start Date defaults to the first day of school and the End Date defaults to the last day of school on the calendar.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Administrative Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

<i>Report: R331</i>		<b>High School</b>	
<i>Printed Fri, Jul 10, 2009, 11:24 AM</i>		<b>2008-2009</b>	
<b>HOMEROOM ATTENDANCE REPORT</b>			
HOMEROOM:			
TEACHER:		TEACHER NAME:	
<hr/>			
ID	STUDENT NAME	GR	GN ST E
<hr/>			
11393	Student85418, MARK	10	M A W
12520	Student61933, BRIANA	09	F A M
9383	Student86648, KAYODE	12	M I B
12477	Student84779, BRYCE	09	F A M
9358	Student86691, ANDREW	12	M A M
11003	Student85778, BRANDON	11	M A W

## 7J. District-wide Membership Report (R500)



**Navigation: Home – SIS – Attendance – Attendance Reports – District-wide Membership Report (R500)**

Formerly known as R500 in SIS. This report shows Attendance information by Membership (programs) and/or grade level.

Home » SIS » Attendance » Attendance Reports » District-wide Membership Report (R500)

**WARNING: You are working with a Past S**

## District-wide Membership Report (R500)

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

Selection Criteria    Selection Summary    Load Settings

**School**

<ul style="list-style-type: none"> <li>- Elementary Kindergarten Schc</li> <li>- Elementary School</li> <li>- Intermediate School</li> <li>- Middle School</li> </ul>	← → ← → ← →	<div style="border: 1px solid gray; height: 20px; width: 100%;"></div> <p style="text-align: center; margin: 0;">High School</p>
---	-------------------	--

**Date Range:** 8/26/2008 to 5/29/2009

**Homeroom Date:** 5/29/2009

**Grade**

<ul style="list-style-type: none"> <li>PS - PS</li> <li>KG - KG</li> <li>01 - 01</li> <li>02 - 02</li> </ul>	← → ← → ← →	<div style="border: 1px solid gray; height: 20px; width: 100%;"></div>
--	-------------------	--

**Absence Type**

<ul style="list-style-type: none"> <li>- LATE-EXCUS - Late/Tardy</li> <li>- LATE-UNEX. - Late/Tardy</li> <li>- EXCUSED - Absent</li> <li>- UNEXCUSED - Absent</li> </ul>	← → ← → ← →	<div style="border: 1px solid gray; height: 20px; width: 100%;"></div>
--	-------------------	--

**Program**

<ul style="list-style-type: none"> <li>** - Not applicable</li> <li>01 - Multihandicapped</li> <li>02 - Deaf-blind handicapped</li> <li>03 - Hearing handicapped</li> </ul>	← → ← → ← →	<div style="border: 1px solid gray; height: 20px; width: 100%;"></div>
---	-------------------	--

**Student Status**

<ul style="list-style-type: none"> <li>A - ACTIVE RES</li> <li>D - DELETED</li> <li>I - INACTIVE</li> <li>J - RES A/JVS</li> </ul>	← → ← → ← →	<div style="border: 1px solid gray; height: 20px; width: 100%;"></div>
--	-------------------	--

**Sorting Options**

<ul style="list-style-type: none"> <li>Student Name (DESC)</li> <li>District of Residence (ASC)</li> <li>District of Residence (DESC)</li> <li>Student Number (ASC)</li> </ul>	← → ← → ← →	<div style="border: 1px solid gray; padding: 2px;">Student Name (ASC)</div>
--	-------------------	---

**Delivery Method:** Pickup Set As Default

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

**Description:**

**School** (required) – Select the desired schools. This defaults to all in district.

**Date Range** (required) – Specify the date ranges to look for attendance. Defaults to the range from the calendar’s starting date to today’s date.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom. Defaults to today’s date

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Note:** *This report lists students on non-attending calendars (but lists them with zero days accumulated). No student is counted more than once.*

**Note:** *The Percentage of Attendance on the report is Present divided by All.*

**Temporary Note:** *Currently, the withdrawal date will print on this report if it is not in the future. This is scheduled to change in a future version so that the withdrawal date will only print on this report if it is within the selected date range.*

Report: R500 Printed Mon, Jul 20, 2009, 2:29 PM										HIGH SCHOOL 2008-2009 District Wide Membership Report							
Bldg: HS Grade: 09										Admission - Withdraw		Membership Days					
Id	Student Name	Stat	Prgm	Sex	Grd	Dist of Res.	Cal	Hm Rm	Date	Cde	FTE (%)	All	Pres.	Exc	Tardy	Unexc	
00136574	Student18747, KYLE	R		M	09	049379	DNAC		08/25/08	-	0	0.0	0.0	0.0	0.0	0.0	
00012846	Student24094, KATHRYN	A		F	09	049379	DFLT	IN06	08/25/08	-	100	172.0	170.5	1.5	1.0	0.0	
00012845	Student24095, BROOKE	A		F	09	049379	DFLT	IN07	08/25/08	-	100	172.0	163.5	8.5	0.0	0.0	
00012844	Student24096, TRAVIS	A		M	09	049379	DFLT	IN07	08/25/08	-	100	172.0	170.0	2.0	1.0	0.0	
00012843	Student24097, CODY	A		M	09	049379	DFLT	IN07	08/25/08	-	100	172.0	162.0	10.0	2.0	0.0	

Grd Students:	6	Grade 23 Totals:	801.0	768.5	30.5	1.0	2.0
		Percentage of Attendance:	95.9%				
Page 49 of 50							
Report: R500 Printed Mon, Jul 20, 2009, 2:29 PM			HIGH SCHOOL 2008-2009 District Wide Membership Report				
Bldg Students:	652	School HS Totals:	104639.0	99918.5	4308.5	1137.0	412.0
		Percentage of Attendance:	95.5%				
Rpt Students:	652	Report Totals:	104639.0	99918.5	4308.5	1137.0	412.0
		Percentage of Attendance:	95.5%				

## 8. Attendance Reports – Daily

Please see the Batch/Report Management documentation for more detailed information about running and viewing reports.

### 8A. Half/full Day Absence Office Report (R320Off)



**Navigation: Home – SIS – Attendance – Attendance Reports – Half/full Day Absence Office Report (R320Off)**

Formerly known as R320 Office in SIS. This report will print Half and Full Day Absence Letters for office use.

## Half/full Day Absence Office Report (R320 Office)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

Ad-Hoc Membership:   
 Public And Private

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Date Range:  to

Homerom Date:

### Grade

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

### Absence Letter Rule

Cumulative Absence Letter  
 Sequential Absence Letter

### Rotation Days

M1 - Monday 1  
 T1 - Tuesday 1  
 W1 - Wednesday 1  
 R1 - Thursday 1

### Membership

60 - Stdnt enrolled in Dist result displacement due  
 60 - Stdnt enrolled in Dist result displacement due  
 Academic Intracurricular Descriptions (Vocational -  
 Academic Intracurricular Descriptions (Vocational -

### Membership Group

10 - Regular Programs  
 11 - Intervention  
 12 - Post-secondary Enrollment Options Program  
 13 - Other Regular Programs

### Program

JAB - Jr Auto Body  
 JAG - Jr AG Mechanics  
 JCOS - Jr Cosmetology  
 SAB - Sr Auto Body

### Homerom Code

A103 - BERRY (Full Year Term)  
 A104 - AUSTIN (Full Year Term)  
 A105 - COUSINS (Full Year Term)  
 A106 - CASTLE (Full Year Term)

### Home School

044222 - Lima City SD (Dist)

Print Reason and Note Codes:  Yes  No

### Sorting Options

Student Number (ASC)   Grade (DESC)  
 Student Number (DESC)   Student Name (ASC)  
 Student Name (DESC)  
 Grade (ASC)

Delivery Method:

Email Address:

Report Format:

Description:

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date Range** (optional) – Specify the date range in which to look for attendance. This range will default to the starting date of the calendar and the current date.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Absence Letter Rule** (optional) – If no Absence Letter Rules are selected, the report will select all Absence Letter Rules. You can also filter by selecting specific Absence Letter Rules for your report.

**Rotation Days** (optional) – If no Rotation Days are selected, the report will select all Rotation Days. You can also filter by selecting specific Rotation Days for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Print Reason and Note Codes** (required) – If Yes is checked, the report will print reason codes and note codes.

**Sorting Options** (optional) – Choose one or more sort options for your report

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

11/21/2004

FONT, MICHELLE LYNN

Home Phone:

Work Phone:

Student Number: 6002

Gender: F

Grade: 10

Homerroom:

Absences Recorded from: 8/24/2004 to 11/21/2004

Date of Absence	Type of Absence	AM/PM	Time Left/Arrived	Reason	Note
09/10/2004	ABSENT			ILL	PRNT CALL
09/21/2004	ABSENT			ILL	PRNT CALL
09/30/2004	ABSENT			ILL	PRNT CALL
10/06/2004	EXCUSED			ILL	ATND OFCR
10/15/2004	SCHOOL REL	AM		FIELD TRIP	
10/15/2004	TARDY	AM		LATE	
10/29/2004	ABSENT			JUVENILE	
11/17/2004	EXCUSED			JUVENILE	NO CALL

Total Days Absent: 6:00      Total Times Tardy: 1      Total Absences YTD: 6:00

# 8B. Daily Office – Student Absences (R307)



Navigation: Home – SIS – Attendance – Attendance Reports – Daily Office- Student Absences (R307)

Formerly known as R307 in SIS. This report is used to generate a list of students absent on a specified date grouped by Absence Type and Grade.

Home » SIS » Attendance » Attendance Reports » Daily Office - Student Absences (R307) Advanced

### Daily Office Report of Student Absences (R307)

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

Selection Criteria | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Homeroom Date: 7/20/2009

Start Date: 7/20/2009   Stop Date: 7/20/2009

**Absence Type**

ABSENT	↔	
EXCUSED	↔	
OTHER	↔	
TARDY	↔	

**Grade**

07 - 07	↔	
08 - 08	↔	
09 - 09	↔	
10 - 10	↔	

**Program**

AOC - ALTERNATIVE OPPORTUNITY CENTER	↔	
AUT - AUTISM STUDENTS	↔	
MH - MULTI-HANDICAPPED STUDENTS	↔	
MS - MILLSTREAM STUDENTS	↔	

**Homeroom Code**

AUT - Teacher1173 (Full Year Term)	↔	
IN01 - Teacher1102 (Full Year Term)	↔	
IN02 - Teacher1126 (Full Year Term)	↔	
IN03 - Teacher1163 (Full Year Term)	↔	

**Home School**

	↔	
--	---	--

Print Phone Numbers:

Print Total For Absence Types:

---

**Sorting Options**

Last Name (DESC)	↔	Last Name (ASC)	↕
First Name (DESC)	↔	First Name (ASC)	
Grade (ASC)	↔		
Grade (DESC)	↔		

---

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address

Use custom address text

**Include Copied On Correspondence:**  Yes  No

---

**Delivery Method:** Pickup

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

---

**Description:**

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date

**Start Date / Stop Date** (required) – Specify the date range to use when looking for absences. These fields both default to today's date (so the report defaults to only looking at the current date). Each day will print on a separate page.

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Grades. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Print Phone Numbers** (optional) – If Yes is checked, the report will print student phone numbers.

**Print Total for Absence Types** (optional) – If Yes is checked, the report will print totals for the various absence types.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection. Labels for this report have a default sort by Grade Level, then alphabetically by Name. If a different sort is selected for the report, labels will sort in the same order that the report is sorted.

**Address** – Select the address to use for labels. If you check "Use custom address text", the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked "Copied on Correspondence".

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Student Number	Student Name	Status	Gender	Grade	Home Room	Pgm	Home Phone Number Sch	Absence Interval	Time In	Time Out	Absence Reason	Absence Note	Calendar
5/1/2009													
<b>EXCUSED</b>													
00012810	Student24135, HOLLY	A	F	09	IN06			AM	10:55		SICK	PRNT CALL	DFLT
00012599	Student24179, BRANDON	A	M	09	IN01			Full			SICK	PRNT CALL	DFLT
00012154	Student24239, RYAN	A	M	09	IN07			AM	10:45		SICK	PRNT CALL	DFLT
00012149	Student24244, DODE	N	M	09	IN06			Full			SICK	PRNT CALL	DFLT
00011839	Student24295, TYLER (J)	A	M	10	IN12			Full			SICK	PRNT CALL	DFLT
00011811	Student24325, JACOB	N	M	10	IN10			Full			SICK	NOTE	DFLT
00011644	Student24362, CHRISTINA	A	F	10	IN11			Full			DOC/DENT	ADVANCED	DFLT
00011640	Student24364, MALCOLM	N	M	10	MH			Full			SICK	PRNT CALL	DFLT
00011557	Student24392, KIMBERLY	A	F	10	IN12			Full	1:17		SICK	PRNT CALL	DFLT
00010836	Student24479, MOLLY (MOLLY)	A	F	11	IN18			Full			VACATION	PRNT CALL	DFLT
00010821	Student24497, KAYLEY (KAYLEY)	A	F	11	IN15			Full			DOC/DENT	ADVANCED	DFLT
00010816	Student24502, ROBYN	A	F	11	IN19			AM	9:30		DOC/DENT	PRNT CALL	DFLT
00010517	Student24582, ROBERT (ROBBIE)	A	M	11	IN15			Full			SICK	PRNT CALL	DFLT
00010509	Student24584, TAYLOR	A	F	11	IN14			AM	10:20		SICK	PRNT CALL	DFLT
00010139	Student24652, ERICA (ERICA)	A	F	11	IN17			Full			VACATION	ADVANCED	DFLT

## 8C. Half/full Day Absence Letter (R320)



**Navigation: Home – SIS – Attendance – Attendance Reports – Half/full Day Absence Letter (R320)**

Formerly known as R320 in SIS. This report generates Half and Full Day Absence Letters based on Absence Letter Templates and Absence Letter Rules.

Home » SIS » Attendance » Attendance Reports » Half/full Day Absence Letter (R320) Advanced S

### Half/full Day Absence Letter (R320)

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

Selection Criteria | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Date Range: 8/21/2012 to 9/28/2012

Homeroom Date: 9/28/2012

**Grade**

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

**Absence Letter Rule**

10-Day Truancy  
 15-Day Truancy  
 5-Day Truancy  
 Medical Status

**Rotation Days**

M - Monday  
 T - Tuesday  
 W - Wednesday  
 R - Thursday

**Membership**

15 - Student received intervention provided during  
 15 - Student received intervention provided in the  
 16 - Student placement by a district in a charter  
 50 - Prev. reported as a dropout in reporting dis

**Membership Group**

11 - Intervention  
 12 - Post-secondary Enrollment Options Program  
 15 - 15  
 16 - 16

<b>Program</b>	
** - NOT APPLICABLE 01 - Multiple Disabilities 02 - Deaf-Blindness 03 - Hearing Impairments	
<b>Homeroom Code</b>	
2-108 - MAYNARD (Full Year Term) 2-124A - WELCH (Full Year Term) 2-124B - BRAY (Full Year Term) 2-125 - GILL (Full Year Term)	
<b>Home School</b>	
<b>Print School Address on Letter:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Print Absence Detail:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Print Student Schedule:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Print Reason and Note Codes:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Print Address On Letter:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Print School Policy:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Attendance Policy:</b>	
<input type="text"/>	
<b>Print Program:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Sorting Options</b>	
Student Number (ASC) Student Number (DESC) Student Name (DESC) Grade (ASC)	Grade (DESC) Student Name (ASC)
<b>Output:</b> <input checked="" type="radio"/> Report <input type="radio"/> Labels <input type="radio"/> Both Report and Labels	
<b>Label Type:</b> Avery Label 5160 - 1" X 2 5/8" 3-columns	
<b>Address:</b> <input checked="" type="radio"/> Use Student Address <input type="radio"/> Use Parent Address	
<input type="checkbox"/> Use custom address text <input type="text"/>	
<b>Include Copied On Correspondence:</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	
<b>Delivery Method:</b> Pickup <input type="button" value="Set As Default"/>	
<b>Email Address:</b> EmhoffH@software-answers.com	
<b>Description:</b> <input type="text"/>	
<input type="button" value="Submit"/>	

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date Range** (optional) – Specify the date range in which to look for attendance. This range will default to the starting date of the calendar and the current date.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Absence Letter Rule** (optional) – If no Absence Letter Rules are selected, the report will select all Absence Letter Rules. You can also filter by selecting specific Absence Letter Rules for your report.

**Rotation Days** (optional) – If no Rotation Days are selected, the report will select all Rotation Days. You can also filter by selecting specific Rotation Days for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Grades. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Print Absence Detail** (required) – If Yes is checked, the report will print details for each student absence event.

**Print Student Schedule** (required) – If Yes is checked, the report will print the student schedule.

**Print Reason and Note Codes** (required) – If Yes is checked, the report will print reason codes and note codes for each absence event.

**Print Address on Letter** (required) – If Yes is checked, the report will print the student's address.

**Print School Policy** (required) – If yes is checked, the report will print the corresponding school policy.

**Attendance Policy** (optional) – The absence letter will print the verbiage entered in this field.

**Print Program** (optional) – If yes is checked, the Program field from the Student Profile General tab will print.

**Print School Admin Name** (required) – If yes is checked, the report will print the full school name.

**Sorting Options** (optional) – Choose one or more sort options for your report

**Output** – Select Report, Labels or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the drop-down list.

**Address** – Select the address to use for labels. If you check "Use custom address text", the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked "Copied on Correspondence".

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

DASL HIGH SCHOOL 645 Data Way FINDLAY, OH 45840 4194258900 Attendance Officer:		11/21/2004			
To the Parent/Guardian of WELLS, JONA RENEE 843 NORTHWALD DR  LIMA OH 45801  Counselor: Program: Grade: 11 Homeroom:					
The Ohio Revised code states that all children between the ages of six (6) and eighteen (18) must attend school. Please contact our attendance office for details on local school policies concerning school attendance requirements. Students with excessive absences have been found to be deficient in their academic achievement.					
This letter is to inform you of your child's absence from school. The details of your child's absence from school are listed below. Please discuss this attendance problem with your child and urge him/her to attend all of his/her scheduled classes. If you have any questions concerning our school attendance policies or your child's attendance records, please contact our office. Sincerely,					
<input type="text"/>					
Absences Recorded from: 8/24/2004 to 11/21/2004					
Date of Absence	Type of Absence	AM/PM	Time Left/Arrived	Reason	Note
09/22/2004	EXCUSED			ILL	SCHO CALL
09/30/2004	ABSENT			ILL	PRNT CALL
10/22/2004	SCHOOL REL	AM		FIELD TRIP	
11/05/2004	EXCUSED			COLLEGE	
Total Days Absent: 3.00		Total Times Tardy: 0		Total Absences YTD: 3.00	
Course	Sec	Course Term	Meeting Time	Teacher	
ALGEBRA II	8	All Year Courses	8 (165)	LAURA LAYMAN	
BASIC ENGLISH 11	1	All Year Courses	5 (208)	DAVID COUSINS	
CHEMISTRY I	7	All Year Courses	- See Schedule -	MICHAEL WEBBER	
FRENCH III	1	All Year Courses	3,3A (281)	DONALD BERRY	
LATIN III	1	All Year Courses	6 (284)	DAVID COUSINS	
SPANISH III	3	All Year Courses	4 (280)	MARK HANDLEY	

## 9. Attendance Reports – Period

Please see the Batch/Report Management documentation for more detailed information about running and viewing reports.

### 9A. Period Absence Office Report (R317Off)



**Navigation: Home – SIS – Attendance – Attendance Reports – Period Absence Office Report (R317Off)**

Formerly known as R317 in SIS. This report is used to generate an office search report to identify students who have an attendance problem.

## Period Absence Office Report (R317 Office)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Date Range: 8/26/2008 to 7/28/2008

Homeroom Date: 7/28/2008

### Grade

09 - 09  
10 - 10  
11 - 11  
12 - 12

### Absence Letter Rule

### Rotation Days

M1 - Monday 1  
T1 - Tuesday 1  
W1 - Wednesday 1  
R1 - Thursday 1

### Period

1  
2  
3  
3A

### Membership

60 - Stdnt enrolled in Dist result displacem  
60 - Stdnt enrolled in Dist result displacem  
Academic Intracurricular Descriptions (Voc  
Academic Intracurricular Descriptions (Voc

### Membership Group

10 - Regular Programs  
11 - Intervention  
12 - Post-secondary Enrollment Options F  
13 - Other Regular Programs

Print Absence Detail:  Yes  No

Print Reason and Note Codes:  Yes  No

### Sorting Options

Student Number (ASC)  
Student Number (DESC)  
Student Name (DESC)  
Grade (ASC)

Grade (DESC)  
Student Name (ASC)

Delivery Method: Pickup

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date From** (optional) – Specify the date from to look for attendance. This will default to the starting date on the calendar.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Absence Letter Rule** (optional) – If no Absence Letter Rules are selected, the report will select all Absence Letter Rules. You can also filter by selecting specific Absence Letter Rules for your report.

**Rotation Days** (optional) – If no Rotation Days are selected, the report will select all Rotation Days. You can also filter by selecting specific Rotation Days for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Print Reason and Note Codes** (required) – If Yes is checked, the report will print reason codes and note codes for each student absence event.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

# 9B. Daily Report of Student Period Absences (R315)



**Navigation: Home – SIS – Attendance – Attendance Reports – Daily Report of Student Period Absences (R315)**

Formerly known as R315 in SIS. This report is used to generate a list of all students absent on a specified date. Selection based on grade level, absence type, or absence reason is also available.

Home » SIS » Attendance » Attendance Reports » Daily - Student Period Absences (R315)

### Daily Report of Student Period Absences (R315)

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

Selection Criteria
Selection Summary
Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Date :** 12/21/2006 ⚡

**Homeroom Date:** 12/21/2006 ⚡

**Grade**

<span style="font-size: x-small;">09 - 09</span> <span style="font-size: x-small;">10 - 10</span> <span style="font-size: x-small;">11 - 11</span> <span style="font-size: x-small;">12 - 12</span>	<span style="font-size: x-small;">↕</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↕</span>	
--	--	--

**Absence Type**

<span style="font-size: x-small;">A - Absent</span> <span style="font-size: x-small;">E - Excused</span> <span style="font-size: x-small;">O - Other</span> <span style="font-size: x-small;">T - Tardy</span>	<span style="font-size: x-small;">↕</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↕</span>	
---	--	--

**Absence Reason**

<span style="font-size: x-small;">A - Appt.</span> <span style="font-size: x-small;">B - Hunting</span> <span style="font-size: x-small;">C - College</span> <span style="font-size: x-small;">D - Death</span>	<span style="font-size: x-small;">↕</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↕</span>	
--	--	--

**Print Teacher IDs:**

**Print Unlisted Phone Numbers:**

**Sorting Options**

<span style="font-size: x-small;">Student Number (ASC)</span> <span style="font-size: x-small;">Student Number (DESC)</span> <span style="font-size: x-small;">Student Name (ASC)</span> <span style="font-size: x-small;">StudentName (DESC)</span>	<span style="font-size: x-small;">↕</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↔</span> <span style="font-size: x-small;">↕</span>		<span style="font-size: x-small;">↕</span>
---	--	--	--

**Delivery Method:** Pickup Set As Default

**Email Address:** nik@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Submit

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the Public And Private check box to include Ad-Hoc Memberships created by others and marked for public use in the drop-down menu. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date From** (optional) – Specify the date from to look for attendance. This will default to the starting date on the calendar.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date.

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report.

**Absence Reason** (optional) – If no Absence Reasons are selected, the report will select all Absence Reasons. You can also filter by selecting specific Absence Reasons for your report.

**Print Periods and Teacher IDs** (optional) – If checked, the report will print Periods and Teacher IDs.

**Print Unlisted Phone Numbers** (optional) – If checked, the report will print unlisted student phone numbers.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Daily Report of Student Period Absences**

Day's Meeting Periods

Student Number	Student Name	Status	Grade	HMRM	Telephone	1	2	3	3A	4	5	6	7	8	9	4A	4B
[REDACTED]	[REDACTED]	N	09	DUNH		S											
[REDACTED]	[REDACTED]	A	09	BARW		E	E	E	E	E	E						
[REDACTED]	[REDACTED]	A	09	DAVS		E	E	E	E	E	E	E	E	E	E		
[REDACTED]	[REDACTED]	A	09	DUNH					U	U	U	U	U	U	U		
[REDACTED]	[REDACTED]	A	09	FILL													
[REDACTED]	[REDACTED]	A	09	HURT		S	S	S	S	S	S	S	S	S	S		
[REDACTED]	[REDACTED]	A	09	HOFF													
[REDACTED]	[REDACTED]	A	09	SMIT													
[REDACTED]	[REDACTED]	A	09	SMIT		U											
[REDACTED]	[REDACTED]	A	09	HURT		E	E	E	E	E	E	E	E	E	E		
[REDACTED]	[REDACTED]	A	09	BOWL										A	A		
[REDACTED]	[REDACTED]	A	09	MOYE		E	E	E	E	E	E	E	E	E	E		
[REDACTED]	[REDACTED]	A	09	ROSB													
[REDACTED]	[REDACTED]	A	09	HURT		E											
[REDACTED]	[REDACTED]	A	09	HORD		U	U	U	U	U	U	U	U	U	U		

# 9C. Cumulative Report of Student Period Absences (R316)



**Navigation: Home – SIS – Attendance – Attendance Reports – Cumulative Report of Student Period Absences (R316)**

Formerly known as R316 in SIS. This report is used to generate a report listing the cumulative number of periods a student has been absent and/or late within a specified date range. Selection based on grade range as well as number of absences is also provided.

Home » SIS » Attendance » Attendance Reports » Cumulative Student Period Absence (R316)

### Cumulative Report of Student Period Absences (R316)

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

Selection Criteria
Selection Summary
Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

**Ad-Hoc Membership:** -- Select an Ad-Hoc Membership --

Public And Private

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Date Range:** 8/26/2008 to 7/28/2008

**Homeroom Date:** 7/28/2008

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

← →  
↔ ↔

**Absence Type**

E - EXCUSED  
I - ISS  
O - OTHER  
P - PARENT/CP

← →  
↔ ↔

**Absence Range:**  to

**Print Teacher IDs:**

**Sorting Options**

Student Name (ASC)  
Student Name (DESC)  
Grade (ASC)  
Grade (DESC)

← →  
↔ ↔

↑ ↓

**Delivery Method:** Pickup Set As Default

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Submit

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the Public And Private check box to include Ad-Hoc Memberships created by others and marked for public use in the drop-down menu. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date Range** (optional) – Specify the dates during which to look for attendance. This will default to the starting date on the calendar and today's date.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Absence Type** (optional) – If no Absence Types are selected, the report will select all Absence Types. You can also filter by selecting specific Absence Types for your report.

**Absence Range** (optional) – Limit the selection of students to those who have number of days absent within the range specified.

**Print Teacher IDs** (optional) – If checked, the report will print Teacher IDs.

**Sorting Options** (optional) – Choose one or more sort options for your report

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R316  
Printed Mon, Jul 23, 2007, 3:45 PM

[REDACTED] HIGH SCHOOL  
2006-2007  
Cumulative Report of Student Period Absences

Student Number	Student Name	Status	Meeting Periods											
			1	2	3	3A	4	5	6	7	8	9	4A	4B
[REDACTED]	Grade:10 Homeroom: [REDACTED]	A	Absences: 3	3	3	2	3	5	4	4	4	5		
			Partials: 1											
[REDACTED]	Grade:12 Homeroom: [REDACTED]	A	Absences: 4	4	4	4	3	3	4	4	4	4		
			Partials: 1											
[REDACTED]	Grade:12 Homeroom: [REDACTED]	A	Absences: 16	16	16	16	16	12	12	12	12	12		
			Partials: 1											
[REDACTED]	Grade:11 Homeroom: [REDACTED]	N	Absences: 2	2	2	2	1	1	1	1	1	1		
			Partials: 1											
[REDACTED]	Grade:12 Homeroom: [REDACTED]	I	Absences: 31	28	22	15	18	18	18	37	24	28		
			Partials: 3	3					6		6			
[REDACTED]	Grade:11 Homeroom: [REDACTED]	A	Absences: 9	9	9	9	8	8	7	8	9	11		
			Partials: 1											

# 9D. Period Absence Letter (R317)



Navigation: Home – SIS – Attendance – Attendance Reports – Period Absence Letter (R317)

Formerly known as R317 in SIS. This report is used to generate absence letters to parents of students who have met specified absence criteria.

Home » SIS » Attendance » Attendance Reports » Period Absence Letter (R317) Advanced S

### Period Absence Letter (R317)

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

**Selection Criteria** | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Date Range:** 8/21/2012 to 9/28/2012

**Homeroom Date:** 9/28/2012

**Grade**

09 - 09	↔	
10 - 10	↔	
11 - 11	↔	
12 - 12	↔	

**Absence Letter Rule**

	↔	
--	---	--

**Rotation Days**

M - Monday	↔	
T - Tuesday	↔	
W - Wednesday	↔	
R - Thursday	↔	

**Period**

1	↔	
2	↔	
3	↔	
4	↔	

**Membership**

15 - Student received intervention provi	↔	
15 - Student received intervention provi	↔	
16 - Student placement by a district in a	↔	
50 - Prev. reported as a dropout in repo	↔	

**Membership Group**

11 - Intervention  
 12 - Post-secondary Enrollment Options  
 15 - 15  
 16 - 16

← →  
 ⇐ ⇓

---

**Print School Address on Letter:**  Yes  No

**Print Absence Detail:**  Yes  No

**Print Student Schedule:**  Yes  No

**Print Reason and Note Codes:**  Yes  No

**Print Address On Letter:**  Yes  No

**Print School Policy:**  Yes  No

**Attendance Policy:**

---

**Sorting Options**

Student Number (ASC)  
 Student Number (DESC)  
 Student Name (DESC)  
 Grade (ASC)

← →  
 ⇐ ⇓

Grade (DESC)  
 Student Name (ASC)

⇕

---

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address

Use custom address text

**Include Copied On Correspondence:**  Yes  No

---

**Delivery Method:** Pickup

**Email Address:**

---

**Description:**

---

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Date Range** (required) – Specify the date ranges to look for attendance. This will default to the starting date on the calendar for the Start Date and to today's date for the End Date.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom – will always default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Absence Letter Rule** (optional) – If no Absence Letter Rules are selected, the report will select all Absence Letter Rules. You can also filter by selecting specific Absence Letter Rules for your report.

**Rotation Days** (optional) – If no Rotation Days are selected, the report will select all Rotation Days. You can also filter by selecting specific Rotation Days for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Print Absence Detail** (required) – If Yes is checked, the report will print details for each student absence event.

**Print Student Schedule** (required) – If Yes is checked, the report will print student schedules on the absence letter.

**Print Reason and Note Codes** (required) – If Yes is checked, the report will print reason codes and note codes for each student absence event.

**Print Address on Letter** (required) – If Yes is checked, the report will print the student's address.

**Print School Policy** (required) – If yes is checked, the report will print the corresponding school policy.

**Attendance Policy** (optional) – Enter the text of the Attendance Policy that will print on the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the drop-down list.

**Address** – Select the address to use for labels. If you check "Use custom address text", the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked "Copied on Correspondence".

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Submits this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

DASL HIGH SCHOOL  
 645 Data Way  
 FINDLAY, OH 45840  
 4194258900  
 Attendance Officer:

11/21/2004

To the Parent/Guardian of  
 EYE, CORY ROBERT  
 12 NORTH ST  
 LIMA OH 45801  
 Counselor:  
 Program:  
 Grade: 10 Homeroom: A105



The Ohio Revised code states that all children between the ages of six (6) and eighteen (18) must attend school. Please contact our attendance office for details on local school policies concerning school attendance requirements. Students with excessive absences have been found to be deficient in their academic achievement.

This letter is to inform you of your child's absence from school. The details of your child's absence from school are listed below. Please discuss this attendance problem with your child and urge him/her to attend all of his/her scheduled classes.  
 If you have any questions concerning our school attendance policies or your child's attendance records, please contact our office.  
 Sincerely,

[Signature Line]

Absences Recorded from: 8/24/2004 to 11/21/2004

Absence Date	Absence Type	Period	Time Left/Arrived	Reason	Note
11/17/2004	UNEXCUSED	3A,4,5,6	went uptown	COLLEGE	CALL RECVD
11/18/2004	PARENT/CP	3	test		

Total Days Absent: 1.50

Total Times Tardy: 0

Total Absences YTD: 9.00

Course	Sec	Course Term	Meeting Time	Teacher
ANATOMY	3	All Year Courses	- See Schedule -	CASTLE RONALD
APPLIED MATH II	2	All Year Courses	8 (226)	MICHAEL WEBBER
ART 10	1	All Year Courses	M,T,W,R: 9 (MSS)	DONALD BERRY
BASIC ENGLISH 10	1	All Year Courses	5 (211)	DONALD BERRY
FRENCH II	2	All Year Courses	7 (281)	SUSAN CLARK
GERMAN II	1	All Year Courses	6 (282)	LAURA LAYMAN
LATIN II	1	All Year Courses	4 (284)	DAVID COUSINS
PRACTICAL GEOMETRY	1	All Year Courses	3,3A (222)	CASTLE RONALD

This page intentionally left blank.

---

# ProgressBook StudentInformation Course History, Class Rank and Transcripts Guide



# **ProgressBook StudentInformation Course History, Class Rank and Transcripts Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

## Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Course History, Class Rank and Transcripts Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.6.0	<a href="#">“Manually Add Student Course History”</a>	22	Updated description of <b>Counts for Graduation</b> field to indicate that it is not currently functional.
14.3.0	<a href="#">“Student Course History Summary”</a>	9	Updated image. Added “Course Is College Prep” and “Course Is Dual Credit” to <b>Columns Available</b> field description.
14.3.0	<a href="#">“View Student Course History”</a>	13	Updated image.
14.3.0	<a href="#">“Custom Transcript Formats (R702)”</a>	31	Updated image and description of <b>Sorting Options</b> field to reflect that “Student Name (ASC)” is the only sort option.
14.2.0	<a href="#">“Edit Student Course History”</a>	15	Updated image of <b>Manually Entered Course</b> screen and added description of new <b>Is Dual Credit</b> and <b>Is College Prep</b> check boxes.
14.2.0	<a href="#">“Manually Add Student Course History”</a>	22	Updated image of <b>Manually Entered Course</b> screen and added description of new <b>Is Dual Credit</b> and <b>Is College Prep</b> check boxes.
14.1.0	<a href="#">“Custom Transcript Formats (R702)”</a>	31	Added descriptions of new GPA Sets fields and updated screen shot.

This page intentionally left blank.

# Table of Contents

Change Log.....	i
Table of Contents.....	iii
Course History, Class Ranking, and Transcripts Overview .....	1
Understanding the Course History, Class Ranking and Transcripts Module .....	1
Course History and Transcripts Outline and Flow .....	2
Course History System Maintenance .....	3
Course History Transfer Codes Maintenance.....	3
Add/Edit Course History Transfer Codes .....	4
GPA Set Maintenance .....	4
Course History & Class Rank Records.....	5
Course History Menu .....	5
Student GPA & Rank List.....	6
Student GPA History .....	7
Student Course History Summary .....	9
View Student Course History .....	13
Edit Student Course History .....	15
Manually Add Student Course History .....	22
Course History & Transcripts Reports .....	29
Transcript Formatter (R702) .....	29
Custom Transcript Formats (R702).....	31
Student GPA Ranking (R325).....	41
Appendix A. Example Transcript Formats.....	43

This page intentionally left blank.

---

## **Course History, Class Ranking, and Transcripts Overview**

An accurate course history must be maintained for all students in order to create student transcripts and calculate class rank lists and student GPAs (Grade Point Average).

The StudentInformation Course History module also provides the ability to share student course history information between “trusted” districts. Each district will have the option to add districts to their list of trusted districts, thus allowing individuals with the appropriate security, access to view only, “shared” student’s course history information.

There are dynamic screens that allow the viewing of student class ranking and GPAs within each grade. Links from those screens list individual student’s detailed GPA history information. Transcripts may be produced that will list all course information for selected students as well as attendance and assessment/testing data.

---

## **Understanding the Course History, Class Ranking and Transcripts Module**

A student scheduled into a course has a course history record dynamically displayed in StudentInformation. By maintaining a student’s marks, course history is automatically updated with new information from the student’s scheduled courses.

When a student enrolls from another district it is usually necessary to manually add course information so that courses previously completed at another building/district may be included in a student’s GPA and ranking as well as transcript information. You may use course codes that are part of your StudentInformation database and thereby default fields to those values, or you may designate all new data for the required fields when manually entering course history information. Manually entered course information consists of two tabs, one with course detail information including whether a course is to be included in the GPA and Credit calculations as well as Honor Roll. The second tab is for recording the course marks information, which determines how the course history marks are used in GPA and Rank calculations.

Updating course history information does not automatically update GPA and Ranking tables however. That is accomplished by processing GPA Sets. StudentInformation allows districts to define more than one GPA Set calculation and keeps a running history and details of each calculation performed for all applicable students.

---

# Course History and Transcripts Outline and Flow

## 1. Course History System Maintenance

- A. **Transfer Codes** – Codes used to categorize Course History Records.
- B. **GPA Sets** – Module where the building defines the configuration required for calculating GPA and Rank. Several may be defined
- C. **Trusted Districts** – A list of school districts that will be allowed to view transcript data for the current school district

## 2. Course History and Class Rank Records

### A. Course History

- 1. **Student GPA and Rank Listing** – By selecting the applicable GPA Set and Grade Level the user can view the GPA and Class Rank list for selected criterion.
- 2. **Student GPA History** – Details of student's GPA calculations and ranking

- B. **Student Course History Summary** – Summary of a selected student's course history and marks information with the ability to manually add course history records from other districts.

- 1. **View Student Course History**
- 2. **Edit Student Course History**
- 3. **Manually Add Student Course History**

## 3. Reports

- A. **Transcript Formatter (R702)** – Report used for producing transcripts of various formats

- 1. **Non-Custom Transcript Formats (R702)**
- 2. **Custom Transcript Formats (R702)**

- B. **Student GPA Ranking (R325)** – Report listing students' GPAs and class rank.

---

# Course History System Maintenance

## Course History Transfer Codes Maintenance

**Navigation: Home – Management – School Administration – Course History Administration – Transfer Codes**

Transfer Codes are used to optionally categorize reasons for Manual Courses entered into the Student Course History records.

Home » Management » School Administration » Course History Administration » Transfer Codes

### Course History Transfer Codes Maintenance

From this screen, you can display, add, change and delete Course History Transfer codes.

Add Transfer Code

		Code	Name ^	Description	Active
		HS	High School	High School Course History Record	
		MSJH	Middle School/Junior High records		
		OSD	Other School District	Course History records received from another school district	

Show Active Only

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

– This Transfer Code has been entered at a higher level (Global Level or District Level) and cannot be changed at the Building Level.

– Active Transfer Code – can be used on new Student Course History Records.

– Inactive Transfer Code – cannot be used on new Student Course History Records.

## Add/Edit Course History Transfer Codes

Home » Management » School Administration » Course History Administration » Transfer Codes

### Course History Transfer Codes Maintenance

From this screen, you can display, add, change and delete Course History Transfer codes.

**Code:**  ⚡

**Name:**  ⚡

**Description:**

**Is Active:**

Save Save and New Cancel

**Code** (required) – Enter up to 4 characters alphanumeric Transfer Code. If you try to use an existing inactive Transfer Code, you will be prompted to reactive this inactive Transfer code if you wish.

Transfer Codes may be defined globally (by the DA Site), at the district level, or at the school level per the chart below.

	Visibility and Use	Editable
<b>Global Level</b>	DA Site, District, School	DA Site
<b>District Level</b>	DA Site, District, School	DA Site, District
<b>School Level</b>	DA Site, District, School	DA Site, District, School

**Name** (required) – Enter Name of Transfer Code.

**Description** (optional) – Enter Description of Transfer Code.

**Is Active** (optional) – Yes or No; Transfer Code must be Active to use on new Student Course History Records/

## GPA Set Maintenance

**Navigation:** Home – Management – School Administration – Course History Administration – GPA Sets

GPA Set Maintenance screen is used to define the configuration required for calculating GPA and Rank. Buildings may have more than one GPA set used for GPA calculations.

Home » Management » School Administration » Course History Administration » GPA Sets

## GPA Set Maintenance

From this screen, you can display, add, change and delete data pertaining to GPA sets.

Add GPA Set

		Name ^	Modified	Last Calculated	
			1st Quarter	3/2/2005 12:41:00 PM	3/21/2005 11:57:00 AM
			1st Semester Average	3/2/2005 12:40:00 PM	3/21/2005 11:57:00 AM
			2nd Quarter	3/2/2005 12:42:00 PM	7/7/2005 9:28:00 AM
			2nd Semester Average	3/2/2005 12:42:00 PM	7/7/2005 9:28:00 AM
			3rd Quarter	3/2/2005 12:44:00 PM	7/7/2005 9:28:00 AM
			4th Quarter	3/2/2005 12:44:00 PM	7/7/2005 9:28:00 AM
			Cumulative	3/2/2005 12:45:00 PM	7/7/2005 9:28:00 AM

**Sorting** – You may sort by any column (Name, Modified, Last Calculated) in ascending or descending order by clicking on the column header.

– Delete this GPA Set.

– Edit this GPA Set.

– Refresh GPA Set.

The Refresh GPA Set process may take a few minutes to complete. The Last Calculated column will display the correct date and time when the process is finished, but this page will not automatically refresh. Refresh this page by clicking its name in the breadcrumb trail after a few minutes to confirm that the GPA Set has been refreshed, or continue working in StudentInformation prior to returning to this page.

**Adds GPA Set** – Add a new GPA Set.

For more information on GPA Sets see *ProgressBook StudentInformation Marks Guide*.

## Course History & Class Rank Records

### Course History Menu

Navigation: Home – SIS – Course History

Course History menu provides links to Student GPA/Rank listing and to the Student Course History menu.

Home » SIS » Course History

## Course History

Please make a menu selection

[Student Course History Menu](#)      [Student GPA/Rank](#)

## Student GPA & Rank List

**Navigation: Home – SIS – Course History – Student GPA/Rank**

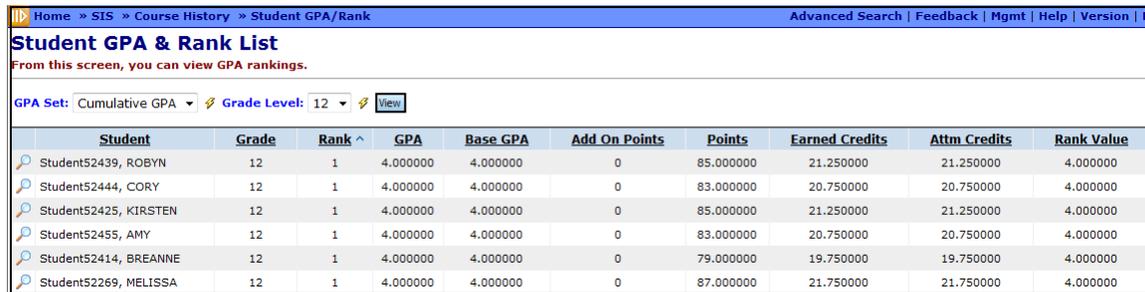
The Student GPA & Rank List is a screen where Student GPA and Rank information may be viewed and/or printed, by selecting the applicable GPA Set and Grade Level.



**GPA Set** (required) – Make a selection from the available GPA Sets that have been defined for the working building.

**Grade Level** (required) – Select the grade level that you wish to view GPA and Rank information.

Click **View** to view GPA and Rank information for selected students.



Student	Grade	Rank ^	GPA	Base GPA	Add On Points	Points	Earned Credits	Attm Credits	Rank Value
StudentS2439, ROBYN	12	1	4.000000	4.000000	0	85.000000	21.250000	21.250000	4.000000
StudentS2444, CORY	12	1	4.000000	4.000000	0	83.000000	20.750000	20.750000	4.000000
StudentS2425, KIRSTEN	12	1	4.000000	4.000000	0	85.000000	21.250000	21.250000	4.000000
StudentS2455, AMY	12	1	4.000000	4.000000	0	83.000000	20.750000	20.750000	4.000000
StudentS2414, BREANNE	12	1	4.000000	4.000000	0	79.000000	19.750000	19.750000	4.000000
StudentS2269, MELISSA	12	1	4.000000	4.000000	0	87.000000	21.750000	21.750000	4.000000

**Sorting** – You may sort by any column (Student, Grade, Rank, GPA, Base GPA, Add On Points, Points, Credits, Rank Value) in ascending or descending order by clicking on the column header.

**Rank Value** – This column will display the value used to rank students relative to each other.

Click the  magnifier to view student GPA details:

Home SIS Teacher Menu EZ Query Management EMIS My Account

**SCRAMBLED** Student73930, ABIGAIL (ABBEY) ID: 10141 Counselor: [X]  
 HIGH SCHOOL 2009-2010 Gender: F Homeroom: IN24  
 Calendar: DFLT Grade: 12 Status: A [Find]

Home » SIS » Course History » Student GPA Details

### Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

**GPA Set:**

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
1st Qtr	Standard GPA Calculation (Alpha)	Qtr1	Progress 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Calculations:**

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	12/22/2009 10:43 AM	23.0000	6.0000	3.8333
Last time GPA was recalculated	11/4/2009 8:37 AM	23.0000	6.0000	3.8333

**Details:**

Year	Course			Include in Total Credits	Include in GPA	Is HS Credit	Mark			Is Earned	In GPA	Calculation Values			
	Code	Abbr	Term				Type	Mark	Crd Type			Pt Val	Crd Att	Crd Earn	Crs Crd
2009-2010	013	DRAWING	1Sem	✓	✓	✓	Quarter Mark	A+	Progress 1	✓	✓	4.0000	.5000	.5000	.5000
2009-2010	016	ART II	Year	✓	✓	✓	Quarter Mark	A+	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000
2009-2010	073	RES EMER	1Sem	✓	✓	✓	Quarter Mark	A	Progress 1	✓	✓	4.0000	.5000	.5000	.5000
2009-2010	125	ENG IVC	Year	✓	✓	✓	Quarter Mark	A	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000
2009-2010	150	CP ALGEB	Year	✓	✓	✓	Quarter Mark	B	Progress 1	✓	✓	3.0000	1.0000	1.0000	1.0000
2009-2010	186	PHYSCS	Year	✓	✓	✓	Quarter Mark	A	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000
2009-2010	212	AM GOV	Year	✓	✓	✓	Quarter Mark	A-	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000

### GPA Calculation Tips

Standard GPA

$$\text{GPA} = (\text{Sum of (Pt Val} \times \text{Crd Att)}) / (\text{Sum of Crd Att})$$

GPA by Course Count

$$\text{GPA} = (\text{Sum of Pt Val}) / (\# \text{ of Marks marked as in Cum GPA})$$

### Student GPA History

**Navigation: Home – SIS – Student – Course History – GPA History**

In StudentInformation each time the GPA Sets are recalculated or new GPA Sets calculated, a record is created in the Student GPA History.

<b>DASL</b>		<a href="#">CONTRARY, MARY M.</a>	ID: 00005001	Counselor:
		DASL HIGH SCHOOL 2007-2008	Gender: F	Homeroom:
		Calendar: DFLT	Grade: 09	Status: A

Home » SIS » Student » Course History » GPA History

## Student GPA History

From this screen, you can view student GPA history.

School Year	School ^	GPA Set	Rank	GPA	Points	Credits	Last Calculated
2006	DASL HIGH SCHOOL	Cum	3	2.615000	51.000000	19.500000	12/20/2006 2:40:00 PM
2004	DASL HIGH SCHOOL	Qtr4	1	4.000000	7.000000	1.750000	7/7/2005 9:28:00 AM
2004	DASL HIGH SCHOOL	Qtr1	5	2.000000	1.500000	0.750000	3/21/2005 11:57:00 AM
2004	DASL HIGH SCHOOL	Cum	1	2.308000	15.000000	6.500000	7/7/2005 9:28:00 AM
2004	DASL HIGH SCHOOL	Qtr2	5	3.000000	2.250000	0.750000	7/7/2005 9:28:00 AM
2004	DASL HIGH SCHOOL	Avg2	1	2.143000	7.500000	3.500000	7/7/2005 9:28:00 AM
2007	DASL HIGH SCHOOL	Cum	3	2.500000	30.000000	12.000000	2/7/2008 2:54:00 PM
2004	DASL HIGH SCHOOL	Qtr3	4	2.333000	1.750000	0.750000	7/7/2005 9:28:00 AM
2004	DASL HIGH SCHOOL	Avg1	1	2.500000	7.500000	3.000000	3/21/2005 11:57:00 AM

Click a **GPA Set code** to see the GPA Set Results for that particular student.

Home	SIS	Teacher Menu	EZ Query	Management	EMIS	My Account
------	-----	--------------	----------	------------	------	------------

SCRAMBLED Student73930, ABIGAIL (ABBEY) ID: 10141 Counselor: [x]

Calendar: DFLT HIGH SCHOOL 2009-2010 Gender: F Homeroom: IN24

Grade: 12 Status: A [Find]

Home » SIS » Course History » Student GPA Details

## Student GPA Supporting Details

From this screen, you can view data pertaining to the students GPA details.

**GPA Set:**

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
1st Qtr	Standard GPA Calculation (Alpha)	Qtr1	Progress 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Calculations:**

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	12/22/2009 10:43 AM	23.0000	6.0000	3.8333
Last time GPA was recalculated	11/4/2009 8:37 AM	23.0000	6.0000	3.8333

**Details:**

Year	Code	Abbr	Term	Course			Mark			Calculation Values					
				Include in Total Credits	Include in GPA	Is HS Credit	Type	Mark	Crd Type	Is Earned	In GPA	Pt Val	Crd Att	Crd Earn	Crs Crd
2009-2010	013	DRAWING	1Sem	✓	✓	✓	Quarter Mark	A+	Progress 1	✓	✓	4.0000	.5000	.5000	.5000
2009-2010	016	ART II	Year	✓	✓	✓	Quarter Mark	A+	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000
2009-2010	073	RES EMER	1Sem	✓	✓	✓	Quarter Mark	A	Progress 1	✓	✓	4.0000	.5000	.5000	.5000
2009-2010	125	ENG IVC	Year	✓	✓	✓	Quarter Mark	A	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000
2009-2010	150	CP ALGEB	Year	✓	✓	✓	Quarter Mark	B	Progress 1	✓	✓	3.0000	1.0000	1.0000	1.0000
2009-2010	186	PHYSICS	Year	✓	✓	✓	Quarter Mark	A	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000
2009-2010	212	AM GOV	Year	✓	✓	✓	Quarter Mark	A-	Progress 1	✓	✓	4.0000	1.0000	1.0000	1.0000

This screen displays the results of that GPA Set for this student including a current GPA result based on the GPA Set (displaying what this student's GPA would be if the GPA Set had just been refreshed).

The Details section displays each course used to calculate this GPA, with each course's line including that course's school year, course code, abbreviation, course term, Include in Total Credits value, Include in GPA value, Is High School Credit value, mark type, Mark, credit type, Is Earned value, In GPA value, Point Value, Credits Attempted, and Credits Earned, Credit Credited, Add On, and Total Points.

## Student Course History Summary

**Navigation: Home – SIS – Student – Course History – Student Course History**

The Student Course History Summary screen provides the ability to view and document a student's course history with respect to courses and their corresponding marks.

Student Course History is composed currently of two types of maintenance records: Scheduled Courses (courses assigned through normal scheduling process) and Manual Courses (courses manually entered to represent courses taken at another school district).

**Student Course History Summary**  
From this screen, you can view student course history.

[Hide Filters]

District: Ashland City Schools Credit Type: All I want to...

**Include School Years:**

School Years Available	School Years Selected
2013-2014	
2012-2013	
2011-2012	
2010-2011	
2009-2010	

**Include Mark Types:**

Mark Types Available	Mark Types Selected
Avg - Avg	
EX - Exam	
Exam - Exam	
FIN - FIN	
FIN - Final	

Show Manual Courses With No Marks:  Yes  No

Show 'Is High School Credit' Courses Only:  Show 'Include in GPA' Courses Only:  Show 'Include in Total Credits' Courses Only:

**View:**

Columns Available	Columns Selected
Grade	School
Course Abbreviation	School Year
Course Name	Reporting Term Code
Teacher Name	Course Code
Course Level of Difficulty	Course Short Name
Course Add-On Level	Course Section
Course Area of Study	Mark
Course Subject Area	Mark Type
Course Department	Attempted Credits
Course CORE Subject Area	Earned Credits

**District** – Select the applicable school district from the drop-down list.

**Credit Type** – Select the applicable credit type that you wish to view with this student's Course History. All will be the default.

**Include School Years** – List of available and selected School Years. The user may select as many school years as they wish. If no school years are selected, then no filter will be applied and all school years will be included.

**IMPORTANT:** The screen is no longer limited to showing course history from the past six years.

**Include Mark Types** – List of available and selected Mark Types. The user may select as many mark types as they wish. If no mark types are selected, then no filter will be applied and all mark types will be included.

**Show Manual Courses with No Marks** – Yes or No; indicates if manual course records with no marks should be included.

**Show Is High School Credit Courses Only** - Yes or No (default); indicates if only manual course records for courses marked Is High School Credit (Courses – General tab) should be included.

**Show Include in GPA Courses Only** - Yes or No (default); indicates if only manual course records for courses marked Include in GPA (Courses – Marks tab) should be included.

**Show Include in Total Credits Courses Only** - Yes or No (default); indicates if only manual course records for courses marked Include in Total Credits (Courses – Marks tab) should be included.

**Columns Available** – Fields available for selection when viewing student’s course history information. Fields include:

- Grade
- Course Abbreviation
- Course Name
- Teacher Name
- Course Level of Difficulty
- Course Add-On Level
- Course Area of Study
- Course Subject Area
- Course Department
- Course CORE Subject Area
- Course Is High School Credit
- Course Include in GPA
- Course Include in Total Credits
- Course Is College Prep
- Course Is Dual Credit
- Numeric Mark
- Mark Equivalent
- Mark Credit Type
- School
- School Year
- Reporting Term Code
- Course Code
- Course Short Name
- Course Section
- Mark
- Mark Type
- Attempted Credits
- Earned Credit

**Columns Selected** – Fields selected for display when user views the selected student’s course history information. Fields must be in the Columns Selected if they are to display on the Student Course History Summary screen.

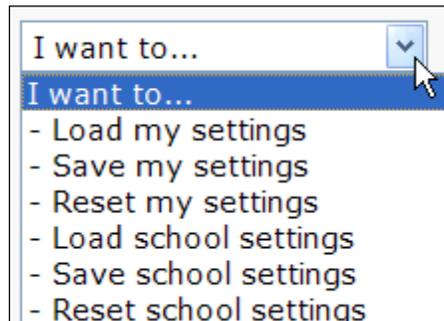
← → – Click arrows to move selections back and forth from the Columns Available and Columns Selected.

↔ ↔ – Click arrows to move ALL items back and forth from the Columns Available and Columns Selected.

**View History** – View Student Course History Summary using selected fields

**Add Manually Entered Course** – Add manual course history information for the selected student. See [“Manually Add Student Course History.”](#)

**I want to....** – Choose from the drop-down list below to load and save Student Course History Summary settings.



**Load my settings** – This option will allow the user to reload their saved settings into the filter controls. If the user navigates to the Manually Entered Courses screen or the Student Mark Entry screen, using the buttons on the Student Course History Summary screen, and then returns to the Student Course History Summary screen using the designated buttons on the Manually Entered Courses screen or the Student Mark Entry screen, then the filter options selected when leaving the Student Course History Summary screen will be reapplied when the user returns to the screen, rather than the user's saved settings. The Load my settings option allows the user to reload their saved settings in this situation.

**Save my settings** – Save Student Course History Summary settings. These settings will automatically populate every time the user brings up the Student Course History Summary screen. The user will receive the following message after saving the settings.

**Your settings have been saved**

**Reset my settings** – Reset Student Course History Summary settings. The settings will return to the default StudentInformation Student Course History Summary settings. The user will receive the following message after resetting the settings.

**Your settings have been reset**

**Load school settings** – Will populate the Student Course History Summary screen with the saved school settings.

**Save school settings** – Save Student Course History Summary settings and make them the default for the entire school building. This can only be done if the user has specific security access to save school settings. Any user without their own saved settings will inherit the school's default settings. The user will receive the following message after saving school settings.

**School settings have been saved**

**Reset school settings** – Reset Student Course History Summary default settings for the entire school building. The settings will return to the default StudentInformation Student Course History Summary settings. This can only be done if the user has specific security access to save school settings. The user will receive the following message after resetting school settings.

**School settings have been reset**

## View Student Course History

**Navigation: Home – SIS – Student – Course History – Student Course History**

Click **View History** to view the Student’s Course History records, after selecting the applicable filters and fields for display as detailed in section “*Student Course History Summary*.”

Home » SIS » Student » Course History » Student Course History

### Student Course History Summary

From this screen, you can view student course history.

[\[Hide Filters\]](#)

**District:** Ashland City Schools

**Credit Type:** All ▼

I want to... ▼

**Include School Years:**

School Years Available

- 2013-2014
- 2012-2013
- 2011-2012
- 2010-2011
- 2009-2010

**School Years Selected**

**Include Mark Types:**

Mark Types Available

- Avg - Avg
- EX - Exam
- Exam - Exam
- FIN - FIN
- FIN - Final

**Mark Types Selected**

Show Manual Courses With No Marks:  Yes  No

Show 'Is High School Credit' Courses Only:  Show 'Include in GPA' Courses Only:  Show 'Include in Total Credits' Courses Only:

**View:**

Columns Available

- Grade
- Course Abbreviation
- Course Name
- Teacher Name
- Course Level of Difficulty
- Course Add-On Level
- Course Area of Study
- Course Subject Area
- Course Department
- Course CORE Subject Area

**Columns Selected**

- School
- School Year
- Reporting Term Code
- Course Code
- Course Short Name
- Course Section
- Mark
- Mark Type
- Attempted Credits
- Earned Credits

[Add Manually Entered Course](#)

[View History](#)

Home » SIS » Student » Course History » Student Course History Advanced Search | Feedback | Mgmt | Help

### Student Course History Summary

From this screen, you can view student course history.

[Show Filters](#)

Total Attempted Credits: 19.25 Total Earned Credits: 19.25

	School	School Year	Term Code	Course Code	Course Short Name	Section	Mark Type	Mark	Attempted Credits	Earned Credits
	HIGH SCHOOL	2008-2009	Fin	011	ART I	4	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2008-2009	Fin	035	MONEY MATTERS	61	Final Mark	A	0.500000	0.500000
	HIGH SCHOOL	2008-2009	Fin	123	ENG III (COLL)	7	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2008-2009	Fin	144	GEOMETRY	9	Final Mark	B	1.000000	1.000000
	HIGH SCHOOL	2008-2009	Fin	183	ANAT/PHYS	3	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2008-2009	Fin	184	CP CHEMISTRY	12	Final Mark	B	1.000000	1.000000
	HIGH SCHOOL	2008-2009	Fin	204	STREET LAW	82	Final Mark	A	0.500000	0.500000
	HIGH SCHOOL	2007-2008	Fin	044	COMP APPL	51	Final Mark	A	0.250000	0.250000
	HIGH SCHOOL	2007-2008	Fin	069	SPAN II	9	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2007-2008	Fin	074	SPORTS/GAMES	32	Final Mark	P	0.250000	0.250000
	HIGH SCHOOL	2007-2008	Fin	121	ENG II	2	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2007-2008	Fin	143	ALG II	1	Final Mark	B	1.000000	1.000000
	HIGH SCHOOL	2007-2008	Fin	166	MIXED CHORUS	4	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2007-2008	Fin	182	BIOLOGY	8	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2007-2008	Fin	206	AMER HISTORY	7	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2006-2007	Fin	068	SPAN I	2	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2006-2007	Fin	074	SPORTS/GAMES	81	Final Mark	P	0.250000	0.250000
	HIGH SCHOOL	2006-2007	Fin	078	HEALTH	82	Final Mark	A-	0.500000	0.500000
	HIGH SCHOOL	2006-2007	Fin	120	ENG I	3	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2006-2007	Fin	140	ALG I	61	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2006-2007	Fin	170	FR CHOIR	4	Final Mark	A	1.000000	1.000000
	HIGH SCHOOL	2006-2007	Fin	180	PEC SC	1	Final Mark	B	1.000000	1.000000
	HIGH SCHOOL	2006-2007	Fin	205	WORLD STUDIES	9	Final Mark	A	1.000000	1.000000

23 Records Displayed [Back To Top](#)

The fields selected on the Columns Selected tab will be viewable in the Student Course History Summary.

**Show Filters/Hide Filters** – Show or Hide filters used to select this Course History display.

**Add Manually Entered Course** – Add manual course history information for the selected student. See [“Manually Add Student Course History.”](#)

**Total Attempted Credits** – Provides the total of Attempted Credits and are calculated for the marks that meet the filter criteria to be shown on the screen, using the same credit summation rules that are used for the transcript.

**Total Earned Credits** – Provides the total of Earned Credits. The Earned Credits are only shown for marks where the Mark Credit Type = Earned, and the Total Earned Credits also includes credits for marks where the Mark Credit Type = Earned.

**School** – The Course History Summary grid shows both manually entered courses and standard courses. When displaying the school for a manually entered course, the School field in the Course History Summary grid displays the School Description when available; otherwise the name associated with the School IRN field is displayed.

For standard courses, the School field in the Course History Summary grid displays the EMIS Location Description from the Course record when available;

otherwise the name associated with the EMIS Location IRN field from the Course record is displayed. If no value is present in either the EMIS Location Description or the EMIS Location IRN on the Course record, then the Course History Summary grid shows the name of the school associated with the Master Calendar of the Course.

**Sorting** – You may sort by any column in ascending or descending order by clicking on the column header. The default sort order when a student is first displayed on the screen is School Year, Reporting Term and Course Code. Once a sort column is clicked on the grid, the course history records will be sorted only by the selected sort column. The default sort will be applied again when a new student is selected for display on the screen.

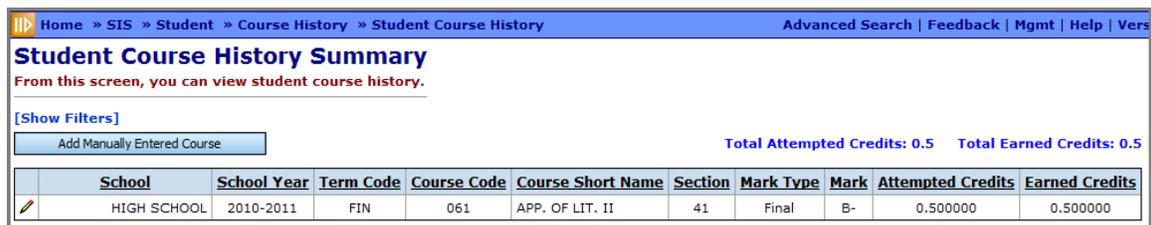
When sorting by Teacher Name (by clicking on the Teacher Name column), non-manual courses will be sorted by Teacher Last Name and manual courses will be sorted by the value entered for the manual course. In order for the sort to work correctly for students with both manual and non-manual courses, users will need to enter the Teacher Name in Last Name, First Name format for manual courses.

 – Edit a Course History Record.

 – This Course History Record is not editable; the student is currently enrolled in this Course or the record is from a prior year.

## Edit Student Course History

**Navigation: Home – SIS – Student – Course History – Student Course History**

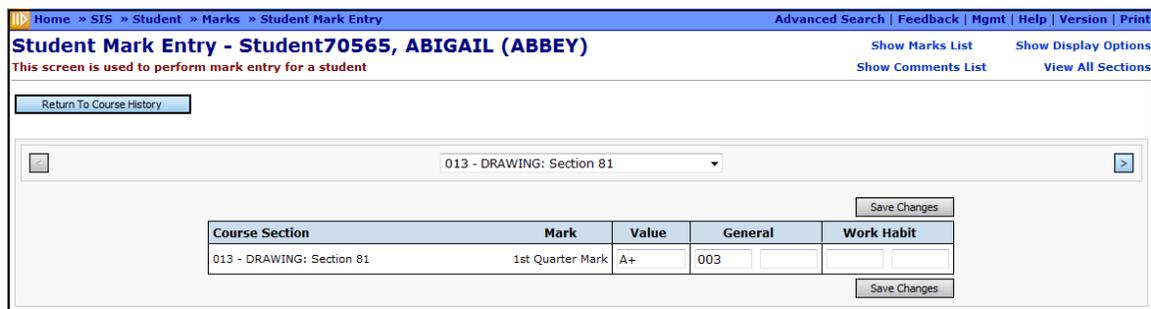


The screenshot shows the 'Student Course History Summary' page. At the top, there is a navigation breadcrumb: Home » SIS » Student » Course History » Student Course History. Below this, there are links for 'Advanced Search', 'Feedback', 'Mgmt', 'Help', and 'Vers'. The main heading is 'Student Course History Summary' with a sub-note: 'From this screen, you can view student course history.' There is a '[Show Filters]' link and an 'Add Manually Entered Course' button. On the right, it displays 'Total Attempted Credits: 0.5' and 'Total Earned Credits: 0.5'. Below this is a table with the following data:

	School	School Year	Term Code	Course Code	Course Short Name	Section	Mark Type	Mark	Attempted Credits	Earned Credits
	HIGH SCHOOL	2010-2011	FIN	061	APP. OF LIT. II	41	Final	B-	0.500000	0.500000

Click  to edit a specific Student Course History Record

If this is a “scheduled” course you will be taken to the Student Mark Entry Grid for the appropriate course section and grading period.



The screenshot shows the 'Student Mark Entry' page for Student70565, ABIGAIL (ABBEY). The navigation breadcrumb is: Home » SIS » Student » Marks » Student Mark Entry. There are links for 'Advanced Search', 'Feedback', 'Mgmt', 'Help', 'Version', and 'Print'. The main heading is 'Student Mark Entry - Student70565, ABIGAIL (ABBEY)'. Below this, there are links for 'Show Marks List', 'Show Display Options', 'Show Comments List', and 'View All Sections'. There is a 'Return To Course History' button. A dropdown menu shows '013 - DRAWING: Section 81'. Below this is a table with the following data:

Course Section	Mark	Value	General	Work Habit
013 - DRAWING: Section 81	1st Quarter Mark	A+	003	

**Save Changes** – Will save changes to the Student Mark Entry screen. Click the Return to Course History button to go back to the Student Course History Summary page.

If this is a “manually” added course history record, you will be taken to the Edit Screen for the Manually Entered Course, as shown in the following figure.

Home » SIS » Student » Course History » Manually Entered Courses

### Manually Entered Course

From this screen, you can display, add, change and delete data pertaining to manually entered courses.

School Year of Manually Entered Course: 2013-2014

Course Details | Student Marks

Select a course from the school year selected to auto populate the fields:

Course: 012 [ ... ] [ Auto Populate ]

Code: PAINTING [ ⚡ ] Subject Area: [ ]  
 Abbreviation: PAINTING [ ⚡ ] Area of Study: FA - FINE ARTS [ ]  
 Short Name: PAINTING [ ⚡ ] Level of Difficulty: [ ]  
 Name: [ ] Add On Category: [ ]  
 Section: [ ] Hours of Instruction: 60 [ ]  
 Transfer Code: [ ] Attempted Credits: 0.5 [ ⚡ ]  
 Date Completed: [ ] Mark Bump: [ ]  
 Ratio Denominator: 100 [ ] Rank Weight: [ ]  
 Grade Level: 11 - 11 [ ⚡ ] ⓘ This is the student's grade level from the student profile for the selected school year  
 Teacher Name: [ ]  
 Course Description: [ ]  
 Credit Flex: N - The course is not a Credit Flexibility Course [ ]

EMIS Subject Code: 020250 - Drawing and Painting [ ]  
 EMIS Subject Area for Credit: FAR - Fine Arts [ ]  
 CORE Subject Area: FAR - Fine Arts Units [ ⚡ ] (Only required when Is High School Credit is checked)

Is High School Credit  Include in GPA  Include in Total Credits  Include in Honor Roll  
 Counts for Graduation  In Graduation / Eligibility  Is Honors Course  Is Dual Credit  
 Is College Prep

School IRN: [ ] [ ⚡ ] School Description: [ ]

Comments: [ ]

[ Save and View Course History ] [ Save and New ] [ Save and Enter Marks ] [ Cancel ]

ⓘ Note: If a manual course is saved with no marks, it can still be viewed on the Summary screen by checking the 'Show Manual Courses With No Marks' box in the filters section

Student Marks List (Note: The marks for this manual course can be edited on the Student Marks tab)

Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
There are no records to display							

**School Year of Manually Entered Course** (required) – defaults to the school year in context, but can be changed to a different school year in the drop-down only if the existing manual course has no marks. Once a new manual course has been saved with the selected school year, and marks are added to the manual course, the drop-down is read-only. If the school year needs to be changed, the existing marks need to be deleted, or the manual course itself will need to be deleted and a new manual course added.

**Code** (required) – Indicate the Course Code to be used for the manual course history entry (up to 15 characters – alphanumeric)

*Note: Consider state reporting limitations when specifying course codes.*

**Subject Area** (optional) – Select an option from the drop-down list. This field is used in the graduation verification module.

**Abbreviation** (required) – Indicate a Course Abbreviation to be used (up to 8 characters).

**Area of Study** (optional) – Select an option from the drop-down list. This field is used in the graduation verification module.

**Short Name** (required) – Indicate a Course short name to be used (up to 15 characters).

**Level of Difficulty** (optional) – Select an option from the drop-down list of available Levels of Difficulty (see *ProgressBook StudentInformation Scheduling Guide* for details).

**Name** (required) – Indicate full Course Name to be used (up to 30 characters).

**Add On Category** (optional) – Select an option from the drop-down list, if applicable (see *ProgressBook StudentInformation Scheduling Guide* for details).

**Section** (optional) – Indicate the section number of the course entered.

**Hours of Instruction** (optional) – Indicate the number of hours of instruction received, per year. This is an EMIS reportable field. For more information, see *ProgressBook StudentInformation EMIS Guide*.

**Transfer Code** (optional) – Select an option from the drop-down list, if applicable (see [“Course History Transfer Codes Maintenance.”](#))

**Attempted Credit** (required) – Indicate the number of attempted credits for this course history record.

**Date Completed** (required) – Enter the date the course was completed (or use calendar date picker tool).

**Mark Bump** (option) – Select the proper Mark Bump option if defined (see *ProgressBook StudentInformation Marks End User Guide* for details).

**Ratio Denominator** (optional) – This allows you to set a specific ratio denominator (rather than the default 100) for credit ratios.

**Rank Weight** (optional) – Select the proper Rank Weight option if defined (see *ProgressBook StudentInformation Marks End User Guide* for details).

**Grade Level** (non-modifiable) – The grade level of the selected student during the selected school year.

**Teacher Name** (optional) – Indicate a teacher’s name who taught the course (max 50 characters).

**Course Description** (optional) – Indicate a Course Description to be used (max 1000 characters).

**EMIS Subject Code** (optional) – Select the appropriate EMIS Course Subject Code from the drop-down list. This details the subject of the course being reported. There is no default for this field. For more information see *ProgressBook StudentInformation EMIS Guide*.

**EMIS Subject Area for Credit** (optional) – Select the appropriate EMIS Course Subject Area from the drop-down list. This indicates the subject for courses offered in which high school credit toward graduation is applied, whether at the middle school or high school level. For more information see *ProgressBook StudentInformation EMIS Guide*.

**CORE Subject Area** (required if Is High School Credit is checked) – Select the appropriate CORE Subject Area from the drop-down list. This is the subject area and/or CORE requirement area in which a student has earned credit/units towards graduation. See the latest revision of *ProgressBook StudentInformation EMIS Guide* for more information regarding this field.

**In High School Credit** – Indicates if this course history record should be counted for credits towards high school graduation

**Include in GPA** – Indicates if this course history record should be included in Cumulative GPA calculations

**Include in Total Credits** – Indicates if this course history record should be included in Cumulative Credit totals (does not affect Cumulative GPA calculations)

**Include in Honor Roll** – Indicates if this course history record should be included in Honor Roll calculations

**Counts for Graduation** – Indicates if this course history record should be included in course counts for Graduation

**In Graduation / Eligibility** – Indicates if this course history record should be included in course counts for Graduation Verification module

**Is Honors Course** – Indicates if this course should be marked as an Honors Course

**Is Dual Credit** – Indicates if this course should be marked as dual credit (for eTranscripts)

**Is College Prep** – Indicates if this course should be marked as college prep (for eTranscripts)

**School IRN** (required) – Input the IRN of the school (where course was completed) or enter all 9s (999999). If a valid IRN number is input, then the school description will auto populate with that district's/building's name. If all 9s are input, the field will be populated with the words "Post Secondary/Out of State" but can be modified if neither applies.

**School Description** (required) – Will be auto populated if a valid IRN number is used in the School IRN field. Otherwise use of 999999 will populate the field with the words "Post Secondary/Out of State" but can be modified if neither applies.

**Comments** (optional) – Open text for input of additional comments regarding this course history record.

**Delete** – Delete this Manual Course History record. A confirmation screen will appear as below.



Home » SIS » Student » Course History » Manually Entered Courses

### Manually Entered Course

From this screen, you can display, add, change and delete data pertaining to manually entered courses.

Are you sure you want to delete the following Manual Course?

0121 - ENGLISH 10

Ok Cancel

**Save and View Course History** – Will save current Manual Course History record on this student and return to Student Course History listing where you will see the updated information. If a manual course is saved with no marks, it can still be viewed on the Student Course History Summary screen by checking the Show Manual Courses with no Marks box in the filters section.

**Save and Enter Marks** – Will save current Manual Course History record on this student and take you to the Student Marks tab to enter marks for this course history record.

**Cancel** – Cancel changes and return to the Course History page.

**Student Marks List** – A read-only grid of the marks for the manual course is show at the bottom of the Course Details tab. These marks can be edited on the Student Marks tab.

Student Marks List (Note: The marks for this manual course can be edited on the Student Marks tab)							
Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
Fnl	F	B	Earned	100 / 100		1.00000	1.00000

## Student Marks Tab

Home » SIS » Student » Course History » Manually Entered Courses Advanced Search | Feedback | Mgmt | Help

### Manually Entered Course

From this screen, you can display, add, change and delete data pertaining to manually entered courses.

The Manually Entered Course was successfully saved

School Year of Manually Entered Course: 2009-2010

Course Details | Student Marks

Course: 012  
Name: PAINTING  
Section:

Term:  Mark Type:  Description:   
Alpha Mark:  Numeric Mark:  Earned Credits:   
Credit Type:  Credit Ratio/Percentage:

Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
Qtr1	Qtr	A	Progress 1	100 / 100		0.50000	0.50000

Note: If a manual course is saved with no marks, it can still be viewed on the Summary screen by checking the 'Show Manual Courses With No Marks' box in the filters section

**School Year of Manually Entered Course** (display) – School Year of the current manually entered course history record. The field is always read-only on the Student Marks tab. This prevents a mark from being saved with a reporting term, mark type, and alpha mark for a school year that is different than the school year of the associated manual course.

**Course** (display) – Course ID of the current manually entered course history record.

**Name** (display) – Course Name of the current manually entered course history record.

**Section** (display) – Section number of the current manually entered course history record.

**Term** (required) – Select appropriate term from drop-down list.

**Mark Type** (required) – Select appropriate Mark Type from drop-down list.

**Description** (optional) – Input the Mark Description to be used for this record.

**Alpha Mark** (required) – Select appropriate Alpha Mark (if applicable) from drop-down list. The Earned Credit field is disregarded and earned credits are calculated using the alpha mark when a failing grade is entered.

**Numeric Mark** (required) – Enter appropriate Numeric Mark (if applicable). Numeric marks are only available if your building has designated Numeric Marks for marks reporting in the DASL Options setup (refer to *ProgressBook StudentInformation School Setup and Configuration Guide*). Both numeric and alpha marks can be specified when StudentInformation is configured to use numeric marks. When both types of marks are specified, the Marks column displays the alpha mark and the alpha mark is used to calculate earned credits when a failing grade is entered (the Earned Credit field value is disregarded).

**Earned Credits** (optional) – Enter the number of earned credits for this course / term combination.

**Credit Type** (required) – Select appropriate Credit Type from drop-down list.

**Credit Ratio/Percentage** (required) – Indicate the Credit Ratio to be used with this marks record.

**Add** – Add a Marks record for this Course with specified criteria. If the Earned Credits is greater than 3 or the Credit Ratio is less than 10, a confirmation screen appears as below.

The screenshot shows a confirmation dialog box with a blue header bar containing the breadcrumb: Home » SIS » Student » Course History » Manually Entered Courses. The main title is 'Manually Entered Course' in bold blue text. Below the title is a red instruction: 'From this screen, you can display, add, change and delete data pertaining to manually entered courses.' The main content area asks: 'Are you sure you want to save the Manual Course Mark with the following values?' followed by 'Earned Credits - 4'. At the bottom are two buttons: 'Ok' and 'Cancel'.

### **Student Marks List**

	Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
 	Fnl	F	B	Earned	100 / 100		1.00000	1.00000

 – Delete this specific Marks record for this Course.

 – Edit this specific Marks record for this Course.

**Delete** – Cancel and return to Course History information.

**Previous Tab** – Save information and return to the Course Details tab of the Manual Course History entry.

**View Course History** – Save information and return to the Student Course History Summary page.

## Manually Add Student Course History

Navigation: Home – SIS – Student – Course History – Student Course History – Add Manually Entered Course Button

Home » SIS » Student » Course History » Manually Entered Courses

### Manually Entered Course

From this screen, you can display, add, change and delete data pertaining to manually entered courses.

School Year of Manually Entered Course: 2013-2014

Course Details | Student Marks

Select a course from the school year selected to auto populate the fields:

Course: 012

---

**Code:** PAINTING   
**Abbreviation:** PAINTING   
**Short Name:** PAINTING   
**Name:**    
**Section:**   
**Transfer Code:**   
**Date Completed:**   
**Ratio Denominator:** 100    
**Grade Level:** 11 - 11  ⓘ This is the student's grade level from the student profile for the selected school year  
**Teacher Name:**   
**Course Description:**   
**Credit Flex:** N - The course is not a Credit Flexibility Course

**Subject Area:**   
**Area of Study:** FA - FINE ARTS  
**Level of Difficulty:**   
**Add On Category:**   
**Hours of Instruction:** 60  
**Attempted Credits:** 0.5     
**Mark Bump:**   
**Rank Weight:**

---

**EMIS Subject Code:** 020250 - Drawing and Painting  
**EMIS Subject Area for Credit:** FAR - Fine Arts  
**CORE Subject Area:** FAR - Fine Arts Units ⓘ (Only required when Is High School Credit is checked)

Is High School Credit   
  Include in GPA   
  Include in Total Credits   
  Include in Honor Roll  
 Counts for Graduation   
  In Graduation / Eligibility   
 Is Honors Course   
 Is Dual Credit  
 Is College Prep

---

**School IRN:**  ⓘ   
**School Description:**  ⓘ

---

**Comments:**

---

ⓘ Note: If a manual course is saved with no marks, it can still be viewed on the Summary screen by checking the 'Show Manual Courses With No Marks' box in the filters section

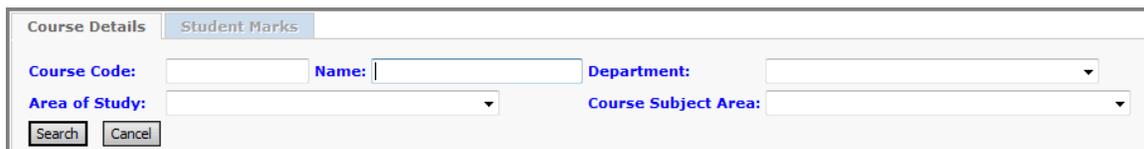
**Student Marks List** (Note: The marks for this manual course can be edited on the Student Marks tab)

Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
There are no records to display							

**School Year of Manually Entered Course** (required) – Defaults to the school year in context, but can be changed to a different school year in the drop-down list. Once a new manual course has been saved with the selected school year, and marks are added to the manual course, the field is read-only. If the school year needs to be changed, the existing marks need to be deleted, or the manual course itself will need to be deleted and a new manual course added.

**Course** (optional) – Indicate an existing course in the building course listing that you wish to use (with default values if desired).

 – Activates the course search controls. The course search drop-down lists are populated with values for the year selected in the school year drop-down list. When search criteria are entered and Search is clicked, a list of courses meeting the criteria is shown, with a selection button next to each course. When the desired course is selected, the course search controls will disappear, and the Manually Entered Courses will be populated with the values for the selected course.



The screenshot shows a web form titled "Course Details" with a "Student Marks" tab. The form contains several input fields: "Course Code:" (text), "Name:" (text), "Department:" (dropdown), "Area of Study:" (dropdown), and "Course Subject Area:" (dropdown). At the bottom left, there are "Search" and "Cancel" buttons.

**Auto-Populate** – Auto populates some of the mandatory fields with data from existing courses within the working building. These defaults can be used to minimize needed input, but can be modified if needed. Fields populated include:

- Code
- Subject Area
- Abbreviation
- Area of Study
- Short Name
- Level of Difficulty
- Name
- Add On Category
- Mark Bump
- Ratio Denominator
- Rank Weight
- Course Description
- EMIS Subject Code
- EMIS Subject Area for Credit
- CORE Subject Area
- Course checkboxes

**Code** (required) – Indicate the Course Code to be used for the manual course history entry (up to 15 characters – alphanumeric).

**Note:** Consider state reporting limitations when specifying course codes.

**Subject Area** (optional) – Select an option from the drop-down list. This field is used in the graduation verification module.

**Abbreviation** (required) – Indicate a Course Abbreviation to be used (up to 8 characters).

**Area of Study** (optional) – Select an option from the drop-down list. This field is used in the graduation verification module.

**Short Name** (required) – Indicate a Course short name to be used (up to 15 characters).

**Level of Difficulty** (optional) – Select an option from the drop-down list of available Levels of Difficulty (see *ProgressBook StudentInformation Scheduling Guide* for details).

**Name** (required) – Indicate full course name of the Course to be used (up to 30 characters).

**Add On Category** (optional) – Select an option from the drop-down list, if applicable (see *ProgressBook StudentInformation Scheduling Guide* for details).

**Section** (optional) – Indicate the section number of the course entered.

**Hours of Instruction** (optional) – Indicate the number of hours of instruction received, per year. This is an EMIS reportable field. For more information see *ProgressBook StudentInformation EMIS Guide*.

**Transfer Code** (optional) – Select an option from the drop-down list, if applicable (see [“Course History Transfer Codes Maintenance”](#)).

**Attempted Credits** (required) – Enter the number of attempted credits for this course history record. Valid values are 0 to 10 in 0.5 increments. If Attempted Credits is greater than 3, a confirmation screen will appear when clicking the **Save and View Course History**, **Save and New** or **Save and Enter Marks** buttons. This value is used in GPA calculations when the manually added course is included in the GPA calculations and the Use Manual Course History Course Credit option on the Calculations tab of the GPA Set Maintenance screen is selected.

**Date Completed** (required) – Enter the date the course was completed (or use calendar date picker tool).

**Mark Bump** (option) – Select the proper Mark Bump option if defined (see *ProgressBook StudentInformation Marks User Guide* for details).

**Ratio Denominator** (optional) – This allows you to set a specific ratio denominator (rather than the default 100) for credit ratios.

**Rank Weight** (option) – Select the proper Rank Weight option if defined (see *ProgressBook StudentInformation Marks Guide* for details).

**Grade Level** (non-modifiable) – The grade level of the selected student during the selected school year.

**Teacher Name** (optional) – Indicate a teacher’s name who taught the course (max 50 characters).

**Course Description** (optional) – Indicate a Course Description to be used (max 1000 characters).

**Credit Flex** (optional) – Indicates if the course is a Credit Flexibility Course and if it is used for credit recovery work. Available options are N (not Credit Flexibility Course, default setting), R (is Credit Flexibility Course and used for credit recovery work) and Y (is Credit Flexibility Course but not used for credit recovery work). Saving the Credit Flex set on the EMIS tab on the Courses screen causes it to be included when transferring a student’s course history.

**EMIS Subject Code** (optional) – Details the subject of the course being reported.

**EMIS Subject Area for Credit** (optional) - 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.

**CORE Subject Area** (required only when Is High School Credit is checked) – Indicates the subject area and/or CORE requirement area in which a student has earned credit/units towards graduation.

**Is High School Credit** – Indicates if this course history record should be counted for credits towards high school graduation

**Include in GPA** – Indicates if this course history record should be included in Cumulative GPA calculations

**Include in Total Credits** – Indicates if this course history record should be included in Cumulative Credit totals (does not affect Cumulative GPA calculations.)

**Include in Honor Roll** – Indicates if this course history record should be included in Honor Roll calculations

**Counts for Graduation** – This option is not currently functional.

**In Graduation / Eligibility** – Indicates if this course history record should be included in course counts for Graduation Verification module

**Is Honors Course** – Indicates if this course history record should be included with Honors Courses

**Is Dual Credit** – Indicates if this course should be marked as dual credit (for eTranscripts)

**Is College Prep** – Indicates if this course should be marked as college prep (for eTranscripts)

**School IRN** (required) – Input the IRN of the school (where course was completed) or enter all 9s (999999). If a valid IRN number is input, then the school description will auto populate with that district’s/building’s name. If all 9s are input, the field will be populated with the words “Post Secondary/Out of State” but can be modified if neither applies. The  icon links to the Ohio Department of Education’s Search Organization page.

**School Description** (non-modifiable) – Will be auto populated if a valid IRN number is used in the School IRN field. Otherwise use of 999999 will populate the field with the words “Post Secondary/Out of State” but can be modified if neither applies.

**Comments** (optional) – Open text for input of additional comments regarding this course history record.

**Save and View Course History** – Will save current Manual Course History record on this student and return to Student Course History listing where you will see the updated information. If a manual course is saved with no marks, the following confirmation screen will appear.



If a manual course is saved with no marks, it can still be viewed on the Student Course History Summary screen by checking the Show Manual Courses with no Marks box in the filters section.

**Save and New** - Saves the current Manual Course History record on this student and cursor will be at the Course field for you to enter another Manual Course History record for this student. The values in the following fields will be carried forward to the next manual course entry:

- School Year drop-down
- Date Completed
- Grade Level
- Hours of Instruction
- Attempted Credits
- Mark Bump
- Rank Weight
- School IRN
- School Description

If a manual course is saved with no marks, the following confirmation screen will appear.



If a manual course is saved with no marks, it can still be viewed on the Student Course History Summary screen by checking the Show Manual Courses with no Marks box in the filters section.

**Note:** The Course Code entered in the course search control at the top of the screen is not cleared out, so the user can see the most recent course that was searched on. Do not confuse this with the Course Code on the manual course record.

**Save and Enter Marks** – Will save current Manual Course History record on this student and take you to the Student Marks tab to enter marks for this course history record.

**Cancel** – Clear all data entered and do not save the manual course history entry.

### Student Marks List

**Student Marks List** (Note: The marks for this manual course can be edited on the Student Marks tab)

Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
There are no records to display							

The Student Marks List is a read-only grid of the marks for the manual course. The marks for this manual course can be edited on the Student Marks tab.

### Student Marks Tab

Home » SIS » Student » Course History » Manually Entered Courses Advanced Search | Feedback | Mgmt | Help | Version | P

**Manually Entered Course**

From this screen, you can display, add, change and delete data pertaining to manually entered courses.

The Manually Entered Course was successfully saved

School Year of Manually Entered Course: 2009-2010

Course Details Student Marks

---

Course: 0111  
 Name: ENGLISH 9  
 Section:

Term:   ⚡ Mark Type:   ⚡ Description:  

Alpha Mark:   ⚡ Numeric Mark:   ⚡ Earned Credits:  

Credit Type:   ⚡ Credit Ratio/Percentage:   ⚡ Add

Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
There are no records to display							

ⓘ Note: If a manual course is saved with no marks, it can still be viewed on the Summary screen by checking the 'Show Manual Courses With No Marks' box in the filters section

**School Year of Manually Entered Course** (display) – School Year of the current manually entered course history record. The drop-down is always read-only on the Student Marks tab. This prevents a mark from being saved with a reporting term, mark type, and alpha mark for a school year that is different than the school year of the associated manual course.

**Course** (display) – Course ID of the current manually entered course history record.

**Name** (display) – Course Name of the current manually entered course history record.

**Section** (display) – Section number of the current manually entered course history record.

**Term** (required) – Select appropriate term from drop-down list.

**Mark Type** (required) – Select appropriate Mark Type from drop-down list.

**Description** (optional) – Input the Mark Description to be used for this record.

**Alpha Mark** (required) – Select appropriate Alpha Mark (if applicable) from list. The Earned Credit field is disregarded and earned credits are calculated using the alpha mark when a failing grade is entered.

**Numeric Mark** (required) – Enter appropriate Numeric Mark (if applicable). Numeric marks are only available if your building has designated Numeric Marks for marks reporting in the DASL Options setup (refer to *ProgressBook StudentInformation School Setup and Configuration Guide*). Both numeric and alpha marks can be specified when StudentInformation is configured to use numeric marks. When both types of marks are specified, the Marks column displays the alpha mark and the alpha mark is used to calculate earned credits when a failing grade is entered (the Earned Credit field value is disregarded).

**Earned Credits** (optional) – Enter the number of earned credits for this course / term combination.

**Credit Type** (required) – Select appropriate Credit Type from drop-down list.

**Credit Ratio/Percentage** (required) – Indicate the Credit Ratio/Percentage to be used with this marks record.

Home » SIS » Student » Course History » Manually Entered Courses

### Manually Entered Course

From this screen, you can display, add, change and delete data pertaining to manually entered courses.

Are you sure you want to save the Manual Course Mark with the following values?

Earned Credits - 4

Ok Cancel

**Add** – Add a Marks record for this Course with specified criteria. If the Earned Credits is greater than 3 or the Credit Ratio is less than 10, a confirmation screen appears as shown in the following figure.

### Student Marks Grid

	Term	Mark Type	Mark	Credit Type	Credit Ratio	Description	Attempted Credits	Earned Credits
 	Fnl	F	B	Earned	100 / 100		1.00000	1.00000

 – Delete this specific Marks record for this Course.

 – Edit this specific Marks record for this Course.

The value in the Attempted Credits column is used in GPA calculations when the manually entered course is included in the GPA calculation and the Use Manual Course History Mark Credit Detail option on the Calculations tab of the GPA Set Maintenance screen is selected.

**Previous Tab** – Save information and return to the Course Details tab of the Manual Course History entry.

**Create New Manual Course** – Save information and return to the Manually Entered Course page to enter a new Manual Course History record.

**View Course History** – Save information and return to the Student Course History Summary page.

---

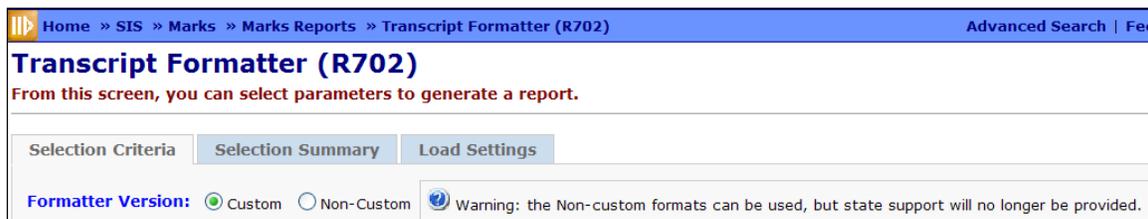
## Course History & Transcripts Reports

Please see the Batch/Report Management documentation for more detailed information about running and viewing reports.

### Transcript Formatter (R702)

**Navigation: Home – SIS – Marks – Marks Reports – Transcript Formatter (R702)**

The Student Transcript formatter determines the information to be included on a student transcript along with the layout of the transcript. The report is set to break at the end of each student's transcript, even though a student's transcript may take more than one page. Transcripts may be printed for selected students using their ID number or for all students matching selected criterion.



Formatter Version:

- **Custom** – transcripts generated with the custom Transcript Formatter
- **Non-Custom\*** – transcripts using fixed formats. This control and associated warning message only displays if the ITC has configured StudentInformation to allow non-custom report cards in the StudentInformation web.config file.

**\*IMPORTANT!! Non-Custom Transcripts no longer operable.**

As of DASL V10.1.0, non-custom transcripts are no longer operable; only the custom transcripts should be used.

State Support and/or the ITCs have the option of disabling the non-custom transcripts within the DASL.config file. See *ProgressBook StudentInformation Administration Guide* for more information.

# Custom Transcript Formats (R702)

Navigation: Home – SIS – Marks – Marks Reports – Transcript Formatter (R702)

Home » SIS » Marks » Marks Reports » Transcript Formatter (R702) Advanced Search | Feedback | Mgmt | Help | Version | Print

### Transcript Formatter (R702)

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

Selection Criteria   Selection Summary   Load Settings

Formatter Version:  Custom    Non-Custom   Warning: the Non-custom formats can be used, but state support will no longer be provided.

Report Layout: FixedN2

Watermark Image: None   Watermark Alignment: Top Left

Footer Location:  Directly Beneath the Detail Section    At The Bottom of the Last Report Page

Report Orientation:  Portrait    Landscape

Paper Kind: Letter

Paper Width: 8.5   Paper Height: 11

Left Margin: 0.5   Top Margin: 0.5

Right Margin: 0.5   Bottom Margin: 0.5   Gutter: 0.0

School Year(s) For Marks

2010-2011  
2009-2010  
2008-2009  
2007-2008

Mark Credit Type for Current Year

Not Used  
Progress 1  
Progress 2  
Progress 3

Earned

Mark Credit Type for Current Year

Not Used  
Progress 1  
Progress 2  
Progress 3

Earned

Mark Credit Type for Prior Years

Not Used  
Progress 1  
Progress 2  
Progress 3

Earned

Course Types

Class  
Lunch  
Study hall  
ESC course

Show Separate Marks Subreports for Each School Year:  Yes    No

Show Separate Marks Subreports for Each School:  Yes    No

Show Separate Rows in Credits Subreport for Credits from Different Schools in the Same Year:  Yes    No

Print Transcript If Student Has No Marks:  Yes    No

Print Regular Course That Has No Marks:  Yes    No

Print Course History That Has No Marks:  Yes    No

Include Dropped Courses In Past Or Current Course Terms In Current Year:  Yes    No

Include Dropped Courses In Future Course Terms In Current Year:  Yes    No

Include Dropped Courses in Prior Years:  Yes    No

Require 'Update History' Flag to be True for Course to be on Transcript:  Yes    No

Require 'Is High School Credit' Flag to be True for Course to be on Transcript:  Yes    No

**Prior Years GPA Sets**

FINAL GPA 2012  
FINAL GPA 2012  
Awards GPA 2012  
Cumulative GPA 2012

---

**Current Year GPA Sets**

FINAL GPA 2013  
FINAL GPA 2013  
Awards GPA 2013  
Cumulative GPA 2013

Refresh GPA Set Results:  Yes  No

GPA's will ONLY print for the school in context

---

**School Year(s) For Attendance**

2013-2014  
2012-2013  
2011-2012  
2010-2011

Show External Absence In Attendance Subreport Even If Days Attended Is Zero:  Yes  No

Absence Cutoff Date:

---

Show Separate Subreport for Selected '4th Prof', '6th Prof', '9th Prof', and 'OGT' Tests:  Yes  No

Show ACT, SAT, PSAT, PLAN, SAT2, and AP Assessment Data From AAT or MISC:  AAT  MISC

**Assessment Test Types**

4th Prof  
6th Prof  
9th Prof  
OGT

Show Assessment Test Parts that are Failed and have 'Required for Graduation' = 'No':  Yes  No  
 Use custom Pass/Fail description

Show Assessment Test Parts that are Failed and have 'Required for Graduation' = 'Yes':  Yes  No  
 Use custom Pass/Fail description

---

Misc Groups	Misc Data Definitions
<b>Misc Group 1:</b> 50 - ACVIEVEMENT/ABILITY 6 - ADDITIONAL STUDENT INI 93 - AGE 3 94 - AGE 4	<input type="text"/>
<b>Misc Group 2:</b> 50 - ACVIEVEMENT/ABILITY 6 - ADDITIONAL STUDENT INI 93 - AGE 3 94 - AGE 4	<input type="text"/>
<b>Misc Group 3:</b> 50 - ACVIEVEMENT/ABILITY 6 - ADDITIONAL STUDENT INI 93 - AGE 3 94 - AGE 4	<input type="text"/>
<b>Misc Group 4:</b> 50 - ACVIEVEMENT/ABILITY 6 - ADDITIONAL STUDENT INI 93 - AGE 3 94 - AGE 4	<input type="text"/>

---

Choose Graduation Eligibility Rule:   Choose a Graduation Eligibility rule from the list to be used by Credit Summary subreport.

Mark Type:   Choose the mark type to use for Credit Summary subreport calculations. The mark type is only required if Primary, Secondary, or a specific Rule are chosen.

Recalculate Graduation Eligibility:   Check recalculate to refresh the student's Graduation Eligibility data (slower) or Uncheck recalculate to use the student's cached Graduation Eligibility data (faster) for Credit Summary subreport.

**Student Status**

A - ACTIVE RES  
ACCA - ASHLAND ACADEMY  
AE - ACTIVE ELSEWHERE  
D - DELETED

**Administrative Homeroom**

2-108 - MAYNARD (Full Year Term)  
2-124A - WELCH (Full Year Term)  
2-124B - BRAY (Full Year Term)  
2-125 - GILL (Full Year Term)

**Program**

\*\* - NOT APPLICABLE  
01 - Multiple Disabilities  
02 - Deaf-Blindness  
03 - Hearing Impairments

**Home School**

**Counselor**

FREEMAN, MS  
FITZGERALD, MS  
MONTGOMERY, MS

**Membership**

15 - Student received intervention provided during r  
15 - Student received intervention provided in the si  
16 - Student placement by a district in a chartered n  
50 - Prev. reported as a dropout in reporting district

**Special Education Services**

215001 - Adapted Physical Education Services  
215002 - Aide Services  
215003 - Attendant Services  
215004 - Audiological Services

**Membership Group**

11 - Intervention  
12 - Post-secondary Enrollment Options Program  
15 - 15  
16 - 16

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

Empty form area for additional information or notes.

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address  
 Use custom address text

**Include Copied On Correspondence:**  Yes  No

**Delivery Method:** Pickup

**Email Address:** chris@noacisc.org

**Description:**

**Report Layout** (required) – Select the appropriate format from the drop-down menu. These formats are created with the Custom Formatter application. However, the following formats come preloaded.

Format	Alpha (A), Numeric (N), Alpha Equiv of Numeric (AEN)	Prints Total Credits	Prints Detailed Credits for each year	Prints GPA	Prints Attend	Prints OGT	Prints SAT	Prints ACT	Prints PSAT	Prints PLAN	Prints Actual Assess Scores	Prints MISC	Prints SS#	Prints Total Ranked	Prints Cohi school name	Prints SSID	Other
Format01	A	Yes	No	Yes	Yes	Yes	No	No	No	No	Yes	No	Yes	Yes	No	Yes	
Format01_Numeric	A, N	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	No	Yes	
Format02	A	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No	No	Yes	No	No	Yes	
Format11	A	Yes	No	Yes	Yes	Yes	No	No	No	No	Yes	No	Yes	Yes	No	Yes	
Format12	A	Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	No	Yes	Yes	Yes	Yes	
Format12_Numeric	A, N	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes	
Format12AssessFromAATNoLimit	A, N	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	
Format20	A	Yes	No	Yes	Yes	Yes	No	No	No	No	No	No	Yes	No	Yes	Yes	
Format21	A	Yes	No	Yes	Yes	Yes	No	No	No	No	Yes	No	No	Yes	Yes	Yes	Prints Homeroom Text – "Official Student Transcript" prints at the top Hard-coded grading scales appear at bottom
Format22	A	Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	No	Yes	Yes	Yes	Yes	
Format32	A	Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	No	Yes	Yes	Yes	Yes	
FixedN1	A	Yes	No	Yes	Yes	Yes	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	
FixedN2	A	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	No	Yes	Yes	Yes	Yes	Prints Home School IRN & Name
FixedN3_alphaequivalent	A, AEN	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	

**Watermark Image** (optional) – Select an image to be printed on all pages from the drop-down list. This is configured by ITCs.

**Watermark Alignment** (optional) – Select the position for the watermark image from the drop-down menu. Choices are Top Left, Bottom Left, Top Right, Bottom Right and Center.

**Footer Location** (required) – Choose whether the Transcript footer information is displayed directly beneath the detail section, or at the bottom of the last page of the transcript (if the transcript runs onto multiple pages).

**Report Orientation** (required) – Select whether the transcript prints in portrait or landscape orientation.

**Paper Kind** (required) – Select the type of paper used for the transcript. Choices are Custom, Letter or Legal.

**Paper Width** (optional) – Only available if using Custom for Paper Kind. Enter the width of the paper used, in inches. If using Letter or Legal, this value is 8.5.

**Paper Height** (optional) – Only available if using Custom for Paper Kind. Enter the height of the paper used, in inches. If using Letter or Legal, this value is 11.

**Left Margin** (optional) – Enter the left-side print margin for the transcript, in inches. Must be between 0 and 3, decimals can be used.

**Top Margin** (optional) – Enter the top margin for the transcript, in inches. Must be between 0 and 3, decimals can be used.

**Right Margin** (optional) – Enter the right-side print margin for the transcript, in inches. Must be between 0 and 3, decimals can be used.

**Bottom Margin** (optional) – Enter the bottom margin for the transcript, in inches. Must be between 0 and 3, decimals can be used.

**Gutter** (optional) – Enter the width of space between columns, in inches. Must be between 0 and 3, decimals can be used.

**School Year(s) for Marks** (optional) – Select the appropriate school years to be included in the transcript Course History information. If none are selected, all will be used in the creation of the report.

**Mark Credit Type for Current Year** (required) – Select desired Mark Credit Types for the current year that you wish printed on the transcript.

**Mark Credit Type for Prior Years** (required) – Select desired Mark Credit Types for all prior years that you wish printed on the transcript.

**Course Types** (optional) – Select desired Course Type(s) to print on the transcript from the dual-select box. If no Course Types are selected, all Course Types will print on the transcript.

**Show Separate Marks Subreports for Each School Year** (optional) – Yes or No. Select Yes to display a separate Marks sub-report on the transcript for each separate school year displayed on the transcript. Selecting No will display all Marks for all school years displayed on the transcript in a single sub-report.

**Show Separate Marks Subreports for Each School** (optional) – Yes or No. If a student has courses from two different schools in the same school year, do you want each school broken out into its own section? If so, answer Yes.

***Note:** If the user chooses No for the option Show Separate Marks Subreports for Each School Year, and Yes for the option Show Separate Marks Subreports for Each School, the Marks subreports are sorted by the earliest School Year ascending for the courses in the Marks subreport, then School Year Type ID ascending for the courses in the Marks subreport, then the EMIS Location Name. If the EMIS Location Name is not defined for a course on the EMIS tab of the Courses screen, then the School Name is used for the EMIS Location Name for that course.*

**Show Separate Rows in Credits Subreport for Credits from Different Schools in the Same Year** (optional) – Yes or No. If the student was in two different buildings and has course history from each building, do you want each school broken out into its own section? If so, answer Yes.

**Print Transcript if Student Has No Marks** (optional) – Yes or No. If you would like to print a transcript for a student who has no current marks or course history, answer Yes.

**Print Regular Course That Has No Marks** (optional) – Yes or No. If a student has courses currently in progress but the courses do not have marks yet and you'd like them to print on the transcripts anyway, answer Yes.

**Print Course History That Has No Marks** (optional) – Yes or No. Not possible – you cannot enter course history without also entering mark. It does not matter if you answer Yes or No.

**Include Dropped Courses in Past or Current Course Terms in the Current Year** (optional) – Yes or No. If a student has dropped courses in a completed course term or the current course term, do you want the courses to print on the transcript? If you do want the dropped courses to print, answer Yes.

**Include Dropped Courses in Future Course Terms in the Current Year** (optional) – Yes or No. If a student drops a 2<sup>nd</sup> semester only class and you are running her transcript in the middle of 1<sup>st</sup> semester, do you want the dropped 1<sup>st</sup> semesters only class printing on her transcript? If you want future drops printing, answer Yes.

**Include Dropped Courses in Prior Years** (optional) – Yes or No. If a student has dropped courses in prior years, do you want the dropped courses from prior years printing on the transcript? If you do want prior year's drops printing, answer Yes.

**Require "Update History" Flag to be True for Course to be on Transcript** (optional) – Yes or No. The Update History flag on the Course determines if a course displays on the student's course history screen. Occasionally a school will unmark a course as Update History and does not want this course to print on the transcript. In 99% of the cases you will want to mark Yes for this prompt.

**Require "Is High School Credit" Flag to be True for Course to be on Transcript** (optional) – Yes or No. Select whether a course must be marked as "Is High School Credit" = yes before it will appear on the transcript. If Yes is marked, the transcript will only print courses that are marked as Is High School Credit. If No is marked, courses from the student's middle school and elementary years will print on the transcript, but the student's current year classes that are not marked as Is High School Credit will not print on the transcript.

**Prior Years GPA Sets** – Select the desired GPA set(s) from the dual-select box. If you do not select a GPA set, GPA information does not print on the transcript.

***Note:** The school year that displays with the GPA sets is the starting year of the school year. For example, to get the final GPAs for the 2012-2013 school year, select Final GPA 2012.*

**Current Year GPA Sets** – Select the desired GPA set(s) from the dual-select box. If you do not select a GPA set, GPA information does not print on the transcript.

**Note:** The school year that displays with the GPA sets is the starting year of the school year. For example, to get the final GPAs for the 2012-2013 school year, select Final GPA 2012.

**Refresh GPA Set Results** – Yes or No. Select the appropriate radio button option.

**Note:** This option refreshes only the Current Year GPA Sets.

**School Year(s) for Attendance** (optional) – Select the appropriate school years to be included in the transcript Absence History information. If none are selected, all will be used in the creation of the report.

**Show External Absence In Attendance Subreport Even If Days Attended Is Zero** (optional) – Yes or No. If the student has an external absence record, do you want this external absence record to appear in the Attendance subreport even if the Days Attended is zero for the external absence record and the student is on a non-attending calendar for the year of the external absence record? If so, answer Yes.

**Absence Cutoff Date** (optional) – Specify the date after which absences are not counted towards the attendance information listed on the transcript.

**Show Separate Subreport for Selected 4<sup>th</sup> Prof, 6<sup>th</sup> Prof, 9<sup>th</sup> Prof and OGT Tests** (optional) – Yes or No. If you would like test scores from each test to show in a separate section, answer Yes.

**Show ACT, SAT, PSAT, PLAN, SAT2, and AP Assessment Data from AAT or MISC** (required) – Choose whether the listed assessment data is coming from the AAT (Additional Assessment Test pages) or from the MISC (Miscellaneous Data Groups).

**Assessment Test Types** (optional) – Select the tests for which you wish data to display on the transcript (Achievement, Proficiency, OGT and Additional Assessment Tests). If no tests are selected, all test information will display on the transcript.

**Show Assessment Test Parts that are Failed and have Required for Graduation = No:** (optional) – Yes or No. Defaults to Yes. This option is designed to be used for students that are NOT REQUIRED to take the Assessment test. Students that are required to pass the test for graduation (Required for Graduation = Yes) and fail will NOT show the failing test part on the transcript. According to the Assessment Center the word “failed” cannot be put on the transcript for any student required to take the test for graduation.

If Yes is selected, a Use custom Pass/Fail description checkbox will be visible, with an associated textbox for the user to enter custom verbiage. If the box is checked, the custom verbiage entered in the textbox will be shown in the Assessment subreport on the Transcript for the Transcript Short or Transcript Lone keywords for all test parts for which Required for Graduation = No, regardless of whether the student passed or failed the test part. If the box is not checked, then the assessment standard verbiage of Passed will be shown for

passing test part scores, and no verbiage will be shown for failing test part scores.

**Show Assessment Test Parts that are Failed and have 'Required for Graduation' = Yes** – Select whether or not to display on the transcript the test parts that the student has failed. This option applies to students who are required to take the OGT.

If you select Yes, the User custom Pass/Fail description check box displays. To display a custom message for failed test parts, select this check box and enter a custom description in the text field. If you do not select this check box, the P/F column is blank for failed test parts in the OGT grid.

**Misc Groups** (optional) – (Only if using Assessment data from MISC) – Select the applicable Misc Groups (i.e. ACT, SAT, PSAT and PLAN test scores) that you wish to print on the Transcript and move from the available (left) list box to the selected (second) list box. If none are selected, NONE will print on the transcripts.

**Go** – Populates the Misc Data Definitions list box with the applicable definitions for the selected Misc Groups. The Data Definitions must be selected if they are to be printed.

**Misc Data Definitions** (optional) – (Only if using Assessment data from MISC) – Select the Misc Data Definitions (fields) that you wish to print on the Transcript by moving the appropriate definitions from the available list box (third) to the selected list box (fourth). The Misc Data Definitions displayed are based on the Misc Groups selected. If no Misc Data Definitions are selected, NONE will print on the transcripts.

**Choose Graduation Eligibility Rule** (optional) – Select a graduation eligibility rule to view the student's status for that rule on the report.

**Mark Type** (required if a rule is chosen in Choose Graduation Eligibility Rule list) – Select the mark type to use in the current year's total.

**Recalculate Graduation Eligibility** – If selected, the report recalculates the student's status for the selected eligibility rule. Otherwise, the report displays the last calculated status.

**Student Status** (optional) – If no Student Statuses are selected, the report will use all Student Statuses in creation of the report. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will use all Administrative Homerooms in creation of the report. You can also filter by selecting specific Administrative Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will use all Programs in creation of the report. You can also filter by selecting specific Programs for your report.

**Home School** (optional) – If no Home Schools are selected, the report will use all Home Schools in creation of the report. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Counselor** (optional) – If no Counselors are selected, the report will use all Counselors in creation of the report. You can also filter by selecting specific Counselors for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Special Education Services** (optional) – Select the Special Education services to return the transcripts for students who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Membership Group** (optional) – If no Membership Groups are selected, the report will use all Membership Groups for creation of the report. You can also filter by selecting specific Membership Groups for your report.

**Ad-Hoc Membership** (optional) – You can select an Ad-Hoc Membership from the drop-down list. If you select an Ad-Hoc Membership, only transcripts for students from that Ad-Hoc Membership will be used in the report. Check the "Public and Private" checkbox to see Memberships created by other users in your drop-down list.

**Student ID(s)** (optional) – If report cards are needed for individual students, the student IDs may be input here (separated by commas), and transcripts will only be produced for those individuals.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. Defaults to today's date.

**Omit Unlisted Phone Numbers** (optional) – Check this box to remove unlisted phone numbers from transcripts.

**Show Building or District Admission Date** (required) – If the Building option is chosen, then an Admission Date from the Student Admission records will be shown. If the District option is chosen, then a District Admission Date from the Student EMIS FS records will be shown.

**Show Earliest or Latest Admission Date** (required) – If the Earliest option is chosen, then the earliest Building or District admission date will be shown for the student, depending on the previous option. If the Latest option is chosen, then

the latest Building or District admission date will be shown for the student, depending on the previous option.

**Show Building or District Withdrawal Date** (required) – If the Building option is chosen, then the latest Withdrawal Date from the Student Admission records will be shown. If the District option is chosen, then the District Withdrawal Date from the latest Student EMIS FS record will be shown.

**Common Text For Transcript** (optional) – Type in a common text message that is to appear on all transcripts.

**Grading Scale** (optional) – Type in a common grading scale text message that is to appear on all transcripts.

**Improve Performance by Separating Report Processing by Grade** (optional) – Choose this option for shorter execution time and lower memory usage when running the report for multiple grade levels. A separate interim report will be generated for each selected grade, and then the interim reports for all selected grades will be combined into one final report. When choosing this option, Grade will be the first sort order for the final report, in order of the grades selected in the Grade dual select below.

**Grade** (optional) – If no Grades are selected, the report will use all Grades in the creation of the report. You can also filter by selecting specific Grades for your report. Please Note: Grade is required if “Improve Performance by Separating Report Processing by Grade” is chosen.

**Sorting Options** – The only sort option for this report is “Student Name (ASC).”

**Output** – Select Report, Labels or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the drop-down list.

**Address** – Select the address to use for labels. If you check “Use custom address text,” the text you enter in the field will be added at the top of each label.

**Include Copied on Correspondence** – Yes or No; Selecting Yes will include address labels for contacts marked as “Copied on Correspondence” when creating labels.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Description** (optional) – Will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

## Student GPA Ranking (R325)

**Navigation: Home – SIS – Marks – Marks Reports – Student GPA Ranking**

The screenshot shows the 'Student GPA Ranking (R325)' web application interface. At the top, there is a navigation breadcrumb: Home » SIS » Marks » Marks Reports » Student GPA Ranking (R325). The page title is 'Student GPA Ranking (R325)' and a sub-header states: 'From this screen, you can select parameters to generate a report.' Below this are three tabs: 'Selection Criteria', 'Selection Summary', and 'Load Settings'. The 'Selection Criteria' tab is active. The form includes several sections with selection criteria and corresponding empty boxes for selection:

- Homeroom Date:** 7/30/2008 (with a calendar icon)
- Grade:** 09 - 09, 10 - 10, 11 - 11, 12 - 12
- Student Status:** A - ACTIVE RES, D - DELETED, I - INACTIVE, JVS - Student Attending JVS
- Program:** JAB - Jr Auto Body, JAG - Jr AG Mechanics, JCOS - Jr Cosmetology, SAB - Sr Auto Body
- GPA Set:** 7 Semester GPA, Cumulative, 1st Quarter, 2nd Quarter
- Home School:** 010199 - Elida High School (Sch), 018606 - Kalida High School (Sch)
- Sorting Options:** Grade (ASC), Grade (DESC), Rank (ASC), Rank (DESC)

At the bottom, there are fields for 'Delivery Method' (set to 'Pickup'), 'Email Address' (set to 'amy@noacsc.org'), 'Report Format' (set to 'Adobe PDF'), and a 'Description' field. A 'Submit' button is located at the bottom left of the form.

**Grade** (optional) – If no Grades are selected, the report will use all Grades in creation of the report. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will use all Student Statuses in creation of the report. You can also filter by selecting specific Student Statuses for your report.

**Program** (optional) – If no Programs are selected, the report will use all Programs in creation of the report. You can also filter by selecting specific Programs for your report.

**GPA Set** (required) – Select the appropriate GPA set for this submission of the report.

**Home School** (optional) – If no Home Schools are selected, the report will use all Home Schools in creation of the report. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: DASL - R325		HIGH SCHOOL						RUN AT 12:59 PM 1/7/2010					
SCHOOLYEAR: 2009-2010		GPA SET NAME: 1st Qtr		STUDENT GPA RANKING REPORT							PAGE 1 OF 3		
ID	STUDENT NAME	GN	GR	FR	HOME ROOM	HOME SCHOOL	CREDITS ATTEMPTED	CREDITS EARNED	POINTS	GPA	RANK VALUE	RANK/OF	%
12846	Student69182, KATHRYN	F	10		IN13		7.250	7.250	24.75	3.4138	3.4138	76 of 145	47.6
12845	Student69183, BROOKE	F	10		IN14		6.250	6.250	25.00	4.0000	4.0000	1 of 145	99.3
12844	Student69184, TRAVIS	M	10		IN14		6.250	6.250	23.00	3.6800	3.6800	54 of 145	62.8
12843	Student69185, CODY	M	10		IN14		5.750	5.750	11.25	1.9565	1.9565	139 of 145	4.1
12842	Student69186, MATTHEW	M	10		IN13		6.250	6.250	24.00	3.8400	3.8400	33 of 145	77.2
12841	Student69187, SCOTT	M	10		IN12		7.250	7.250	22.50	3.1034	3.1034	92 of 145	36.6
12840	Student69188, MICHELLE	F	10		IN12		6.250	6.250	16.75	2.6900	2.6900	116 of 145	20.0
12839	Student69189, KYLIE	F	10		IN12		6.750	6.750	26.00	4.0000	4.0000	1 of 145	99.3
12838	Student69190, CRAIG	M	10		IN12		6.750	6.750	21.75	3.2222	3.2222	83 of 145	42.8
12837	Student69192, ALYSSA	F	10		IN12		6.250	6.250	18.00	3.0000	3.0000	93 of 145	35.9

The % column on the R325 shows the percentage of students below the student in question. Example: A student who is ranked 1 may be in the 99<sup>th</sup> percentile of all students.

**Note:** As of 10.2.0.15301, the Rank Value column was added to the report output.

# Appendix A. Example Transcript Formats

**FixedN1**

**ASHLAND HIGH SCHOOL**  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City Schools  
(419)289-7968

**BROOKS, AMANDA**  
6770 West Sawmill Road  
Becksville, OH 44141  
STUDENT NUMBER: 190216  
SSID: GD2789147

**Student Transcript**  
44141

**GENDER:** F  
**SSN:** 963277441  
**BIRTH DATE:** 2/8/1995  
**ADMISSION DATE:** 8/1/2009  
**WITHDRAWAL DATE:**  
**GRADUATION DATE:**

**3/14/2012**

2009						
GRADE	SCHOOL NAME	COURSE NAME	IN	GPA	FIN	CRED ATTN EARN
09	ASHLAND HS	C.B.I. US HISTORY	Yes	C+		1.000 1.000
09	ASHLAND HS	C.B.I. WORK-STUDY	Yes	A+		1.000 1.000
09	ASHLAND HS	CAREER BASED INTERVEN	Yes	B		1.000 1.000
09	ASHLAND HS	ENGLISH 9	Yes	C+		1.000 1.000
09	ASHLAND HS	HEALTH	Yes	C		0.500 0.500
09	ASHLAND HS	PHYS ED I	Yes	A-		0.250 0.250
09	ASHLAND HS	PRE-ALGEBRA	Yes	C+		1.000 1.000
09	ASHLAND HS	SCIENCE 9	Yes	D		1.000 1.000

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA And Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANK
30.000	12.500	12.500	2.400	187	277

2010						
GRADE	SCHOOL NAME	COURSE NAME	IN	GPA	FIN	CRED ATTN EARN
10	ASHLAND HS	ADVENTURE/LIFE SPORTS	Yes	A+		0.250 0.250
10	ASHLAND HS	APP. OF LIT. II	Yes	D+		0.500 0.500
10	ASHLAND HS	INTRO TO ART	Yes	A		1.000 1.000
10	ASHLAND HS	KEYBOARDING W/MSWOR	Yes	C+		0.500 0.500
10	ASHLAND HS	PRAC BIOLOGY	Yes	C+		1.000 1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	Yes	B+		1.000 1.000
10	ASHLAND HS	WORLD HISTORY	Yes	D+		1.000 1.000
10	ASHLAND HS	WRITING WORKSHOP I	Yes	B		0.500 0.500

ACT	
CATEGORY CODE	1/1/2012
COMP	20
ENG	18
ENGWRT	16
MATH	26
READ	13
SCI	21
WRITSUB	05

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTN PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total		12.50	12.50

# FixedN2

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-1968

BROOKS, AMANDA  
6770 West Snowflake Road  
Becksville, OH 44141  
PARENT/GUARDIAN: RANDY BAKER  
STUDENT NUMBER: 190216  
SSID: GD2789147

## Student Transcript

3/14/2012

GENDER: F  
SSN: 96327441  
BIRTHDATE: 26/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:  
HOME SCHOOL IIRN:  
HOME SCHOOL NAME:

2009						
GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FIN	CRED ATT	CRED EARN
09	ASHLAND HS	C.B.I. US HISTORY	Yes	C+	1.000	1.000
09	ASHLAND HS	C.B.I. WORK-STUDY	Yes	A+	1.000	1.000
09	ASHLAND HS	CAREER BASED INTERVEN	Yes	B	1.000	1.000
09	ASHLAND HS	ENGLISH 9	Yes	C+	1.000	1.000
09	ASHLAND HS	HEALTH	Yes	C	0.500	0.500
09	ASHLAND HS	PHYS ED I	Yes	A-	0.250	0.250
09	ASHLAND HS	PRE-ALGEBRA	Yes	C+	1.000	1.000
09	ASHLAND HS	SCIENCE 9	Yes	D	1.000	1.000
Total Credits:					6.75	6.75

2010						
GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FIN	CRED ATT	CRED EARN
10	ASHLAND HS	ADVENTURE/LIFE SPORTS	Yes	A+	0.250	0.250
10	ASHLAND HS	APP. OF LIT. II	Yes	D+	0.500	0.500
10	ASHLAND HS	INTRO TO ART	Yes	A	1.000	1.000
10	ASHLAND HS	KEYBOARDING W/MSWOR	Yes	C+	0.500	0.500
10	ASHLAND HS	PRAC BIOLOGY	Yes	C+	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	Yes	B+	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	Yes	D+	1.000	1.000
10	ASHLAND HS	WRITING WORKSHOP I	Yes	B	0.500	0.500
Total Credits:					5.75	5.75

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA and Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANK
30.000	12.500	12.500	2.400	187	277

ACT	
CATEGORY CODE	1/1/2012
COMP	20
ENG	18
ENGWRIT	16
MATH	26
READ	13
SCI	21
WRITSUB	05

PLAN	
CATEGORY CODE	1/24/2012
COMP	22
ENG	24
MATH	24
READ	24
SCI	24

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATT PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total:		12.50	12.50

# FixedN3\_alphaequivalent

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-7968

BROOKS, AMANDA  
6770 West Sawville Road  
Becksville, OH  
STUDENT NUMBER: 190216  
SSID: G02789147

## Student Transcript

44141

3/14/2012  
GENDER: F  
SSN: 963271441  
BIRTHDATE: 2/6/1996  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009-2010						
GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FIN	CRED ATTM	CRED EARN
09	ASHLAND HS	C.B.I. US HISTORY	Yes	C+	1.000	1.000
09	ASHLAND HS	C.B.I. WORK-STUDY	Yes	A+	1.000	1.000
09	ASHLAND HS	CAREER BASED INTERVEN	Yes	B	1.000	1.000
09	ASHLAND HS	ENGLISH 9	Yes	C+	1.000	1.000
09	ASHLAND HS	HEALTH	Yes	C	0.500	0.500
09	ASHLAND HS	PHYS ED I	Yes	A-	0.250	0.250
09	ASHLAND HS	PRE-ALGEBRA	Yes	C+	1.000	1.000
09	ASHLAND HS	SCIENCE 9	Yes	D	1.000	1.000
Total Credits:					6.75	6.75

2010-2011						
GRADE	SCHOOL NAME	COURSE NAME	IN GPA	FIN	CRED ATTM	CRED EARN
10	ASHLAND HS	ADVENTURE/LIFE SPORTS	Yes	A+	0.250	0.250
10	ASHLAND HS	AP P. OF LIT. II	Yes	D+	0.500	0.500
10	ASHLAND HS	INTRO TO ART	Yes	A	1.000	1.000
10	ASHLAND HS	KEYBOARDING W/MSWOR	Yes	C+	0.500	0.500
10	ASHLAND HS	PRAC BIOLOGY	Yes	C+	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	Yes	B+	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	Yes	D+	1.000	1.000
10	ASHLAND HS	WRITING WORKSHOP I	Yes	B	0.500	0.500
Total Credits:					5.75	5.75

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

ACT Scores	
Definition	1/2012
COMP	20
ENG	18
ENGWRIT	16
MATH	26
READ	13
SCI	21
WRITSUB	05

PLAN	
CATEGORY CODE	1/24/2012
COMP	22
ENG	24
MATH	24
READ	24
SCI	24

Cumulative GPA And Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANK
30.000	12.500	12.500	2.400	187	277

Counselor \ Principal \_\_\_\_\_  
Void Without Official Signature

Date \_\_\_\_\_

# Format01

Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-7968

BROOKS, AMANDA  
670 West Snowflake Road  
Becksville, OH 44141  
STUDENT NUMBER: 190216  
SSID: G02789147

GENDER: F  
SSN: 963277441  
BIRTHDATE: 2/6/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009							
GRADE	COURSE NAME	IN	GPA	FIN	CRSE CREDIT	CREDIT ATTN	CREDIT EARN
09	C.B.J. US HISTORY	Title		C+	1.000	1.000	1.000
09	C.B.J. WORK-STUDY	Title		A+	1.000	1.000	1.000
09	CAREER BASED INTERVEN	Title		B	1.000	1.000	1.000
09	ENGLISH 9	Title		C+	1.000	1.000	1.000
09	HEALTH	Title		C	0.500	0.500	0.500
09	PHYS ED I	Title		A-	0.250	0.250	0.250
09	PRE ALGEBRA	Title		C+	1.000	1.000	1.000
09	SCIENCE 9	Title		D	1.000	1.000	1.000

2010							
GRADE	COURSE NAME	IN	GPA	FIN	CRSE CREDIT	CREDIT ATTN	CREDIT EARN
10	ADVENTURE/LIFE SPORTS	Title		A+	0.250	0.250	0.250
10	APP. OF LIT. II	Title		D+	0.500	0.500	0.500
10	INTRO TO ART	Title		A	1.000	1.000	1.000
10	KEYBOARDING W/ MS WOR	Title		C+	0.500	0.500	0.500
10	PRAC BIOLOGY	Title		C+	1.000	1.000	1.000
10	TECHNICAL ALGEBRA I	Title		B+	1.000	1.000	1.000
10	WORLD HISTORY	Title		D+	1.000	1.000	1.000
10	WRITING WORKSHOP I	Title		B	0.500	0.500	0.500

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA And Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANKD
30.000	12.500	12.500	2.400	187	277

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTN PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total:		12.500	12.500

Counselor \ Principal

Date

Void Without Official Signature

# Format01\_Numeric

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-1968

BROOKS, AMANDA  
6770 West Snowflake Road  
Becksville, OH 44141  
STUDENT NUMBER: 190216  
SSID: GD2789147

## Student Transcript

3/14/2012

GENDER: F  
SSN: 963277441  
BIRTHDATE: 2/6/1996  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009-2010						
GRADE	COURSE NAME	INGPA	FIN	CRSE CREDIT	CREDIT ATTM	CREDIT EARN
09	C.B.I. US HISTORY	Yes	C+	1.000	1.000	1.000
09	C.B.I. WORK-STUDY	Yes	A+	1.000	1.000	1.000
09	CAREER BASED INTERVEN	Yes	B	1.000	1.000	1.000
09	ENGLISH 9	Yes	C+	1.000	1.000	1.000
09	HEALTH	Yes	C	0.500	0.500	0.500
09	PHYS ED I	Yes	A-	0.250	0.250	0.250
09	PREALGEBRA	Yes	C+	1.000	1.000	1.000
09	SCIENCE 9	Yes	D	1.000	1.000	1.000

2010-2011						
GRADE	COURSE NAME	INGPA	FIN	CRSE CREDIT	CREDIT ATTM	CREDIT EARN
10	ADVENTURE/LIFE SPORTS	Yes	A+	0.250	0.250	0.250
10	APP. OF LIT. II	Yes	D+	0.500	0.500	0.500
10	INTRO TO ART	Yes	A	1.000	1.000	1.000
10	KEYBOARDING W/MS WOR	Yes	C+	0.500	0.500	0.500
10	PRAC BIOLOGY	Yes	C+	1.000	1.000	1.000
10	TECHNICAL ALGEBRA I	Yes	B+	1.000	1.000	1.000
10	WORLD HISTORY	Yes	D+	1.000	1.000	1.000
10	WRITING WORKSHOP I	Yes	B	0.500	0.500	0.500

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

ACT Scores	
Definition	1/2012
COMP	20
ENG	18
ENGWRIT	16
MATH	26
READ	13
SCI	21
WRITSUB	05

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTM PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total:		12.50	12.50

Cumulative GPA And Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANKD
30.000	12.500	12.500	2.400	187	277

Counselor \ Principal

Void Without Official Signature

Date

# Format02

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City Schools  
(419)289-7968

BROOKS, AMANDA  
670 West Snowflake Road  
Becksville, OH 44141  
STUDENT NUMBER: 190216  
SSID: G02789147

Student Transcript

3/14/2012

GENDER: F  
SSN: 963271441  
BIRTHDATE: 26/1996  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009						
GRADE	COURSE NAME	INGPA	FIN	CRSE CREDIT	CREDIT ATTN	CREDIT EARN
09	C.B.I. US HISTORY	True	C+	1.000	1.000	1.000
09	C.B.I. WORK-STUDY	True	A+	1.000	1.000	1.000
09	CAREER BASED INTERVENTION	True	B	1.000	1.000	1.000
09	ENGLISH 9	True	C+	1.000	1.000	1.000
09	HEALTH	True	C	0.500	0.500	0.500
09	PHYS ED I	True	A-	0.250	0.250	0.250
09	PRE-ALGEBRA	True	C+	1.000	1.000	1.000
09	SCIENCE 9	True	D	1.000	1.000	1.000
Total Credits:				6.750	6.750	6.750

2010						
GRADE	COURSE NAME	INGPA	FIN	CRSE CREDIT	CREDIT ATTN	CREDIT EARN
10	ADVENTURE/LIFE SPORTS	True	A+	0.250	0.250	0.250
10	APP. OF LIT. II	True	D+	0.500	0.500	0.500
10	INTRO TO ART	True	A-	1.000	1.000	1.000
10	KEYBOARDING W/ MS WORD	True	C+	0.500	0.500	0.500
10	PRAC BIOLOGY	True	C+	1.000	1.000	1.000
10	TECHNICAL ALGEBRA I	True	B+	1.000	1.000	1.000
10	WORLD HISTORY	True	D+	1.000	1.000	1.000
10	WRITING WORKSHOP I	True	B	0.500	0.500	0.500
Total Credits:				6.750	6.750	6.750

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA And Credits				
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK
30.000	12.500	12.500	2.400	187

OGT			
GRD	TEST PART	DATE	P/F
10	Writing	3/1/2011	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTN PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	6.750	6.750
Credits Total:		12.50	12.50

Counselor \ Principal

Date

Void Without Official Signature

# Format11

Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-7968

BROOKS, AMANDA  
670 West Snowflake Road  
Becksville, OH 44141  
STUDENT NUMBER: 190216  
SSID: GD2789147

GENDER: F  
SSN: 963271441  
BIRTHDATE: 2/6/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009						
GRADE	COURSE NAME	INGPA	FIN	CRSE CREDIT	CREDIT ATTN	CREDIT EARN
09	C.B.I. US HISTORY	True	C+	1.000	1.000	1.000
09	C.B.I. WORK-STUDY	True	A+	1.000	1.000	1.000
09	CAREER BASED INTERVENT	True	B	1.000	1.000	1.000
09	ENGLISH 9	True	C+	1.000	1.000	1.000
09	HEALTH	True	C	0.500	0.500	0.500
09	PHYS ED I	True	A-	0.250	0.250	0.250
09	PREALGEBRA	True	C+	1.000	1.000	1.000
09	SCIENCE 9	True	D	1.000	1.000	1.000

2010						
GRADE	COURSE NAME	INGPA	FIN	CRSE CREDIT	CREDIT ATTN	CREDIT EARN
10	ADVENTURE/LIFE SPORTS	True	A+	0.250	0.250	0.250
10	APP. OF LIT. II	True	D+	0.500	0.500	0.500
10	INTRO TO ART	True	A	1.000	1.000	1.000
10	KEYBOARDING W/MS WORD	True	C+	0.500	0.500	0.500
10	PRAC BIOLOGY	True	C+	1.000	1.000	1.000
10	TECHNICAL ALGEBRA I	True	B+	1.000	1.000	1.000
10	WORLD HISTORY	True	D+	1.000	1.000	1.000
10	WRITING WORKSHOP I	True	B	0.500	0.500	0.500

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA And Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RNKD
30.000	12.500	12.500	2.400	187	277

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTN PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total:		12.50	12.50

Counselor / Principal

Date

Void Without Official Signature

# Format12

Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City Schools  
(419)289-7968

BROOKS, AMANDA  
6770 West Snowville Road  
Becksville, OH 44141  
STUDENT NUMBER: 190216  
SSID: GD2789147

GENDER: F  
SSN: 983277441  
BIRTHDATE: 2/6/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

**2009**

GRD	SCHOOL	COURSE NAME	IN	GPA	FIN	CRSE CRED	CRED ATT	CRED EARN
09	ASHLAND HS	C.B.I. US HISTORY	True		C+	1.000	1.000	1.000
09	ASHLAND HS	C.B.I. WORK-STUD	True		A+	1.000	1.000	1.000
09	ASHLAND HS	CAREER BASED IN	True		B	1.000	1.000	1.000
09	ASHLAND HS	ENGLISH 9	True		C+	1.000	1.000	1.000
09	ASHLAND HS	HEALTH	True		C	0.500	0.500	0.500
09	ASHLAND HS	PHYS ED I	True		A-	0.250	0.250	0.250
09	ASHLAND HS	PRE-ALGEBRA	True		C+	1.000	1.000	1.000
09	ASHLAND HS	SCIENCE 9	True		D	1.000	1.000	1.000
Total Credits:						6.750	6.750	6.750

**Attendance**

SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

**Cumulative GPA And Credits**

POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANK
30.000	12.500	12.500	2.400	187	277

**2010**

GRD	SCHOOL	COURSE NAME	IN	GPA	FIN	CRSE CRED	CRED ATT	CRED EARN
10	ASHLAND HS	ADVENTURE/LIFE	True		A+	0.250	0.250	0.250
10	ASHLAND HS	APP. OF LIT. II	True		D+	0.500	0.500	0.500
10	ASHLAND HS	INTRO TO ART	True		A	1.000	1.000	1.000
10	ASHLAND HS	KEYBOARDING W/	True		C+	0.500	0.500	0.500
10	ASHLAND HS	PRAC BIOLOGY	True		C+	1.000	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGE	True		B+	1.000	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	True		D+	1.000	1.000	1.000
10	ASHLAND HS	WRITING WORKSH	True		B	0.500	0.500	0.500
Total Credits:						6.750	6.750	6.750

**OGT**

GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

**Total Credits**

SCHOOL YEAR	SCHOOL NAME	CRED ATT	CRED EARN
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	6.750	6.750
Credits Total:		12.500	12.500

Counselor \ Principal

Date

Void Without Official Signature

# Format12\_Numeric

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-7968

BROOKS, AMANDA  
6770 West Snowville Road  
Becksville, OH 44141  
STUDENT NUMBER: 190216  
SSID: G02789147

## Student Transcript

3/14/2012  
SS ID: G02789147  
SSN: 963277441  
GENDER: F  
BIRTHDATE: 2/6/1996  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATTM	CRED EARN
09	ASHLAND HS	C.B.I.USH HISTORY	True	C+	1.000	1.000	1.000
09	ASHLAND HS	C.B.I.WORKSTUDY	True	A+	1.000	1.000	1.000
09	ASHLAND HS	CAREER BASED INTERN	True	B	1.000	1.000	1.000
09	ASHLAND HS	ENGLISH 9	True	C+	1.000	1.000	1.000
09	ASHLAND HS	HEALTH	True	C	0.500	0.500	0.500
09	ASHLAND HS	PHYS ED I	True	A	0.250	0.250	0.250
09	ASHLAND HS	PRE-ALGEBRA	True	C+	1.000	1.000	1.000
09	ASHLAND HS	SCIENCE 9	True	D	1.000	1.000	1.000
Total Credits:					6.750	6.750	6.750

2010							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATTM	CRED EARN
10	ASHLAND HS	ADVENTURE/LIFE SPO	True	A+	0.250	0.250	0.250
10	ASHLAND HS	APP. OF LIT. II	True	D+	0.500	0.500	0.500
10	ASHLAND HS	INTRO TO ART	True	A	1.000	1.000	1.000
10	ASHLAND HS	KEYBOARDING/MS/	True	C+	0.500	0.500	0.500
10	ASHLAND HS	PRACT BIOLOGY	True	C+	1.000	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	True	B+	1.000	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	True	D+	1.000	1.000	1.000
10	ASHLAND HS	WRITING WORKSHOP I	True	B	0.500	0.500	0.500
Total Credits:					5.750	5.750	5.750

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA And Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANK
30.000	12.500	12.500	2.400	187	277

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

ACT Scores	
Definition	1/2012
COMP	20
ENG	18
ENGWRIT	16
MATH	26
READ	13
SCI	21
WRITSUB	05

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTM PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total:		12.50	12.50

Counselor \ Principal

Void Without Official Signature

Date

# Format12AssessFromAA TNoLimit

Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City Schools  
(419)289-7968

BROOKS, AMANDA  
6710 West Stillman Road  
Becksville, OH  
STUDENT NUMBER: 190216

44141

GENDER: F  
SSN: 963277441  
SSID: G02789147  
BIRTHDATE: 2/8/1995  
ADMISSION DATE: 3/1/2009  
WITHDRAWAL DATE:

PROGRAM: Career Center  
HOMEROOM:

GRADUATION DATE:  
HOME SCHOOL:

2009							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATTM	CRED EARN
09	ASHLAND HS	C.B.I. US HISTORY	True	C+	1.000	1.000	1.000
09	ASHLAND HS	C.B.I. WORK-STUD	True	A+	1.000	1.000	1.000
09	ASHLAND HS	CAREER BASED IN	True	B	1.000	1.000	1.000
09	ASHLAND HS	ENGLISH 9	True	C+	1.000	1.000	1.000
09	ASHLAND HS	HEALTH	True	C	0.500	0.500	0.500
09	ASHLAND HS	PHYS ED I	True	A-	0.250	0.250	0.250
09	ASHLAND HS	PRE-ALGEBRA	True	C+	1.000	1.000	1.000
09	ASHLAND HS	SCIENCE 9	True	D	1.000	1.000	1.000
Total Credits:					6.750	6.750	6.750

2010							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATTM	CRED EARN
10	ASHLAND HS	ADVENTURE/LIFE	True	A+	0.250	0.250	0.250
10	ASHLAND HS	APP. OF LIT. II	True	D+	0.500	0.500	0.500
10	ASHLAND HS	INTRO TO ART	True	A	1.000	1.000	1.000
10	ASHLAND HS	KEYBOARDING WK	True	C+	0.500	0.500	0.500
10	ASHLAND HS	PRAC BIOLOGY	True	C+	1.000	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGE	True	B+	1.000	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	True	D+	1.000	1.000	1.000
10	ASHLAND HS	WRITING WORKSH	True	B	0.500	0.500	0.500
Total Credits:					6.750	6.750	6.750

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00
		719	6	1

Cumulative GPA And Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANKD
30.000	12.500	12.500	2.400	187	277

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/20/11	410	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTM PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	6.750	6.750
Credits Total:		12.50	12.50

ACT	
CATEGORY CODE	1/1/2012
ENG	18
MATH	26
READ	13
SCI	21
COMP	20
ENGWRIT	16
WRITSUB	05

PLAN	
CATEGORY CODE	1/24/2012
COMP	22
ENG	24
MATH	24
READ	24
SCI	24

Counselor \ Principal

Date

Void Without Official Signature

# Format20

Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City Schools  
(419)289-7968

BROOKS, AMANDA  
6770 West Stillwell Road  
Becksville, OH  
STUDENT NUMBER: 190216  
SSID: G02789147

44141

GENDER: F  
SSN: 963277441  
BIRTHDATE: 2/6/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATTN	CRED EARN
09	ASHLAND HS	C.B.I. US HISTORY	True	C+	1.000	1.000	1.000
09	ASHLAND HS	C.B.I. WORK-STUDY	True	A+	1.000	1.000	1.000
09	ASHLAND HS	CAREER BASED INTER	True	B	1.000	1.000	1.000
09	ASHLAND HS	ENGLISH 9	True	C+	1.000	1.000	1.000
09	ASHLAND HS	HEALTH	True	C	0.500	0.500	0.500
09	ASHLAND HS	PHYS ED I	True	A-	0.250	0.250	0.250
09	ASHLAND HS	PRE-ALGEBRA	True	C+	1.000	1.000	1.000
09	ASHLAND HS	SCIENCE 9	True	D	1.000	1.000	1.000

2010							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATTN	CRED EARN
10	ASHLAND HS	ADVENTURE/LIFESPOR	True	A+	0.250	0.250	0.250
10	ASHLAND HS	APP. OF LIT. II	True	D+	0.500	0.500	0.500
10	ASHLAND HS	INTRO TO ART	True	A	1.000	1.000	1.000
10	ASHLAND HS	KEYBOARDING W/MSU	True	C+	0.500	0.500	0.500
10	ASHLAND HS	PRAC BIOLOGY	True	C+	1.000	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	True	B+	1.000	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	True	D+	1.000	1.000	1.000
10	ASHLAND HS	WRITING WORKSHOP I	True	B	0.500	0.500	0.500

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA And Credits			
GPACRED EARNED	GPACRED ATTEMPT	GPA	RANK
12.500	12.500	2.400	187

OGT			
GRD	TEST PART	DATE	P/F
10	Writing	3/1/2011	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATTN PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total:		12.50	12.50

Counselor \ Principal

Date

Void Without Official Signature

# Format21

Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-7968

BROOKS, AMANDA  
6770 West Snowflake Road  
Becksville, OH  
STUDENT NUMBER: 190216  
SSID: GD2789147

44141

GENDER: F  
SSN: 963277 441  
BIRTHDATE: 2/6/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009

GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRS CRED	CRD ATTM	CRD EARN
09	ASHLAND HS	C.B.I. US HISTORY	True	C+	1.000	1.000	1.000
09	ASHLAND HS	C.B.I. WORK-STUDY	True	A+	1.000	1.000	1.000
09	ASHLAND HS	CAREER BASED INTERVEN	True	B	1.000	1.000	1.000
09	ASHLAND HS	ENGLISH 9	True	C+	1.000	1.000	1.000
09	ASHLAND HS	HEALTH	True	C	0.500	0.500	0.500
09	ASHLAND HS	PHYS ED I	True	A-	0.250	0.250	0.250
09	ASHLAND HS	PRE-ALGEBRA	True	C+	1.000	1.000	1.000
09	ASHLAND HS	SCIENCE 9	True	D	1.000	1.000	1.000

2010

GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRS CRED	CRD ATTM	CRD EARN
10	ASHLAND HS	ADVENTURE/LIFESPORTS	True	A+	0.250	0.250	0.250
10	ASHLAND HS	APP. OF LIT. II	True	D+	0.500	0.500	0.500
10	ASHLAND HS	INTRO TO ART	True	A	1.000	1.000	1.000
10	ASHLAND HS	KEYBOARDING W/MSWOR	True	C+	0.500	0.500	0.500
10	ASHLAND HS	PRAC BIOLOGY	True	C+	1.000	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	True	B+	1.000	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	True	D+	1.000	1.000	1.000
10	ASHLAND HS	WRITING WORKSHOP I	True	B	0.500	0.500	0.500

Attendance

SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA and Credits

POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANKD
30.000	12.500	12.500	2.400	187	277

OGT

GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

Total Credits

SCHOOL YEAR	SCHOOL NAME	CRD ATTN PRO	CRD EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	5.750	5.750
Credits Total:		12.50	12.50

Counselor \ Principal

Date

Void Without Official Signature

COLLEGE PREP PROGRAM  
Academic Grade and Point Average  
A 91-100 5.00  
B 83-90 4.00  
C 75-82 3.00  
D 67-74 2.00  
F Be bw 67 0

GENERAL PROGRAM  
A 91-100 4.00  
B 83-90 3.00  
C 75-82 2.00  
D 67-74 1.00  
F Be bw 67 0

# Format22

## Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City Schools  
(419)239-1968

BROOKS, AMANDA  
6770 West Snowflake Road  
Becksville, OH  
STUDENT NUMBER: 190216  
SSID: G02789147

GENDER: F  
SSN: 963277441  
BIRTHDATE: 2/8/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATT	CRED EARN
09	ASHLAND HS	C.B.I. WORK-STUDY	Tre	A+	1.000	1.000	1.000
09	ASHLAND HS	PRE-ALGEBRA	Tre	C+	1.000	1.000	1.000
09	ASHLAND HS	ENGLISH 9	Tre	C+	1.000	1.000	1.000
09	ASHLAND HS	HEALTH	Tre	C	0.500	0.500	0.500
09	ASHLAND HS	PHYS ED I	Tre	A-	0.250	0.250	0.250
09	ASHLAND HS	SCIENCE 9	Tre	D	1.000	1.000	1.000
09	ASHLAND HS	CAREER BASED INTERVENT	Tre	B	1.000	1.000	1.000
09	ASHLAND HS	C.B.I. US HISTORY	Tre	C+	1.000	1.000	1.000
Total Credits:					6.750	6.750	6.750

2010							
GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	CRED ATT	CRED EARN
10	ASHLAND HS	APP. OF LIT. II	Tre	D+	0.500	0.500	0.500
10	ASHLAND HS	PRAC BIOLOGY	Tre	C+	1.000	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	Tre	D+	1.000	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	Tre	B+	1.000	1.000	1.000
10	ASHLAND HS	WRITING WORKSHOP I	Tre	B	0.500	0.500	0.500
10	ASHLAND HS	INTRO TO ART	Tre	A	1.000	1.000	1.000
10	ASHLAND HS	ADVENTURE/LIFE SPORTS	Tre	A+	0.250	0.250	0.250
10	ASHLAND HS	KEYBOARDING W/MSWORD	Tre	C+	0.500	0.500	0.500
Total Credits:					6.750	6.750	6.750

Attendance				
SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA and Credits					
POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTAL RANK
30.000	12.500	12.500	2.400		277

OGT				
GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRED ATT PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	6.750	6.750
Credits Total:		12.500	12.500

Counselor \ Principal

Void Without Official Signature

Date

# Format32

## Student Transcript

3/14/2012

ASHLAND HIGH SCHOOL  
1440 KING RD.  
ASHLAND, OH 44805  
Ashland City School  
(419)289-1968

BRDO KS, AMANDA  
6770 West Snowville Road  
Becksville, OH  
STUDENT NUMBER: 190216  
SSID: GD2789147

44141

GENDER: F  
SSN: 963277 44 1  
BIRTHDATE: 2/6/1995  
ADMISSION DATE: 8/1/2009  
WITHDRAWAL DATE:  
GRADUATION DATE:

2009

GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	ATTM	CRED EARN
09	ASHLAND HS	C.B.I. WORK-STUDY	Tne	A+	1.000	1.000	1.000
09	ASHLAND HS	PRE-ALGEBRA	Tne	C+	1.000	1.000	1.000
09	ASHLAND HS	ENGLISH 9	Tne	C+	1.000	1.000	1.000
09	ASHLAND HS	HEALTH	Tne	C	0.500	0.500	0.500
09	ASHLAND HS	PHYS ED I	Tne	A-	0.250	0.250	0.250
09	ASHLAND HS	SCIENCE 9	Tne	D	1.000	1.000	1.000
09	ASHLAND HS	CAREER BASED INTERV	Tne	B	1.000	1.000	1.000
09	ASHLAND HS	C.B.I. US HISTORY	Tne	C+	1.000	1.000	1.000
Total Credits:					6.750	6.750	

2010

GRD	SCHOOL	COURSE NAME	IN GPA	FIN	CRSE CRED	ATTM	CRED EARN
10	ASHLAND HS	APP. OF LIT. II	Tne	D+	0.500	0.500	0.500
10	ASHLAND HS	PRAC BIO LOGY	Tne	C+	1.000	1.000	1.000
10	ASHLAND HS	WORLD HISTORY	Tne	D+	1.000	1.000	1.000
10	ASHLAND HS	TECHNICAL ALGEBRA I	Tne	B+	1.000	1.000	1.000
10	ASHLAND HS	WRITING WORKSHOP I	Tne	B	0.500	0.500	0.500
10	ASHLAND HS	INTRO TO ART	Tne	A	1.000	1.000	1.000
10	ASHLAND HS	ADVENTURE/LIFE SPORT	Tne	A+	0.250	0.250	0.250
10	ASHLAND HS	KEYBOARDING W/MSW	Tne	C+	0.500	0.500	0.500
Total Credits:					6.750	6.750	

Attendance

SCHOOL YEAR	SCHOOL	DAYS PRESENT	DAYS ABSENT	TIMES TARDY
2009	ASHS	173.00	1.00	1.00
2010	ASHS	168.00	5.00	0.00
2011	ASHS	179.00	0.00	0.00
2012	ASHS	199.00	0.00	0.00

Cumulative GPA And Credits

POINTS	GPA CRED EARNED	GPA CRED ATTEMPT	GPA	RANK	TOTL RANK
30.000	12.500	12.500	2.400	187	277

OGT

GRD	TEST PART	DATE	SCORE	P/F
10	Writing	3/1/2011	410	Passed

Total Credits

SCHOOL YEAR	SCHOOL NAME	CRED ATTM PRO	CRED EARN PRO
2009	ASHLAND HS	6.750	6.750
2010	ASHLAND HS	6.750	6.750
Credits Total:		12.50	12.50

Counselor \ Principal

Date

Void Without Official Signature

---

# ProgressBook StudentInformation Course Requests Guide



# **ProgressBook StudentInformation Course Requests Guide**

(This document is current for ProgressBook StudentInformation v13.5.0 or later.)

© 2013 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44114

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

## Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Course Requests Guide* document have been made.

Product Version	Heading	Page	Reason
13.5.0	<i>"4A. Course Request Verification Slip (R416)"</i>	62	Added note to Output field about printing labels for Firefox users.
13.1.0	Cover	N/A	Updated cover with StudentInformation logo and renamed guide appropriately.
13.1.0	Global	N/A	Updated DASL references to StudentInformation (except in references to the Course Requests application).
13.1.0	<i>"4A. Course Request Verification Slip (R416)"</i>	62	Updated figure for FY13 changes and added text describing the Special Education Services list.  Also added information for Adobe 10 when printing labels in Output field.

This page intentionally left blank.

# Table of Contents

Change Log .....	i
Course Requests Overview .....	1
Understanding the Course Requests Module .....	2
Course Requests Outline and Flow .....	3
Course Requests Documentation Key .....	4
1. Public Administration .....	4
1A. Application Configuration .....	4
1B. Account Generation .....	9
1B-1. Account Generation – Student Search .....	11
1B-2. Account Generation – Specify Username .....	14
1B-3. Account Generation – Specify Student Number .....	16
1C. Account Information Letter .....	17
1D. Uncommitted Requests .....	21
1E. Account Usage .....	24
1E-1. Account Usage – Delete Account .....	28
2. Public Users .....	28
2A. Logging In .....	29
2B. My Account .....	30
2C. Course Requests .....	32
2D. Print .....	36
3. Scheduling – Course Requests .....	37
3A. Course Requests .....	37
3A-1. Edit Course Requests .....	39
3A-2. Delete Course Requests .....	41
3B. Student Requests .....	43
3B-1. Add/Edit Student Requests .....	45
3B-2. Delete Student Requests .....	48
3B-3. Course Section Student Statuses Reference .....	49
3C. Course Request Mass Update Groups .....	51

3C-1. Add Course Request Mass Update Groups .....	53
3C-2. Edit Course Request Mass Update Groups .....	54
3C-3. Delete Course Request Mass Update Groups .....	55
3C-4. View Course Request Mass Update Group Rules .....	56
3C-5. Add/Edit Course Request Mass Update Group Rules.....	57
3C-6. Delete Course Request Mass Update Group Rules.....	61
4. Scheduling – Course Request Reports.....	62
4A. Course Request Verification Slip (R416) .....	62
4B. Student Course Request Verification (R401) .....	66
4C. Tally of Student Course Requests (R402) .....	69
4D. Course Request Labels (R206) .....	71

# Course Requests Overview

---

The Student Course Request application is an internet application allowing students to make course requests for a future school year or future school term on the internet or the school intranet. Course requests will be created directly in StudentInformation. Users of other student management systems (POISE/SIS/McSIS, Pentamation, eSIS, etc.), may also have their students use this application by loading course and student data to the StudentInformation application via existing StudentInformation data transfer routines. Student request data can be exported in a standard format from the StudentInformation application following the completion of student requests and loaded into third party applications. The existing StudentInformation student management software infrastructure makes it easy to manage course information, assign common groups of requests to students in batches, create administrative requests that can be locked from student changes, and view request statistics in real-time.

In addition to allowing students to create their course requests online, the application can also be accessed by students' parents if the school desires. Parents may be granted access only to view their children's requests or may be granted access to make requests that cannot be altered by the student. Parental access to the students' requests may also be configured to allow parents to confirm and approve their children's requests online. The application will also provide the ability to print a request confirmation sheet to act as a receipt for the student or to be used to record and collect a parent's actual signature affirming their agreement with the student's course request selections.

The student/parent application will also offer rudimentary account and user profile management facilities. Users, both parents and students, will be able to view their own demographic information, request changes to their profile, or even directly update their demographic contact information as determined and configured by each individual school.

The Student Course Request application will run as a separate application from the existing StudentInformation application for security and deployment reasons. However, much of the Student Course Request Application schedule and course management functionality will be provided by existing StudentInformation application functionality. In addition, reporting functionality used by school personnel will be available exclusively through existing StudentInformation application functionality. The Student Course Request Application will provide interfaces and entry points to load the minimal data required for use of the Student Course Request Application for schools operating outside the StudentInformation application.

# Understanding the Course Requests Module

---

## Public Administration

Public Administration is used to initialize and manage the Public Users accounts. Public Administration will normally be handled by an existing StudentInformation user such as a Guidance Counselor or Principal. The first step is to set up the parameters of the Course Requests Application using the Application Configuration screen. After the Application Configuration is set for a specific building, the Account Generation process can be run. Account Generation will create Public User accounts for the specified students and/or guardians. Once Public User accounts are created, the Account Information Letter can be printed which contains each account's user name and password. These Account Information Letters can be handed out to students and/or guardians.

The Uncommitted Requests report will show students who have uncommitted, unapproved, or no course requests. The Account Usage screen shows the user name and last login of Public Accounts. Profile Changes allow the StudentInformation user to accept or refuse profile changes made in the StudentInformation Public application.

## Public Users

Public Users are students and/or guardians. They will log in to the Course Requests Application using the user name and password created in the Account Generation process and printed on the Account Information Letter. Public Users will be able to add, delete, review and submit course requests which will then be reviewed and picked up by the Scheduler.

## Course Request Mass Update Groups

The Course Request Mass Update Groups provides the user with a quick way to add student course requests in an initial request state en masse for selected groups of students. As rules are defined, a user may implement only those rules they select. Each rule updates independently of other rules. When a request is submitted, the updates will be performed on the selected results set. If no result set exists at the time of the update, a new result set will be created as this could be the initial step in the schedule process where requests are gathered. Processing of a mass update rule is not dependent on a specific master schedule. Requests added/updated by a rule are not assigned, meaning that they do not assign a specific section of the requested course to a user. This process is reserved for the batch scheduler.

## Scheduling

Various on-line course request screens and reports are part of the Scheduling module and are explained in more detail in the *ProgressBook StudentInformation Scheduling Guide*.

## Course Requests Outline and Flow

---

1. Public Administration
  - A. **Application Configuration** – This screen allows each building to edit the configuration settings of the Student Course Request Application.
  - B. **Account Generation** – The Account Generation screen provides an interface to create new user accounts for students and guardians to use the Course Request Application.
  - C. **Account Information Letter** – This report will print individual account information letters to be delivered to students and guardians.
  - D. **Uncommitted Requests** – This screen will create a list of students that have unapproved, uncommitted, or no course requests.
  - E. **Account Usage** – The Account Usage screen will display usage statistics for a group of Student Course Request Application users.
    - a. Account Usage – Delete Account
2. Public Users
  - A. **Logging In** – Student and Guardian log in to the StudentInformation Course Request Application.
  - B. **My Account** – Change Profile information and password.
  - C. **Course Requests** – Student and Guardian enter Course Requests.
  - D. **Print** – Print from the Public User screen.
3. Scheduling – Course Requests
  - A. **Course Requests** – Used to modify Course Requests.
  - B. **Student Requests** – Used to modify Student Course Requests.
  - C. **Course Request Mass Update Groups** – Used to create Course Requests for a group of students based on specific rules.
4. Scheduling – Course Request Reports
  - A. **Course Request Verification Slip (R416)** – Creates verification slips to pass out to students for verification of the accuracy of their course requests.

- B. Student Course Request Verify (R401)** – Prints out forms with student information and course requests for verification. Can also print parent signature information.
- C. Tally of Student Course Requests (R402)** – This report is used to provide a count of the number of students, broken down by grade, requesting each course.
- D. Course Request Labels (R206)** – Used to generate student labels to be affixed to course request sheets.

## Course Requests Documentation Key

---



Defined at the Building level



Defined at the Student level



Report



Important

## 1. Public Administration

---

### 1A. Application Configuration



**Navigation: Management – School Administration – Public Administration – Application Configuration**

This screen allows each building to edit the configuration settings of the Student Course Request Application. These settings can be changed at any time.

**Very Important** – Make sure you are in the upcoming school year!

**DASL HIGH SCHOOL**

**2007-2008 (LIVE)**

Click on the working school and change the School Year as needed.

Home » SIS » Student » Edit Profile FY09

## Change Working School

Select your working school and school year

School Year:  ⌵ ⚡

Working School:  ⌵  Save as Default School

Click **Finished** to save the proper School Year.

Home » Management » School Administration » Public Administration » Application Configuration

## Student Course Request Application Configuration

From this screen, you can edit the configuration settings for the Student Course Request Application.

Context Options

School Year:  ⌵

### Context Options

**School Year** – Select the school year that the Public Course Request application will be looking to for requests. You can also turn off the application by selecting “Public Application off for School.”

Home » Management » School Administration » Public Administration » Application Configuration

## Student Course Request Application Configuration

From this screen, you can edit the configuration settings for the Student Course Request Application.

**Context Options**

School Year: 2007-2008

**Security Options**

Student Validation Method: Student Number

Guardian Access: View Only

Dates of Application Availability: 12/1/2006 - 1/15/2007

**Contact Profile Editing Options**

Name: Queue

Mailing Address: Queue

Phone Number: Direct

Email Address: Queue

**Course Request Options**

External course catalog address: w.daslschool.edu/catalog.html  Use external course catalog

Guardian approval required: None

Request may specify:  Alternate Course

Minimum credits required: 0

Maximum credits allowed: 10

Enforce Prerequisites and Corequisites:

Requisite Action: Warn

Permit Completed Courses:

**Course Types:**

Class  Spare

Lunch  Satellite course

Study hall  Post secondary course

ESC course  blank - legacy

Course Group  Vocational

Excluded Courses:

Request Cut-off Date: 12/31/2006

Save Cancel

## Security Options

**Student Validation Method** (required) – Select the student verification method required to access the Student Course Request application. The valid options are None, Student Social Security Number, or Student Number.

**Guardian Access** (required) – Select the access level guardian users have to student course requests. The valid options are None, View Only, Modify Requests, or Modify and Lock Requests.

- **None** – Guardians are not assigned a Username and cannot access the student course requests.
- **View Only** – Guardians are assigned a Username and can view the student course requests, but cannot modify the student course requests.

- **Modify Requests** – Guardians are assigned a Username and can modify student course requests. If the Guardian Access is set to “modify requests”, the guardian can still change the requests even if Guardian Approval (see below) isn’t required.
- **Modify and Lock Requests** – Guardians are assigned a Username and can modify student course requests and lock them so they cannot be changed by the student. If the Guardian Access is set to “modify and lock requests”, the guardian can still change the requests even if Guardian Approval (see below) isn’t required.

**Dates of Application Availability** (required) – Enter the date range the application will be available for use by students and guardians. If a user logs in outside of this date range, they will see the following message.

**The application is not available at this time**

## Contact Profile Editing Options

**Name** (required) – Select the method used for users submitting changes to the user name portion of their contact profile. The valid options are None (read only), Queue or Direct.

- **None** – Changes are not allowed to this portion of the contact profile. It is read only for the public user.
- **Queue** – Profile Changes by public users will be stored up in a queue and can be reviewed at Public Administration – Profile Changes. The profile changes can be reviewed and accepted or refused at that time.
- **Direct** – Profile changes to this portion of the contact profile can be made directly by the public user.

Please note that setting these options to Queue or Direct allows a parent account to modify their contact record, and allows a student account to modify their profile information (except name). Before setting any option to "Direct", be sure you have considered that this will allow students direct editing of profile information, and allow parents direct editing of contact record information.

**Mailing Address** (required) – Select the method used for users submitting changes to the mailing address portion of their contact profile. The valid options are None (read only), Queue, Direct – see above for explanation.

**Phone Number** (required) – Select the method used for users submitting changes to the phone number portion of their contact profile. The valid options are None (read only), Queue, Direct – see above for explanation.

**Email Address** (required) – Select the method used for users submitting changes to the email address portion of their contact profile. The valid options are None (read only), Queue, Direct – see above for explanation.

## Course Request Options

**External course catalog address** (optional) – Enter a URL for the external course catalog resource to be used for all courses.

**Use external course catalog** (optional) – Check if an external course catalog URL will be used for all course descriptions. Used for non-StudentInformation users.

**Guardian approval required** (required) – Select the level of guardian approval required for all course requests. The valid options are None, Electronic (logging into DASL Course Request), and Signature (paper copy). A short description of these options is listed on the screen. Defaults to None.

**Request may specify** (optional) – Check if course requests may include an alternate course.

**Minimum credits required** (required) – Enter the minimum credits required per student from 0 to 16 in .5 increments.

**Maximum credits allowed** (required) – Enter the maximum credits allowed per student from 0 to 16 in .5 increments.

**Enforce Prerequisites and Corequisites** (optional) – Check if course prerequisites and co-requisites are to be checked when course requests are added or removed.

**Requisite Action** (required) – If Enforce Prerequisites and Corequisites is checked, select the action to be taken when course prerequisites or co-requisites are not satisfied. Course history is being checked for Prerequisites and Corequisites. The valid options are:

- **Warn** – The student is warned, but not prevented from taking the action.
- **Prevent** – The application displays an error and the request cannot be made.
- **Automatic** (used with co-requisites only) – The application prompts the user and the user decides to continue and the application adds or remove the additional requests, or the user may cancel and no requests will be added or removed.

**Permit Completed Courses** (optional) – Check if courses already completed by the active student will be displayed in the course search results table/grid. This allows students to repeat courses such as band, yearbook, choir, etc.

**Course Types** (optional) – Check the course types to display for the students. All course types will be displayed by default. Un-checking any of these will prevent students from being able to view or request those course types.

**Excluded Courses** (optional) – Type in the course number for courses to be excluded (such as Special Ed courses) – separated by commas. An example of a valid entry would be 58, 68, 100 – where courses 58, 68 and 100 will be excluded from the student Course Request entry.

**Request Cut-off Date** (required) – Enter the cut-off date after which requests can no longer be changed. This date must be the same as or earlier than the Application Availability end date. If a user logs in after the Request Cut-off Date, they will see the following message (with the appropriate date).

**The request cut-off date was 2/2/2006**

**Save** – Saves the configuration settings for the Student Course Request Application. You will receive the message below. Any errors or missing information will be displayed in red at the top of the screen.

Home » Management » School Administration » Public Administration » Application Configuration

**Student Course Request Application Configuration**

From this screen, you can edit the configuration settings for the Student Course Request Application.

**The Application Configuration was successfully saved**

**Cancel** – Do not save the configuration settings for the Student Course Request Application.

## 1B. Account Generation



**Navigation: Management – School Administration – Public Administration – Account Generation**

The Account Generation screen provides an interface to create new user accounts for students and guardians to use the Course Request Application.

Home » Management » School Administration » Public Administration » Account Generation

### Account Generation

Account Generation Details

**Account Type:** Student Only

**Account Lifespan:** Date Limited

**Date Range:** 11/4/2005 to 5/25/2006

**Existing Accounts:** Ignore

---

Student Selection

**Search Mode:**  Student Search  Specify Username  Specify Student Number

**Last Name:**   Perform wildcard search

**First Name:**   Perform wildcard search

**Gender:**  Male  Female  Unspecified

**Homeroom Date:** 11/4/2005

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

Exclude students with selected status(es)

**Administrative Homeroom**

A103 - BERRY (Full Year Term)  
A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)  
A106 - CASTLE (Full Year Term)

Exclude students in selected homeroom(s)

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

Exclude students in selected grade level(s)

**Membership Group**

10 - Regular Programs  
11 - Intervention  
12 - ENROLLMENT OPTIONS  
13 - Other Regular Programs

Exclude students in selected group(s)

**Membership**

60 - Stdnt enrolled in Dist result displacement due t  
60 - Stdnt enrolled in Dist result displacement due t  
Academic Intracurricular Descriptions (Vocational - B  
Academic Intracurricular Descriptions (Vocational - C

Exclude students in selected membership(s)

**Program**

G - Gifted Student  
JAB - Jr Auto Body  
JAG - Jr AG Mechanics  
JCOS - Jr Cosmetology

Exclude students in selected program(s)

Preview Students

## Account Generation Details

**Account Type** (required) – Select the Course Request Account Type to be generated. Valid options are Student Only, Guardian Only, or Student and Guardian.

**Account Lifespan** (required) – Select the lifespan of the course request accounts generated. Valid options are Date Limited (accounts only valid during the specified date range) or Permanent (accounts which only need to be re-initialized to become active each year).

**Date Range** (optional) – If Account Lifespan is Date Limited, enter the starting and ending dates for the date range.

**Existing Accounts** (required) – Select how to handle existing course request accounts. Valid options are:

- **Ignore** – Leave existing accounts as they are and do not change any account properties.
- **Reset** – Replace any existing accounts with a new username and password.
- **Reinitialize** – Reinitialize any existing accounts with the new Account Lifespan (keeping the same username and password).

## Student Selection

**Search Mode** (required) – Select Student Search, Specify Username or Specify Student Number to indicate how students will be searched.

# 1B-1. Account Generation – Student Search



---

**Navigation: Management – School Administration – Public Administration – Account Generation – Search mode: Student Search**

## Student Selection

**Search Mode** (required) – Select Student Search, Specify Username or Specify Student Number to indicate how students will be searched.

**Student Selection**

**Search Mode:**  Student Search  Specify Username  Specify Student Number

**Last Name:**   Perform wildcard search

**First Name:**   Perform wildcard search

**Gender:**  Male  Female  Unspecified

**Homeroom Date:** 11/4/2005

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

Exclude students with selected status(es)

**Administrative Homeroom**

A103 - BERRY (Full Year Term)  
A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)  
A106 - CASTLE (Full Year Term)

Exclude students in selected homeroom(s)

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

Exclude students in selected grade level(s)

**Membership Group**

10 - Regular Programs  
11 - Intervention  
12 - ENROLLMENT OPTIONS  
13 - Other Regular Programs

Exclude students in selected group(s)

**Membership**

60 - Stdnt enrolled in Dist result displacement due t  
60 - Stdnt enrolled in Dist result displacement due t  
Academic Intracurricular Descriptions (Vocational - B  
Academic Intracurricular Descriptions (Vocational - C

Exclude students in selected membership(s)

**Program**

G - Gifted Student  
JAB - Jr Auto Body  
JAG - Jr AG Mechanics  
JCOS - Jr Cosmetology

Exclude students in selected program(s)

**Last Name** (optional) – Enter any student last name for the student selection. Check the check box to perform a wildcard search.

**First Name** (optional) – Enter any student first name for the student selection. Check the check box to perform a wildcard search.

**Gender** (optional) – Choose one or more genders. If no gender is specified, students of all genders will be displayed.

**Homeroom Date** (required) – Enter the date to use when determining homeroom assignment. Homeroom Date will default to today's date.

**Student Status** (optional) – Select the Student Statuses you wish to include or exclude in your search. If no Student Statuses are selected, students in all Student Statuses will be included.

**Exclude students with selected statuses** (optional) – Check if you wish the selected Student Statuses to be excluded from your search.

**Administrative Homeroom** (optional) – Select the Administrative Homerooms you wish to include or exclude in your search. The default mode is include. If no Administrative Homerooms are selected, students in all Administrative Homerooms will be included.

**Exclude students in select homeroom(s)** (optional) – Check if you wish the selected Administrative Homerooms to be excluded from your search.

**Grade** (optional) – Select the Grades you wish to include or exclude in your search. The default mode is Include. If no Grades are selected, students in all Grades will be included.

**Exclude students in selected grade level(s)** (optional) – Check if you wish the selected Grades to be excluded from your search.

**Membership Group** (optional) – Select the Membership Groups you wish to include or exclude in your search. The default mode is Include. If no Membership Groups are selected, students in all Membership Groups will be included.

**Exclude students in selected group(s)** (optional) – Check if you wish the selected Membership Groups to be excluded from your search.

**Membership** (optional) – Select the Memberships you wish to include or exclude in your search. The default mode is Include. If no Memberships are selected, students in all Memberships will be included.

**Exclude students in selected membership(s)** (optional) – Check if you wish the selected Memberships to be excluded from your search.

**Program** (optional) – Select the Programs you wish to include or exclude in your search. The default mode is Include. If no Programs are selected, students in all Programs will be included.

**Exclude students in selected program(s)** (optional) – Check if you wish the selected Programs to be excluded from your search.

**Preview Students** – Displays a list of all students meeting the specified student selection criteria.

Preview Students							
2 Records Displayed							
	Student Name	Student Number	Gender	Grade Level ^	Homeroom	Existing Student Account	Existing Guardian Account
<input checked="" type="checkbox"/>	Rivers, Terrence (Terry)	48652534	M	10	A106		
<input checked="" type="checkbox"/>	Smith, Sally (Sally)	00999999	M	10	A105		

**Sorting** – You may sort by any column (Student Name, Student Number, Gender, Grade, Homeroom, Existing Student Account, Existing Guardian Account) in ascending or descending order by clicking on the column header.

– Indicates the students you wish to create an account for that do not already have a Course Request account. This will default to checked. Uncheck any students for which you do not want a Course Request account created. Students not having a check box already have a Course Request account.

**Student Name** – Name of each student matching the criteria specified.

**Student Number** – Number of student having Course Request account created.

**Gender** – Gender of student having Course Request Account created.

**Grade** – Grade of student having Course Request Account created.

**Homeroom** – Homeroom of student on Homeroom Date specified.

**Existing Student Account** – Will display any student account already assigned to this student.

**Existing Guardian Account** – Will display any guardian account already assigned to this student.

**Mark All** – Mark all students for creation of Course Request accounts.

**Unmark All** – Unmark all students for creation of Course Request accounts.

**Create Accounts** – Create Course Request accounts for student and/or guardians as specified. You will receive the message below. You can now print Account Information Letters.

The accounts were created successfully

## 1B-2. Account Generation – Specify Username



Navigation: Home – Management – School Administration – Public Administration – Account Generation – Search Mode: Specify Username

### Student Selection

**Search Mode** (required) – Select Student Search, Specify Username or Specify Student Number to indicate how students will be searched.

**Student Selection**

**Search Mode:**  Student Search  Specify Username  Specify Student Number

**Username:**  
(comma separated)

**Username (comma separated)** (required) – Enter the Public Administration Username of each account. This would be used when doing a reset or reinitialize of existing public accounts.

**Preview Students** – Displays a list of all students with the specified Usernames

Preview Students						
2 Records Displayed						
<input type="checkbox"/>	Student Name	Student Number	Gender	Grade Level ^	Homeroom	Existing Student Account
<input checked="" type="checkbox"/>	Rivers, Terrence (Terry)	48652534	M	10	A106	t.rivers.7BA6
<input checked="" type="checkbox"/>	Smith, Sally (Sally)	00999999	M	10	A105	s.smith.3A3A

**Sorting** – You may sort by any column (Student Name, Student Number, Gender, Grade, Homeroom, Existing Student Account, Existing Guardian Account) in ascending or descending order by clicking on the column header.

– Indicates the students you wish to create an account for that do not already having a Course Request account. This will default to checked. Uncheck any students for which you do not want a Course Request account created. Students not having a check box already have a Course Request account.

**Student Name** – Name of each student matching the criteria specified.

**Student Number** – Number of student having Course Request account created.

**Gender** – Gender of student having Course Request Account created.

**Grade** – Grade of student having Course Request Account created.

**Homeroom** – Homeroom of student on Homeroom Date specified.

**Existing Student Account** – Will display any student account already assigned to this student.

**Existing Guardian Account** – Will display any guardian account already assigned to this student.

**Mark All** – Mark all students for creation of Course Request accounts.

**Unmark All** – Unmark all students for creation of Course Request accounts.

**Create Accounts** – Create Course Request accounts for student and/or guardians as specified. You will receive the message below. You can now print Account Information Letters.

**The accounts were created successfully**

# 1B-3. Account Generation – Specify Student Number



**Navigation:** Home – Management – School Administration – Public Administration – Account Generation – Search Mode: Specify Student Number

## Student Selection

**Search Mode** (required) – Select Student Search, Specify Username or Specify Student Number to indicate how students will be searched.

**Student Selection**

**Search Mode:**  Student Search  Specify Username  Specify Student Number

**Homeroom Date:**

**Student Number:**  
(comma separated)

123456, 987654

**Homeroom Date** (optional) – Enter the date used to determine the school year from which to return selected students. This date defaults to the current date.

**Student Number (comma separated)** (required) – Enter the student numbers separated by a comma. For example 00007004, 00004008, 00005004 would be entered in the Student Number box.

**Preview Students** – Displays a list of all students with the specified Student Numbers.

2 Records Displayed

Student Name	Student Number	Gender	Grade Level ^	Homeroom	Existing Student Account	Existing Guardian Account
<input checked="" type="checkbox"/> Rivers, Terrence (Terry)	48652534	M	10	A106	t.rivers.7BA6	
<input checked="" type="checkbox"/> Smith, Sally (Sally)	00999999	M	10	A105	s.smith.3A3A	

**Sorting** – You may sort by any column (Student Name, Student Number, Gender, Grade, Homeroom, Existing Student Account, Existing Guardian Account) in ascending or descending order by clicking on the column header.

– Indicates the students you wish to create an account for that do not already have a Course Request account. This will default to checked. Uncheck any students for which you do not want a Course Request account created. Students not having a check box already have a Course Request account.

**Student Name** – Name of each student matching the criteria specified.

**Student Number** – Number of student having Course Request account created.

**Gender** – Gender of student having Course Request Account created.

**Grade** – Grade of student having Course Request Account created.

**Homeroom** – Homeroom of student on Homeroom Date specified.

**Existing Student Account** – Will display any student account already assigned to this student.

**Existing Guardian Account** – Will display any guardian account already assigned to this student.

**Mark All** – Mark all students for creation of Course Request accounts.

**Unmark All** – Unmark all students for creation of Course Request accounts.

**Create Accounts** – Create Course Request accounts for student and/or guardians as specified. You will receive the message below. You can now print Account Information Letters.

The accounts were created successfully

## 1C. Account Information Letter



**Navigation: Home – Management – School Administration – Public Administration – Account Information Letter**

This report will print individual account information letters to be delivered to students and guardians. The individual pages will be formatted to display the address in a standard window envelope. The letter will be handed out to students in the school or mailed to each student and guardian. Each school will be able to customize the verbiage of the letter body.

Home » Management » School Administration » Public Administration » Account Information Letter

### Account Information Letter

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

Selection Criteria   Selection Summary   Load Settings

**Search Mode:**  Student Search    Specify User Name    Specify Student Number

**Last Name:**   Perform wildcard search

**First Name:**   Perform wildcard search

**Gender:**  Male  Female  Unspecified

**Administrative Homeroom**

A103 - BERRY (Full Year Term)   A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)   A106 - CASTLE (Full Year Term)

Exclude students in selected homeroom(s)

**Grade**

09 - 09   10 - 10   11 - 11   12 - 12

Exclude students in selected grade level(s)

**Membership Group**

10 - Regular Programs   11 - Intervention  
12 - Post-secondary Enrollment Options Program   13 - Other Regular Programs

Exclude students in selected group(s)

**Membership**

60 - Stdnt enrolled in Dist result displacement due t  
60 - Stdnt enrolled in Dist result displacement due t  
Academic Intracurricular Descriptions (Vocational - B  
Academic Intracurricular Descriptions (Vocational - C

Exclude students in selected membership(s)

**Program**

G - Gifted Student   JAB - Jr Auto Body  
JAG - Jr AG Mechanics   JCOS - Jr Cosmetology

Exclude students in selected program(s)

**Homeroom Date:** 12/12/2006

**Letter Types To Generate:** Student and Guardian Accounts

**Letter Verbiage:**  
random characters. The random portion of your username, and your entire password, consist only of the numbers 0-9 and the letters A-F. The letter O does not occur in passwords or in the random portion of usernames.

**Sorting Options**

UserName (DESC)   Grade (ASC)  
Grade (DESC)   Student Last Name (ASC)  
Homeroom (ASC)  
Student Last Name (DESC)

**Delivery Method:** Pickup  

**Email Address:** DASL\_Documentation@noacsc.org

**Description:**

**Search Mode** (required) – Select Student Search, Specify Username or Specify Student Number to indicate how students will be searched.

**Last Name** (optional) – Enter any student last name for the student selection. Check the check box to perform a wildcard search.

**First Name** (optional) – Enter any student first name for the student selection. Check the check box to perform a wildcard search.

**Gender** (optional) – Choose one or more genders. If no specific gender is specified, students of all genders will be displayed.

**Administrative Homeroom** (optional) – Select the Administrative Homerooms you wish to include or exclude in your search. The default mode is Include. If no

Administrative Homerooms are selected, students in all Administrative Homerooms will be included.

**Exclude students in selected homeroom(s)** (optional) – Check if you wish the selected Administrative Homerooms to be excluded from your search.

**Grade** (optional) – Select the Grades you wish to include or exclude in your search. The default mode is Include. If no Grades are selected, students in all Grades will be included.

**Exclude students in selected grade(s)** (optional) – Check if you wish the selected Grades to be excluded from your search.

**Membership Groups** (optional) – Select the Membership Groups you wish to include or exclude in your search. The default mode is Include. If no Membership Groups are selected, students in all Membership Groups will be included.

**Exclude students in selected membership group(s)** (optional) – Check if you wish the selected Membership Groups to be excluded from your search.

**Membership** (optional) – Select the Memberships you wish to include or exclude in your search. The default mode is Include. If no Memberships are selected, students in all Memberships will be included.

**Exclude students in selected membership(s)** (optional) – Check if you wish the selected Memberships to be excluded from your search.

**Program** (optional) – Select the Programs you wish to include or exclude in your search. The default mode is Include. If no Programs are selected, students in all Programs will be included.

**Exclude students in selected program(s)** (optional) – Check if you wish the selected Programs to be excluded from your search.

**Homeroom Date** (required) – Enter the date to use when determining homeroom assignment. This field's default value is today's date.

**Letter Types to Generate** (required) – Select the type of letters to generate. Valid options are Student Accounts Only, Guardian Accounts Only, or Student and Guardian Accounts.

**Letter Verbiage** (optional) – Enter the text that will print on the Account Information Letter. The Letter Verbiage can include up to 600 characters of text.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Password and Username Note:** Random passwords and Username extensions are only generated using the numerals 0 through 9, and the letters A, B, C, D, E and F. The letter O does not appear in randomly generated passwords or Username extensions.

School: HIGH SCHOOL	12/15/2009
Homeroom: IN05	
DOMINIC Student75542	
1000 S Main St	
Lima	OH 45804-1241
UserName:	d.student.EB2B
Password:	0BA21DD0BF
Testing public course requests.	

### Sample Account Information Letter

# 1D. Uncommitted Requests



Navigation: Home – Management – School Administration – Public Administration – Uncommitted Requests

This screen will create a list of students that have unapproved or uncommitted course requests. This screen will also list students who have no course requests at all.

**Last Name** (optional) – Enter any student last name for the student selection. Check the box to perform a wildcard search.

**First Name** (optional) – Enter any student first name for the student selection. Check the box to perform a wildcard search.

**Gender** (optional) – Choose one or more genders. If no specific gender is specified, students of all genders will be displayed.

**Homeroom Date** (required) – Enter the date to use when determining homeroom assignment. This field's default value is today's date.

**Student Status** (optional) – Select the Student Statuses you wish to include or exclude in your search. The default mode is Include. If no Student Statuses are selected, students in all Student Statuses will be included.

**Exclude students with selected status(es)** (optional) – Check if you wish the selected Student Statuses to be excluded from your search.

**Administrative Homeroom** (optional) – Select the Administrative Homerooms you wish to include or exclude in your search. The default mode is Include. If no Administrative Homerooms are selected, students in all Administrative Homerooms will be included.

**Exclude students in selected homeroom(s)** (optional) – Check if you wish the selected Administrative Homerooms to be excluded from your search.

**Grade** (optional) – Select the Grades you wish to include or exclude in your search. The default mode is Include. If no Grades are selected, students in all Grades will be included.

**Exclude students in selected grade level(s)** (optional) – Check if you wish the selected Grades to be excluded from your search.

**Membership Group** (optional) – Select the Membership Group(s) you wish to include or exclude in your search. The default mode is Include. If no Membership Groups are selected, students in all Membership Groups will be included.

**Exclude students in selected group(s)** (optional) – Check if you wish the selected Membership Groups to be excluded from your search.

**Membership** (optional) – Select the Membership(s) you wish to include or exclude in your search. The default mode is Include. If no Memberships are selected, students in all Memberships will be included.

**Exclude students in selected membership(s)** (optional) – Check if you wish the selected Memberships to be excluded from your search.

**Program** (optional) – Select the Program(s) you wish to include or exclude in your search. The default mode is Include. If no Programs are selected, students in all Programs will be included.

**Exclude students in selected program(s)** (optional) – Check if you wish the selected Programs to be excluded from your search.

**Show Students without Requests** (optional) – Check if you wish to show students with no Student Course Requests at all.

**Unapproved by Parent/Guardian** (optional) – Check if you wish to show Student Course Requests that required approval but are not yet approved by Parent/Guardian.

**Uncommitted by Student** (optional) – Check if you wish to show Course Requests approved but not committed by the student. If a guidance counselor or principal enters a request directly into the Student Request page for a student then that request has an approved status but uncommitted by the student. The reason for this is because did not go through the Student Course Request module to submit and commit their request.

**Search** – Execute the search based on the criteria specified.

6 Records Displayed

<u>Student Name</u> ^	<u>Student Number</u>	<u>Gender</u>	<u>Grade</u>	<u>Total</u>
<a href="#">Albert, Sue</a>	48652396	F	11	0
<a href="#">Archer, Mike</a>	48652465	M	11	0
<a href="#">Daugherty, Amy</a>	48652419	F	11	0
<a href="#">Schroeder, Peggy</a>	48652442	F	11	0
<a href="#">tester, Christine</a>	48652557	F	12	0
<a href="#">TestTest, Christine</a>	48652534	F	12	0

**Sorting** – You may sort by any column (Student Name, Student Number, Gender, Grade, Total) in ascending or descending order by clicking on the column header.

**Student Name** – Name of the student to whom this Course Request account is assigned.

**Student Number** – Number of the student to whom this Course Request account is assigned.

**Gender** – Gender of the student.

**Grade** – Grade of the student.

**Total** – Total number of Student Course Requests.

Click on the hyperlinked Student Name **Font, Michelle Lynn** to go to the Student Requests page for that student.

<b>DASL</b>	<a href="#">FONT, MICHELLE LYNN</a>	<b>ID:</b> 00006002	<b>Counselor:</b>	<input type="text"/>
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	<b>Gender:</b> F <b>Grade:</b> 10	<b>Homeroom:</b> A105 <b>Status:</b> A	\$

Home » SIS » Scheduling » Requests

### Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Default Schedule ▾ Default Schedule Result ▾  Display Assignments

2 Records Displayed of 2

	Prim. Req.	Alt. Req.	Priority	Req. Status	Active	Assignment	Type	Status
<input checked="" type="checkbox"/> <input type="checkbox"/>	216 - JOURNALISM I		1	Approved		<input type="button" value="+"/>		
<input checked="" type="checkbox"/> <input type="checkbox"/>	283 - SPANISH II		9	Approved		<input type="button" value="+"/>		

Show Active Only

Please see the *ProgressBook StudentInformation Scheduling Guide* for more information concerning the Student Requests screen.

## 1E. Account Usage



**Navigation: Home – Management – School Administration – Public Administration – Account Usage**

The Account Usage screen will display usage statistics for a selected group of Public Course Request application users, or it will display usage statistics for all Public Course Request application users associated with the student in context.

Home » Management » School Administration » Public Administration » Account Usage

## Account Usage

Specify Date Range For Search

Date Range: 11/4/2005 to 5/25/2006

Specify User

Username:  Go

Search Students

Last Name:   Perform wildcard search

First Name:   Perform wildcard search

Gender:  Male  Female  Unspecified

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

Exclude students with selected status(es)

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

Exclude students in selected grade level(s)

**Membership Group**

10 - Regular Programs  
11 - Intervention  
12 - ENROLLMENT OPTIONS  
13 - Other Regular Programs

Exclude students in selected group(s)

**Membership**

60 - Stdnt enrolled in Dist result displacement due t  
60 - Stdnt enrolled in Dist result displacement due t  
Academic Intracurricular Descriptions (Vocational - B  
Academic Intracurricular Descriptions (Vocational - C

Exclude students in selected membership(s)

**Program**

G - Gifted Student  
JAB - Jr Auto Body  
JAG - Jr AG Mechanics  
JCOS - Jr Cosmetology

Exclude students in selected program(s)

Search

## Selection Criteria (no student in context):

### Specify Date Range for Search

**Date Range** (required) – Enter the from and to dates to search for Course Request activity.

### Specify User

**User Name** (optional) – Enter the Course Request User Name assigned to the student or guardian.

**Go** – Display the Account Usage for the User Name entered.

## Search Students

**Last Name** (optional) – Enter any student last name for the student selection. Check the box to perform a wildcard search.

**First Name** (optional) – Enter any student first name for the student selection. Check the box to perform a wildcard search.

**Gender** (optional) – Choose one or more genders. If no specific gender is specified, students of all genders will be displayed.

**Student Status** (optional) – Select the Student Statuses you wish to include or exclude in your search. The default mode is Include. If no Student Statuses are selected, students in all Student Statuses will be included.

**Exclude students in student status(es)** (optional) – Check if you wish the selected Student Statuses to be excluded from your search.

**Grade** (optional) – Select the Grades you wish to include or exclude in your search. The default mode is Include. If no Grades are selected, students in all Grades will be included.

**Exclude students in selected grade level(s)** (optional) – Check if you wish the selected Grades to be excluded from your search.

**Membership Group** (optional) – Select the Membership Groups you wish to include or exclude in your search. The default mode is Include. If no Membership Groups are selected, students in all Membership Groups will be included.

**Exclude students in selected membership group(s)** (optional) – Check if you wish the selected Membership Groups to be excluded from your search.

**Membership** (optional) – Select the Memberships you wish to include or exclude in your search. The default mode is Include. If no Memberships are selected, students in all Memberships will be included.

**Exclude students in selected membership(s)** (optional) – Check if you wish the selected Memberships to be excluded from your search.

**Program** (optional) – Select the Programs you wish to include or exclude in your search. The default mode is Include. If no Programs are selected, students in all Programs will be included.

**Exclude students in selected program(s)** (optional) – Check if you wish the selected Programs to be excluded from your search.

**Search** – Execute the search based on the criteria specified.

Search									
2 Records Displayed									
Account Type	Username	Last Login	Student Name ^	Student Number	Gender	Grade	Link	Active	
✘ Student	h.banana.5E4A	12/05/2007 09:49 AM	Banana, Hannah	48652258	F	09	<input type="checkbox"/>		
✘ Student	j.sprat.3D9C	12/05/2007 09:46 AM	SPRAT, JACK JOSEPH	00005004	M	12	<input type="checkbox"/>		

Show Active Only

## Associated User List (student in context):

DASL		EYE, MAGNUM P.	ID: 00004001	Counselor:	DASL HIGH SCHOOL		2007-2008	
Chris Keller		DASL HIGH SCHOOL 2007-2008	Gender: M	Homeroom: A105	[Find Students] Find [Go]			
		Calendar: DFLT	Grade: 10	Status: A	Advanced Search   Feedback   Mgmt   Help			
Home » Management » School Administration » Public Administration » Account Usage								
<b>Account Usage</b>								
2 Records Displayed								
Account Type	Username	Last Login	Student Name ^	Student Number	Gender	Grade	Link	Active
Guardian	eye.1207		EYE, MAGNUM P.	00004001	M	10	<input type="checkbox"/>	
Student	m.eye.D407	02/28/2005 09:30 PM	EYE, MAGNUM P.	00004001	M	10	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Show Active Only								

## User List and Search Results:

**Sorting** – You may sort by any column (Account Type, User Name, Last Login, Student Name, Student Number, Gender, Grade) in ascending or descending order by clicking on the column header.

**Account Type** – Student, Guardian or Student/Guardian Course Request account.

**Username** – User Name for this Course Request account.

**Last Login** – Date and time that this user last logged into the DASL Course Request Application.

**Student Name** – Name of the student to whom this Course Request account is assigned.

**Student Number** – Number of the student to whom this Course Request account is assigned.

**Gender** – Gender of the student.

**Grade** – Grade of the student.

**Link** – If checked, signifies that the guardian account has been linked from another guardian account. This would be the result of using the Link Students page with a guardian account.

**Active** – A light bulb indicates an active account; a dim light bulb indicates an inactive account. Users cannot login with an inactive account.

**Show Active Only** – Check to show only active accounts; uncheck to show both active and inactive accounts.

# 1E-1. Account Usage – Delete Account



Navigation: Home – Management – School Administration – Public Administration – Account Usage

Account Type	Username	Last Login	Student Name ^	Student Number	Gender	Grade	Link	Active
✗ Student	h.banana.5E4A	12/05/2007 09:49 AM	Banana, Hannah	48652258	F	09	<input type="checkbox"/>	
✗ Student	j.sprat.3D9C	12/05/2007 09:46 AM	SPRAT, JACK JOSEPH	00005004	M	12	<input type="checkbox"/>	

Show Active Only

Click ✗ to delete (deactivate) an account.

Home » Management » School Administration » Public Administration » Account Usage

### Account Usage

Are you sure you want to deactivate the following account? The user will not be able to login with this account after deactivation.  
Username: t.rivers.9FE5

**Ok** – Delete this account. Users cannot login with an inactive account. A delete confirmation will be given.

**The selected account was deactivated**

**Cancel** – Do not delete this account.

## 2. Public Users

Students and Guardians are considered Public Users of the DASL Course Request Application. They will use a separate application to submit student Course Requests.

Please see your DA-Site for the Public User URL. Go to the Public User URL to access the DASL Course Requests Application.

DASL Home Page	Course Requests
<a href="#">Log In</a>   <a href="#">Print</a>	
Username: <input type="text"/>	

**DASL Home Page** – Go to the DASL Public Home page.

**Course Requests** – Go to the DASL Public Course Requests page. See section 2C. Course Requests for more details.

**Log In** – Go to the Login page. See section 2A. Logging In for more details.

Print – Print the current page. See section 2D. Print for more details.

## 2A. Logging In



### Navigation: Public User URL – Log In

DASL Home Page	Course Requests
	
<a href="#">Log In</a>   <a href="#">Print</a>	
<p><b>Username:</b> <input type="text" value="s.brewer.20FF"/> </p> <p><b>Password:</b> <input type="password" value="••••••••"/> </p> <p><input type="button" value="Log In..."/> <input type="button" value="Forgot Password"/></p>	

**Username** (required) – Enter the Course Request Application username that was assigned. This can be found on the Account Information Letter.

**Password** (required) – Enter the Course Request Application password that was assigned. This can be found on the Account Information Letter.

**Log In** – Log In to the DASL Course Request Application.

**Forgot Password** – Click to retrieve a forgotten password.

DASL Home Page	Course Requests
	
<a href="#">Log In</a>   <a href="#">Print</a>	
<p><b>In order to retrieve your password, a valid email address must already be specified for your account.</b></p>	
<p><b>Username:</b> <input type="text" value="s.brewer.20FF"/> </p> <p><input type="button" value="Submit"/> <input type="button" value="Cancel"/></p>	

**Username** (required) – Enter the Course Request Application username that was assigned.

**Note:** A valid email address must be already be specified for the user account to retrieve the password.

**Submit** – Submit the password request – the current password will be sent to the email address assigned to this user.

**Cancel** – Cancel the password request.

Once logged in, your account and student information is summarized in the top bar, and the Log In menu option changes to two others.

DASL Home Page	Course Requests
	
<b>Logged In As:</b> s.brewer.20FF	<b>Counselor:</b> Not yet assigned
<b>Student:</b> BREWER, SEAN CONORY	<b>School Phone:</b> (419) 555-1234
<b>School:</b> DASL ELEMENTARY SCHOOL (2005-2006)	<b>Grade:</b> 02 <b>ID:</b> 00001007
<b>Application Availability:</b> 8/1/2005 - 6/1/2006	<b>Request Cut-off Date:</b> 6/1/2006
<a href="#">My Account</a>   <a href="#">Log Out</a>   <a href="#">Print</a>	

**My Account** – View and edit your Public Account information and profile. See section 2B. My Account for more details.

**Log Out** – Log out from the DASL Public Application.

## 2B. My Account



### Navigation: My Account

DASL Home Page	Course Requests
 <p><b>Logged In As:</b> s.brewer.20FF  <b>Student:</b> BREWER, SEAN CONORY  <b>School:</b> DASL ELEMENTARY SCHOOL (2005-2006)  <b>Application Availability:</b> 8/1/2005 - 6/1/2006</p>	<p><b>Counselor:</b> Not yet assigned  <b>School Phone:</b> (419) 555-1234  <b>Grade:</b> 02 <b>ID:</b> 00001007  <b>Request Cut-off Date:</b> 6/1/2006</p>
<a href="#">My Account</a>   <a href="#">Log Out</a>   <a href="#">Print</a>	

Click **My Account** on the blue Menu Bar to view and edit the Public Account information.

DASL Home Page	Course Requests
 <p><b>Logged In As:</b> s.brewer.20FF  <b>Student:</b> BREWER, SEAN CONORY  <b>School:</b> DASL ELEMENTARY SCHOOL (2005-2006)</p>	<p><b>Counselor:</b> Not yet assigned  <b>School Phone:</b> (419) 555-1234  <b>Grade:</b> 02 <b>ID:</b> 00001007</p>
<a href="#">My Account</a>   <a href="#">Log Out</a>   <a href="#">Print</a>	
<h3>Account Management</h3>	
<p><b>Title:</b> <input type="text"/></p> <p><b>First Name:</b> <input type="text" value="SEAN CONORY"/></p> <p><b>Middle Name:</b> <input type="text"/></p> <p><b>Last Name:</b> <input type="text" value="BREWER"/></p> <p><b>Last Name Suffix:</b> <input type="text"/></p> <p><b>Street Address:</b> <input type="text" value="200 E KIBBY STREET"/> ⚡</p> <p><input type="text" value="SUITE 100"/></p> <p><b>City:</b> <input type="text" value="LIMA"/> ⚡</p> <p><b>State:</b> <input type="text" value="OH"/> ⚡</p> <p><b>Zip:</b> <input type="text" value="45804"/> ⚡</p> <p><b>Home Phone:</b> <input type="text" value="(419) 222-9915"/> ⚡</p> <p><b>Work Phone:</b> <input type="text"/> <b>Ext:</b> <input type="text"/></p> <p><b>Place of Employment:</b> <input type="text"/></p> <p><input type="checkbox"/> Can be contacted at work</p> <p><b>Pager Number:</b> <input type="text"/> <b>Ext:</b> <input type="text"/></p> <p><b>Email Address:</b> <input type="text"/></p>	
<input type="button" value="Submit"/> <input type="button" value="Change My Password"/> <input type="button" value="Cancel"/>	

Update the Public Account Information as necessary. Changes to the Account Management information are not allowed if Contact Profile Editing Options are set to None for the Name, Mailing Address, Phone or Email Address.

**Title** (optional or non-editable) – Select the Title from drop-down list. Valid options are Mr., Mrs., Ms. and Dr.

**First Name** (required or non-editable) – Enter the First Name of the Course Request user.

**Middle Name** (optional or non-editable) – Enter the Middle Name of the Course Request user.

**Last Name** (required or non-editable) – Enter the Last Name of the Course Request user.

**Last Name Suffix** (optional or non-editable) – Enter the Last Name Suffix of the Course Request user.

**Street Address** (required or non-editable) – Enter the Street Address of the Course Request user.

**City** (required or non-editable) – Enter the City of the Course Request user.

**State** (required or non-editable) – Enter the State of the Course Request user.

**Zip** (required or non-editable) – Enter the Zip Code of the Course Request user.

**Home Phone** (required or non-editable) – Enter the Home Phone number of the Course Request user.

**Work Phone** (optional or non-editable) – Enter the Work Phone number of the Course Request user.

**Ext.** (optional or non-editable) – Enter the Work Phone Extension of the Course Request user.

**Place of Employment** (optional or non-editable) – Enter the Employer of the Course Request user.

**Can be contacted at work** – Yes or No; Check if the Course Request user can be contacted at work.

**Pager Number** (optional or non-editable) – Enter the Pager Number of the Course Request user.

**Ext.** (optional or non-editable) – Enter the Pager Number Extension of the Course Request user.

**Email Address** (optional or non-editable) – Enter the Email Address of the Course Request user.

**Cancel** – Do not save changes to the Account Management screen.

**Submit** – Submit these changes. If the Contact Profile Editing Option is set to Direct, the changes will take place immediately.

The account profile information was submitted successfully

If the Contact Profile Editing Option is set to Queue, the changes will be put into a Profile Changes Queue and will be updated when approved by the Public Administrator.

The account profile information was submitted successfully

The account profile information you submitted on 05/04/2005 11:40 PM is waiting approval.

**Change My Password** – Change the Public Account password. Check “Use Email Address as Username” if an email address is available on the Public Account and the email address is to be used as the Public Account Username.

**Course Requests**

Logged In As: s.brewer.20FF  
 Student: BREWER, SEAN CONORY  
 School: DASL ELEMENTARY SCHOOL (2005-2006)

Counselor: Not yet assigned  
 School Phone: (419) 555-1234  
 Grade: 02 ID: 00001007

My Account | Log Out | Print

### Password Change

Username: s.brewer.20FF

New Password:

Confirm New Password:

Use Email Address as Username

Save Cancel

**Save** – Save new Password.

**Cancel** – Do not save new Password

## 2C. Course Requests



### Navigation: Course Requests

Any course requests already entered will display on this screen, above the “Review Requests” button and the Course Requests Search panel. Course

Requests preceded by   indicate that those are already Approved requests and cannot be edited through the Public Course Requests module.

**Course Requests**

After finalizing your requests, remember to “Review Requests” and submit them.

Course	Course Name	Teacher	Period	Credits	Alt Course	Status
 	200	YEARBOOK II		0.50		Student Pending
 	234	ANATOMY II		0.50		Student Pending

Review Requests

Search Mode:  Course Search  Specify Course Code

Department: All

Area of Study (AOS): All

Course Subject Area (CSA): All

Credits: Any 0.5

Course Groups: Display standard courses only

Honor Courses: Display all courses

Include Completed Courses:

Search

## Search Mode: Course Search

**Department** (optional) – Select a Course Department to narrow your search. In the results table, the Course Department Code, rather than the Name, will be listed.

**Area of Study (AOS)** (optional) – Select an Area of Study to narrow your search. In the results table, the Area of Study Code, rather than the Name, will be listed.

**Course Subject Area (CSA)** (optional) – Select a Course Subject Area to narrow your search. In the results table, the Course Subject Area Code, rather than the Name, will be listed.

**Credits** (optional) – Enter a number of credits or partial credits, then select “At least”, “Exactly” or “More than” from the pull-down menu to operate on that number of credits. Selecting “Any” from the pull-down menu ignores any numeric value in the Credits box.

**Course Groups** (optional) – Select one of: “Display all courses and course groups”, “Display standard courses only” or “Display course groups only.”

**Honor Courses** (optional) – Select one of: “Display all courses”, “Display Honors courses only” or “Display Non-Honors courses only.”

**Include Completed Courses** – Yes or No; Checking this box will include courses the student has completed in the results list.

**Search** – Display available courses that match the criteria entered.

## Search Mode: Specify Course Code

The screenshot shows the DASL Home Page with a user logged in as s.brewer.20FF. The page displays course request information for SEAN CONROY at DASL ELEMENTARY SCHOOL. A table lists a course request for '2LO HOMEROOM 2LO' with 0.00 credits and an 'Approved' status. Below the table is a 'Review Requests' button. The 'Search Mode' section has 'Specify Course Code' selected. A text input field for 'Course Code (comma separated)' is empty, and a 'Search' button is at the bottom.

Course	Course Name	Teacher	Period	Credits	Alt Course	Status
2LO	HOMEROOM 2LO			0.00		Approved

**Course Code** (required) – Enter Course code numbers or Course Group code numbers, separated by commas.

DASH Home Page Course Requests

Logged In As: h.banana.SEA4 Counselor: Not yet assigned  
 Student: Barana, Hannah School Phone: (419) 555-1234  
 School: DASL HIGH SCHOOL (2007-2008) Grade: 09 ID: 48652218  
 Application Availability: 2/1/2005 - 12/31/2007 Request Cut-off Date: 12/31/2007

[My Account](#) | [Log Out](#) | [Print](#)

### Course Requests

No requests exist. Search for the courses you would like to request.

Search Mode:  Course Search  Specify Course Code

Department:

Area of Study (AOS):

Course Subject Area (CSA):

Credits:

Course Groups:

Honor Courses:

Include Completed Courses:

Course	Course Name	Desc	Dept	AOS	CSA	Group	Honors	In GPA
<input type="checkbox"/>	<a href="#">200</a>	<a href="#">YEARBOOK II</a>	ENG		ELE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">234</a>	<a href="#">ANATOMY II</a>	SCI		SCI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Comp</a>	<a href="#">Computer Programming</a>	Comp			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">hea</a>	<a href="#">Health</a>	HPE			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">PE</a>	<a href="#">Phys. Ed</a>	HPE			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Search** – Display the specified course.

To add a request:

- Click to add a single course.
- OR check boxes and click **Request Selected Courses**.

### Course Requests

The selected requests were added successfully

After finalizing your requests, remember to "Review Requests" and submit them.

	Course	Course Name	Teacher	Period	Credits	Alt Course	Status
	<a href="#">200</a>	<a href="#">YEARBOOK II</a>			0.50		Student Pending
	<a href="#">234</a>	<a href="#">ANATOMY II</a>			0.50		Student Pending

**Status** – Status of specific Course Requests. Valid options are Approved, Pending and Uncommitted. **Only Approved requests are used in the Scheduler.**

Click to delete a request.

Click to edit a request.

After finalizing the list of requests, click **Review Requests** to review the requests.

**Request Review**

Your requests have not been submitted. Click "Submit Requests" to confirm that you want these courses.

Course	Course Name	Teacher	Period	Credits	Alt Course	Status
<a href="#">200</a>	<a href="#">YEARBOOK II</a>			0.50		Student Pending
<a href="#">234</a>	<a href="#">ANATOMY II</a>			0.50		Student Pending

**Credit Total:** 1.00

## Submit the requests

1. If you are satisfied with the list of requests, click **Submit Requests**.
2. Choose **Print** on the menu bar to print your request screen.
3. Click **Cancel** to return to the "Course Requests" screen.

## Notes for Students and Guardians

- Requests may already exist that were created by the school.
- Requests may be locked by the school. Locked requests can't be deleted.
- **"Submit Requests" can only be done once. After you submit your requests, you will no longer be able to change your requests.**
- Click a course code or course name to pop up the course detail.
- If you already have the list of courses you want to request, click the "Specify Course Code" option in the search area. Enter a list of course codes separated by commas and click "Search". After examining the search results, click "Request Selected Courses".

## Notes for Administrators

"Submit Requests" can only be done once by a student. After "Submit Requests", a student can no longer modify his/her requests. If a student needs to modify requests after "Submit Requests" has been done, there are two options:

- Edit the requests for the student using the Requests page in StudentInformation.
- On the Requests page with a selected student in context, click the student's requests and then submit them again.
- Until a student submits his/her requests, the Request Status shows as "Student Pending" on the Requests page.

- Only “Approved” requests are used in the scheduler.
- By default, requests created using Course Request Mass Update rules are approved and locked.
- When a student submits his/her requests and guardian approval is turned off, the requests are marked as “Approved.”
- In order to see the detailed status of a particular request, edit the request on the Requests page.
- “Student Committed” is checked if student has done “Submit Requests” on Request Review page in DASL Public application.

## 2D. Print



### Navigation: Print

Use this option to print a page of the DASL Public application.

**Course Requests**

No requests exist. Search for the courses you would like to request.

Search Mode:  Course Search  Specify Course Code

Department: All

Area of Study (AOS): All

Course Subject Area (CSA): All

Credits: Any 0.5

Course Groups: Display standard courses only

Honor Courses: Display all courses

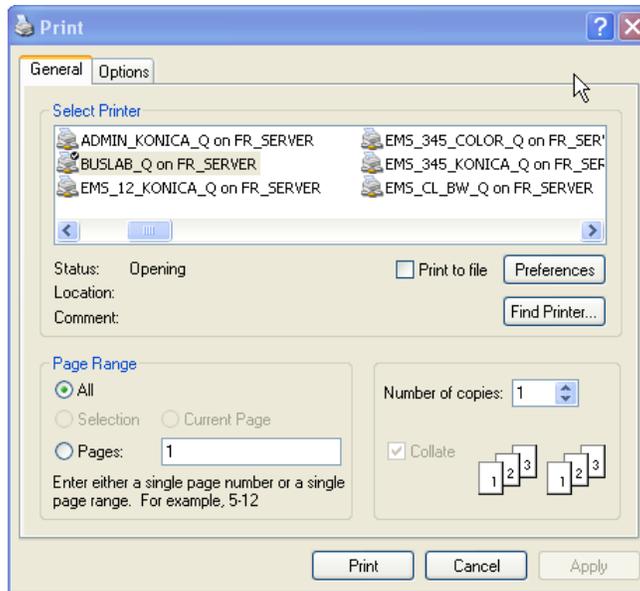
Include Completed Courses:

Search

Course	Course Name	Desc	Dept	AOS	CSA	Group	Honors	In	GPA
<input type="checkbox"/>	202	YELBROOK II	ENG		ELE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	231	ANATOMY II	SCI		SCI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Comp	Computer Programming	COMP			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Hsa	Health	HPE			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	PE	Phys.Ed	HPE			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Request Selected Courses

Click **Print** on the Menu Bar to print from the Course Requests screen.



Use the Print Dialog Box to print to the appropriate printer.

## 3. Scheduling – Course Requests

---

### 3A. Course Requests



#### Navigation: Home – SIS – Scheduling – Requests

The Request screen serves a dual purpose in StudentInformation. When no student is selected, the screen can be used to view, add and/or modify request information for specific courses; the students that have requested the course for the school year. From this screen requests may be added, modified or dropped and the online scheduler processed. (To see the screen when a student is selected in context, see section 3B. Student Course Requests.)

Home » SIS » Scheduling » Requests

## Course Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Course:  ... Department:

Teacher:  Area of Study:

[Hide Search Criteria]

Default Schedule  Default Schedule Result   Display Assignments

48 Records Displayed of 48

	Student Number	Student Name	Grade	Prim. Req.	Alt. Req.	Priority	Req. Status	Active
X	00004008	SAWYER, THOMAS (JACK)	11	171 - ART II		5	Student Pending	💡
X	00006002	FONT, MICHELLE LYNN	10	216 - JOURNALISM I		1	Approved	💡
X	00006003	JONES, WHITNEY ANN	10	216 - JOURNALISM I		1	Approved	💡
X	00006004	LINE, TROY AARON	10	216 - JOURNALISM I		1	Approved	💡
X	00006005	MAY, DAISY LEE	10	216 - JOURNALISM I		1	Approved	💡
X	00007001	CONTRARY, JASON WILLIAM	09	235 - ENVIRONMENTAL SCIENCE		6	Approved	💡
X	00007002	PERRY, RICHARD MATTHE (RICH)	09	235 - ENVIRONMENTAL SCIENCE		8	Approved	💡

**Course** (optional) – Type in a course ID or use the Course Selection Wizard (described in earlier documentation 2F).

**...** – Open Course Selection Wizard for help selecting a course (see earlier documentation for complete details on the Course Selection Wizard 2G-1).

**Department** (optional) – Select a Course Department from drop-down list, as search criteria (see Course Department – 2A thru 2A-3).

**Teacher** (optional) – Select a Teacher from drop-down list of all available teachers in the building, as course search criteria.

**Area of Study** (optional) – Select a Course Area of Study from drop-down list, as search criteria (see Course Area of Study – 2D thru 2D-3).

**Hide Search Criteria/Show Search Criteria** – Click here to hide or display the search criteria panel.

**Sorting** – You may sort by any column (Student Number, Student Name, Grade, Primary Request, Alternate Request, Priority, Request Status, Active) in ascending or descending order by clicking on the column header

**Default Schedule** – Select from the drop-down menu, the Schedule to be used with the Scheduler (note: if the school year has been finalized/started then this will not be available for selection – the default must be used as shown above).

**Default Schedule Result** – Select from the drop-down menu, the Schedule Result to be used with the Scheduler (note: if the school year has been finalized/started then this will not be available for selection – the default must be used as shown above).

**Display Assignments** – Display Course Requests that have been assigned to course sections if desired. If unchecked (default) only those requests that have NOT been assigned will be displayed in the grid.

**Search** – Search for Course Requests.

 – Delete this Course Request.

 – Edit this Course Request.

 – Active Course Request.

 – Inactive Course Request – will not be used when processing online scheduler.

**Show Active Only** – If checked, will show only active Course Requests; if not checked, will show both active and inactive Course Requests.

**Go to Course Section Assignments** – Go to the Course Section Assignments screen for the selected course.

## 3A-1. Edit Course Requests



Navigation: Home – SIS – Scheduling – Requests

Home » SIS » Scheduling » Requests

### Course Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Course:  ... Department:

Teacher:  Area of Study:

[Hide Search Criteria]

Default Schedule  Default Schedule Result   Display Assignments

4 Records Displayed of 4

	Student Number	Student Name	Grade	Prim. Req.	Alt. Req.	Priority	Req. Status	Active
 	00006002	FONT, MICHELLE LYNN	10	216 - JOURNALISM I		1	Approved	
 	00006003	JONES, WHITNEY ANN	10	216 - JOURNALISM I		1	Approved	
 	00006004	LINE, TROY AARDN	10	216 - JOURNALISM I		1	Approved	
 	00006005	MAY, DAISY LEE	10	216 - JOURNALISM I		1	Approved	

Show Active Only

Click  to edit a specific Course Request.

Home » SIS » Scheduling » Requests

## Course Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

**Student:** JONES, WHITNEY ANN

**Primary Course:** 216  

**Alternate Course:**  

**Priority:** 1    Or leave blank to use the primary course priority automatically

**Teacher:**    Exclude

**Period:**    Exclude

**Request Status:**

<b>DASL</b>	<b>Guardian</b>	<b>Student</b>
<input type="checkbox"/> Mass Request Rule Created	<input type="checkbox"/> Guardian Created	<input type="checkbox"/> Student Created
<input checked="" type="checkbox"/> Locked	<input type="checkbox"/> Guardian Pending	<input type="checkbox"/> Student Pending
<input checked="" type="checkbox"/> Approved	<input type="checkbox"/> Guardian Locked	<input type="checkbox"/> Student Committed
<input type="checkbox"/> Guardian Approved		

**Is Active:**

**Student** (display only) – Name of the student for which the course request is being modified.

**Primary Course** (required) – Course ID for the primary course requested.

 – Open Course Selection Wizard for help selecting a course for the appropriate selection (see Scheduling End User Documentation for more details).

**Alternate Course** (optional) – Course ID for an Alternate Course that you want to schedule if the primary course requested cannot be scheduled.

**Priority** (optional) – Indicate the Student Request priority that you wish the Batch Scheduler to use for this request. Default priority is one (1) which is the lowest and 9 is the highest priority. You can also use the   buttons to increase or decrease priority. Leaving this field blank will use the Course Priority as the Priority for this request.

**Note:** Request priority will only affect student schedules if it is selected for all scheduling passes on the Job Parameter Set.

**Use Primary Course Priority** – Replace any entered priority (or blank priority) with the Course Priority.

**Teacher** (optional) – Select a teacher from the drop-down list of available teachers. If a teacher is specified then the scheduler will try to schedule this request with the specified teacher, if available.

**Exclude** – Yes or No; if checked then the scheduler will exclude the student from being scheduled into a course taught by the specified teacher (above).

**Period** (optional) – Select a period from the drop-down list of available periods. If a period is specified then the scheduler will try to schedule this request with the specific period, if available.

**Exclude** – Yes or No; if checked then the scheduler will exclude the student from being scheduled into a course during the specified period (above).

**Request Status** – These check boxes display the request status. "Locked" is checked if the Request was entered in StudentInformation, rather than the Public Course Request module, and means the request cannot be modified by Public users. "Guardian Locked" means that the Public Course Request application Guardian account user has locked the request, and the request cannot be modified by Public Course Request application Student account users. Check "Approved" to approve the Course Request and allow the Batch Scheduler to schedule a course section assignment for the request.

**Is Active** (optional) – Yes or No; Student Course Request must be Active to use with online or batch scheduler. Active by default.

**Save** – Will save current Student Course Request and return to Student Course Request Maintenance listing where you will see the updated information.

**Cancel** – Will clear out data already entered and return to Student Course Request Maintenance listing.

**<Prev Request** – Will save changes to the current request and display the previous request for modification

**Next Request>** – Will save changes to the current request and display the next request for modification.

## 3A-2. Delete Course Requests



### Navigation: Home – SIS – Scheduling – Requests

Home » SIS » Scheduling » Requests

### Course Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Course:   Department:

Teacher:   Area of Study:

[\[Hide Search Criteria\]](#)

Default Schedule  Default Schedule Result   Display Assignments

4 Records Displayed of 4

	Student Number	Student Name	Grade	Prim. Req.	Alt. Req.	Priority	Req. Status	Active
✕	00006002	FONT, MICHELLE LYNN	10	216 - JOURNALISM I		1	Approved	
✕	00006003	JONES, WHITNEY ANN	10	216 - JOURNALISM I		1	Approved	
✕	00006004	LINE, TROY AARON	10	216 - JOURNALISM I		1	Approved	
✕	00006005	MAY, DAISY LEE	10	216 - JOURNALISM I		1	Approved	

Show Active Only

Click **X** to delete a specific Course Request. **IMPORTANT:** Do **NOT** delete course requests that have already been assigned.

Home » SIS » Scheduling » Requests

## Course Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

**Are you sure you want to delete the following Request?**  
JOURNALISM I

**Ok** – Delete the Student Course Request.

**Cancel** – Do Not Delete the Student Course Request.

***Note:** A Student Course Request is not actually deleted – it is made Inactive as notated by the “dim” Active code. Show both Active and Inactive Student Course Requests by un-checking the Show Active Only check box.*

Home » SIS » Scheduling » Requests

## Course Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Course:  ... Department:

Teacher:  Area of Study:

[Hide Search Criteria]

Default Schedule  Default Schedule Result   Display Assignments

4 Records Displayed of 4

	Student Number	Student Name	Grade	Prim. Req.	Alt. Req.	Priority	Req. Status	Active
 	00006002	FONT, MICHELLE LYNN	10	216 - JOURNALISM I		1	Approved	
 	00006003	JONES, WHITNEY ANN	10	216 - JOURNALISM I		1	Approved	
 	00006004	LINE, TROY AARON	10	216 - JOURNALISM I		1	Approved	
 	00006005	MAY, DAISY LEE	10	216 - JOURNALISM I		1	Approved	

Show Active Only

<b>DASL</b>	<a href="#">FONT, MICHELLE LYNN</a>	<b>ID:</b> 00006002	<b>Counselor:</b>
<b>DASL User</b>	DASL HIGH SCHOOL	<b>Gender:</b> F	<b>Homeroom:</b> A105
	2004-2005 (8/24/2004 - 6/1/2005)	<b>Grade:</b> 10	<b>Status:</b> A

Home » SIS » Scheduling » Requests

## Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Default Schedule ▾ Default Schedule Result ▾  Display Assignments

2 Records Displayed of 2

	Prim. Req.	Alt. Req.	Priority	Req. Status	Active	Assignment	Type	Status
✗	216 - JOURNALISM I		1	Approved				
✗	283 - SPANISH II		9	Approved				

Show Active Only

To activate an Inactive Student Course Requests, see 3A-1. Edit Student Course Requests.



**IMPORTANT: Do NOT delete course requests that have already been assigned.**

## 3B. Student Requests



### Navigation: Home – SIS – Scheduling – Requests

The Request screen serves a dual purpose in StudentInformation. When a student is selected the information added or viewed is for the selected student; the courses that the student has requested for the school year. From this screen requests may be added, modified or dropped and the online scheduler processed. (To see the screen when no student is in context, see section 3A. Course Requests.)

<b>DASL</b>	<a href="#">FONT, MICHELLE LYNN</a>	<b>ID:</b> 00006002	<b>Counselor:</b>
<b>DASL User</b>	DASL HIGH SCHOOL	<b>Gender:</b> F	<b>Homeroom:</b> A105
	2004-2005 (8/24/2004 - 6/1/2005)	<b>Grade:</b> 10	<b>Status:</b> A

Home » SIS » Scheduling » Requests

## Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Default Schedule  Default Schedule Result   Display Assignments

2 Records Displayed of 2

	Prim. Req.	Alt. Req.	Priority	Req. Status	Active	Assignment Type	Status
 	216 - JOURNALISM I		1	Approved		<input type="button" value="+"/>	
 	283 - SPANISH II		9	Approved		<input type="button" value="+"/>	

Show Active Only

**Sorting** – You may sort by any column (Primary Request, Alternate Request, Priority, Active) in ascending or descending order by clicking on the column header.

**Default Schedule** – Select from the drop-down menu, the Schedule to be used with the Scheduler (note: if the school year has been finalized/started then this will not be available for selection – the default must be used as shown above).

**Default Schedule Result** – Select from the drop-down menu, the Schedule Result to be used with the Scheduler (note: if the school year has been finalized/started then this will not be available for selection – the default must be used as shown above).

**Display Assignments** – Display Student Course Requests that have been assigned to course sections (default). If left unchecked only those requests that have NOT been assigned will be displayed in the grid.

**Search** – Search for Student Course Requests.

**Add Request** – Add a new Student Course Request.

**Drop All Requests** – Drop All Student Course Request.

 – Delete this Student Course Request.

 – Edit this Student Course Request.

– Proceed to Course Section Assignment for this Request (see Scheduling End User Documentation for details).

 – Active Student Course Request.

 – Inactive Student Course Request – will not be used when processing online scheduler.

**Show Active Only** – If checked, will show only active Student Course Requests; if not checked, will show both active and inactive Student Course Requests.

**Run Scheduler** – Run the Single Student Scheduler (formerly known as the “Online Scheduler”) to assign course sections to the initial course requests.

**Go to Course Section Assignments** – Go to the Course Section Assignments screen for the selected student.

## 3B-1. Add/Edit Student Requests



### Navigation: Home – SIS – Scheduling – Requests

**DASL** FONT, MICHELLE LYNN ID: 00006002 Counselor:  
 DASL HIGH SCHOOL Gender: F Homeroom: A105  
 DASL User 2004-2005 (8/24/2004 - 6/1/2005) Grade: 10 Status: A

Home » SIS » Scheduling » Requests

### Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Default Schedule: [v] Default Schedule Result: [v]  Display Assignments [Search]

[Run Scheduler] [Go to Course Section Assignments]

[Add Request] [Drop All Requests]

2 Records Displayed of 2

	Prim. Req.	Alt. Req.	Priority	Req. Status	Active	Assignment Type	Status
✕ ✎	216 - JOURNALISM I		1	Approved	💡	±	
✕ ✎	283 - SPANISH II		9	Approved	💡	±	

Show Active Only

Click **Add Request** to add a new Student Course Request.

Click ✎ to edit a Student Course Request (Primary).

Home » SIS » Scheduling » Requests

### Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

**Student:** FONT, MICHELLE LYNN

**Primary Course:** [ ] ✎ ...

**Alternate Course:** [ ] ...

**Priority:** [ ] Use Primary Course Priority Or leave blank to use the primary course priority automatically

**Teacher:** [v]  Exclude

**Period:** [v]  Exclude

**Request Status:** **DASL** **Guardian** **Student**

Mass Request Rule Created  Guardian Created  Student Created

Guardian Pending  Student Pending

Locked  Guardian Locked

Approved  Guardian Approved  Student Committed

**Is Active:**

[Save] [Save and New] [Cancel]

**Student** (read-only) – This displays which student will have the request added.

**Primary Course** (required) – Type in the Primary Course ID that the student is requesting.

 – Open Course Selection Wizard for help selecting a course for the appropriate selection (see Scheduling End User Documentation for more details).

**Alternate Course** (optional) – Type in the Alternate Course ID that the student is requesting. If an alternate course is specified, the scheduler will use it if unable to add the Primary Course to the student's schedule due to conflicts.

**Priority** (optional) – Indicate the Student Request priority that you wish the Batch Scheduler to use for this request. Default priority is one (1) which is the lowest and 9 is the highest priority. You can also use the  buttons to increase or decrease priority. Leaving this field blank will use the Course Priority as the Priority for this request.

***Note:** Request priority will only affect student schedules if it is selected for all scheduling passes on the Job Parameter Set.*

**Use Primary Course Priority** – Replace any entered priority (or blank priority) with the Course Priority.

**Teacher** (optional) – Select a teacher from the drop-down list of available teachers. If a teacher is specified then the scheduler will try to schedule this request with the specified teacher, if available.

**Exclude** – Yes or No; if checked then the scheduler will exclude the student from being scheduled into a course taught by the specified teacher (above).

**Period** (optional) – Select a period from the drop-down list of available periods. If a period is specified then the scheduler will try to schedule this request with the specific period, if available.

**Exclude** – Yes or No; if checked then the scheduler will exclude the student from being scheduled into a course during the specified period (above).

**Request Status** – These check boxes display the request status. "Locked" is checked if the Request was entered in StudentInformation, rather than the Public Course Request module, and means the request cannot be modified by Public users. "Guardian Locked" means that the Public Course Request application Guardian account user has locked the request, and the request cannot be modified by Public Course Request application Student account users. Check "Approved" to approve the Course Request and allow the Batch Scheduler to schedule a course section assignment for the request.

**Is Active** (optional) – Yes or No; Student Course Request must be Active to use with online or batch scheduler. Active by default.

**Save** – Will save current Student Course Request and return to Student Course Request Maintenance listing where you will see the updated information.

**Save and New** – Will save current new Student Course Request and return to Student Course Request – Add Request.

**Cancel** – Will clear out data already entered and return to Student Course Request Maintenance listing.

**<Prev Request** – Will save changes to the current request and display the previous request for modification.

**Next Request>** – Will save changes to the current request and display the next request for modification.

Once a Course Section has been assigned to a student with the  button, that button is replaced by a standard  Edit icon, and a standard  Delete icon now displays to its left. In addition, the new Course Section Assignment is highlighted.

<b>DASL</b>	<a href="#">FONT, MICHELLE LYNN</a>	ID: 00006002	Counselor:
DASL User	DASL HIGH SCHOOL	Gender: F	Homeroom: A105
	2004-2005 (8/24/2004 - 6/1/2005)	Grade: 10	Status: A <span style="float: right;">\$</span>

Home » SIS » Scheduling » Requests

### Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Default Schedule  Default Schedule Result   Display Assignments

3 Records Displayed of 3

	Prim. Req.	Alt. Req.	Priority	Req. Status	Active		Assignment	Type	Status
 	216 - JOURNALISM I		1	Approved		 	216 - JOURNALISM I Section: 1	Manual	Assigned
 	271 - CHOIR 10		1	Approved					
 	283 - SPANISH II		9	Approved					

Show Active Only

Use these new buttons to edit or delete that Course Section Assignment. See the Scheduling End User Documentation for details on editing and deleting Course Section Assignments. Note that this is just another way to add, edit and delete Course Section Assignments, rather than completely replacing the Course Section Assignments screen (*Navigation: Home – SIS – Scheduling – Course Section Assignments*).

## 3B-2. Delete Student Requests



Navigation: Home – SIS – Scheduling – Requests

<b>DASL</b>	<a href="#">FONT, MICHELLE LYNN</a>	ID: 00006002	Counselor:
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: F Grade: 10	Homeroom: A105 Status: A

Home » SIS » Scheduling » Requests

### Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Default Schedule: [v] Default Schedule Result: [v]  Display Assignments [Search]

[Run Scheduler] [Go to Course Section Assignments]

[Add Request] [Drop All Requests]

2 Records Displayed of 2

	Prim. Req.	Alt. Req.	Priority	Req. Status	Active	Assignment Type	Status
✕	216 - JOURNALISM I		1	Approved	💡	[+]	
✕	283 - SPANISH II		9	Approved	💡	[+]	

Show Active Only

Click ✕ to delete this Student Course Request (Primary Request).

**IMPORTANT: Do NOT delete a course request that has already been assigned.**

<b>DASL</b>	<a href="#">FONT, MICHELLE LYNN</a>	ID: 00006002	Counselor:
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: F Grade: 10	Homeroom: A105 Status: A

Home » SIS » Scheduling » Requests

### Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

**Are you sure you want to delete the following Request?**  
JOURNALISM I

[Ok] [Cancel]

**Ok** – Delete the Student Course Request.

**Cancel** – Do Not Delete the Student Course Request.

**Note:** A Student Course Request is not actually deleted – it is made Inactive as notated by the “dim” Active code. Show both Active and Inactive Student Course Requests by un-checking the Show Active Only check box.

<b>DASL</b>	<a href="#">FONT, MICHELLE LYNN</a>	<b>ID:</b> 00006002	<b>Counselor:</b>
<b>DASL User</b>	DASL HIGH SCHOOL	<b>Gender:</b> F	<b>Homeroom:</b> A105
	2004-2005 (8/24/2004 - 6/1/2005)	<b>Grade:</b> 10	<b>Status:</b> A

Home » SIS » Scheduling » Requests

## Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Default Schedule  Default Schedule Result   Display Assignments

3 Records Displayed of 3

	Prim. Req.	Alt. Req.	Priority	Req. Status	Active	Assignment	Type	Status
	216 - JOURNALISM I		1	Approved				
	271 - CHOIR 10		1	Approved				
	283 - SPANISH II		9	Approved				

Show Active Only

To activate an Inactive Student Course Requests, see 3B-2. Edit Student Course Requests.

**IMPORTANT: Do NOT delete a course request that has already been assigned.**

### 3B-3. Course Section Student Statuses Reference

**Assigned** –The student has been successfully assigned by the scheduler into a course section for the requested course.

**UnAssigned** – The student has NOT been successfully assigned by the scheduler into a course section for the requested course. This is the generic status given to a failure to find an assignment by the scheduler, when the failure does not fit into one of the other failure statuses. Failure statuses include all statuses other than Assigned or Dropped.

**All Sections for the Course conflict with other Assignments** – All sections for the requested course are in conflict with other course sections that have already been assigned for the student. The already-assigned course sections for the student could include sections that were assigned before the scheduler was run and are not being reset or course sections that have already been assigned during the current scheduling process.

**Dropped** – The course section has been dropped for the student. StudentInformation keeps a record of all course sections that have been dropped for a student, rather than deleting the student’s dropped course sections. A student’s dropped course sections can be shown on the Course Section Assignments page by checking the ‘Dropped’ Status check box.

**All Sections for Course are filled to capacity** – All course sections for the requested course were filled at the time the scheduler was trying to schedule the student into a course section for the request.

**All Sections for the Course are in locked Group Sections** – The student has made a request for an individual course for which all sections are members of group sections, and all of the group sections are locked.

**Course has no Course Sections on the Master Schedule** – The course requested does not have any course sections setup on the Master Schedule.

**Course Has No Course Sections with Meeting Times on the Master Schedule** – None of the course sections for the requested course have been given meeting times.

**Group has no Group Sections on the Master Schedule** – The requested course group does not have any group sections setup on the Master Schedule.

**Course Has No Sections In Selected Course Terms** – The requested course does not have any course sections that meet in the course terms that have been selected for inclusion in the current scheduling run.

**Group Section is missing at least one Course Section** – There is a missing course section on the master schedule for one of the group sections for the group of which the requested course is a member.

**Course is not Active for the master calendar** – The IsActive value has been set to false on the Master Calendar for the requested course.

**Max Periods Per Day constraint prevented a schedule from being found** – The student received a tentative schedule, but then the schedule was rejected due to a violation of the 'Maximum Number of Periods Per Day' constraint. A violation occurs if the student's courses meet in more than the maximum number of periods on a day on more days in a schedule term than the number allowed by the 'Maximum Days Allowed with Excessive Day Length' value for the Schedule Job. However, there is no violation if the 'Enforce Max Periods Per Day' flag is False for the current Pass.

**Max Course Deviation constraint prevented a schedule from being found** – The student received a tentative schedule, but then the schedule was rejected due to a violation of the 'Maximum Variation of Courses Between Schedule Terms' constraint. A violation occurs if the difference in the number of scheduled courses between any two schedule terms is higher than the maximum specified by the parameter. However, there is no violation if the 'Enforce Number of Courses Between Schedule Terms' flag is False for the current Pass.

**Max Course Weight Deviation constraint prevented a schedule from being found** – The student received a tentative schedule, but then the schedule was rejected due to a violation of the 'Maximum Variation of Course Weights Between Schedule Terms' constraint. A violation occurs if the difference in total course weight between any two schedule terms is higher than the maximum specified by parameter. Course weights are defined in the course master records. The default

weight for a course is 10. However, there is no violation if the 'Enforce Course Weights Between Schedule Terms' flag is False for the current Pass.

**Daily Pattern Rule constraint prevented a schedule from being found** – The student received a tentative schedule, but then the schedule was rejected due to a violation of a Daily Pattern Rule constraint. A violation occurs if the pattern of the types of the student's assigned course requests in any schedule term matches a violating pattern more times than the 'Maximum Number of Days Allowed with Restricted Patterns' value for the Schedule Job. However, there is no violation if the 'Enforce Daily Pattern Rules' flag is False for the current Pass for the Schedule Pass Control Codes for the Schedule Job ID.

**Course Sequencing Rule constraint prevented a schedule from being found** – The student received a tentative schedule, but then the schedule was rejected due to a violation of the Course Sequencing Rule constraint. The student's scheduled requests are tested for violations of 'In Earlier Terms', 'Not In Earlier Terms', 'In Same Terms', and 'Not In Same Terms'. A violation occurs if any of the student's scheduled courses violates any of the rules setup in the Course Sequence Rules for the school, school year and master schedule. The 'In Earlier Terms' rule (Type 1) is violated if the Course 1 value from the Schedule Course Sequence Rule meets in any Schedule Term that is greater than or equal to the Min schedule term in which Course 2 meets. The 'Not In Earlier Terms' rule (Type 2) is violated if Course 1 meets in any Schedule Term that is less than the Max schedule term in which Course 2 meets. The 'In Same Terms' rule (Type 3) is violated if the Course 1 value from the Schedule Course Sequence Rules record for the rule meets in any schedule term in which Course 2 does not meet. The 'Not In Same Terms' rule (Type 4) is violated if the Course 1 value from the Schedule Course Sequence Rules record for the rule meets in any schedule term in which Course 2 also meets. Each of the student's scheduled courses is examined in turn to see if it matches either Course 1 or Course 2 for any of the rules, and if so it is tested to see if it violates any of the rules in regard to any of the student's other scheduled courses. However, there is no violation if the 'Course Sequencing Rules' value is False for the current Pass, and Rigidity value is 'Enforce Throughout Pass' on the individual rule in the Course Sequencing Rules. If the Rigidity value is 'Enforce Throughout Run' for the rule that is violated, then the violation is recorded.

## 3C. Course Request Mass Update Groups



**Navigation: Home – Management – School Administration – Scheduling Administration – Request Update Groups**

The Course Request Mass Update Groups and Rules create course requests for a group of students based on specific rules. This replaces P502 and B114 from SIS. Course Requests created by Mass Update Rules are automatically marked as "Locked" and "Approved", so Public Course Request users cannot modify

these requests and the Batch Scheduler will attempt to schedule a course section assignment for these requests when it is next run.

Mass updating rules allow the user to specify selection criteria for students and then add course requests based on these rules. Multiple rules may be added in each rules group. Each rule is performed before the process moves on to the next rule in sequence. A rule may perform an update function based on something that was done in a prior rule, i.e. one with an earlier sequence number. An example would be that if a user wants to give all students in Band a request for Orchestra and drop Music, the selection would be based on the course request Band. Band would be selected as the course to add, then in the next rule, for any student that had Band and Orchestra, their Music course would be dropped.

Mass Update Rules can be created for Course Groups as well as individual Courses, and multiple groups of Mass Update Rules may be created and run.

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Add Course Request Mass Update Group

	Code	Name ^	Description	Active
  	9th	9th grade		

Show Active Only

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

 – Delete this Course Request Mass Update Group.

 – Edit this Course Request Mass Update Group.

 – View the rules for the Course Request Mass Update Group.

 – Active Course Request Mass Update Group – will generate course requests.

 – Inactive Course Request Mass Update Group – will not generate course requests.

**Show Active Only** – If checked, will show only active Course Request Mass Update Groups; if not checked, will show both active and inactive Course Request Mass Update Groups.

**Add Course Request Mass Update Group** – Add a new Course Request Mass Update Group.

## 3C-1. Add Course Request Mass Update Groups



Navigation: Home – Management – School Administration – Scheduling Administration – Request Update Groups

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Add Course Request Mass Update Group

	Code	Name ^	Description	Active
  	9th	9th grade		

Show Active Only

Click **Add Course Request Mass Update Group** to add new Course Request Mass Update Group.

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Code:

Name:

Description:

Is Active:

**Code** (required) – Enter 4 character (alphanumeric) code for the Course Request Mass Update Group.

**Name** (required) – Enter a 50 character name for the Course Request Mass Update Group.

**Description** (optional) – Enter a description for the Course Request Mass Update Group.

**Is Active** (optional) – If checked, Course Request Mass Update Group is active and can be used for course requests.

**Save** – Will save current Course Request Mass Update Group and return to Course Request Mass Update Group Maintenance listing where you will see the updated information.

**Save and New** – Will save current Course Request Mass Update Group and return to Add Course Request Mass Update Group.

**Cancel** – Do not save the data entered.

## 3C-2. Edit Course Request Mass Update Groups



Navigation: Home – Management – School Administration – Scheduling Administration – Request Update Groups

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Add Course Request Mass Update Group

	Code	Name ^	Description	Active
  	9th	9th grade		

Show Active Only

Click  to edit a Course Request Mass Update Group.

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Code:  

Name:  

Description:

Is Active:

Save Cancel

**Code** (required) – Enter 4 character (alphanumeric) code for the Course Request Mass Update Group.

**Name** (required) – Enter a 50 character name for the Course Request Mass Update Group.

**Description** (optional) – Enter a description for the Course Request Mass Update Group.

**Is Active** (optional) – If checked, Course Request Mass Update Group is active and can be used for course requests.

**Save** – Will save current Course Request Mass Update Group and return to Course Request Mass Update Group Maintenance listing where you will see the updated information.

**Cancel** – Do not save the data entered.

## 3C-3. Delete Course Request Mass Update Groups



Navigation: Home – Management – School Administration – Scheduling Administration – Request Update Groups

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Add Course Request Mass Update Group

		Code	Name ^	Description	Active
		9th	9th grade		

Show Active Only

Click to delete a Course Request Mass Update Group.

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Are you sure you want to deactivate the following Course Request Mass Update Group?  
10th - 10th Grade

**Ok** – Delete the Course Request Mass Update Group.

**Cancel** – Do Not Delete the Course Request Mass Update Group.



**Please Note:** A Course Request Mass Update Group is not actually deleted – it is made Inactive as noted by the “dim” Active code. Show Active and Inactive Course Request Mass Update Group by un-checking the Show Active Only box.

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Add Course Request Mass Update Group

		Code	Name ^	Description	Active
		10th	10th Grade		
		9th	9th grade		

Show Active Only

To activate an Inactive Course Request Mass Update Group, see 3C-2 Edit Course Request Mass Update Groups.

## 3C-4. View Course Request Mass Update Group Rules



Navigation: Home – Management – School Administration – Scheduling Administration – Request Update Groups – Rules

Home » Management » School Administration » Scheduling Administration » Request Update Groups

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.

Add Course Request Mass Update Group

		Code	Name ^	Description	Active
		9th	9th grade		

Show Active Only

Click to view the rules for this Course Request Mass Update Group.

Home » Management » School Administration » Scheduling Administration » Request Update Groups » Rules

### Course Request Mass Update Rules - 9th - 9th grade Math

From this screen, you can display, add, change and delete data pertaining to course request mass update rules.

Add Mass Update Rule    Execute this Rule Group    Back to Groups

			Course Request Update Rule	Course Request Update Rule Description	Active
			Blue Team Math	Applied Math for Blue Team	
			Geometry	All other Math	

Show Active Only

– Delete this Course Request Update Rule.

– Edit this Course Request Update Rule.

– Move the selected rule up or down within the Rule Group.



**Please Note: The order of the rules (from top to bottom) is the sequence that the rules will be executed.**

– Active Course Request Update Rule – will be executed with Rule Group.

– Inactive Course Request Update Rule – will not be executed with Rule Group.

**Show Active Only** – If checked, will show only active Course Request Update Rules; if not checked, will show both active and inactive Course Request Update Rules.

**Add Mass Update Rule** – Add new Course Request Update Rule.

**Execute this Rule Group** – Will execute the Rule Group and submit the Scheduling Batch Process to Batch/Report Management. You will receive the following system message.

The job was submitted successfully



**Please Note: The order of the rules (from top to bottom) is the sequence that the rules will be executed.**

Upon completion of the Scheduling Batch Process, you will be able to view the generated requests in Course Requests via the menu SIS – Scheduling – Requests.

**Back to Groups** – Return to the Course Request Mass Update Group list.

## 3C-5. Add/Edit Course Request Mass Update Group Rules



**Navigation: Home – Management – School Administration – Scheduling Administration – Request Update Groups – Rules**

Home » Management » School Administration » Scheduling Administration » Request Update Groups » Rules

### Course Request Mass Update Rules - 9th - 9th grade Math

From this screen, you can display, add, change and delete data pertaining to course request mass update rules.

	Course Request Update Rule	Course Request Update Rule Description	Active
<input type="checkbox"/> <input type="checkbox"/>	Blue Team Math	Applied Math for Blue Team	<input checked="" type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/>	Geometry	All other Math	<input checked="" type="checkbox"/>

Show Active Only

Click **Add Mass Update Rule** to add a new Course Request Update Rule.

Click to edit a Course Request Update Rule.

### Course Request Mass Update Rules - 9th - 9th grade

From this screen, you can display, add, change and delete data pertaining to course request mass update rules.

Rule Name:

Rule Description:

Is Active:

Select the parameters for which students have this rule applied

**Student Status**

A - ACTIVE RES D - DELETED I - INACTIVE N - NON-RES	↔ ↔	
--	-----	--

**Grade**

09 - 09 10 - 10 11 - 11 12 - 12	↔ ↔	
--	-----	--

**Gender**

M F	↔ ↔	
--------	-----	--

**Administrative Homeroom**

A103 - BERRY (Full Year Term) A104 - AUSTIN (Full Year Term) A105 - COUSINS (Full Year Term) A106 - CASTLE (Full Year Term)	↔ ↔	
--	-----	--

Select the course(s) to be added or dropped for the students matching the parameters

**Add Course:**  ...

**Drop Course:**  ...

If a student's Request is dropped, then any Course Section Assignments associated with the Request are also deleted, for all existing Schedule Result sets in which the student received an Assignment for that Request

Save Save and New Cancel Execute Without Saving Save and Execute

**Administrative Homeroom**

A103 - BERRY (Full Year Term) ↑  
A104 - AUSTIN (Full Year Term) ↓  
A105 - COUSINS (Full Year Term) ←  
A106 - CASTLE (Full Year Term) ↓

**Program**

G - Gifted Student ↑  
JAB - Jr Auto Body ↓  
JAG - Jr AG Mechanics ←  
JCOS - Jr Cosmetology ↓

**Team**

Band Grade 9  
Blue Team  
Gold Team

**Membership Group**

10 - Regular Programs ↑  
11 - Intervention ↓  
12 - ENROLLMENT OPTIONS ←  
13 - Other Regular Programs ↓

**Membership**

60 - Stdnt enrolled in Dist result displacement due to H ↑  
60 - Stdnt enrolled in Dist result displacement due to H ↓  
Academic Intracurricular Descriptions (Vocational - Bus ←  
Academic Intracurricular Descriptions (Vocational - Dist ↓

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

**For Number of Requests:** =

**For Course:**  ...

**And For Course:**  ...

**Rule Name** (required) – Enter the name of the Rule.

**Rule Description** (required) – Enter the description of the Rule.

**Is Active** (optional) – If checked, Course Request Update Rule is active and will be executed and applied to Course Requests.

**Student Status** (optional) – Specify the Student Statuses that this rule will use to filter students. If no Student Statuses are selected, the rule will apply to all Student Statuses.

**Grade** (optional) – Specify the Grades that this rule will use to filter students. If no Grades are selected, the rule will apply to all Grades.

**Gender** (optional) – Specify the Genders that this rule will use to filter students. If no Genders are selected, the rule will apply to all Genders.

**Administrative Homeroom** (optional) – Specify the Administrative Homeroom(s) that this rule will use to filter students. If no Administrative Homerooms are selected, the rule will apply to all Administrative Homerooms.

**Program** (optional) – Specify the Programs that this rule will use to filter students. If no Programs are selected, the rule will apply to all Programs.

**Team** (optional) – Specify the Teams that this rule will use to filter students. If no Teams are selected, the rule will apply to all Teams.

**Membership Group** (optional) – Specify the Membership Groups that this rule will use to filter students. If no Membership Groups are selected, the rule will apply to all Membership Groups.

**Membership** (optional) – Specify the Memberships that this rule will use to filter students. If no Memberships are selected, the rule will apply to all Memberships.

**Ad-Hoc Membership (optional)** – Specify the Ad-Hoc Membership that this rule will use to filter students. Public or Private memberships can be specified.

**For Number of Requests** (optional) – Enter a number of requests and select an operator from the drop-down list: equal to (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), or greater than or equal to (=>). Only students who have the appropriate numbers of requests will be affected by this Rule. For instance, if you select <= for the operator, and 5 for the number of requests, all students with 5 or fewer requests will be affected by the rule. If no number is entered, the rule will apply to students with any number of requests.

**For Course** (optional) – Enter a course code (or select through the Course Search (⋮)). Only students with a request for this course will be affected by this Rule. If left blank, this Rule will apply to students regardless of which Courses they have requested.

**And For Course** (optional) – Enter a course code (or select through the Course Search (⋮)). Only students with requests for both this course and the course listed in “For Course” will be affected by this Rule. If left blank, this Rule will apply to students regardless of which Courses they have requested.

**Add Course** (optional) – Enter the course number for the course that you wish to add for the students selected with the above rule criteria, or select through the Course Search (⋮).

**Drop Course** (optional) – Enter the course number for the course that you wish to drop for the students selected with the above rule criteria, or select through the Course Search (⋮).

**Save** – Will save the Course Request Update Rule to the rule group; will not execute the rule at this time.

**Save and New** – Will save the Course Request Update Rule to the rule group and return to Add Mass Update Rule; Will not execute the rule at this time.

**Cancel** – Do not save or execute the Course Request Update Rule.

**Execute Without Saving** – Execute the Course Request Update Rule as entered, but do not save the Course Request Update Rule to the rule group. You will receive the system message below.

The job was submitted successfully



**Please Note:** The order of the rules (from top to bottom) is the sequence that the rules will be executed. You can change the Rule order on the Rules Maintenance screen.

Upon completion of the Scheduling Batch Process, you will be able to view the generated requests in Course Requests via the menu SIS – Scheduling – Requests.

**Save and Execute** – Execute the Course Request Update Rule as entered and save the Course Request Update Rule to the rule group. You will receive the system message below.

The job was submitted successfully



**Please Note:** The order of the rules (from top to bottom) is the sequence that the rules will be executed. You can change the Rule order on the Rules Maintenance screen.

Upon completion of the Scheduling Batch Process, you will be able to view the generated requests in Course Requests via the menu SIS – Scheduling – Requests.

## 3C-6. Delete Course Request Mass Update Group Rules



**Navigation:** Home – Management – School Administration – Scheduling Administration – Request Update Groups – Rules

Home » Management » School Administration » Scheduling Administration » Request Update Groups » Rules

### Course Request Mass Update Rules - 9th - 9th grade Math

From this screen, you can display, add, change and delete data pertaining to course request mass update rules.

	Course Request Update Rule	Course Request Update Rule Description	Active
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Blue Team Math	Applied Math for Blue Team	<input checked="" type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Geometry	All other Math	<input checked="" type="checkbox"/>

Show Active Only

Click **X** to delete this Course Request Update Rule.

Home » Management » School Administration » Scheduling Administration » Request Update Groups » Rules

### Course Request Mass Update Rules - 9th - 9th grade

From this screen, you can display, add, change and delete data pertaining to course request mass update rules.

Are you sure you want to delete the following Course Request Mass Update Rule?

Testing - Testing Rule

**Ok** – Delete the Course Request Update Rule.

**Cancel** – Do Not Delete the Course Request Update Rule.



**Please Note:** A Course Request Update Rule is not actually deleted – it is made Inactive as notated by the “dim” Active code. Show both Active and Inactive Course Request Update Rules by un-checking the Show Active Only check box.

Home » Management » School Administration » Scheduling Administration » Request Update Groups » Rules

### Course Request Mass Update Rules - 9th - 9th grade Math

From this screen, you can display, add, change and delete data pertaining to course request mass update rules.

The selected Course Request Mass Update Rule was successfully deleted

Add Mass Update Rule   Execute this Rule Group   Back to Groups

	Course Request Update Rule	Course Request Update Rule Description	Active
	Geometry	All other Math	

Show Active Only

To activate an Inactive Course Request Update Rule, see 3C-5 Edit Course Request Update Rule.

## 4. Scheduling – Course Request Reports

### 4A. Course Request Verification Slip (R416)



**Navigation: Home – SIS – Scheduling – Scheduling Reports – Course Request Verification Slip (R416)**

The Course Request Verification Slip produces verification slips with a list of each student’s course requests and includes a line for Student’s signature. This report sorts by Course ID.

## Course Request Verification Slip (R416)

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

Selection Criteria		Selection Summary		Load Settings	
Hide header for paper with pre-printed letterhead: <input type="checkbox"/> Top Margin: 0.3					
Schedule:		Default Schedule			
Schedule Result:		12-13 Result Set			
Current Course Assignment School Year:		2012-2013			
Homeroom Date:		9/12/2012			
<b>Grade</b>					
09 - 09		↔			
10 - 10		↔			
11 - 11		↔			
12 - 12		↔			
Select Only Students Who Have Any Requests: <input type="checkbox"/>					
Print Current Courses: <input type="checkbox"/>					
<b>Reporting Term</b>					
GP1 - GP1		↔			
INT1 - 1st 9 week interim		↔			
GP2 - GP2		↔			
INT2 - 2nd 9 week interim		↔			
<b>Mark Type</b>					
Avg		↔			
Exam		↔			
Final		↔			
Grading Period		↔			
<b>Counselor</b>					
FREEMAN, MS		↔			
FITZGERALD, MS		↔			
MONTGOMERY, MS		↔			
<b>Team</b>					
		↔			
<b>Student Status</b>					
A - ACTIVE RES		↔			
ACCA - ASHLAND ACADEMY		↔			
AE - ACTIVE ELSEWHERE		↔			
D - DELETED		↔			
<b>Special Education Services</b>					
215001 - Adapted Physical Education Se		↔			
215002 - Aide Services		↔			
215003 - Attendant Services		↔			
215004 - Audiological Services		↔			
Print Alternates Also: <input type="checkbox"/>					
Print Only One Student Per Page <input type="checkbox"/>					
Common Text:					
<div style="border: 1px solid gray; height: 40px;"></div>					
<b>Sorting Options</b>					
Homeroom (ASC)		↔			
Homeroom (DESC)		↔			
Grade (ASC)		↔			
Grade (DESC)		↔			
<b>Output:</b> <input checked="" type="radio"/> Report <input type="radio"/> Labels <input type="radio"/> Both Report and Labels					
Label Type: Avery Label 5160 - 1" X 2 5/8" 3-columns					
<b>Address:</b> <input checked="" type="radio"/> Use Student Address <input type="radio"/> Use Parent Address					
<input type="checkbox"/> Use custom address text					
<b>Include Copied On Correspondence:</b> <input type="radio"/> Yes <input checked="" type="radio"/> No					
<b>Delivery Method:</b> Pickup <input type="button" value="Set As Default"/>					
<b>Email Address:</b> EmhoffH@software-answers.com					
<b>Report Format:</b> Adobe PDF					
<b>Description:</b>					
<div style="border: 1px solid gray; height: 20px;"></div>					
<input type="button" value="Submit"/>					

**Hide header for paper with pre-printed letterhead** (options) – Selecting this option will not print the header info to facilitate use with letterhead paper.

**Top Margin** (option) – The number of inches to leave as the top margin of the report (default is 0.3). To be used to adjust for letterhead paper.

**Schedule** – Select a Master Schedule for this report.

**Schedule Result** – Select a Schedule Result set for this report.

**Current Course Assignment School Year** (optional) – Select the appropriate School Year from the list of available School Years. Defaults to the Current working school year.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Select Only Students Who Have Any Requests** (optional) – Yes or No; Indicates if you wish for only students with at least one request to be included on the report.

**Print Current Courses** (optional) – Yes or No; Indicates if you wish for students' current courses to be included on the report.

**Reporting Term** (optional) – If no Reporting Terms are selected, the report will select all Reporting Terms. You can also filter by selecting specific Reporting Terms for your report.

**Mark Type** (optional) – If no Mark Types are selected, the report will select all Mark Types. You can also filter by selecting specific Mark Types for your report.

**Counselor** (optional) – If no Counselors are selected, the report will select all Counselors. You can also filter by selecting specific Counselors for your report.

**Team** (optional) – If no Teams are selected, the report will select all Teams. You can also filter by selecting specific Teams for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context.*

**Print Alternates Also** (optional) – Yes or No; Indicates if you wish for students' Alternate Course Requests to be included on the report.

**Print Only One Student Per Page** (optional) – Yes or No; Indicates if you wish to see only one student on each page (otherwise, the report will display as many students on each page as will fit).

**Common Text** (optional) – Free form text to be included on the students' Course Request Verification Slips. For example, this could be used as a student signature line or a note to return the slip to the student's counselor, etc.).

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** (optional) – Select one option for the intended output for this run of the report. Options are Report, Labels or both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection.

**Address** (optional) – Indicate which address should be used if labels are created in the output. Options are: Use Student Address or Use Parent Address.

**Use Custom Address Text** (optional) – If you check this box, the custom text entered in the text field will print at the top of each address field on the report.

**Include Copied on Correspondence** – Yes or No; Selecting Yes will include address labels for contacts marked as “Copied on Correspondence” when creating labels.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: DASL - R416		DASL HIGH SCHOOL		RUN AT 12:03 PM 3/19/2008				
SCHOOLYEAR: 2007-2008		COURSE REQUEST VERIFICATION SLIP		PAGE 18 OF 18				
STUDENT:	POTTS, JORDAN DANIEL	NUMBER:	4004					
GRADE:	10	TELEPHONE						
SEX:	M	HDCP:	**					
HMRM:	A105	HOME DIST:	043877					
COUNSELOR:								
REQUESTED COURSE	COURSE NAME	SEC	CURRENT YR - TRM	COURSE CODE - NAME	SEC	RP	MRK	MRK TYPE
052	LANGUAGE ARTS	2						
182	FRENCH I	1						
2007	ART	1						
232	BIOLOGY I	1						
233	ANATOMY	2						
240	PRACTICAL GEOMETRY	2						
255	AMER HISTORY AP	2						
423	SOCIOLOGY	2						
431	PHYSICS	2						
573	ENGLISH	2						
655	MATH	2						
962	ECONOMICS	3						

## 4B. Student Course Request Verification (R401)



**Navigation: Home – SIS – Scheduling – Scheduling Reports – Student Course Request Verify (R401)**

This report is used to generate a list of each student’s course requests for verification. Additionally, it is used to edit the course requests to ensure that the student has met all course restrictions, i.e., prerequisites, co-requisites, gender restriction, grade restrictions, etc. Requests failing to meet the restrictions defined on the Course maintenance will be marked with edit codes.

Home » SIS » Scheduling » Scheduling Reports » Student Course Request Verify (R401)

## Student Course Request Verification (R401)

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

Selection Criteria   Selection Summary   Load Settings

Homeroom Date: 10/6/2008

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

Correct Number Of Requests Start:

Correct Number Of Requests End:

Print Only Students With Error Messages:

**Counselor**

ALLEN, MARK

**Sorting Options**

Student Name (ASC)  
Student Name (DESC)  
Grade (ASC)  
Grade (DESC)

Delivery Method: Pickup

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Correct Number of Requests Start** (optional) – Enter a starting number for a range to indicate the average number of requests which should have been entered for each student. An error message will be printed corresponding to each student falling outside this range.

**Correct Number of Requests End** (optional) – Enter an Ending number for a range to indicate the average number of requests which should have been entered for each student. An error message will be printed corresponding to each student falling outside this range.

**Print Only Students with Error Messages** (optional) – Yes or No; indicates if the report should only include students with error messages produced on their course request verification.

**Counselor** - If no Counselors are selected, the report will select all Counselors. You can also filter by selecting specific Counselors for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

STUDENT		COURSE REQUESTS			COURSE REQUESTS		
ID	COURSE TITLE	PRIORITY	EDIT CODE	ID	COURSE TITLE	PRIORITY	EDIT CODE
39	No Requests						
DEMPSTER, KEEVON HOME DIST: 043877 TEL: (419) 467-4874 GRADE: 09 SEX: M HMRM: COUNSELOR: HDCP COND: **							
1224	076 BAND	5		171	ART II	5	
LEE, HARPER (LEE)	182 FRENCH I	5		183	SPANISH I	5	
HOME DIST: 043877	2012 ENGLISH 7	5		2013	READING 7	5	
TEL: (419) 345-2345	2014 MATH 7	5		232	BIOLOGY I	5	
GRADE: 09 SEX: F HMRM:	233 ANATOMY	5		275	PRINTING	5	
COUNSELOR:	423 SOCIOLOGY	5		425	COMPUTER PROGRAMMING 2	5	
HDCP COND: **	431 PHYSICS	5		825	PSYCHOLOGY	5	

**Edit Code Key:**

- ALT Alternate Course ID not valid for Group
- INV Invalid Course ID
- SEX Sex (gender) restriction not met
- GRD Grade restriction not met
- OTH Other restrictions to be checked manually
- DUP Duplicate Course Requests
- PRQ Prerequisites not met
- COQ Corequisites not met

## 4C. Tally of Student Course Requests (R402)



### Navigation: Home – SIS – Scheduling – Scheduling Reports – Tally of Student Course Requests (R402)

The Tally of Student Course Requests (R402) report is used to provide a count of the number of students, broken down by grade, requesting each course. Once generated, the R402 can be used as an aid in determining the number of sections required for each course offered. Please see the *ProgressBook StudentInformation Scheduling Guide* for more information concerning this report.

This report is used to provide a count of the number of students, broken down by grade, requesting each course. Once generated, the R402 can be used as an aid in determining the number of sections required for each course offered.

Home » SIS » Scheduling » Scheduling Reports » Tally Of Student Course Requests (R402) Advanced Search

### Tally Of Student Course Requests (R402)

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

**Selection Criteria** | Selection Summary | Load Settings

**Grade**

09 - 09	↕	↔	
10 - 10	↕	↔	
11 - 11	↕	↔	
12 - 12	↕	↔	

**Department**

ADM - ADMINISTRATIVE	↕	↔	
ART - ART	↕	↔	
ATH - ATHLETIC	↕	↔	
BUS - BUSINESS	↕	↔	

**Print Totals By Grade:**

**Sorting Options**

Department (ASC)	↔	Course Code (ASC)	↕
Department (DESC)	↔		
Course Code (DESC)	↔		

**Delivery Method:** Pickup

**Email Address:**

**Report Format:** Adobe PDF

**Description:**

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Department** (optional) – If no Departments are selected, the report will select all Departments. You can also filter by selecting specific Departments for your report.

**Print Totals By Grade** (optional) – Yes or No; check the box to display Totals by Male and Female counts by Grade for each course. A blank check box indicates to print only Total Male/Female counts by Grade at the end of the report.

**Sorting Options** (optional) – Choose one or more sort options for your report

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: DAHL - R402		DAHL HIGH SCHOOL								RUN AT 2:09 PM 12/4/2007		
SCHOOLYEAR: 2005-2006		TALLY OF STUDENT COURSE REQUESTS								PAGE 1 OF 1		
COURSE CODE	COURSE NAME	TOTAL	TOTAL F	TOTAL M	GRADE 09		GRADE 10		GRADE 11		GRADE 12	
					F	M	F	M	F	M	F	M
076	BAND	25	12	13	3	3	3	3	4	4	2	3
171	ART II	25	12	13	3	3	3	3	4	4	2	3
182	FRENCH I	25	12	13	3	3	3	3	4	4	2	3
183	SPANISH I	25	12	13	3	3	3	3	4	4	2	3
2012	ENGLISH 7	25	12	13	3	3	3	3	4	4	2	3
2013	READING 7	25	12	13	3	3	3	3	4	4	2	3
2014	MATH 7	25	12	13	3	3	3	3	4	4	2	3
232	BIOLOGY I	25	12	13	3	3	3	3	4	4	2	3
233	ANATOMY	25	12	13	3	3	3	3	4	4	2	3
275	PAINTING	25	12	13	3	3	3	3	4	4	2	3
423	SOCIOLOGY	25	12	13	3	3	3	3	4	4	2	3
425	COMPUTER PROG 2	25	12	13	3	3	3	3	4	4	2	3
431	PHYSICS	25	12	13	3	3	3	3	4	4	2	3
825	PSYCHOLOGY	25	12	13	3	3	3	3	4	4	2	3

## 4D. Course Request Labels (R206)



### Navigation: Home – SIS – Scheduling – Scheduling Reports – Course Request Labels (R206)

This report is used to generate student labels to be affixed to course request sheets. These labels are for the purpose of request sheets and are not address labels. The label format is fixed for Avery 5160 labels.

Home » SIS » Scheduling » Scheduling Reports » Course Request Labels (R206)

### Course Request Labels (R206)

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

Selection Criteria   Selection Summary   Load Settings

**Homeroom Date:** 2/10/2009

**Grade**

07 - 07  
08 - 08  
09 - 09  
10 - 10

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Homeroom Year:** 2010 Summer

**Sorting Options**

Grade (ASC)  
Grade (DESC)  
Homeroom (ASC)  
Homeroom (DESC)

**Delivery Method:** Pickup   Set As Default

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Submit

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. Defaults to today's date.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Homeroom Year** (optional) – Select the appropriate homeroom year to be used for creation of the labels. Defaults to current working school year.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

3669	Hm Rm Bldg:	AVEL	4009	Hm Rm Bldg:	AVEL	4023	Hm Rm Bldg:	AVEL
Student48540, AARON			Student48349, AUSTIN			Student48338, NOAH		
Home Room in	2007-2008	: 214	Home Room in	2007-2008	: 104	Home Room in	2007-2008	: 105
Grade Level in	2008-2009	: 06	Grade Level in	2008-2009	: 06	Grade Level in	2008-2009	: 06
4024	Hm Rm Bldg:	AVEL	4041	Hm Rm Bldg:	AVEL	4043	Hm Rm Bldg:	AVEL
Student48337, KERA-ANN			Student48319, BLAKE			Student48318, DYLAN		
Home Room in	2007-2008	: 105	Home Room in	2007-2008	: 102	Home Room in	2007-2008	: 105
Grade Level in	2008-2009	: 06	Grade Level in	2008-2009	: 06	Grade Level in	2008-2009	: 06

---

# ProgressBook StudentInformation Discipline Guide



# **ProgressBook StudentInformation Discipline Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Discipline Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	<a href="#">“Search for Incidents”</a>	16	Removed “Date of the incident” from list of search criteria as this is not currently functional.
14.7.0	<a href="#">“View Offender’s Past Incidents”</a>	26	Updated image to show new <b>Offender Comments</b> field. Updated description to state that all past incidents from within the same school district are listed. Added note about how to view incidents from previous school years.
14.7.0	<a href="#">“Add Offenders”</a>	35	Updated procedure and image to include new <b>Offender Comments</b> field.
14.5.0	Entire Guide	N/A	Rewrote guide to describe revised Discipline module functionality.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Overview</b>	<b>1</b>
<b>Discipline Codes</b>	<b>3</b>
Understand Discipline Code Types .....	3
Maintain Discipline Codes .....	5
Add Discipline Codes .....	5
Edit Discipline Codes .....	8
Delete Discipline Codes .....	10
<b>Discipline Incidents</b>	<b>13</b>
Manage Referral Workload .....	13
View All Incidents .....	14
View Student's Discipline Incidents .....	15
Search for Incidents .....	16
Create Customized Views .....	17
View Incident Details .....	22
Edit Incident Details .....	23
View Offender's Past Incidents .....	26
View Offender's Schedule .....	28
View Offender's Attendance Records .....	29
Contact Offender's Parents .....	30
Print Discipline Letter .....	31
Add Incidents .....	33
Add Offenders .....	35
Add Victims .....	38
Add Witnesses .....	40
Add Notes .....	41
<b>Reports</b>	<b>43</b>
Manage Report Templates .....	43
Upload Report Templates .....	43
Download Report Templates .....	45
Delete Report Templates .....	45

---

*Table of Contents*

Run Discipline Reports .....	46
Discipline Action Report.....	47
Discipline Action Report (Report Builder) .....	47
Discipline All Report.....	48
Discipline Infraction Report.....	48
Discipline Service List Report (Report Builder).....	48
Discipline Total Detail Report .....	49
Discipline Total Summary Report.....	50
Discipline Letter Export (DISCDT) .....	51
Total Incidents By Day.....	51
Total Incidents By Grade Level .....	52
Total Incidents By Infraction .....	53
Total Incidents By Location .....	55
Incidents Per Day By Month .....	57
Total Incidents By Referrer.....	58
Total Incidents By Time Frame.....	60

# Overview

StudentInformation lets you create and manage discipline referrals related to classroom attendance and negative behavior. You may need this information for state reporting purposes and/or to create reports for your own purposes.

This documentation covers the following areas within StudentInformation that are related to discipline:

- Creating and maintaining discipline codes – See [“Discipline Codes.”](#)
- Creating and managing discipline referrals and documenting incidents – See [“Discipline Incidents.”](#)
- Discipline reports – See [“Reports.”](#)

This page intentionally left blank.

# Discipline Codes

You use discipline codes to record specific types of information on student discipline incidents, so it is important to set up these codes in a way that meets the needs of your school or district. Refer to the appropriate section as follows:

- [“Understand Discipline Code Types”](#)
- [“Maintain Discipline Codes”](#)

---

## Understand Discipline Code Types

As shown in the following tables, you are required to set up action codes and infraction type codes in order to successfully record a discipline incident in StudentInformation. However, you may also want to set up some of the many available optional types of discipline codes to help you keep more detailed records about discipline incidents.

### Required Discipline Codes

Discipline Code Type	Description	Examples
Action Code	Disciplinary action taken by your school or district in response to any reported discipline incident(s)	<ul style="list-style-type: none"><li>• detention</li><li>• in school suspension</li><li>• out of school suspension</li><li>• expulsion</li></ul>
Infraction Type Code	Infraction committed by a student that resulted in a punishment (action)	<ul style="list-style-type: none"><li>• bullying</li><li>• assault</li><li>• fighting</li><li>• bomb threats</li><li>• possession of weapon</li><li>• vandalism</li></ul>

### Optional Discipline Codes

Discipline Code Type	Description	Examples
Adjudication Code	Court decision applied to a discipline incident resulting in an arrest	<ul style="list-style-type: none"><li>• citation</li><li>• conviction</li><li>• fine</li><li>• probation</li></ul>
Arrest Code	Decision whether or not to arrest a student involved in an incident and details related to any arrest	<ul style="list-style-type: none"><li>• arrest pending</li><li>• arrested for weapons violation</li><li>• arrested but not for weapons violation</li><li>• not arrested</li></ul>
Contact Type Code	Type of communication made between your school and a student’s contact person(s)	<ul style="list-style-type: none"><li>• call to guardian</li><li>• letter to guardian</li></ul>

### Optional Discipline Codes

Discipline Code Type	Description	Examples
Incident Place Codes	Location where an incident occurred	<ul style="list-style-type: none"> <li>• on school grounds</li> <li>• bus</li> <li>• field trip</li> <li>• school sponsored event</li> <li>• playground</li> <li>• athletic stadium</li> </ul>
Incident Time Frame Code	Time of day when an incident occurred	<ul style="list-style-type: none"> <li>• before school</li> <li>• during school</li> <li>• after school</li> </ul>
Injury Severity Code	Seriousness of an injury sustained by any party as a result of an incident	<ul style="list-style-type: none"> <li>• fatal injury</li> <li>• major injury</li> <li>• minor injury</li> </ul>
Offender Code	Classification of person who committed a disciplinary offense	<ul style="list-style-type: none"> <li>• student</li> <li>• adult visitor</li> <li>• intruder</li> <li>• district employee</li> <li>• parent</li> </ul>
Parent Involvement Code	Method of involving a parent of a student involved in a discipline incident for purposes of information and/or remediation	<ul style="list-style-type: none"> <li>• telephone conference</li> <li>• school conference</li> <li>• written notification</li> <li>• family counseling</li> <li>• law enforcement/legal involvement</li> </ul>
Policy Code	Discipline policy specific to your school district that was violated in relation to a discipline incident	<ul style="list-style-type: none"> <li>• unauthorized touching</li> <li>• fighting</li> <li>• attendance</li> <li>• behavior</li> <li>• bullying</li> </ul>
Discipline Victim Code	Classification of a victim of an incident	<ul style="list-style-type: none"> <li>• student</li> <li>• adult visitor</li> <li>• district employee</li> <li>• parent</li> </ul>
Weapon Code	Type of weapon used in an incident	<ul style="list-style-type: none"> <li>• knife</li> <li>• firearm</li> <li>• mace</li> </ul>
Weapon Detected Method Code	How a weapon was detected	<ul style="list-style-type: none"> <li>• scanner/security</li> <li>• detected by fellow student</li> <li>• detected by school staff</li> </ul>

## Maintain Discipline Codes

You can maintain all types of discipline codes in StudentInformation in the following ways:

- To enter a new discipline code, see [“Add Discipline Codes.”](#)
- To edit an existing discipline code, see [“Edit Discipline Codes.”](#)
- To delete a discipline code, see [“Delete Discipline Codes.”](#)

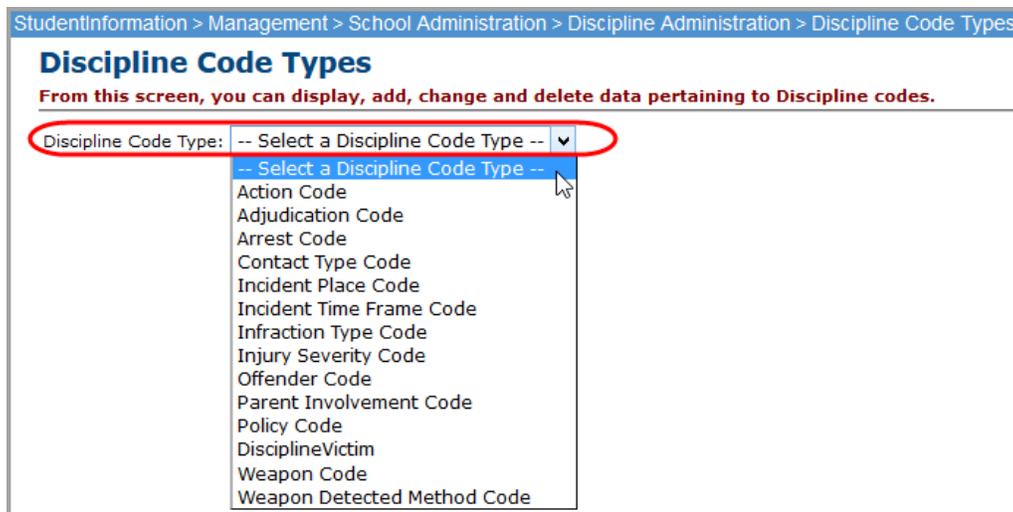
**Note:** You can create discipline codes at the ITC, district or building level. If   icons display at the beginning of the row, this indicates the record was created at a higher level, and you can only edit or delete it at that higher level.

## Add Discipline Codes

**Navigation:** StudentInformation – Management – School Administration – Discipline Administration – Discipline Code Types

1. On the **Discipline Code Types** screen, in the **Discipline Code Type** drop-down list, select the type of discipline code you want to add.

**Note:** This topic shows images of the action code type. However, the procedure for adding a discipline code is similar for all discipline code types.



### Select Discipline Code Type

Any existing codes of the type you selected display in a grid.

2. Click **Add Discipline Code**.

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

From this screen, you can display, add, change and delete data pertaining to Discipline codes.

Discipline Code Type: Action Code

**Add Discipline Code**

		Code	Name ^	Description	EMIS Code	Active
		11	Det - Absent	Missed detention due to absence		
		10	Det - Skipped	Skipped detention		
		9	detention	before or after school detention		
		6	Emergency Removal by dist.	Emergency Removal by dist.	6	
		1	Expulsion	Expulsion	1	
		4	In school alternative	In school alternative	4	
		3	In school suspension	In school suspension	3	
		8	NO CREDIT	NO CREDIT GIVEN FOR MISSED DAYS		
		2	Out of school suspension	Out of school suspension	2	
		R1	R1-Alternative education	Alternative education		

#### Add Discipline Codes

The add-edit version of the screen displays with the type of discipline code you selected in the **Discipline Code Type** drop-down list.

3. In the **Code** field, enter a discipline code of up to four alphanumeric characters.
4. In the **Name** field, enter a name for the code.
5. Optional: In the **Description** field, enter a description of this discipline code.
6. Optional (For action codes and infraction type codes only): If you want to map this code to an EMIS reportable type of discipline, in the **EMIS Type of Discipline** drop-down list, select the type.

**Note:** For an explanation of EMIS action codes, see *ProgressBook StudentInformation EMIS Guide*.

7. Optional: If you do not want this discipline code to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive discipline codes on new student discipline records.

8. Click **Save**. Or, to continue adding discipline codes, click **Save and New**.

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

**From this screen, you can display, add, change and delete data pertaining to Discipline codes.**

Discipline Code Type: Action Code

Code: 7

Name: Removal by Hearing Officer

Description: Removal by Hearing Officer

EMIS Type of Discipline: 7 - Removal by a hearing officer

Is Active:

**Save** Save and New Cancel

### Add Discipline Code

A confirmation message displays, and the new discipline code displays in the list.

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

**From this screen, you can display, add, change and delete data pertaining to Discipline codes.**

Discipline Code Type: Action Code

The Action Code was successfully saved

Add Discipline Code

	Code	Name ^	Description	EMIS Code	Active
	11	Det - Absent	Missed detention due to absence		
	10	Det - Skipped	Skipped detention		
	9	detention	before or after school detention		
	6	Emergency Removal by dist.	Emergency Removal by dist.	6	
	1	Expulsion	Expulsion	1	
	4	In school alternative	In school alternative	4	
	3	In school suspension	In school suspension	3	
	8	NO CREDIT	NO CREDIT GIVEN FOR MISSED DAYS		
	2	Out of school suspension	Out of school suspension	2	
	R1	R1-Alternative education	Alternative education		
	7	Removal by Hearing Officer	Removal by Hearing Officer	7	

Show Active Only

### Confirmation of Added Discipline Code

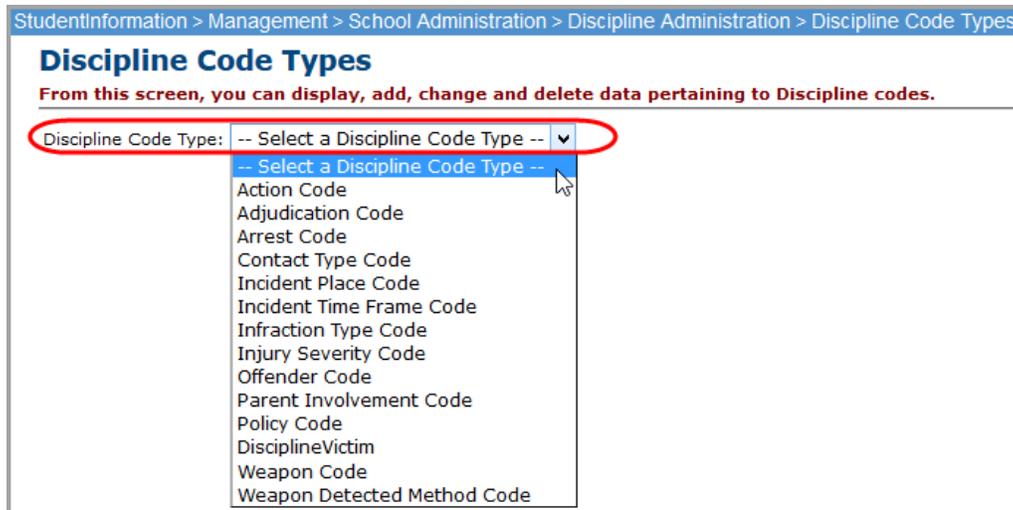
**Note:** Inactive discipline codes (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Discipline Codes

**Navigation: StudentInformation – Management – School Administration – Discipline Administration – Discipline Code Types**

1. On the **Discipline Code Types** screen, in the **Discipline Code Type** drop-down list, select the type of discipline code you want to edit.

**Note:** This topic shows images of the action code type. However, the procedure for editing a discipline code is similar for all discipline code types.



### Select Discipline Code Type

Any existing codes of the type you selected display in a grid.

2. In the row of the discipline code you want to edit, click  .

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

From this screen, you can display, add, change and delete data pertaining to Discipline codes.

Discipline Code Type: Action Code

Add Discipline Code

	Code	Name ^	Description	EMIS Code	Active
	11	Det - Absent	Missed detention due to absence		
	10	Det - Skipped	Skipped detention		
	9	detention	before or after school detention		
	6	Emergency Removal by dist.	Emergency Removal by dist.	6	
	1	Expulsion	Expulsion	1	
	4	In school alternative	In school alternative	4	
	3	In school suspension	In school suspension	3	
	8	NO CREDIT	NO CREDIT GIVEN FOR MISSED DAYS		
	2	Out of school suspension	Out of school suspension	2	
	R1	R1-Alternative education	Alternative education		
	7	Removal by Hearing Officer	Removal by Hearing Officer	7	

Show Active Only

### Edit Discipline Codes

The add-edit version of the screen displays with the type of discipline code you selected in the **Discipline Code Type** drop-down list.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Discipline Codes.”](#)

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

From this screen, you can display, add, change and delete data pertaining to Discipline codes.

Discipline Code Type: Action Code

Code: 6

Name: Emergency Removal by dist.

Description: Emergency Removal by district personnel

EMIS Type of Discipline: 6 - Emergency removal by district personnel

Is Active:

**Save** Cancel

### Edit Discipline Code

A confirmation message displays, and the edited discipline code displays in the list.

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

From this screen, you can display, add, change and delete data pertaining to Discipline codes.

Discipline Code Type:

The Action Code was successfully saved

	Code	Name ^	Description	EMIS Code	Active
	11	Det - Absent	Missed detention due to absence		
	10	Det - Skipped	Skipped detention		
	9	detention	before or after school detention		
	6	Emergency Removal by dist.	Emergency Removal by district personnel	6	
	1	Expulsion	Expulsion	1	
	4	In school alternative	In school alternative	4	
	3	In school suspension	In school suspension	3	
	8	NO CREDIT	NO CREDIT GIVEN FOR MISSED DAYS		
	2	Out of school suspension	Out of school suspension	2	
	R1	R1-Alternative education	Alternative education		
	7	Removal by Hearing Officer	Removal by Hearing Officer	7	

Show Active Only

### Confirmation of Edited Discipline Code

## Delete Discipline Codes

**Navigation: StudentInformation – Management – School Administration – Discipline Administration – Discipline Code Types**

1. On the **Discipline Code Types** screen, in the **Discipline Code Type** drop-down list, select the type of discipline code you want to delete.

**Note:** This topic shows images of the action code type. However, the procedure for deleting a discipline code is similar for all discipline code types.

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

From this screen, you can display, add, change and delete data pertaining to Discipline codes.

Discipline Code Type: -- Select a Discipline Code Type --

- Select a Discipline Code Type --
- Action Code
- Adjudication Code
- Arrest Code
- Contact Type Code
- Incident Place Code
- Incident Time Frame Code
- Infraction Type Code
- Injury Severity Code
- Offender Code
- Parent Involvement Code
- Policy Code
- DisciplineVictim
- Weapon Code
- Weapon Detected Method Code

#### Select Discipline Code Type

Any existing codes of the type you selected display in a grid.

- In the row of the discipline code you want to delete, click .

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

From this screen, you can display, add, change and delete data pertaining to Discipline codes.

Discipline Code Type: Action Code

	Code	Name ^	Description	EMIS Code	Active
	11	Det - Absent	Missed detention due to absence		
	10	Det - Skipped	Skipped detention		
	9	detention	before or after school detention		
	6	Emergency Removal by dist.	Emergency Removal by district personnel	6	
	1	Expulsion	Expulsion	1	
	4	In school alternative	In school alternative	4	
	3	In school suspension	In school suspension	3	
	8	NO CREDIT	NO CREDIT GIVEN FOR MISSED DAYS		
	2	Out of school suspension	Out of school suspension	2	
	R1	R1-Alternative education	Alternative education		
	7	Removal by Hearing Officer	Removal by Hearing Officer	7	

Show Active Only

#### Delete Discipline Codes

A message displays, asking if you are sure you want to delete the discipline code.

- Click **Ok**.

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

**From this screen, you can display, add, change and delete data pertaining to Discipline codes.**

Discipline Code Type:

Are you sure you want to delete the following Action Code?  
7 - Removal by Hearing Officer

**Confirm Delete**

A confirmation message displays, and the discipline code no longer displays in the list.

StudentInformation > Management > School Administration > Discipline Administration > Discipline Code Types

### Discipline Code Types

**From this screen, you can display, add, change and delete data pertaining to Discipline codes.**

Discipline Code Type:

The selected Action Code was deactivated successfully.

	Code	Name ^	Description	EMIS Code	Active
	11	Det - Absent	Missed detention due to absence		
	10	Det - Skipped	Skipped detention		
	9	detention	before or after school detention		
	6	Emergency Removal by dist.	Emergency Removal by district personnel	6	
	1	Expulsion	Expulsion	1	
	4	In school alternative	In school alternative	4	
	3	In school suspension	In school suspension	3	
	8	NO CREDIT	NO CREDIT GIVEN FOR MISSED DAYS		
	2	Out of school suspension	Out of school suspension	2	
	R1	R1-Alternative education	Alternative education		

**Confirmation of Deleted Discipline Code**

# Discipline Incidents

This section explains how to create and manage discipline referrals and how to document incidents.

A “referral” is the process used to start a discipline incident. Typically, teachers create referrals; however, StudentInformation administrative users can also create them.

From the referral information, you create a discipline “incident” in StudentInformation. The incident documents the event that transpired that requires disciplinary action and includes a combination of the time, location, infraction(s), offender(s), victim(s), witness(es) and disciplinary action(s) taken. You may need to capture this data for your own trending analysis and/or to comply with EMIS and Civil Rights reporting.

**Note:** *You perform all of these functions in StudentInformation at the building level.*

Refer to the appropriate section as follows:

- To manage existing referrals and incidents, see [“Manage Referral Workload.”](#)
- To document new incidents, see [“Add Incidents.”](#)

---

## Manage Referral Workload

You can manage the discipline referrals assigned to you and view and update existing incidents as follows:

- To view all incidents for the school year in context, see [“View All Incidents.”](#)
- To view a list of incidents for a specific student, see [“View Student’s Discipline Incidents.”](#)
- To search for a specific incident, see [“Search for Incidents.”](#)
- To create a view with customized filter and sort options to suit your preferences and responsibilities, see [“Create Customized Views.”](#)
- To view details of an existing incident, see [“View Incident Details.”](#)
- To edit details of an existing incident, see [“Edit Incident Details.”](#)
- To review an offender’s past disciplinary incidents, see [“View Offender’s Past Incidents.”](#)
- To look up an offender’s current class location, see [“View Offender’s Schedule.”](#)
- To look up an offender’s attendance records, see [“View Offender’s Attendance Records.”](#)
- To look up contact information for an offender’s parents/guardians, see [“Contact Offender’s Parents.”](#)
- To print a discipline letter for an offender, see [“Print Discipline Letter.”](#)

## View All Incidents

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

- On the **Discipline Incidents** screen, review the list of all incidents for the building and school year in context. Incident statuses are as follows:
  - New** – Referral created in GradeBook but not yet opened in StudentInformation
  - Open** – Incident opened or created in StudentInformation; in process of being investigated
  - Complete** – No further action needed; case is closed; you can reopen later
  - Cancelled** – Not needed (for instance, in the case of a duplicate incident); you can uncancel later

StudentInformation > SIS > Discipline > Discipline Incidents [Find Students] [Go To]

### Discipline Incidents

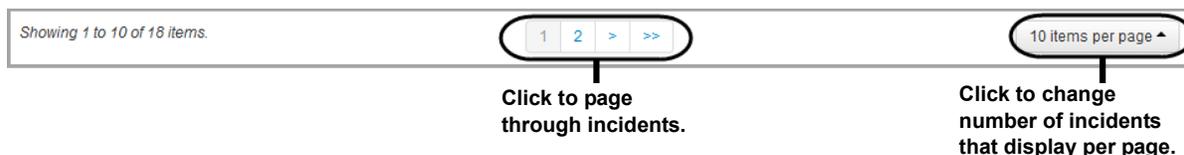
+ New Incident Search Select a filter... Reset search and filter

	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	89173	Open	Joe Adams referral					06/17/14	
Actions	89168	Comp...	PAUL BARNES ref...	BARNES	PAUL		09	06/04/14	
Actions	89164	Open	VICKIE CANTRELL...	CANTRELL	VICKIE		11	06/03/14	
Actions	89097	Canc...	Testing					05/07/14	
Actions	89072	Open	Fighting					04/30/14	
Actions	89079	Open	RAUL ARMSTRON...	ARMSTRONG	RAUL		11	04/30/14	
Actions	89060	Open	CLAIRE BARLOW ...	BARLOW	CLAIRE		11	04/29/14	
Actions	88028	Open	Testing D	MCKNIGHT	ARNOLD		09	04/28/14	
Actions	89031	Open	BONNIE ARMSTR...	ARMSTRONG	BONNIE		11	04/28/14	Bullying
Actions	89031	Open	BONNIE ARMSTR...	BEASLEY	OLGA		10	04/28/14	Bullying

Showing 1 to 10 of 18 items. 1 2 > >> 10 items per page

### View All Incidents

- Optional: To sort the data on any column, click the column heading.
- Optional: To view additional incidents, use the options at the bottom of the screen to page through incidents or change the number of incidents that display per page.



### View Additional Incidents

## View Student's Discipline Incidents

### Navigation: StudentInformation – SIS – Student – View Profile

1. With a student in context on the **View Profile** screen, in the **I want to...** drop-down list, select "View A Student's Discipline Incidents."

StudentInformation > SIS > Student > View Profile

**AVERY, SANDRA**

From this screen, you can view the student

**Address:** 9300 AVERY Road  
ASHLAND, OH 4480

**Phone Number:** (419) 555-6936

**Email Address:**

**Parent/Guardian:** AVERY, CHARLES  
H: (419) 555-6936  
W: (419) 555-3600

**Student Status:** ACTIVE RES

**Birthdate:** 5/21/1998

I want to...

- Edit This Student's Profile
- View/Edit Full Schedule
- View/Apply Fees
- View The Medical Health Log
- View This Student's Memberships
- View Today's Schedule
- View Contacts
- View Lockers
- View A Student's Family Group
- View A Student's Discipline Incidents**

### I want to... View A Student's Discipline Incidents

The **Discipline Incidents** screen displays with only those incidents in which the student in context is an offender.

StudentInformation > SIS > Discipline > Discipline Incidents

**Discipline Incidents (AVERY, SANDRA)**

[Remove student filter](#)

	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	88015	Open	Truancy	AVERY	SANDRA		10	07/29/14	Truancy

Showing 1 to 1 of 1 items.

10 items per page

### View Student's Discipline Incidents

**Note:** For information on the functionality of this screen, see ["View Incident Details."](#)

2. Optional: To view discipline incidents for all students, click **Remove student filter**.

## Search for Incidents

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

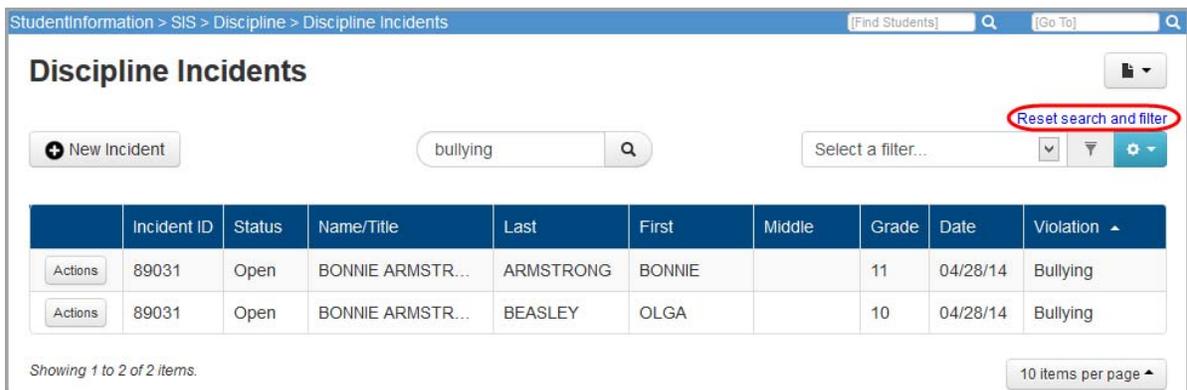
1. On the **Discipline Incidents** screen, in the search box at the top of the screen, enter any of the following search criteria:
  - Incident ID
  - Status (For example, to search for referrals you have not yet viewed, enter **New**.)
  - Title of the incident
  - Student offender’s first name, last name or grade
  - Violation
2. Click  or press <Enter>.



### Search for Incidents

The screen updates to display only the incident(s) matching your search criterion.

3. Optional: To clear the search criterion and return to the default view, click **Reset search and filter**.



### Incidents Matching Search Criteria

## Create Customized Views

You can create a view with customized filter and sort options to suit your preferences and responsibilities (for example, if you are only responsible for administering discipline to students in specific grades or with last names in a specific range of the alphabet). Once created, these views are available for you to select every time you sign in to StudentInformation.

**Note:** You do not need to create a custom view if you want to sort the grid but not filter the results. Instead, to sort on a column, click the column heading.

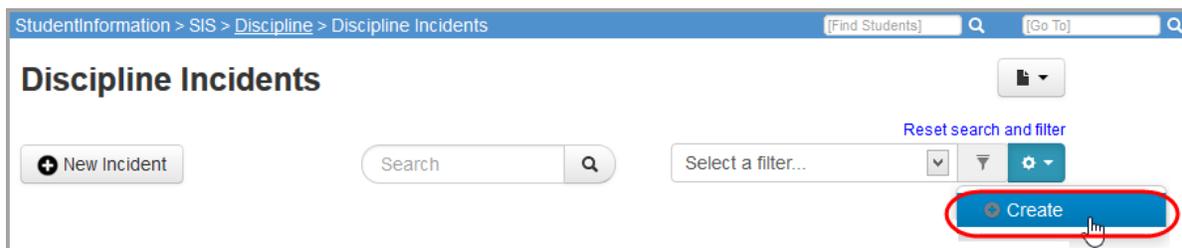
Refer to the appropriate section as follows:

- [“Create Filters”](#)
- [“Apply Filters”](#)
- [“Edit Filters”](#)
- [“Delete Filters”](#)

## Create Filters

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

1. On the **Discipline Incidents** screen, in the filters area at the top of the screen, click .
2. In the drop-down list, select “Create.”



### Create Filters

3. On the **Create Filter** window, in the top (name) section, enter a name for the filter.
4. Optional: If you want the customized filter/sort you are creating to default every time you access the **Discipline Incidents** screen, select the **Use as default** check box.
5. In the middle (sort) section of the window, set your sort options as follows:
  - a. Select the field on which to sort the results.
  - b. Select whether the sort should be “Ascending” or “Descending.”
6. In the the lower (filter) section of the window, set your filter options as follows:
  - a. Select a column on which to filter the results.
  - b. Select the boolean operator for the filter.
  - c. Select the criterion.

- d. Optional: To create an additional filter:
  - i. Click **+**
  - ii. In the and/or drop-down list that displays to the left of the filter section, select boolean operator “And” or “Or.”
  - iii. Repeat the process of entering filter criteria.

7. Click **Submit**.

**Create Filter**

The **Discipline Incidents** screen displays the new filter in the filter area, and the screen view updates to display using the customized sort/filter options you selected.

8. Optional: To clear the filter and return to the default view, click **Reset search and filter**.

	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	89079	Open	RAUL ARMSTRON...	ARMSTRONG	RAUL		11	04/30/14	
Actions	89031	Open	BONNIE ARMSTR...	ARMSTRONG	BONNIE		11	04/28/14	Bullying
Actions	89060	Open	CLAIRE BARLOW ...	BARLOW	CLAIRE		11	04/29/14	
Actions	88020	Open	HOWARD BROOK...	BROOKS	HOWARD		11	04/16/14	Use/possess ...
Actions	89164	Open	VICKIE CANTRELL...	CANTRELL	VICKIE		11	06/03/14	
Actions	88013	Comp...	Inappropriate Lang...	FRAZIER	CARMEN		11	04/11/14	Harassment/l...
Actions	89032	Open	STEVE HODGE ref...	HODGE	STEVE		12	04/28/14	

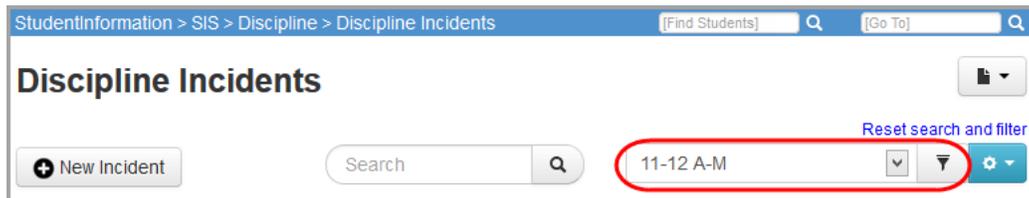
Showing 1 to 7 of 7 items. 10 items per page

**Customized View**

## Apply Filters

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

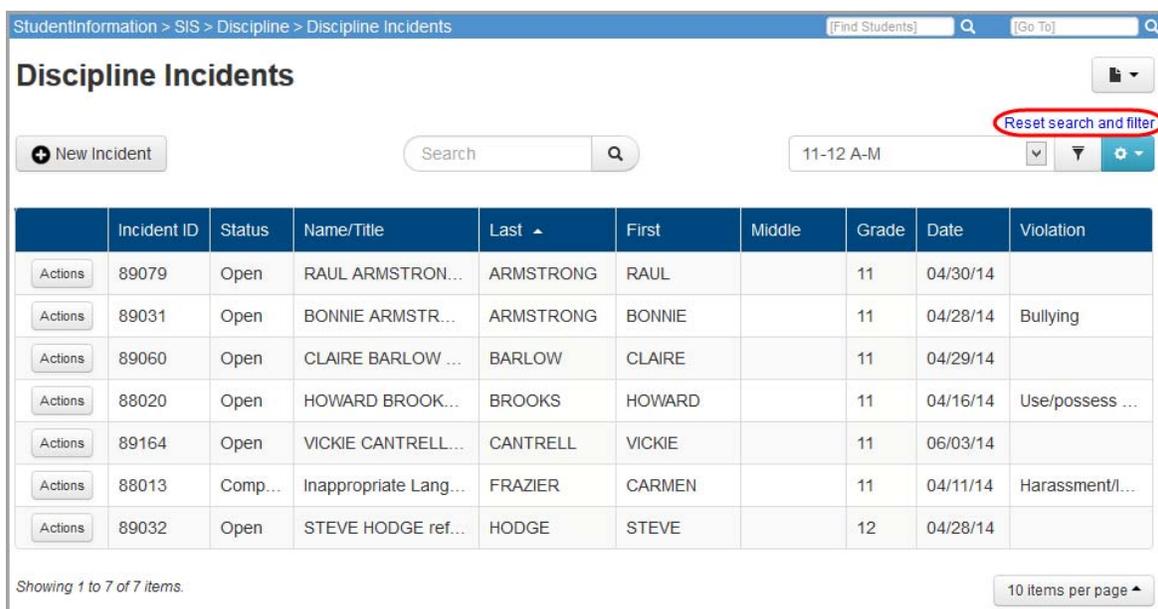
1. On the **Discipline Incidents** screen, in the filters area at the top of the screen, select the filter you want to apply.
2. Click .



### Apply Filter

The **Discipline Incidents** screen view updates to display using the filter option you selected.

3. Optional: To clear the filter and return to the default view, click **Reset search and filter**.



	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	89079	Open	RAUL ARMSTRON...	ARMSTRONG	RAUL		11	04/30/14	
Actions	89031	Open	BONNIE ARMSTR...	ARMSTRONG	BONNIE		11	04/28/14	Bullying
Actions	89060	Open	CLAIRE BARLOW ...	BARLOW	CLAIRE		11	04/29/14	
Actions	88020	Open	HOWARD BROOK...	BROOKS	HOWARD		11	04/16/14	Use/possess ...
Actions	89164	Open	VICKIE CANTRELL...	CANTRELL	VICKIE		11	06/03/14	
Actions	88013	Comp...	Inappropriate Lang...	FRAZIER	CARMEN		11	04/11/14	Harassment/l...
Actions	89032	Open	STEVE HODGE ref...	HODGE	STEVE		12	04/28/14	

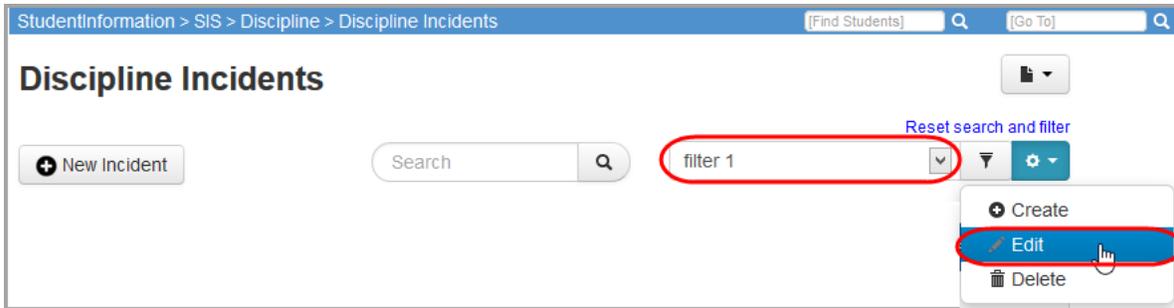
Showing 1 to 7 of 7 items. 10 items per page

### Filter Applied

## Edit Filters

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

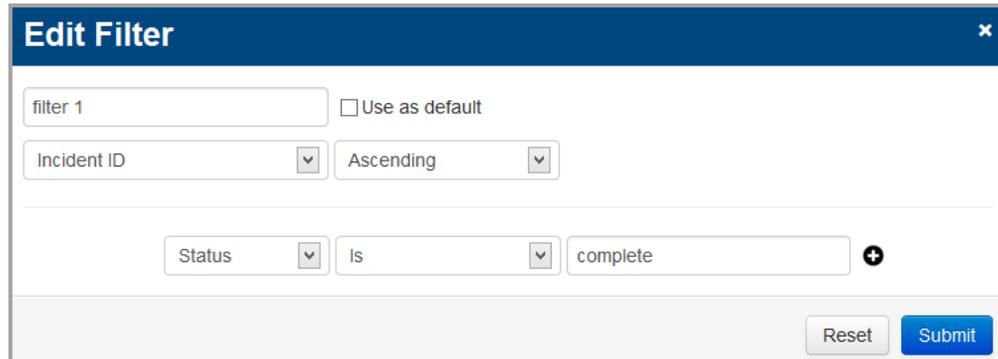
1. On the **Discipline Incidents** screen, in the filters area at the top of the screen, select the filter you want to edit.
2. Click .
3. In the drop-down list, select "Edit."



### Edit Filters

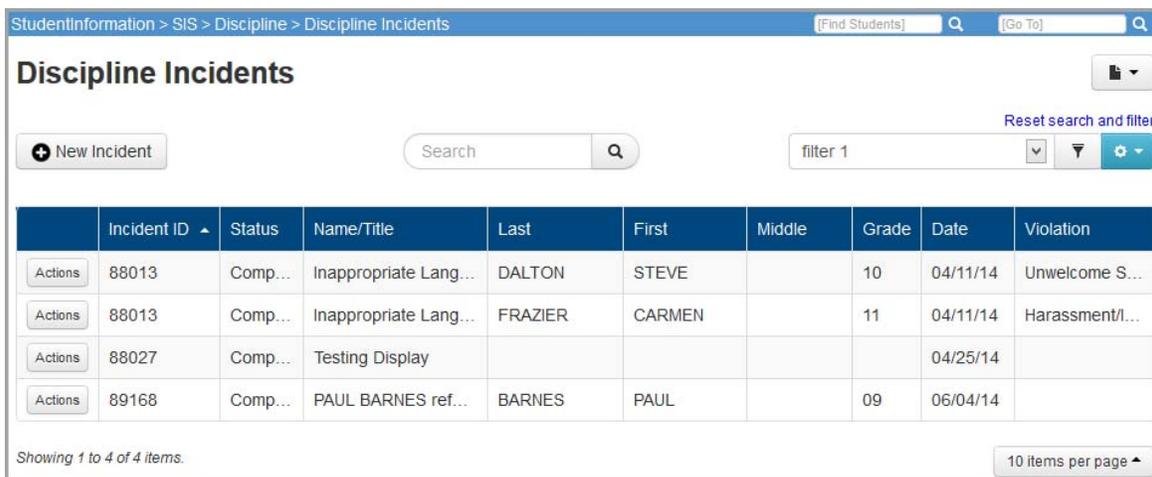
4. On the **Edit Filter** window, make any desired changes, and click **Submit**.

**Note:** For more information about the fields on this window, see [“Create Filters.”](#)



### Edit Filter

The **Discipline Incidents** screen view updates to display using the edited sort/filter options you selected.

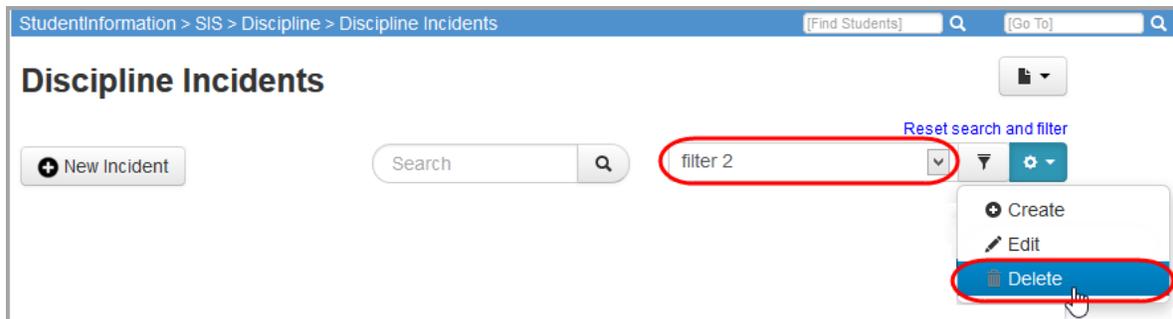


### Edited Filter View

## Delete Filters

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

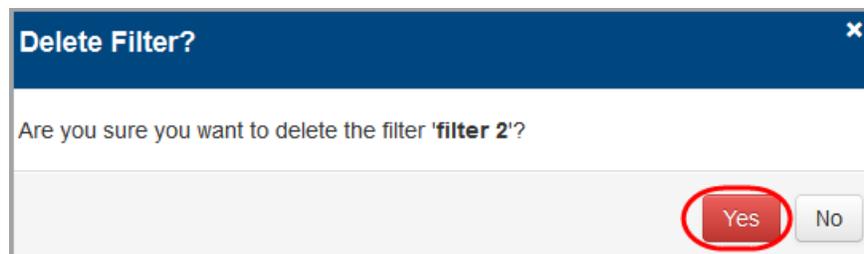
1. On the **Discipline Incidents** screen, in the filters area at the top of the screen, select the filter you want to delete.
2. Click .
3. In the drop-down list, select “Delete.”



#### Delete Filter

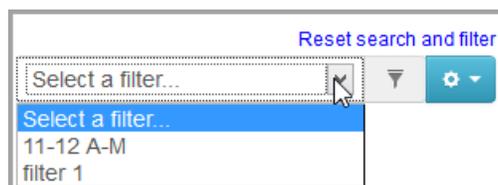
A message displays, asking if you are sure you want to delete the filter.

4. Click **Yes**.



#### Confirm Delete

The filter no longer displays in the **Select a filter** drop-down list.

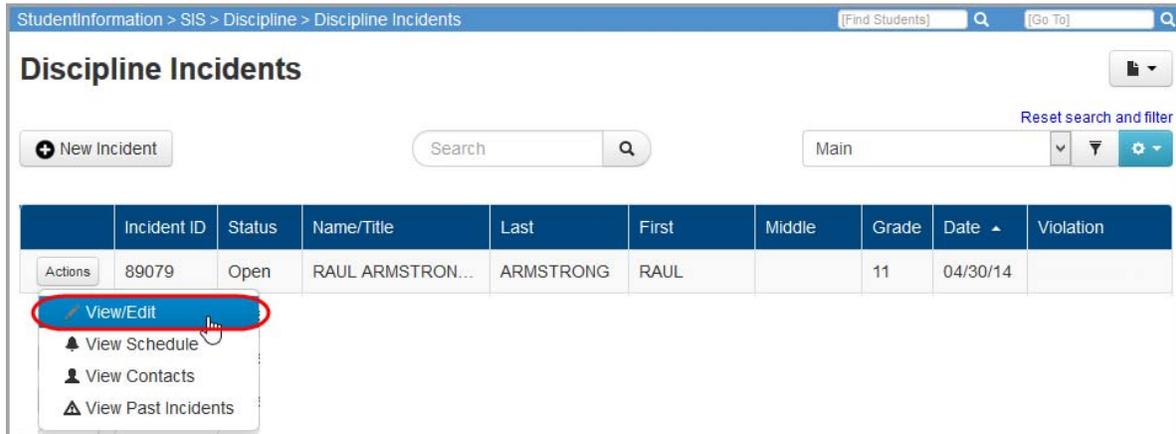


#### Filter Deleted

## View Incident Details

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, in the row of the incident whose details you want to view, click **Actions**.
2. In the drop-down list, select “View/Edit.”



### View Incident Details

The add-edit version of the discipline incident displays, and you can review the incident details.

**Note:** For more information about the fields on this screen, see [“Add Incidents.”](#)

StudentInformation > SIS > Discipline > Discipline Incidents > Add/Edit Discipline Incident [Find Students] [Go To]

### Discipline Incident - 89079 Open

RAUL ARMSTRONG referral

4/30/2014 📅 2:00 PM 🕒 During school hours ⌵

Cut 7th period class

**Incident Category**

Bullying

Religious Intolerance

Sexual Orientation

Against Property

On School Grounds ⌵ Select location/room... ⌵

Building IRN 🔍 Staff ⌵ Search for Referrer... 🔍

Offenders (1) Victims (0) Witnesses (0) Office Notes

Student ⌵ Search... ➕ Add Offender



**ARMSTRONG, RAUL** Grade Level: 11 Age: 17 Gender: M 🗑️

- ➕ Policies / Infractions
- ➕ Disciplinary Actions
- ➕ Parent Involvement
- > Other
- > Law Enforcement
- > Weapon Involvement

- 📅 Schedule
- 📅 Attendance
- 👤 Contacts
- 🖨️ Print Letter
- ⚠️ Past Incidents

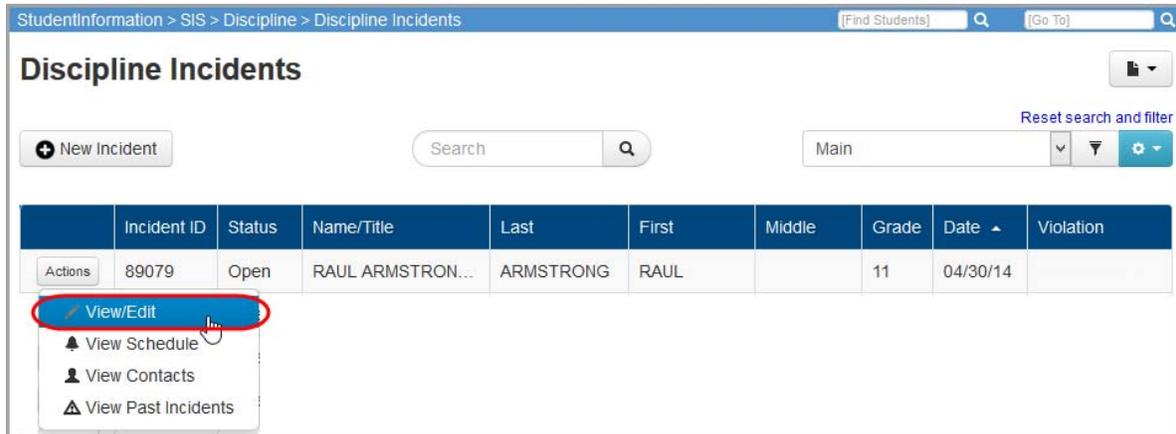
Update Incident or Cancel

### Discipline Incident Details

## Edit Incident Details

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, in the row of the incident whose details you want to edit, click Actions.
2. In the drop-down list, select “View/Edit.”



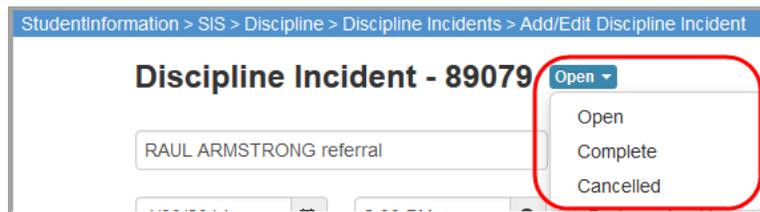
### Edit Incident Details

The add-edit version of the discipline incident displays.

3. Make any desired changes.

**Note:** For more information about the fields on this screen, see [“Add Incidents.”](#)

4. Optional: To change the status of the incident:
  - i. At the top of the screen next to the incident number, click the status drop-down list.
  - ii. Select a new status.



### Change Incident Status

5. Click **Update Incident**.

StudentInformation > SIS > Discipline > Discipline Incidents > Add/Edit Discipline Incident [Find Students] [Go To]

### Discipline Incident - 89079 Open

RAUL ARMSTRONG referral

4/30/2014 2:00 PM During school hours

Cut 7th period class

On School Grounds Select location/room...  Against Property

Building IRN Staff Search for Referrer...

Offenders (1) Victims (0) Witnesses (0) Office Notes

Student Search... Add Offender

**ARMSTRONG, RAUL** Grade Level: 11 Age: 17 Gender: M

**+** Policies / Infractions

Select policy... Weapons  Policy/Infraction Comments

Truancy

**+** Disciplinary Actions

**+** Parent Involvement

**>** Other

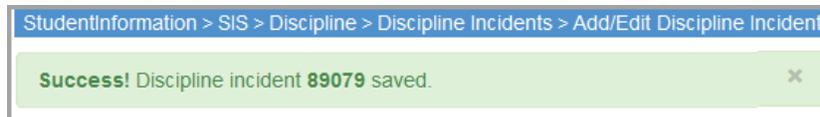
**>** Law Enforcement

**>** Weapon Involvement

Update Incident or Cancel

**Update Incident**

A confirmation message displays.



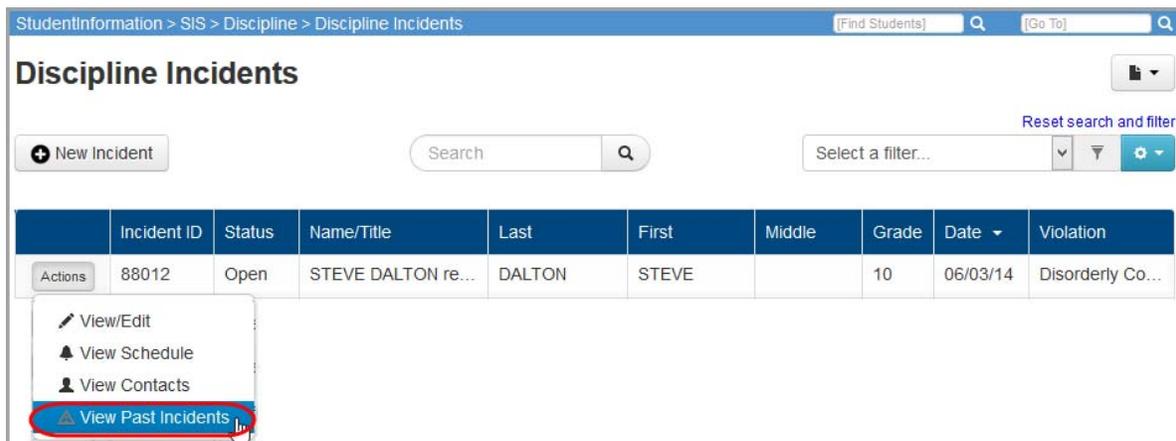
**Confirmation of Edited Incident**

## View Offender's Past Incidents

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

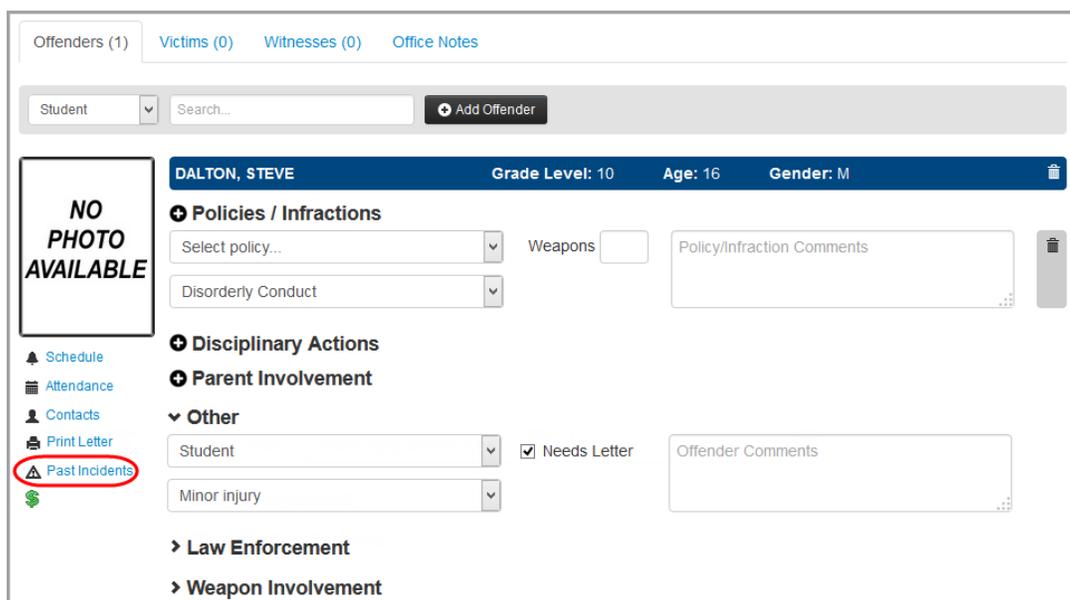
You can check to see if an offender has any past disciplinary incidents within the same school district and view details of those events.

1. Access the list of the offender's past incidents in one of the following ways:
  - From the main grid view of the **Discipline Incidents** screen:
    - i. In the row of the incident for the offender whose past incidents you want to view, click **Actions**.
    - ii. In the drop-down list, select "View Past Incidents."



### View Past Incidents From Grid View

- From within the incident detail view (add-edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Past Incidents**.



### View Past Incidents From Incident Detail View

The **Incidents** window displays, and you can review a list of the offender's past incidents.

- Optional: To view details of a past incident, click the **Incident ID**.

**Note:** The link is only enabled for incidents from the school year in context. To open an incident from a previous school year, first put that school year in context.

Incidents				
DALTON, STEVE				
Incident ID	Status	Name/Title	Date	Policy/Infraction
88012	Open	STEVE DALTON referral	6/3/2014	Disorderly Conduct
88013	Complete	Inappropriate Language	4/11/2014	Unwelcome Sexual Conduct

**List of Offender's Past Incidents**

The incident detail view opens, and you can review the past incident.

StudentInformation > SIS > Discipline > Discipline Incidents > Add/Edit Discipline Incident [Find Students] [Go To]

### Discipline Incident - 88013 Complete

Inappropriate Language

4/11/2014 12:00 AM During school hours

Student A made inappropriate sexual references towards Student B. Student B retaliated with more sexual references.

**Incident Category**

Bullying  
 Religious Intolerance  
 Sexual Orientation

Against Property

On School Property Select location/room... Building IRN Staff Search for Referrer...

Offenders (2) Victims (0) Witnesses (0) Office Notes

Student Search... Add Offender

**NO PHOTO AVAILABLE**

**DALTON, STEVE** Grade Level: 10 Age: 16 Gender: M

**Policies / Infractions**

Select policy... Weapons Policy/Infraction Comments

Unwelcome Sexual Conduct

**Disciplinary Actions**

In school suspension Demerits Action Comments

4/15/2014 - 4/16/2014 # of Days 2

Alt Education Assigned  Received Services  Served Modified Expulsion \*- Not Applicable

**Parent Involvement**

- Other
- Law Enforcement
- Weapon Involvement

[Schedule](#)  
[Attendance](#)  
[Contacts](#)  
[Print Letter](#)  
[Past Incidents](#)

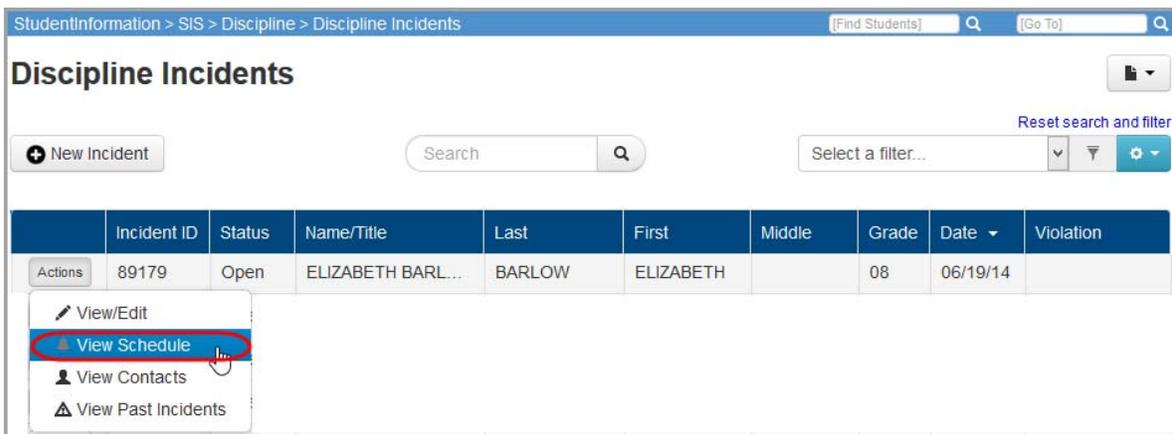
**Past Incident**

## View Offender’s Schedule

### Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

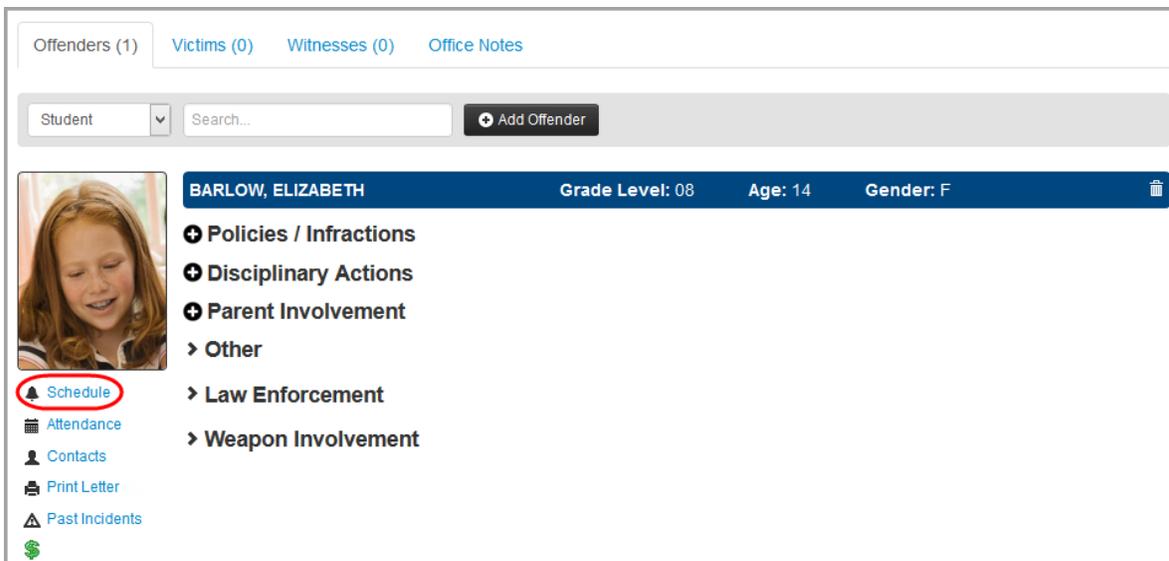
If you want to find the offender’s current class location (for example, in order to call him/her to your office), you can look up the offender’s schedule in one of the following ways:

- From the main grid view of the **Discipline Incidents** screen:
  - i. In the row of the incident for the offender whose schedule you want to view, click .
  - ii. In the drop-down list, select “View Schedule.”



#### View Schedule From Grid View

- From within the incident detail view (add-edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Schedule**.



#### View Schedule From Incident Detail View

The **Schedule** window displays, and you can review the offender's schedule.

Schedule							
BARLOW, ELIZABETH							
Period	Course Code	Course Name	Section	Teacher	Location	Rotation Days	Term
1	8862	Band 8	1	ALLISON ANTHONY	B136 - Music (Fresh/Symphonic Band)	M, T, W, R, F	All Year
2	8816	Algebra I	1	DAISY SIMS	C236 - C236	M, T, W, R, F	All Year
3	8823	Earth and Space Science	2	VIVIAN SINGLETON	C237 - C237	M, T, W, R, F	All Year
4	83	Lunch 8	1	VERA PAGE	CAFA - Cafeteria	M, T, W, R, F	All Year
5A	8852	FCS/Financial Literacy	6	MARIAN RICE	C100 - C100	M, T, W, R, F	2nd Semester Only
5B	8846	Expert 21 Reading	4	RACHEL HART	C246 - C246	M, T, W, R, F	All Year
6	8803	Language Arts 8	4	JEFFERY HODGE	C232 - C232	M, T, W, R, F	All Year
7	8833	American History 8	4	CLINTON SYKES	C233 - C233	M, T, W, R, F	All Year

**Offender's Schedule**

## View Offender's Attendance Records

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents – Add/Edit Discipline Incident

1. On the add-edit version of the **Discipline Incident** screen, at the bottom of the screen on the **Offenders** tab, click **Attendance**.

Offenders (1) Victims (0) Witnesses (0) Office Notes

---

Student ▼ Search... ➕ Add Offender

---



- [Schedule](#)
- [Attendance](#)**
- [Contacts](#)
- [Print Letter](#)
- [Past Incidents](#)

**CANTRELL, VICKIE**
Grade Level: 11
Age: 16
Gender: F
🗑️

- ⊕ Policies / Infractions**
- ⊕ Disciplinary Actions**
- ⊕ Parent Involvement**
- > Other**
- > Law Enforcement**
- > Weapon Involvement**

**View Offender's Attendance Records**

2. On the **Attendance** window, review the attendance records.

Date	Calendar	Absence Level	Absence Type	Reason	Note	Comment
5/15/2014	DFLT - Default	Full Absence	A - EXCUSED	003 - excused	5 - 5-DAY WARNING	
5/14/2014	DFLT - Default	Full Absence	A - EXCUSED	002 - unexcused	5 - 5-DAY WARNING	

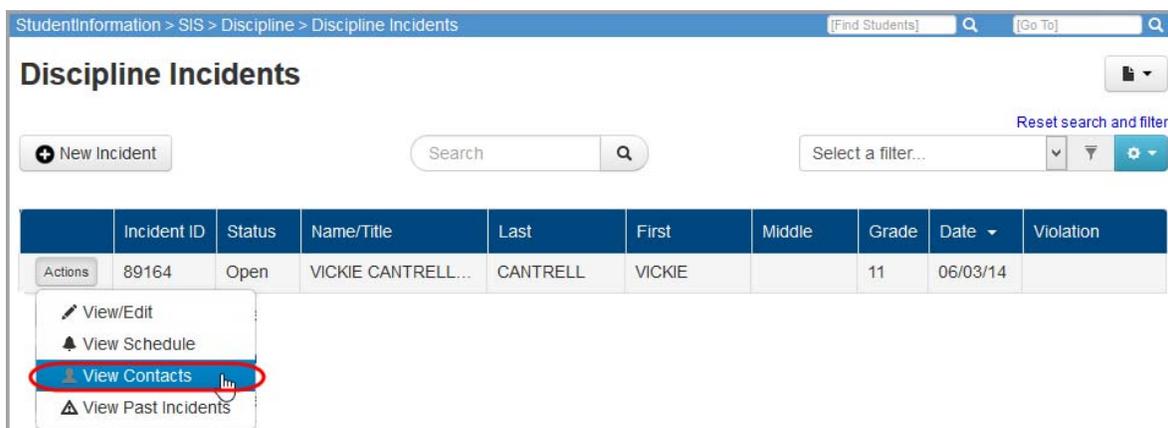
**Attendance Records**

## Contact Offender's Parents

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

If you want to contact the offender's parents/guardians, you can look up their contact information.

1. Access the parent contact information in one of the following ways:
  - From the main grid view of the **Discipline Incidents** screen:
    - i. In the row of the incident for the offender whose contacts you want to view, click  .
    - ii. In the drop-down list, select "View Contacts."



**View Contacts From Grid View**

- From within the incident detail view (add-edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Contacts**.

Offenders (1) Victims (0) Witnesses (0) Office Notes

Student Search... Add Offender

**CANTRELL, VICKIE** Grade Level: 11 Age: 16 Gender: F

- ➕ Policies / Infractions
- ➕ Disciplinary Actions
- ➕ Parent Involvement
- > Other
- > Law Enforcement
- > Weapon Involvement

[Schedule](#)  
[Attendance](#)  
[Contacts](#)  
[Print Letter](#)  
[Past Incidents](#)

### View Contacts From Incident Detail View

The **Contacts** window displays, and you can review the parent contact information.

- Optional: To email the parent directly from this window, click the email address, and proceed to send the email using your preferred application.

Contacts			
CANTRELL, VICKIE			
Type	Name / Address	Phone	Email
Parent(s)	FREDERICK CANTRELL 2305 CANTRELL Road Wooster, OH 44691	Home: (419) 555-4181	
Parent(s)	HERBERT CANTRELL 2305 CANTRELL Road Wooster, OH 44691	Work: (419) 555-5999 Cell: (419) 555-4181	<a href="mailto:test@aol.com">test@aol.com</a>
Parent(s)	CHARLOTTE CANTRELL 2305 CANTRELL Road Wooster, OH 44691	Work: (419) 555-2015 Cell: (419) 555-4180	<a href="mailto:test@aol.com">test@aol.com</a>

### Offender's Parent Contact Information

## Print Discipline Letter

**Navigation:** StudentInformation – SIS – Discipline – Discipline Incidents – Add/Edit Discipline Incident

**Note:** To print a discipline letter for an offender, you must have at least one report template uploaded. (For more information, see [“Manage Report Templates.”](#))

- On the add-edit version of the **Discipline Incident** screen, at the bottom of the screen on the **Offenders** tab, click **Print Letter**.

Offenders (1) Victims (0) Witnesses (0) Office Notes

Student Search... Add Offender

CANTRELL, VICKIE Grade Level: 11 Age: 16 Gender: F

- + Policies / Infractions
- + Disciplinary Actions
- + Parent Involvement
- > Other
- > Law Enforcement
- > Weapon Involvement

Schedule Attendance Contacts **Print Letter** Past Incidents

**Print Discipline Letter**

2. On the **Print Letter** window, select the template you want to use to generate the letter.
3. Click **Run Report**.

Print Letter

Incident Letter Run Report

**Print Letter – Run Report**

4. Open or save the report.

**DALTON HIGH SCHOOL**  
*Sample Discipline Letter*

---

July 29, 2014

MARION ANDERSON  
 7741 ANDERSON Road  
 Dalton, OH 44618

RE: ANDERSON, BENJAMIN

This letter is to inform you that BENJAMIN has been assigned the following disciplinary action(s):

**In school suspension**

The above action(s) are due to the following policy and/or code of conduct violation(s):

**/ Fighting/Violence**

If you have any questions please feel free to contact me at (330) 828-2261.]

Sincerely,

---

DALTON HIGH SCHOOL

**Sample Discipline Letter**

## Add Incidents

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

1. On the **Discipline Incidents** screen, click **New Incident**.



**Add Incidents**

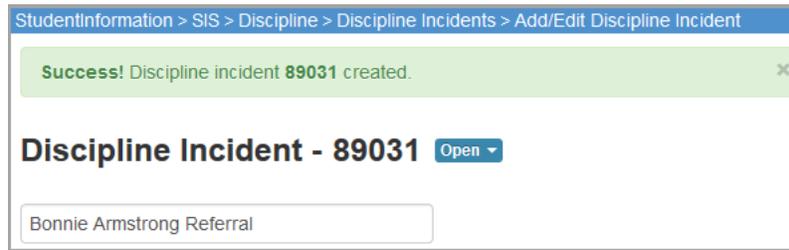
The add-edit version of the screen displays.

2. In the main area at the top of the screen, enter or select the following information:
  - Name you want to assign to the incident
  - Date, time and (optional) time frame during which the incident occurred (defaults to current date, current time and “During school hours”)
  - Optional: Description of the incident
  - Optional: For Civil Rights reporting purposes, in the **Incident Category** area, select the appropriate check box(es).
  - Optional: General and specific location where the incident occurred (defaults to “On School Property”)
  - Optional: If the incident involved physical damage to school property, select the **Against Property** check box.
  - IRN/name of the school (defaults to building in context)
  - Optional: Person who created the referral (can be “Staff,” “Student” or “Other”)
3. At the bottom of the screen, click **Create Incident**.

The screenshot shows the 'Add/Edit Discipline Incident' form. At the top, the breadcrumb navigation reads 'StudentInformation > SIS > Discipline > Discipline Incidents > Add/Edit Discipline Incident'. There are search boxes for 'Find Students' and 'Go To'. The form title is 'Discipline Incident' with a 'New' tag. The incident name field contains 'Bonnie Armstrong Referral'. The date is '5/29/2014', the time is '11:00 AM', and the time frame is 'During school hours'. The description field contains 'Fight in the hallway outside room 120 between 3rd and 4th period'. The 'Incident Category' section has checkboxes for 'Bullying' (checked), 'Religious Intolerance', 'Sexual Orientation', and 'Against Property'. The location dropdowns are set to 'On School Property' and '120 -'. The school is 'Dalton High School' (IRN 008003) and the person who created the referral is 'CASTRO, RUSSELL' (Staff). Below the form, there are tabs for 'Offenders (0)', 'Victims (0)', 'Witnesses (0)', and 'Office Notes'. At the bottom, there is a search bar for adding offenders and a 'Create Incident' button next to a 'Cancel' link.

**Add Incident**

StudentInformation creates the incident with an “Open” status, assigns it a number and displays a confirmation message.



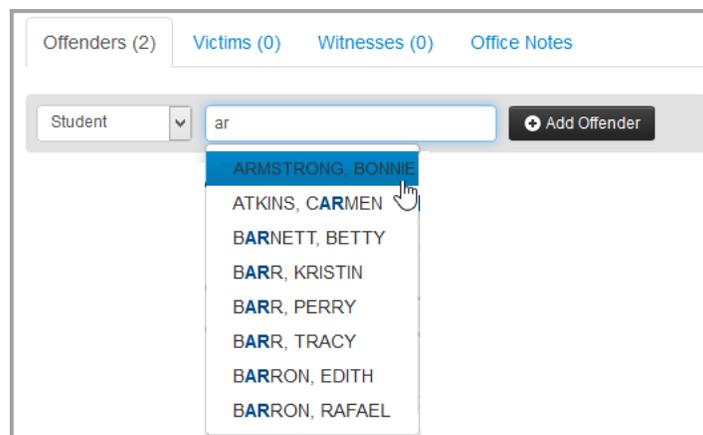
### Incident Added

4. Optional: Continue documenting the incident by adding information as follows:
  - [“Add Offenders”](#)
  - [“Add Victims”](#)
  - [“Add Witnesses”](#)
  - [“Add Notes”](#)

## Add Offenders

You can add one or more offenders to each documented incident.

1. On the **Offenders** tab, in the drop-down list, select whether the offender is a “Student,” “Staff” or “Other.”
2. If you selected “Other,” enter the offender’s first and last name. If you selected “Student” or “Staff,” in the search box, search for the offender as follows:
  - a. Enter the first couple letters of the offender’s first or last name.
  - b. In the search results that display beneath the field, select the correct offender.
3. Click **Add Offender**.



### Add Offender

The offender's information displays.

**Note:** If the offender is a student, to view his/her student profile, click the offender's name. To delete an offender, click .

4. To document the district policy that was violated and the infraction that occurred:
  - a. In the **Policies / Infractions** section, select the appropriate policy and infraction.
  - b. If applicable, enter the number of weapons involved in the incident, as well as any comments about this policy violation/infraction.

**Note:** To document additional policies/infractions, click . To delete a policy/infraction, click .

5. To document disciplinary action taken in response to the incident:
  - a. In the **Disciplinary Actions** section, click .
  - b. Select the disciplinary action taken and the start and end dates of the action.
  - c. Enter the **# of days** covered by the disciplinary action (for example, 2 days of detention).
  - d. If applicable, enter any **Demerits** assigned to the offender and any comments about this action.
  - e. If any of the following situations apply as a result of this action, select the appropriate check box(es):
    - **Alt Education Assigned** – Student assigned to an alternative education program
    - **Received Services** – Student received special education services
    - **Served** – Student completed the required disciplinary action (for example, served the detention or attended anger management classes)
  - f. If applicable, select whether the offender received a **Modified Expulsion**.

**Note:** To document additional disciplinary actions, click . To delete a disciplinary action, click .

6. To document your contact with the offender's parents/guardians:
  - a. In the **Parent Involvement** section, click .
  - b. Select the name of the parent or guardian you contacted, the form of contact (such as telephone conference or written notification) and the date, as well as any additional comments.

**Note:** To document additional parental contacts, click . To delete a parental contact, click .

7. To document any injuries and whether this offender requires a discipline letter:
  - a. In the **Other** section, click ➤.
  - b. Select the offender type.
  - c. If the offender was injured as a result of the incident, select the severity of the injury.
  - d. If you want to include a discipline letter for this offender in the **Discipline Letter Export**, select the **Needs Letter** check box. (For more information, see [“Discipline Letter Export \(DISCDT\).”](#))
  - e. In the **Offender Comments** field, enter any other notes as needed.
8. To document your contact with police related to this incident:
  - a. In the **Law Enforcement** section, click ➤.
  - b. Enter the law enforcement officer’s name.
  - c. If applicable, select the type of arrest and adjudication that occurred for the incident.
9. To document weapons involved in the incident:
  - a. In the **Weapon Involvement** section click ➤.
  - b. Select how the weapon(s) were detected, the type and any comments.
10. Click **Update Incident**.
11. Optional: To add another offender, repeat this procedure.

Offenders (2)
Victims (0)
Witnesses (0)
Office Notes

Student

ARMSTRONG, BONNIE

+ Add Offender



- [Schedule](#)
- [Attendance](#)
- [Contacts](#)
- [Print Letter](#)
- [Past Incidents](#)

**ARMSTRONG, BONNIE**
Grade Level: 11
Age: 17
Gender: F
✕

**⊕ Policies / Infractions**

Select policy...

Weapons

Policy/Infraction Comments

✕

Bullying

✕

**⊕ Disciplinary Actions**

S2-Detention

Demerits

Action Comments

✕

6/2/2014

-

6/3/2014

# of Days

2

Modified Expulsion

✕

Alt Education Assigned
  Received Services
  Served
 

\*- Not Applicable

✕

**⊕ Parent Involvement**

MARC ARMSTRONG

6/2/2014

Comments

✕

Telephone Conference

✕

**▼ Other**

Select offender type...

Needs Letter

Offender Comments

✕

Select injury severity type...

✕

**▼ Law Enforcement**

Law Enforcement Contact Name

Select arrest type...

Select adjudication type...

✕

**▼ Weapon Involvement**

Select detection method...

Select weapon type...

Weapon Comments

✕

Update Incident

or Cancel

### Add Offenders

## Add Victims

You can add one or more victims to each documented incident.

1. On the **Victims** tab, in the drop-down list, select whether the victim is a “Student,” “Staff” or “Other.”
2. If you selected “Other,” enter the victim’s first and last name. If you selected “Student” or “Staff,” in the search box, search for the victim as follows:
  - a. Enter the first couple letters of the victim’s first or last name.
  - b. In the search results that display beneath the field, select the correct victim.
3. Click **Add Victim**.

### Add Victim

The victim's information displays.

**Note:** To delete a victim, click .

4. To document additional details about the victim:
  - a. Select a further classification (type) for the victim.
  - b. If the victim was injured as a result of the incident, select the severity of the injury.
  - c. If the injury required medical treatment, select the **Medical Treatment Required** check box.
  - d. If you referred the victim for non-medical assistance (such as counseling), select the **Student Assistance Program Referral** check box.
  - e. If applicable, enter any comments about the victim.
5. Click **Update Incident**.
6. Optional: To add another victim, repeat this procedure.

**Add Victims**

**Add Witnesses**

You can add one or more witnesses to each documented incident.

1. On the **Witnesses** tab, in the drop-down list, select whether the witness is a “Student,” “Staff” or “Other.”
2. If you selected “Other,” enter the witness’s first and last name. If you selected “Student” or “Staff,” in the search box, search for the witness as follows:
  - a. Enter the first couple letters of the witness’s first or last name.
  - b. In the search results that display beneath the field, select the correct witness.
3. Click **Add Witness**.

**Add Witness**

The witness’s information displays.

**Note:** To delete a witness, click .

4. Enter any comments related to the witness.
5. Click **Update Incident**.

- Optional: To add another witness, repeat this procedure.

The screenshot shows a web interface with four tabs: 'Offenders (1)', 'Victims (1)', 'Witnesses (1)', and 'Office Notes'. The 'Witnesses (1)' tab is active. Below the tabs is a search bar with a dropdown menu labeled 'Student', a text input field labeled 'Search...', and a button labeled '+ Add Witness'. Below the search bar is a blue dropdown menu showing '(staff) CASTRO, RUSSELL' with a trash icon on the right. Below the dropdown is a text area labeled 'Witness Comments'. At the bottom of the interface are two buttons: 'Update Incident' and 'or Cancel'.

### Add Witnesses

## Add Notes

You can add internal notes to each documented incident. This is to capture information that should not be shared except with school staff who have access to discipline incidents in StudentInformation.

- On the **Office Notes** tab, enter this internal information.
- Click **Update Incident**.

The screenshot shows the same web interface as the previous one, but with the 'Office Notes' tab active. The search bar and witness dropdown are not visible. The text area contains the following text: 'Bonnie and Ana have been having issues getting along since Bonnie's father married Ana's mother. May want to consider recommending family counseling.' At the bottom of the interface are two buttons: 'Update Incident' and 'or Cancel'.

### Add Office Notes

This page intentionally left blank.

# Reports

You can run many different discipline reports in StudentInformation and use report templates to generate customized discipline letters. Refer to the appropriate section as follows:

- [“Manage Report Templates”](#)
- [“Run Discipline Reports”](#)

---

## Manage Report Templates

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

- [“Upload Report Templates”](#)
- [“Download Report Templates”](#)
- [“Delete Report Templates”](#)

## Upload Report Templates

**Navigation: StudentInformation – Management – School Administration – Discipline Administration – Report Template Administration**

1. On the **Report Template Administration** screen, click **New Template**.

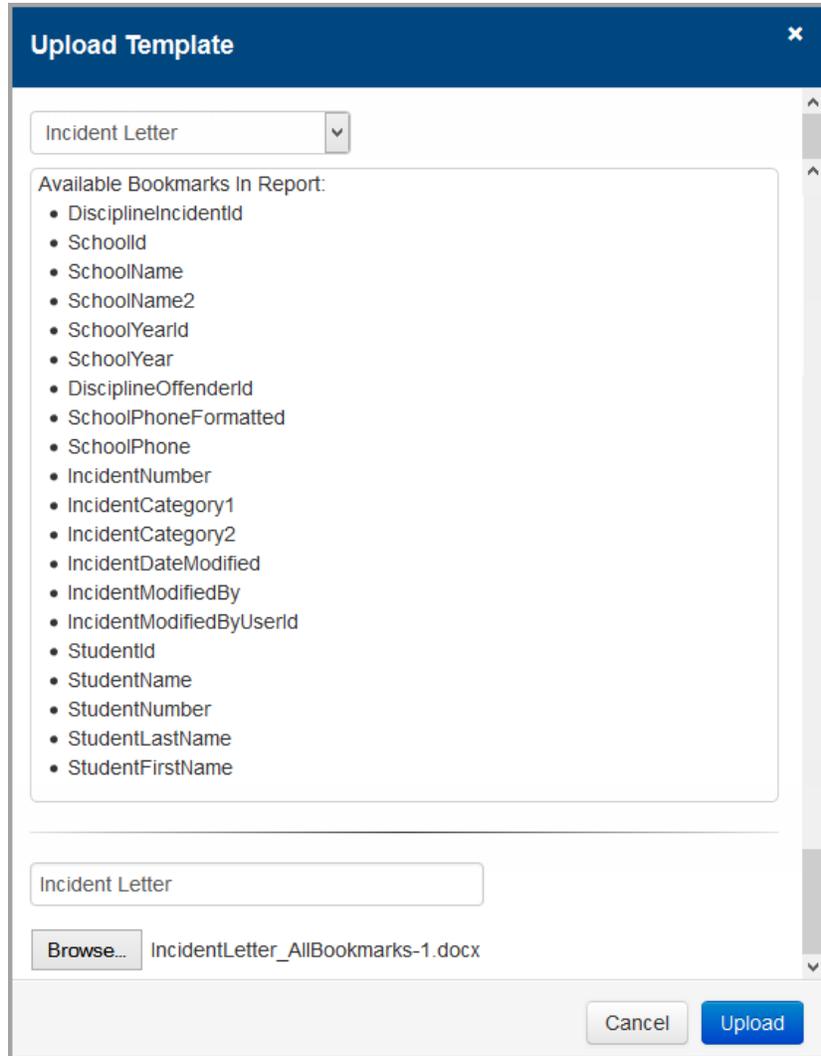


### Upload Report Templates

2. On the **Upload Template** window, in the **Select Report** drop-down list, select the type of report (or letter) with which you want to associate a template.

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

3. In the **Template Description** field, enter the description that you want to display in StudentInformation to identify this template.
4. Click **Browse**, and navigate to and select the file you want to use as a template.
5. Click **Upload**.



**Upload Template**

The uploaded template displays in the list.



**Report Template Added**

## Download Report Templates

**Navigation: StudentInformation – Management – School Administration – Discipline Administration – Report Template Administration**

1. On the **Report Template Administration** screen, in the row of the template you want to download, click **Actions** and select “Download.”



### Download Report Templates

2. Save the file.

## Delete Report Templates

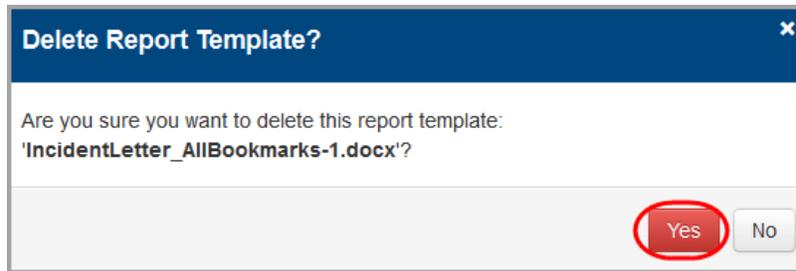
**Navigation: StudentInformation – Management – School Administration – Discipline Administration – Report Template Administration**

1. On the **Report Template Administration** screen, in the row of the template you want to delete, click **Actions** and select “Delete.”



### Delete Report Templates

2. On the confirmation window, click **Yes**.



Confirm Delete

---

## Run Discipline Reports

StudentInformation contains numerous reports to help you manage your student discipline data. Some reports are student or incident-specific, while others show trending data.

**Note:** For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

The following reports provide data about a specific student or discipline incident:

- [“Discipline Action Report”](#) – Discipline incidents resulting in specific action(s)
- [“Discipline Action Report \(Report Builder\)”](#) – Disciplinary actions assigned to students by grade
- [“Discipline All Report”](#) – Detailed disciplinary data by student
- [“Discipline Infraction Report”](#) – Discipline incidents related to specific infraction(s)
- [“Discipline Service List Report \(Report Builder\)”](#) – Students with discipline incidents who are scheduled to serve a discipline action on a particular date
- [“Discipline Total Detail Report”](#) – Detailed discipline data with totals by infraction code and action code
- [“Discipline Total Summary Report”](#) – Summary of discipline data broken out by grade with totals by infraction code and action code
- [“Discipline Letter Export \(DISCDT\)”](#) – Creates an export file for students requiring discipline letters

The following reports help you analyze discipline data across many incidents and students using a larger time frame. You can use these reports to look for trends and hot spots, such as time of day or location in which discipline incidents frequently occur:

- [“Total Incidents By Day”](#)
- [“Total Incidents By Grade Level”](#)
- [“Total Incidents By Infraction”](#)
- [“Total Incidents By Location”](#)
- [“Incidents Per Day By Month”](#)
- [“Total Incidents By Referrer”](#)
- [“Total Incidents By Time Frame”](#)

## Discipline Action Report

Navigation: StudentInformation – SIS – Discipline – Discipline Reports – Discipline Action

This report displays information on discipline incidents resulting in specific action(s).

Report: DAR		DALTON HIGH SCHOOL					
Printed Thu, May 22, 2014, 10:27 AM		2013-2014					
		Discipline Action Report					
SCHOOLYEAR	ID	STUDENT NAME		INCIDENT DATE	ACTION DATE	# DAYS	
SCHOOL NAME	GN	GR	ETH	HMRM	INCIDENT DESCRIPTION	ACTION DESCRIPTION	TELEPHONE
ACTION DATE RANGE: 8/20/2013 TO 5/22/2014							
2013	160580	DALTON, STEVE		04/11/2014	04/15/2014	2.00	
DALTON HIGH SCHOOL	M	10	W	5A	Inappropriate Language	In school suspension	(419) 555-6101
2013	150070	FRAZIER, CARMEN		04/11/2014	04/14/2014	2.00	
DALTON HIGH SCHOOL	F	11	W	5B	Inappropriate Language	In school suspension	(419) 555-2601
2013	170130	MCKNIGHT, ARNOLD		04/28/2014	04/29/2014	1.00	
DALTON HIGH SCHOOL	M	09	W	5A	Testing D	before or after school detention	(419) 555-5949

### Discipline Action Report

## Discipline Action Report (Report Builder)

Navigation: StudentInformation – Local – Report Builder Links – Report Builder Reports

The **Discipline Action** report available on the **Report Builder** screen displays information on disciplinary actions assigned to students by grade. It also includes a check box at the end of each row to let you manually check students on a printed report.

**Note:** For information on running Report Builder reports, see ProgressBook StudentInformation Report Builder User Guide.

Check box for manually checking students on a printed report.

Grade	Student Name	Student Number	School Year	Homeroom	Action Code	Action Description	Action Date	Number Of Days	Served	<input type="checkbox"/>
02	LEE, NORA	790935	2012	25	3	In school suspension	12/7/2012	1	No	<input type="checkbox"/>
									Grade Total:	1
03	JEFFERSON, GINA	790894	2012	217	3	In school suspension	12/6/2012	5	No	<input type="checkbox"/>
	SMITH, JOSHUA	392040	2012	219	3	In school suspension	12/6/2012	5	No	<input type="checkbox"/>
									Grade Total:	2
06	JONES, MATTIE	700086	2012	04	4	In school alternative	12/6/2012	5	No	<input type="checkbox"/>
									Grade Total:	1
<b>Total</b>										<b>4</b>

### Discipline Action Report (Report Builder)

## Discipline All Report

Navigation: StudentInformation – SIS – Discipline – Discipline Reports – Discipline All

This report displays detailed disciplinary data by student.

Report: DAL		WOOSTER HIGH SCHOOL						
Printed Thu, May 22, 2014, 10:45 AM		2013-2014						
<b>Discipline All Report</b>								
Student ID	Name	Grade	Gender	Ethnicity	Homeroom			
175027	MCFADDEN, ROBERTO	09	M	W				
Incident Number: 87968		Incident Date: 2/7/2014		Needs Letter? *				
<b>Infraction(s)</b>								
Code	Description	Location		By				
03	Fighting/Violence	Gym1		Steve Reeling				
<b>Action(s)</b>								
Code:	Date:	Start Date:	End Date:	#Days	Demerits	Modified	Served	Alt Prog
<b>Description:</b>								
MD	03/05/2014	03/05/2014	03/06/2014	001.00	000.00	Y	*	N
Morning Detention								

### Discipline All Report

## Discipline Infraction Report

Navigation: StudentInformation – SIS – Discipline – Discipline Reports – Discipline Infraction

This report displays information on discipline incidents related to specific infraction(s).

Report: DIR		DALTON HIGH SCHOOL								
Printed Thu, May 22, 2014, 10:50 AM		2013-2014								
<b>Discipline Infraction Report</b>										
ID	STUDENT NAME	INCIDENT DATE	INFRACTION DESCRIPTION	GN	GR	ETH	HMRM	SY	SCHOOL NAME	TELEPHONE
<b>INCIDENT DATE RANGE: 8/19/2013 TO 5/22/2014</b>										
160124	BEASLEY, OLGA	04/28/2014	Bullying	F	10	W	5A	2013	DALTON HIGH SCHOOL	(419) 555-0418
160580	DALTON, STEVE	04/11/2014	Unwelcome Sexual Conduct	M	10	W	5A	2013	DALTON HIGH SCHOOL	(419) 555-6101
150070	FRAZIER, CARMEN	04/11/2014	Harassment/Intimidation	F	11	W	5B	2013	DALTON HIGH SCHOOL	(419) 555-2601

### Discipline Infraction Report

## Discipline Service List Report (Report Builder)

Navigation: StudentInformation – Local – Report Builder Links – Report Builder Reports

This report displays information on students with discipline incidents who are scheduled to serve a discipline action on a particular date.

**Note:** For information on running Report Builder reports, see *ProgressBook StudentInformation Report Builder User Guide*.

**ProgressBook Student Information Report Viewer**  
 Report Name: Discipline Service List  
 Date Searched: 4/16/2013

Grade	Student Name	Student Number	School Year	Homeroom	Action Code	Action Name	Start Date	Stop Date	Number Of Days	Served
05	AGUIRRE, BETH	200113	2012		2	Out of school suspension	4/15/2013	4/19/2013	5	No
07	HARMON, BRUCE	180501	2012		5	Detention	4/16/2013	4/16/2013	1	No
	WATKINS, VANESSA	180577	2012		5	Detention	4/16/2013	4/16/2013	1	No
									<b>Grade Total:</b>	<b>2</b>
<b>Total</b>										<b>3</b>

Discipline Service List Report (Report Builder)

## Discipline Total Detail Report

Navigation: StudentInformation – SIS – Discipline – Discipline Reports – Discipline Total Detail

This report displays information on detailed discipline data with totals by infraction code and action code.

Report: DTD  
 Printed Tue, Jun 17, 2014, 12:51 PM

**DALTON HIGH SCHOOL**  
 2013-2014  
**Discipline Total Detail Report**

---

**160124 BEASLEY, OLGA** INCIDENT DATE RANGE: 8/20/2013 TO 6/17/2014

StudentNumber Student Name Program Code: GR: GN: ETH: HMRM:

IncidentNumber	Date	A/I	Code	Description	Location	Program Code	GR	GN	ETH	HMRM
160124				BEASLEY, OLGA		none	10	F	W	none
89031	04/28/2014	I	27	Bullying	Location: 121					
<b>STUDENT TOTALS FOR:</b>		<b>INFRACTIONS:</b>		<b>ACTIONS:</b>						
		27	Bullying	1		0				

---

**160580 DALTON, STEVE** INCIDENT DATE RANGE: 8/20/2013 TO 6/17/2014

StudentNumber Student Name Program Code: GR: GN: ETH: HMRM:

IncidentNumber	Date	A/I	Code	Description	Location	Program Code	GR	GN	ETH	HMRM
160580				DALTON, STEVE		none	10	M	W	none
88013	04/11/2014	I	21	Unwelcome Sexual Conduct	Location: none					
160580				DALTON, STEVE		none	10	M	W	none
88013	04/11/2014	A	3	In school suspension	Start: 04/15/2014 Stop: 04/16/2014 Days: 2.00 Served: *					
<b>STUDENT TOTALS FOR:</b>		<b>INFRACTIONS:</b>		<b>ACTIONS:</b>						
		21	Unwelcome Sexual Conduct	1		3	In school suspension	1		

Discipline Total Detail Report

## Discipline Total Summary Report

Navigation: StudentInformation – SIS – Discipline – Discipline Reports – Discipline Total Summary

This report displays a summary of discipline data broken out by grade with totals by infraction code and action code.

Report: DTS		DALTON HIGH SCHOOL	
Printed Tue, Jun 17, 2014, 12:55 PM		2013-2014	
Discipline Total Summary Report			
<b>Grade = 09</b>			
INCIDENT DATE RANGE: 8/20/2013 TO 6/17/2014			
INFRACTIONS:		ACTIONS:	
	0	9	before or after school detention 1
<b>Grade = 10</b>			
INCIDENT DATE RANGE: 8/20/2013 TO 6/17/2014			
INFRACTIONS:		ACTIONS:	
21	Unwelcome Sexual Conduct 1	3	In school suspension 1
27	Bullying 1		
<b>Grade = 11</b>			
INCIDENT DATE RANGE: 8/20/2013 TO 6/17/2014			
INFRACTIONS:		ACTIONS:	
19	Harassment/Intimidation 1	3	In school suspension 1

Discipline Total Summary Report – Grade Totals

Report: DTS		DALTON HIGH SCHOOL	
Printed Tue, Jun 17, 2014, 12:55 PM		2013-2014	
Discipline Total Summary Report			
<b>GRAND TOTALS</b>			
INFRACTIONS:		ACTIONS:	
19	Harassment/Intimidation 1	3	In school suspension 2
21	Unwelcome Sexual Conduct 1	9	before or after school detention 1
27	Bullying 1		

Discipline Total Summary Report – Grand Totals

## Discipline Letter Export (DISCDT)

**Navigation:** StudentInformation – Management – Import/Export – Discipline Letter Export (DISCDT)

This process creates an export file for students requiring discipline letters.

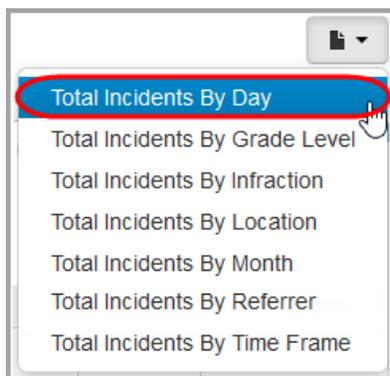
**Note:** For information on the discipline letter export process, see *ProgressBook StudentInformation Import/Export Guide*.

## Total Incidents By Day

**Navigation:** StudentInformation – SIS – Discipline – Discipline Incidents

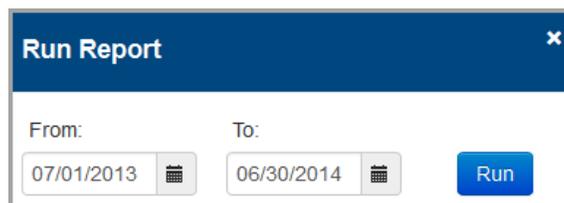
This report shows discipline incident trends by day of the week in both bar graph and table format.

1. On the **Discipline Incidents** screen, in the upper-right corner, click .
2. In the drop-down list, select “Total Incidents By Day.”



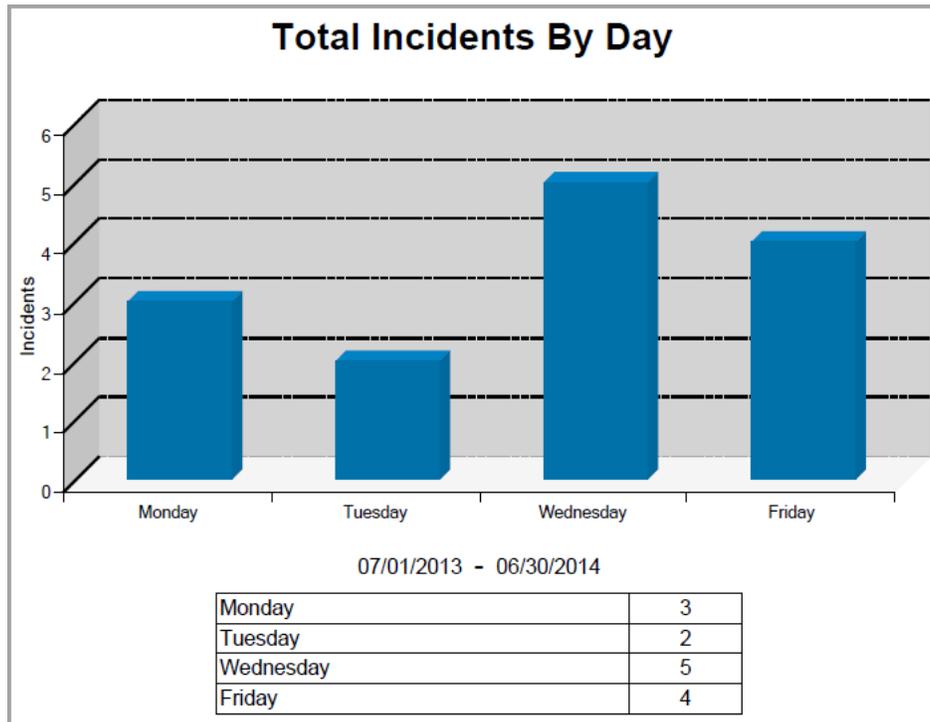
**Report Selection – Total Incidents By Day**

3. On the **Run Report** window, enter or select the **From** and **To** dates of the discipline data you want to analyze.
4. Click **Run**.


 A screenshot of a "Run Report" dialog box. The dialog has a dark blue header with the title "Run Report" and a close button (X). Below the header, there are two date selection fields: "From:" and "To:". The "From:" field contains the date "07/01/2013" and has a calendar icon to its right. The "To:" field contains the date "06/30/2014" and also has a calendar icon to its right. To the right of these fields is a blue button labeled "Run".

**Select Report Dates**

The report displays.



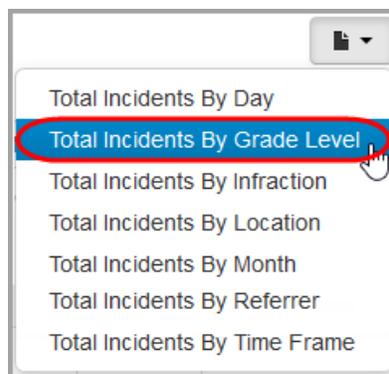
Total Incidents By Day

## Total Incidents By Grade Level

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

This report shows discipline incident trends by grade level in both bar graph and table format.

1. On the **Discipline Incidents** screen, in the upper-right corner, click .
2. In the drop-down list, select “Total Incidents By Grade Level.”



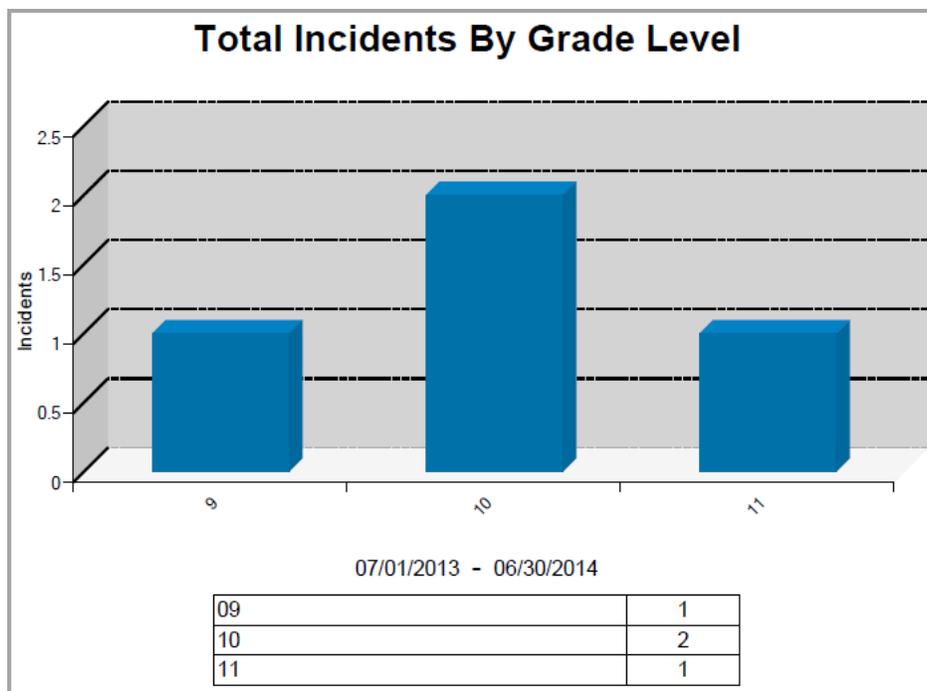
Report Selection – Total Incidents By Grade Level

- On the **Run Report** window, enter or select the **From** and **To** dates of the discipline data you want to analyze.
- Click **Run**.

The image shows a 'Run Report' dialog box with a dark blue header and a white body. It contains two date input fields: 'From:' with the value '07/01/2013' and 'To:' with the value '06/30/2014'. Each field has a small calendar icon to its right. A blue 'Run' button is positioned to the right of the 'To:' field.

Select Report Dates

The report displays.



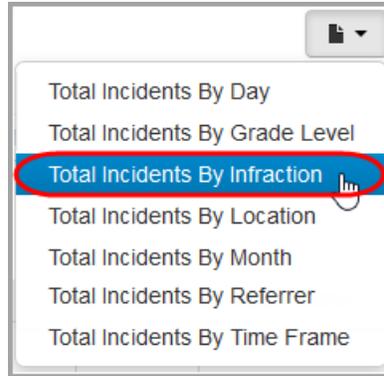
Total Incidents By Grade Level

## Total Incidents By Infraction

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

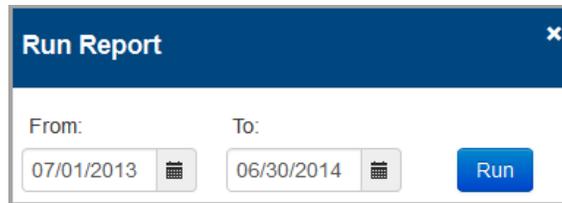
This report shows discipline incident trends by infraction in both bar graph and table format.

- On the **Discipline Incidents** screen, in the upper-right corner, click .
- In the drop-down list, select "Total Incidents By Infraction."



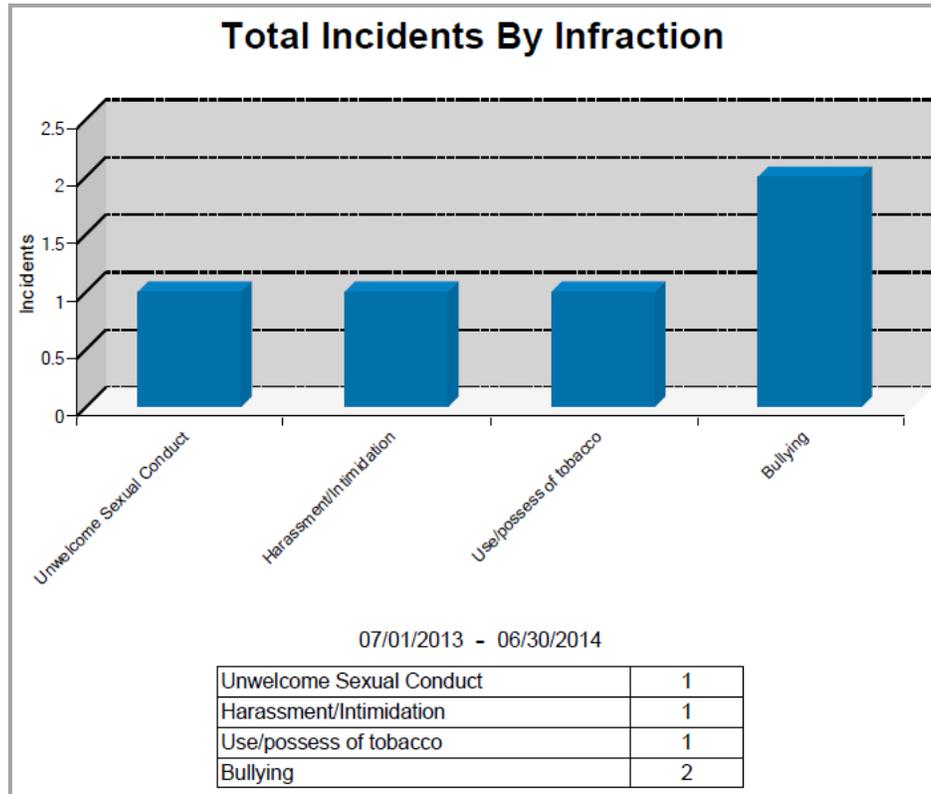
**Report Selection – Total Incidents By Infraction**

3. On the **Run Report** window, enter or select the **From** and **To** dates of the discipline data you want to analyze.
4. Click **Run**.



**Select Report Dates**

The report displays.



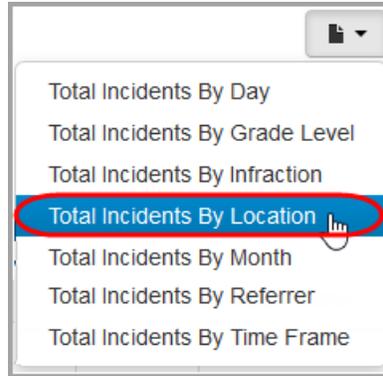
Total Incidents By Infraction

## Total Incidents By Location

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

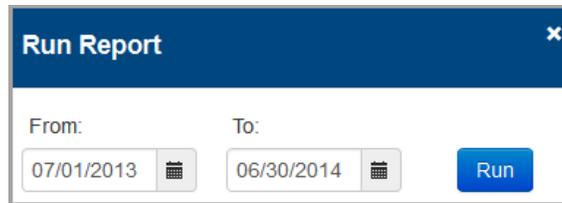
This report shows discipline incident trends by location in both bar graph and table format.

1. On the **Discipline Incidents** screen, in the upper-right corner, click .
2. In the drop-down list, select "Total Incidents By Location."



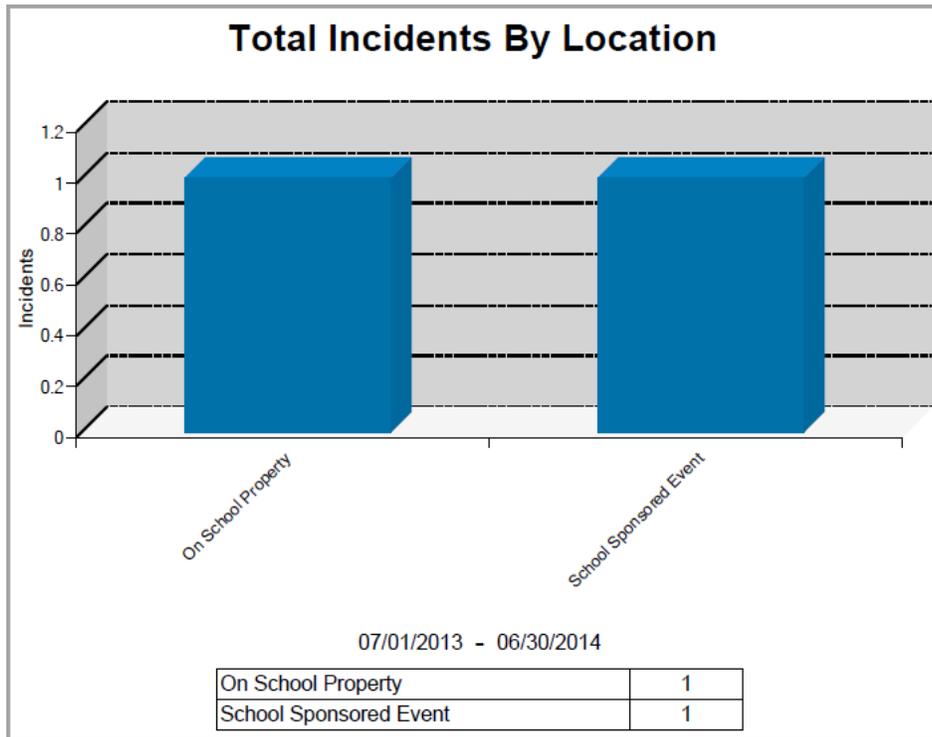
**Report Selection – Total Incidents By Location**

3. On the **Run Report** window, enter or select the **From** and **To** dates of the discipline data you want to analyze.
4. Click **Run**.



**Select Report Dates**

The report displays.



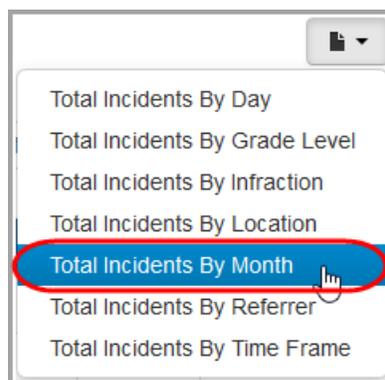
Total Incidents By Location

## Incidents Per Day By Month

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

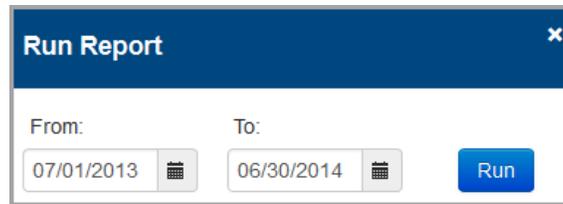
This report shows discipline trends of number of incidents per day by month in both bar graph and table format.

1. On the **Discipline Incidents** screen, in the upper-right corner, click .
2. In the drop-down list, select “Total Incidents By Month.”



Report Selection – Total Incidents By Month

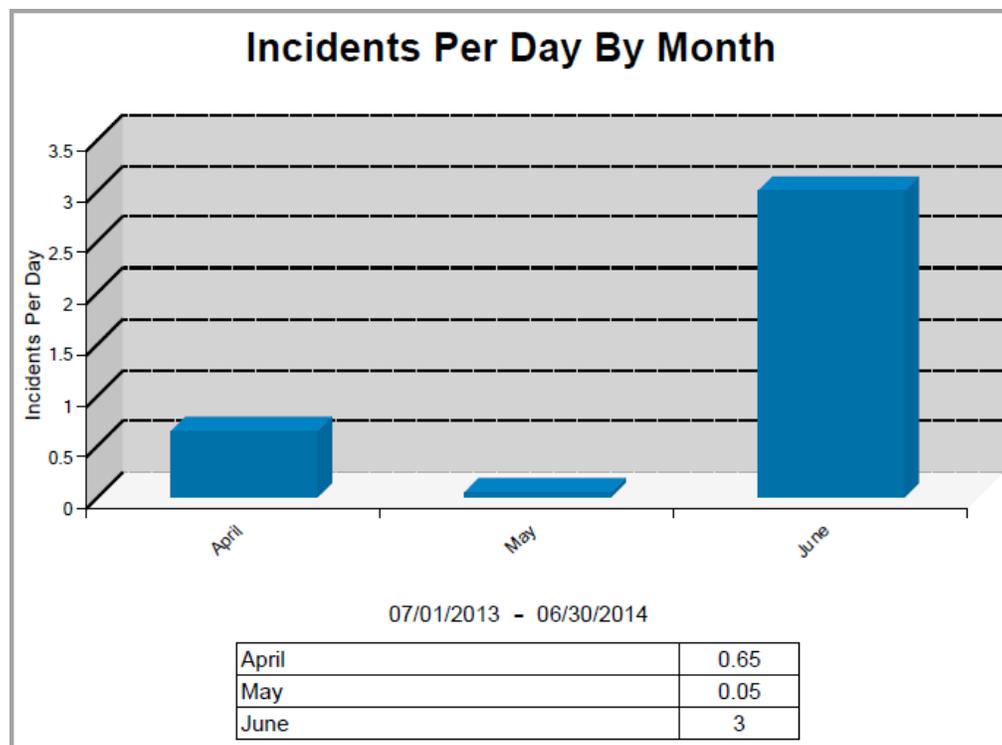
3. On the **Run Report** window, enter or select the **From** and **To** dates of the discipline data you want to analyze.
4. Click **Run**.



The image shows a 'Run Report' dialog box with a dark blue header and a white body. It contains two date input fields: 'From:' with the value '07/01/2013' and 'To:' with the value '06/30/2014'. Each date field has a small calendar icon to its right. A blue 'Run' button is located to the right of the 'To:' field.

Select Report Dates

The report displays.



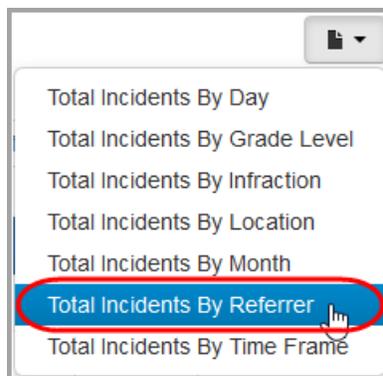
Incidents Per Day By Month

## Total Incidents By Referrer

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

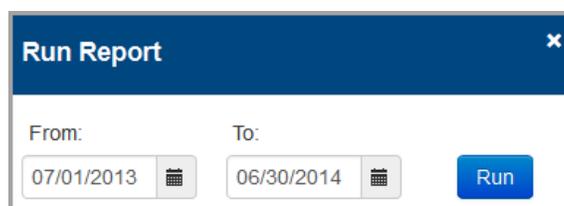
This report shows discipline incident trends by the staff member who made the referral in list format.

1. On the **Discipline Incidents** screen, in the upper-right corner, click .
2. In the drop-down list, select "Total Incidents By Referrer."



**Report Selection – Total Incidents By Referrer**

3. On the **Run Report** window, enter or select the **From** and **To** dates of the discipline data you want to analyze.
4. Click **Run**.



**Select Report Dates**

The report displays.

<b>Total Incidents by Referrer</b>	
07/01/2013 - 06/30/2014	
ADKINS, SHELLY	1
BROWNING, VICTOR	1
DONOVAN, TERRENCE	1
LOPEZ, ESTHER	1
MILLS, JULIE	1

**Total Incidents By Referrer**

## Total Incidents By Time Frame

**Navigation: StudentInformation – SIS – Discipline – Discipline Incidents**

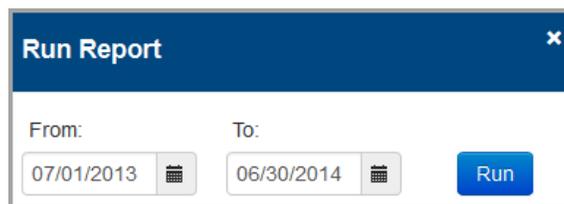
This report shows discipline incident trends by time frame in both bar graph and table format.

1. On the **Discipline Incidents** screen, in the upper-right corner, click .
2. In the drop-down list, select "Total Incidents By Time Frame."



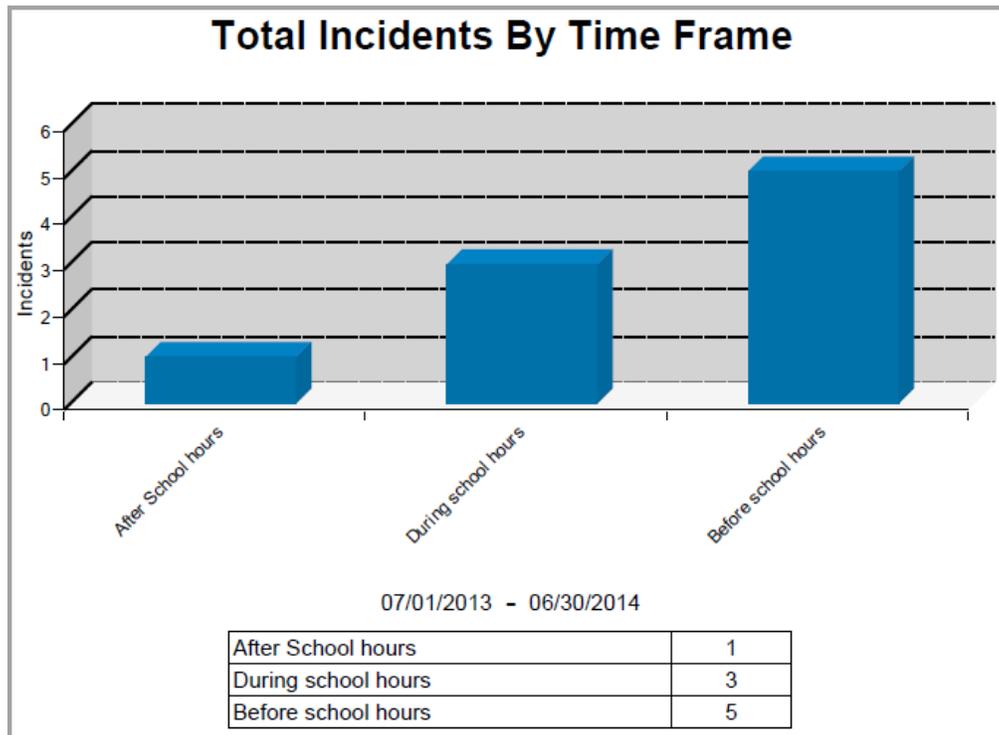
**Report Selection – Total Incidents By Time Frame**

3. On the **Run Report** window, enter or select the **From** and **To** dates of the discipline data you want to analyze.
4. Click **Run**.



**Select Report Dates**

The report displays.



**Total Incidents By Time Frame**

This page intentionally left blank.

---

# ProgressBook StudentInformation Fees Guide



*ProgressBook*<sup>®</sup>  
*StudentInformation*



# **ProgressBook Student Information Fees Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44114

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

## Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Fees Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.7.0	<a href="#">“Fees Outline and Flow”</a>	4	Updated <b>Fee Reports</b> section to reflect renamed <b>Students Eligible for a Refund</b> report.
14.7.0	<a href="#">“Issue a Miscellaneous Credit”</a>	46	Updated images to remove fees with a <b>Max Misc Credit</b> of \$0.00.
14.7.0	<a href="#">“Fee Payments by Accounting Code Detail”</a>	52	Updated text and images to show removal of <b>Payment Type</b> option.
14.7.0	<a href="#">“Fee Payments by Accounting Code Summary”</a>	55	Updated text and images to show removal of <b>Payment Type</b> option.
14.7.0	<a href="#">“Students Eligible for a Refund”</a>	65	Updated section to reflect change from previous report title of “Student with Unrefunded Payments” and addition of <b>Fee Balance</b> column.
14.7.0	<a href="#">“Student Fees Requiring Adjustment”</a>	68	Updated image of report to show new <b>Fee Balance</b> column and layout improvements.
14.5.0	<a href="#">“Student Fee Assignment”</a>	22	Added description of new “Apply All Waivers” option on the <b>Assignments</b> tab and updated image.
14.5.0	<a href="#">“Student Open Fees”</a>	35	Added “Issue a Misc Credit” as an option on the <b>I want to...</b> drop-down list.
14.5.0	<a href="#">“Issue a Miscellaneous Credit”</a>	46	Added section.
14.5.0	<a href="#">“View Fee Details”</a>	48	Updated information about deleting fee payments to reflect that these are now inactivated instead of deleted.
14.5.0	<a href="#">“Fee Payments by Accounting Code Detail”</a>	52	Updated <b>Activity Type</b> field to <b>Payment Type</b> and created new image to show this change and the addition of the “Misc Credit” payment type.
14.5.0	<a href="#">“Fee Payments by Accounting Code Summary”</a>	55	Updated <b>Activity Type</b> field to <b>Payment Type</b> and created new image to show this change and the addition of the “Misc Credit” payment type.
14.0.0	<a href="#">“Outstanding Fees”</a>	33	Added explanation that filter criteria only apply to the year in context. Updated Accounting Code field description.

This page intentionally left blank.

# Table of Contents

Change Log .....	i
Table of Contents.....	iii
Fees Overview .....	1
Understanding the Fees Module .....	2
Prior Year Fees .....	2
Student Fees for Other Schools .....	2
Prorated Fees.....	2
Fee Entry Amounts.....	4
Fees Outline and Flow .....	4
Fees System Maintenance .....	6
DASL Options – Fees Configuration Tab.....	6
Prorated Fee Schedules.....	7
Add/Edit Prorated Fee Schedules .....	8
Accounting Codes .....	9
Add/Edit Accounting Codes.....	11
General Fees.....	11
Add/Edit General Fees .....	13
Course Fees.....	14
Add/Edit Course Fees .....	15
Miscellaneous Fees.....	16
Add/Edit Miscellaneous Fees .....	17
Program Fees.....	18
Add/Edit Program Fees .....	19
Membership Fees.....	20
Add/Edit Membership Fees .....	21
Fee Batch Processes.....	22
Clear Fees .....	22
Student Fee Assignment .....	22
Select Students By: Search Criteria .....	23

Select Students By: Ad-Hoc Membership .....	24
Student Fees .....	32
Students Needing Adjustment .....	32
Outstanding Fees .....	33
Student Open Fees .....	35
Add Fees .....	37
Apply Payment .....	38
Issue a Refund .....	41
Transfer a Payment .....	42
Apply a Waiver .....	44
Issue a Miscellaneous Credit.....	46
View Fee Details.....	48
Homeroom Fee Collection .....	51
Fee Reports .....	52
Fee Payments by Accounting Code Detail .....	52
Fee Payments by Accounting Code Summary .....	55
Outstanding Fee Balances by Account Code (Report Builder) .....	58
Course Fee Analysis Report (Report Builder).....	61
Students Eligible for a Refund .....	65
Student Fees Requiring Adjustment .....	68
Student Fee Payment (R111) .....	71
Student Fee Detail (R109) .....	76
Student Fees Summary (R110) .....	80
Student Fee Invoice (R108-C) .....	83
Student Fee Collection Summary (R108-B).....	88
Student Fee Collection List Detail (R108-A) .....	91
Payments Posted by User Report (Report Builder) .....	95

---

## Fees Overview

Fees Accounting can be used to assign any number of fees to students. The following types of fees are available:

- General Fees
- Course Fees
- Miscellaneous Fees
- Program Fees
- Membership Fees

Each type of fee is explained in detail in the following documentation. Fees can be assigned manually to a specific student or assigned to multiple students through several batch processes that are available. Fees will also automatically apply when the appropriate condition has been met (Course Fees will automatically apply to all students who are scheduled for that course, Program Fees will automatically apply to all students in that program, etc.). Once fees are assigned, they can be paid, refunded, transferred, or waived for a specific student.

The following two batch jobs are available to assist in the Fee assignments:

- Clear Fees
- Student Fee Assignment (for General, Course, Program, and Membership Fees)

Fees can be collected in the office (by a secretary or office personnel) or by homeroom teacher.

There are numerous Fee Reports. Some Fee Reports are new to StudentInformation while other Fee Reports are very similar to reports that were previously available in SIS.

Fees Accounting works with other StudentInformation modules in the following ways:

- Printing Outstanding Fees on grade cards
- Showing a Fee symbol in the Student Context
- Batch Jobs that Clear and Update Fees

---

## Understanding the Fees Module

Below are some key concepts to understanding the Fees Module.

### Prior Year Fees

The StudentInformation application will not roll fees forward to subsequent school years. Fees from previous years may be viewed via a link on the student's fee detail screen. If the fees were assessed before the production implementation of the StudentInformation system, the fees may only be viewed – even if any portion of a fee is unpaid. However, if the fee was assessed after the production implementation of the StudentInformation system, any outstanding fee may have a payment posted to it. This is required due to the way SIS has historically handled fees. Sis is unable to accept payments for fees assessed in previous school years, so unpaid fees in SIS must be rolled if the school plans to accept payments for the unpaid amount. StudentInformation will continue to handle fees assessed by the SIS application in the same manner. Any fees from a previous school year that the school wishes to attempt to collect in subsequent years must be rolled forward in SIS prior to the production implementation of the StudentInformation system.

### Student Fees for Other Schools

Fees assessed to a student at a school previously attended may be collected if the school where the fee was assessed is in the same school district as the school the student is currently attending. This situation will most commonly arise for students transferring to a new school for grade promotion – such as a student moving from junior high to a high school. However, it may also apply to students transferring to another school midyear within the same district for reasons such as change of address.

A student's current school may only accept payment for fees assessed at other schools. The current school may not waive or otherwise adjust or cancel any fee or payment assessed or accepted by the original school. If any fee assessed or managed by the student's previous school is to be waived, forgiven, or removed, the school that originally assessed the fee must make any required changes.

### Prorated Fees

General Fee, Course Fee, and Program Fee assessments and credits may be prorated if a student enrolls after the beginning of the school year; withdraws before the end of a school year; or registers for a course after the beginning of a term (Course Fee); or drops a course before the end of a term (Course Fee).

A prorated fee schedule may be created and associated with any fee and the same schedule may be associated with multiple fees. A prorated fee schedule must contain a start and end day, and a percentage rate that will be applied to the fee. The start and end day values are defined based on actual school days as opposed to calendar days. Fees may have different prorated schedules for late enrollment versus early withdrawal.

If a prorated schedule exists for a fee but the number of days elapsed since the beginning of the term are not defined in the schedule, the assessed fee will not be prorated, and will be assessed at 100%. In the event that a fee is to be credited, such as for dropping a course or for withdrawal of a course, the absence of a prorated ration will result in no credits being applied. Again the result is that the original fee is assessed at 100%.

When prorating general fees for late registration, the prorated amount is based on the number of school days since the beginning of the year. When prorating general fees associated with a student withdrawal, the prorated amount is based on the number of school days from the first day of the school year, or the student's admission date, whichever is later, to the withdraw date. If a student registers for the school year after it has begun, and then withdraws early, the student's general fees are prorated on the number of school days between the late registration date and the withdrawal date.

Course fees are always prorated based on the course registration or drop date and the beginning date of the term in which the course begins. If the student registered for the class after the beginning of the term, the course fees are prorated from the first day of the term in which the course began. If a student drops a course, the applicable course fees are prorated and credited based on the number of school days that have elapsed since the first day of the term in which the course began regardless of when the student registered for the class.

It is important to note that when prorating fees for a course, only the number of school days during the terms when a course is scheduled to meet will be counted. This is important for courses not meeting in consecutive terms and courses not beginning during the first term of the school year. For example, if a student in a school with four (4) 45 day terms is taking a course scheduled for the first and third terms (not meeting during the second term), and the student drops the course on the second day of the third term, the number of days used to calculate the prorated fee amount is 47. This is the number of school days the course was actually scheduled to meet, even though a total of 92 actual school days have transpired. Similarly, if the same student is registered for a course that meets the third and fourth terms, and the student drops the course on the second day of the third term, the fees will be prorated on a basis of two (2) days. Again, this is the number of school days elapsed during the terms the course was scheduled to meet.

Program fees are always prorated based on the number of school days since the first day of the school year. This is true for students registering late for school or withdrawing early from school, as well as students joining or leaving a program anytime during the school year.

It is possible to configure prorated fee schedules such that a student registering late for school or for a course, and then withdrawing prior to the end of the school year or dropping a course before the end of the final course term such that the prorated fee amounts may cause a prorated drop payment to exceed a prorated admission fee assessment. The application will ensure that the prorated drop payment does not exceed the initial fee assessment.

Prorated fee scheduled are configured per school.

## Fee Entry Amounts

The valid range for fee amounts is 0.01 to 99999.99. If you have a fee for less than a dollar, it must be entered with the leading zero – i.e. 0.99. You will receive an error message if you do not enter the leading zero as the dollar amount.

---

## Fees Outline and Flow

1. Fees Accounting System Maintenance
  - A. **DASL Options Fees Configuration tab** – Specify how the Fees module of StudentInformation will function.
  - B. **Prorated Fee Schedules** – Proration tables set up for use with General, Course and Program Fees.
  - C. **Accounting Codes** – Codes defined for use with accounting system and reporting.
  - D. **General Fees** – Fees that are assigned to a group of students, or to all students in the building.
  - E. **Course Fees** – Fees that are applicable to specific courses in the building.
  - F. **Miscellaneous Fees** – Fees that may be applied, but do not fit into any other fee type.
  - G. **Program Fees** – Fees that are applied to specific programs for which students may be assigned.
  - H. **Membership Fees** – Fees that are applied to specific student memberships in StudentInformation.
2. Fee Batch Process
  - A. **Clear Fees** – Batch process to clear student fees.
  - B. **Student Fee Assignment** – Batch process to assign student fees.
3. Student Fees

- A. **Students Needing Adjustment**– An interactive fees screen where all students in the building with open fees (credit balance) are listed.
  - B. **Outstanding Fees** – An interactive fees screen where all students in the building with outstanding fees (debit balance) are listed.
  - C. **Student Open Fees** – Screen for viewing the selected students open fees, with drop-down menu options to apply, add, transfer, waive, refund, etc.
  - D. **Add Fees** – Screen used to add fees to selected student.
  - E. **Apply Payment** – Screen used to apply payments for selected student.
  - F. **Issue Refund**– Screen used to issue a refund to the selected student.
  - G. **Transfer Payment**– Screen used to transfer payments for selected student.
  - H. **Apply Waiver**– Screen used to apply waivers for selected student.
  - I. **Fee Details**– Interactive screen used to view and/or delete student fee detail information.
  - J. **Homeroom Collection** – Interactive screen used for homeroom collection of student fees balances.
4. Fee Reports
- A. **Fee Payments By Accounting Code Detail** – This report generates a fee payment listing by account code and prints details and subtotals of all fees by account code.
  - B. **Fee Payments By Accounting Code Summary** – This report generates a summary fee payment listing by account code.
  - C. **Students Eligible for a Refund** – This report generates a list of students who are eligible for a refund.
  - D. **Student Fees Requiring Adjustment** – This report generates a detailed listing of students needing a payment adjustment for the selected school year. The student may or may not have a credit balance depending on whether the student has other outstanding fee amounts on his account.
  - E. **Student Fee Payment (R111)** – This report generates a list of payments received from each student.
  - F. **Student Fee Detail (R109)** – This report generates a detailed listing of fees assessed for each applicable student. Details may be printed for any combination of fees.
  - G. **Student Fee Summary (R110)** – This report generates a summary by student and fee type of all fees that are currently outstanding for

the selected school year with a grand total for all fees at the end of the report.

- H. **Student Fee Receipt (R108-C)** – This report is used to print a list of fees and payments assessed to student, and will print one student per page to act as a receipt for fees paid.
- I. **Student Fee Collection Summary (R108-B)** – This report is used to print a list of fees assessed to students. The list will include student information and a summary of fee totals assessed by type.
- J. **Student Fee Collection Detail (R108-A)** – This report is used to print a detailed list of fees assessed to students. The list will include student information, all fees assessed and their detail information.

---

## Fees System Maintenance

### DASL Options – Fees Configuration Tab

Navigation: Home – Management – School Administration – DASL Options

The Fees tab defines if the school is using the fees accounting module of StudentInformation.

The screenshot shows the 'DASL Options' screen with the 'Fees' tab selected. The breadcrumb navigation is 'Home » Management » School Administration » DASL Options'. Below the title, there is a description: 'From this screen, you can display and change data pertaining to school year configuration functions.' The 'Fees' tab is active, and other tabs include 'Scheduling', 'Marks', 'Attendance', 'Prog Track', 'INFOhio Export', and 'EMIS Options'. The configuration options are as follows:

Uses Fees:	<input checked="" type="checkbox"/>
Has Fees Assigned:	<input checked="" type="checkbox"/>
Reduced Fee - Fraction Reduced from Fee:	0.50
Use General Fee Waivers:	<input checked="" type="checkbox"/>
Use Course Fee Waivers:	<input checked="" type="checkbox"/>
Use Program Fee Waivers:	<input type="checkbox"/>
Use Membership Fee Waivers:	<input type="checkbox"/>
Show Fees from Past School Years:	<input checked="" type="checkbox"/>
Show Fees from Future School Years:	<input checked="" type="checkbox"/>
Show Fees from All Buildings:	<input checked="" type="checkbox"/>

A 'Save' button is located at the bottom left of the form area.

DASL Options Screen

**Uses Fees** – Should be checked if the building is using fees accounting, then fees will automatically be assessed as per the defined fee code tables. Unchecked and the fees will not be automatically assessed, but may be manually assigned.

**Has Fees Assigned** – Should be checked if the fees have been assigned by the Fees Batch Creation application.

**Reduced Fee – Fraction Reduced from Fee** (required) – Input the percentage of the fee that is reduced, for instance, entering .25 will reduce fees by 25% for students marked with a reduced lunch status (on private info tab of student profile).

**Use General Fee Waivers** – Should be checked if Free/Reduced Waivers are used for General Fees.

**Use Course Fee Waivers** – Should be checked if Free/Reduced Waivers are used for Course Fees.

**Use Program Fee Waivers** – Should be checked if Free/Reduced Waivers are used for Program Fees.

**Use Membership Fee Waivers** – Should be checked if Free/Reduced Waivers are used for Membership Fees.

**Show Fees from Past School Years** – Should be checked if past fees are to display on all fees pages and reports.

**Show Fees from Future School Years** – Should be checked if future fees are to display on all fees pages and reports.

**Show Fees from All Buildings** – Should be checked if other buildings are to display on all fees pages and reports.

**Save** – Will save changes made to the Fees tab, or by clicking on a different tab in the School Year Configuration screen will also save any changes made to the Fees Tab.

## Prorated Fee Schedules

### Navigation: Home – Management – School Administration – Fees Administration – Prorated Fee Schedules

Prorated Fee Schedules are tables set up for use with General, Course, and Program fees for students who are admitted late or withdraw early and will have their fees prorated per a specific set of rules. See [“Understanding the Fees Module”](#) for additional information about prorated fees.

The Prorated Fee Schedules list screen will display a summary of all prorated fee schedules for the working school for the current school year and the current schedule. Each Prorated Fee Schedule will be displayed in a block listing the schedule name and the proration period and ratio details for the schedule.

**Note:** As of 11.3.0.1154, the Prorated Fee Schedules are school year specific to facilitate the viewing of historic data.

Home » Management » School Administration » Fees Administration » Prorated Fee Schedules

### Prorated Fee Schedules Maintenance

From this screen, you can display, add, change and delete Prorated Fee Schedules.

Add Schedule  Show Active Only

Adm - Late Admission			Adm2 - Late Admission 2		
Start Day	End Day	Proration Ratio	Start Day	End Day	Proration Ratio
5	94	100%	5	19	100%
95	184	50%	20	184	0%

With - Withdraw		
Start Day	End Day	Proration Ratio
95	109	100%
110	184	0%

Prorated Fee Schedules Maintenance Screen

**Show Active Only** – If checked, will show only active Prorated Fee Schedules; if not checked, will show both active and inactive Prorated Fee Schedules. Please note that Inactive Prorated Fee Schedules are shown in the darkened grid.

### Add/Edit Prorated Fee Schedules

Home » Management » School Administration » Fees Administration » Prorated Fee Schedules

### Prorated Fee Schedules Maintenance

From this screen, you can display, add, change and delete Prorated Fee Schedules.

Schedule Code:

Schedule Name:

Start Day:  Stop Day:  Proration Ratio:

Is Active:

Add/Edit Prorated Fee Schedules Maintenance Screen

**Schedule Code** (required) – Enter up to 4 character alphanumeric Prorated Fee Schedule Code. If you try to use an existing inactive Prorated Fee Schedule Code, you will be prompted to reactivate this inactive Prorated Fee Schedule if you wish.

**Schedule Name** (required) – Enter the name or description of the Prorated Fee Schedule.

**Start Day** (required) – Enter the start day for this proration schedule detail entry. Among multiple rows of proration detail entries, the start and end days may not overlap in any combination; however there is no requirement that the start and end day ranges be contiguous. At least one row of detail must be entered and not marked for deletion.

**End Day** (required) – Enter the stop day for this proration schedule detail entry. Among multiple rows of proration detail entries, the start and end days may not overlap in any combination; however there is no requirement that the start and end day ranges be contiguous. At least one row of detail must be entered and not marked for deletion.

The following example is valid:

Start Day	End Day	Proration Ratio
1	10	100
11	15	75
20	30	25

The following is an example of overlapping ranges and is not valid:

Start Day	End Day	Proration Ratio
1	15	100
10	25	75
25	30	25

**Proration Ratio** (required) – Enter the proration ratio. If the user specifies any of the values in a given proration detail entry, then all three values must be supplied.

**Add Detail** – Add Prorate Fee Schedule Detail Entry (another row to a Prorated Fee Schedule).

**Active** (optional) – If checked, Prorated Fee Schedule Code is active and can be used on new Fee records.

## Accounting Codes

**Navigation: Home – Management – School Administration – Fees Administration – Accounting Codes**

Accounting Codes are defined to use with Accounting System and Reporting and can be assigned to various Fees. Accounting Codes are optional and do not have to be used.

Home » Management » School Administration » Fees Administration » Accounting Codes

### Accounting Codes Maintenance

From this screen, you can display, add, change and delete Accounting codes.

Add Accounting Code

		Accounting Code	Allocation Code	Active
		INS	302DRI	
		AMA	AUTO	
		NS	BVCAT	
		ICA	CMPSYS	
		DAN	FDANCE	
		MUS	FMUSIC	
		1PI	FSA	
		10P	FSA-PARKING	

Accounting Codes Maintenance Screen

		PAS	XPASS	
		CUL	XREST1	
		10T	XTECH	
		EMN	XTPMSN	
		EMS	XTPMSS	
		TRS	XTRAN2	
		TRA	XTRANI	
		WEL	XWELD	

Show Active Only

89 Records Displayed [Back To Top](#)

Accounting Codes Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Accounting Code, Allocation Code, Active) in ascending or descending order by clicking on the column header.

– Active Accounting Code – Can be used on new Fee Records.

– Inactive Accounting Code – Cannot be used on new Fee Records.

## Add/Edit Accounting Codes

Home >> Management >> School Administration >> Fees Administration >> Accounting Codes

### Accounting Codes Maintenance

From this screen, you can display, add, change and delete Accounting codes.

Accounting Code:  ⚡

Allocation Code:  ⚡

Is Active:

Save Save and New Cancel

### Accounting Codes Maintenance Screen

**Accounting Code** (required) – Enter up to 8 character alphanumeric Accounting Code. If you try to use an existing inactive Accounting Code, you will be prompted to reactivate this inactive Accounting Code if you wish.

**IMPORTANT NOTE:** If you are using the StudentInformation STUFEEES Export, please note that the USAS STUFEEES Import only accepts 6 characters for Accounting Code. You will need to rename your codes to fit into this 6 character limit if you are using the StudentInformation STUFEEES Export with the USAS STUFEEES Import.

**Allocation Code** (required) – Enter the alphanumeric Allocation Code. Allocation codes are entered as required – you will need to enter spaces, hyphens, and/or other separators as necessary. There is not a specified format for the Allocation Code entry.

**Active** (optional) – If checked, Accounting Code is active and can be used on new Fee records.

## General Fees

### Navigation: Home – Management – School Administration – Fees Administration – General Fees

General Fees are assigned automatically by the Student Fee Assignment batch process. General Fees are specific to the school, school year, and student schedule. General Fees can be applied to all students in a school or be limited by gender and/or grade. An unlimited number of General Fees may be configured and assessed to any number of students.

Home » Management » School Administration » Fees Administration » General Fees

## General Fees Maintenance

From this screen, you can display, add, change and delete general fees.

Add General Fee

	Fee Code ^	Grade Year	Gender	Fee Text	Fee Amount	AD	WD	Acct Code	Active
 	09	09		grade level fees	\$15.00				
 	10	10		grade level fees	\$20.00				
 	11	11		grade level fees	\$35.00				
 	12	12		grade level fees	\$45.65				
 	98			STUDENT ID	\$3.00	Adm2		FSA	
 	99			TECHNOLOGY	\$5.00	Adm		XTECH	

Show Active Only

### General Fees Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Fee Code, Grade Year, Gender, Fee Text, Fee Amount, AD, WD, Acct Code, Active) in ascending or descending order by clicking on the column header.



– Active General Fee Code– Can be used on new Fee Records.



– Inactive General Fee Code – Cannot be used on new Fee Records.

## Add/Edit General Fees

Home >> Management >> School Administration >> Fees Administration >> General Fees

### General Fees Maintenance

From this screen, you can display, add, change and delete general fees.

Fee Code:  ⚡

Grade Year:

Gender:

Fee Description:  ⚡

Fee Amount:  ⚡

Prorated Fee Schedule:

(Admission)

Prorated Fee Schedule:

(Withdraw)

Accounting Code:

Active:

Save Save and New Cancel

### General Fees Maintenance Screen

**Fee Code** (required) – Enter up to 8 character alphanumeric General Fee Code. If you try to use an existing inactive General Fee Code, you will be prompted to reactivate this inactive General Fee Code if you wish.

**Grade Year** (optional) – Choose the grade from the drop-down list to which this General Fee applies.

**Gender** (optional) – Choose the gender from the drop-down list that this General Fee applies to.

*Note: Gender “C” is only for community schools when they do not report an element.*

**Fee Description** (required) – Enter the name or description of the General Fee.

**Fee Amount** (required) – Enter the Fee amount.

**Prorated Fee Schedule (Admission)** (optional) – If this fee will be adjusted and prorated because of late admission, choose the appropriate schedule from the drop-down list.

**Prorated Fee Schedule (Withdraw)** (optional) – If this fee will be adjusted and prorated because of early withdrawal, choose the appropriate previously defined prorated fee schedule from the drop-down list.

**Accounting Code** (optional) – Choose the appropriate previously defined Accounting Code from the drop-down list.

**Active** (optional) – If checked, General Fee Code is active and can be used on new Fee records.

## Course Fees

### Navigation: Home – Management – School Administration – Fees Administration – Course Fees

Course Fees are associated with a specific academic course and are automatically assigned by the Student Fee Assignment batch process, the scheduling process, and other processes. Course Fees are specific to a Course Section or can apply to all sections of a specific Course. Course Fees are school specific for each school year and for each schedule configured for the school.

Any number of Course Fees may be configured for a Course (and all its sections), or for a specific Course Section. If a course has fees that apply to all sections as well as fees that apply to specific sections, students will be assessed all fees configured for the section in which they are registered **as well as** all fees configured that apply to all sections. Only use a Section code if you intend to have fees of different amounts for different sections of the course, or if one section of a course has an additional fee amount.

Home » Management » School Administration » Fees Administration » Course Fees

### Course Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Course Fees.

Add Course Fee

	Course Code	Course Name	Course Section	Fee Code	Fee Text	Fee Amount	AD	WD	Acct Code	Active
				306~52	BLDG/GRND II	\$25.00	01	02	XBGM	
				340~1	CONC. IN SCI.	\$10.00	01	02	X302SC	
				332~1	CHEM II	\$20.00	01	02	X302SC	
				306~1	BLD/GRND 2 VICA	\$15.00	01		X9953	
	479	ADVANCED ART	1	479~1~1	ADV ART	\$40.00	01	03	X302A	
	227	ADVANCED PHYSICAL SCIENCE		227~1	ADV PHYS SCI	\$20.00	01	02	X302SC	
	233	ANATOMY		233~1	ANATOMY I	\$80.00	01	02	X302SC	
	237	AP ENVIRONMENTAL SCIENCE		237~1	AP ENVI SCIENCE	\$20.00	01	01	X302SC	
	171	ART II		171~1	ENC W/ ART I	\$30.00	01	03	X302A	
	172	ART III		172~1	ENC W/ ART II	\$30.00	01	03	X302A	
	408	WELDING TECHNOLOGY 2 LAB		408~59	WELDING II	\$47.00	01	02	XWELD	
	408	WELDING TECHNOLOGY 2 LAB		408~1	WELDING 2 VICA	\$15.00	01	02	WELD	
	308	WELDING TECHNOLOGY I LAB		308~58	WELDING I	\$96.00	01	02	XWELD	
	308	WELDING TECHNOLOGY I LAB		308~1	WELDING VICA	\$15.00	01	02	WELD	
	598	WORK AND FAMILY		598~1	WORK & FAMILY	\$15.00	01	03	X302HE	

Show Active Only

150 Records Displayed [Back To Top](#)

### Course Fees Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Course Code, Course Name, Course Section, Fee Code, Fee Text, Fee Amount, AD, WD, Acct Code, Active) in ascending or descending order by clicking on the column header.



– Active Course Fee Code– Can be used on new Fee Records.



– Inactive Course Fee Code – Cannot be used on new Fee Records.

### Add/Edit Course Fees

Home » Management » School Administration » Fees Administration » Course Fees

### Course Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Course Fees.

Course/Section:

Fee Description:

Fee Code:

Fee Amount:

Prorated Fee Schedule (Admission):

Prorated Fee Schedule (Withdraw):

Accounting Code:

Active:

Save Save and New Cancel

#### Add/Edit Course Fees Maintenance Screen

**Course** (required) / **Section** (optional) – Enter the Course number or Course and Section number that this fee applies to. Any number of Course Fees may be configured for a Course Section or a Course (all sections). Please note that Course Section is OPTIONAL for adding a Course Fee. If you leave the Section code field blank, this fee will apply to all sections of this course.

You may use the button to search for a specific Course or Course/Section.

**Fee Description** (required) – Enter the name or description of the Course Fee.

**Fee Code** (required) – Enter up to 8 character alphanumeric Course Fee Code. If you try to use an existing inactive Course Fee Code, you will be prompted to reactivate this inactive Course Fee Code if you wish.

**Fee Amount** (required) – Enter the Fee Amount for this Course Fee.

**Prorated Fee Schedule (Admission)** (optional) – If this fee will be adjusted and prorated because of late admission, choose the appropriate previously defined prorated fee schedule from the drop-down list.

**Prorated Fee Schedule (Withdraw)** (optional) – If this fee will be adjusted and prorated because of early withdrawal, choose the appropriate previously defined prorated fee schedule from the drop-down list.

**Accounting Code** (optional) – Choose the appropriate previously defined Accounting Code from the drop-down list.

**Active** (optional) – If checked, Course Fee Code is active and can be used on new Fee records.

## Miscellaneous Fees

**Navigation: Home – Management – School Administration – Fees Administration – Miscellaneous Fees**

Miscellaneous Fees are fees that may be applied but do not fit into any other fee type. Examples for Miscellaneous Fees could be fees for lost textbooks, damage to books or lockers, athletic fees, etc. Miscellaneous Fees are the only types of fees where the fee amount can be adjusted when the fee is applied to a student. The same Miscellaneous Fee can be assigned to the same student multiple times.

**Miscellaneous Fees Maintenance**  
From this screen, you can display, add, change and delete data pertaining to miscellaneous fees.

Add Misc Fee

	Fee Code ^	Fee Text	Fee Amount	Acct Code	Active
	1	PARKING PASS	\$25.00	FSA-PARKING	
	10	WORKBOOK	\$12.25	X302S	
	11	ART FEE	\$25.00	X302A	
	12	SCIENCE FEE	\$10.00	X302SC	
	13	HANDBOOK	\$6.00	FSA	
	14	DANCE TEAM	\$1.00	FDANCE	
	6	FINE	\$2.00	GF15E	
	7	BOOK FINE	\$2.00	GF15E	
	8	ADJUSMENT FINE	\$0.25	GF15E	
	9	VOCATIONAL FEE	\$1.00	XMSV	
	99	PY FEE	\$1.00	PY FEE	

Show Active Only

40 Records Displayed [Back To Top](#)

### Miscellaneous Fees Maintenance Screen

This page has standard add record, edit record and delete record controls.

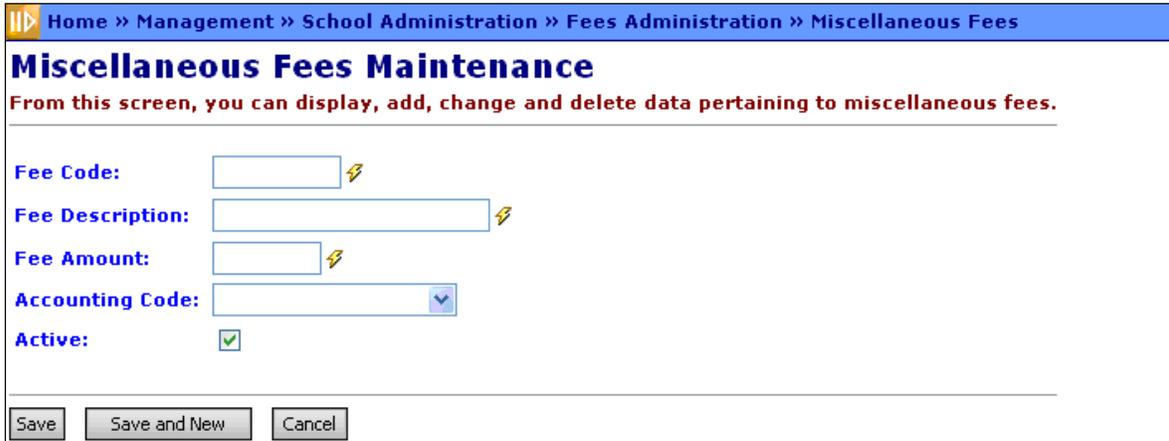
Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Fee Code, Fee Text, Fee Amount, Acct Code, Active) in ascending or descending order by clicking on the column header.

 – Active Miscellaneous Fee Code– Can be used on new Fee Records.

 – Inactive Miscellaneous Fee Code – Cannot be used on new Fee Records.

## Add/Edit Miscellaneous Fees



### Add/Edit Miscellaneous Fees Maintenance Screen

**Fee Code** (required) – Enter up to 8 character alphanumeric Miscellaneous Fee Code. If you try to use an existing inactive Miscellaneous Fee Code, you will be prompted to reactivate this inactive Miscellaneous Fee Code if you wish.

**Fee Description** (required) – Enter the name or description of the Miscellaneous Fee.

**Fee Amount** (required) – Enter the Fee Amount. This Fee Amount will be the default Fee Amount when this particular Miscellaneous fee is applied to a student – it can be adjusted for each student as necessary. For example, if the majority of students paid \$1.00 for a Parking Fee but a few paid \$2.00, you could set up the default Fee Amount as \$1.00 for the Miscellaneous Parking Fee and then change the Fee Amount to \$2.00 when applying to those specific students.

**Accounting Code** (optional) – Choose the appropriate previously defined Accounting Code from the drop-down list.

**Active** (optional) – If checked, Miscellaneous Fee Code is active and can be used on new Fee records.

## Program Fees

**Navigation: Home – Management – School Administration – Fees Administration – Program Fees**

Program Fees are generally utilized by Joint Vocational Schools (JVS) to assess fees to students enrolled in certain courses of study. Program Fees may be assessed manually or automatically by the Student Fee Assignment batch process. Program Fees can apply to all students in a specific program or be further limited by gender and/or grade. Program Fees are school specific, for each school year, and for each schedule configured for the school. A program may have any number of fees configured for it. Any student associated with a program will have all fees for the program assessed.

Fee Code ^	Fee Text	Program	Grade Year	Gender	Fee Amount	AD	WD	Acct Code	Active
auto	auto	AUTO			\$50.00				
Cosm	Cosmotology Fee	COSM	12		\$15.00				

Show Active Only

### Program Fees Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Fee Code, Fee Text, Program, Grade Year, Gender, Fee Amount, AD, WD, Acct Code, Active) in ascending or descending order by clicking on the column header.

– Active Program Fee Code– Can be used on new Fee Records.

– Inactive Program Fee Code – Cannot be used on new Fee Records.

## Add/Edit Program Fees

Home » Management » School Administration » Fees Administration » Program Fees

### Program Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Program Fees.

Fee Code:

Fee Description:

Program:

Grade Year:

Gender:

Fee Amount:

Prorated Fee Schedule: (Admission)

Prorated Fee Schedule: (Withdraw)

Accounting Code:

Active:

Save Save and New Cancel

### Add/Edit Program Fees Maintenance Screen

**Fee Code** (required) – Enter up to 8 character alphanumeric Program Fee Code. If you try to use an existing inactive Program Fee Code, you will be prompted to reactivate this inactive Program Fee Code if you wish.

**Fee Description** (required) – Enter the name or description of the Program Fee.

**Program** (required) – Choose the program from the drop-down list to which this Program Fee applies.

**Grade Year** (optional) – Choose the grade from the drop-down list to which this Program Fee applies.

**Gender** (optional) – Choose the gender from the drop-down list that this Program Fee applies to. Please Note: Gender “C” is only for community schools when they do not report an element.

**Fee Amount** (required) – Enter the Fee amount.

**Prorated Fee Schedule (Admission)** (optional) – If this fee will be adjusted and prorated because of late admission, choose the appropriate schedule from the drop-down list.

**Prorated Fee Schedule (Withdraw)** (optional) – If this fee will be adjusted and prorated because of early withdrawal, choose the appropriate previously defined prorated fee schedule from the drop-down list.

**Accounting Code** (optional) – Choose the appropriate previously defined Accounting Code from the drop-down list.

**Active** (optional) – If checked, Program Fee Code is active and can be used on new Fee records.

## Membership Fees

**Navigation: Home – Management – School Administration – Fees Administration – Membership Fees**

You can use membership fees to assign fees to a student belonging to a fixed membership group (such as an athletic team, club, etc.). You can assess membership fees manually on the **Add a Student Fee** screen. You can also set up the system to automatically assess membership fees on the **Student Fee Assignment** screen. In addition, if you have selected both the **Uses Fees** and **Has Fees Assigned** check boxes on the **Fees** tab of the **DASL Options** screen, the system assesses fees to students automatically at the time you assign them to a membership group.

Home » Management » School Administration » Fees Administration » Membership Fees

### Membership Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Membership Fees.

Add Membership Fee

	Fee Code ^	Fee Text	Membership	Grade	Gender	Fee Amount	Acct Code	Active
	 bkballb	Basketball Boys	420003 - Basketball		F	\$15.00		
	 bkballg	Basketball Girls	420003 - Basketball		F	\$20.00		

Show Active Only

### Membership Fees Maintenance Screen

This page has standard add record, edit record and delete record controls

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Fee Code, Fee Text, Membership, Grade, Gender, Fee Amount, Acct Code, Active) in ascending or descending order by clicking on the column header.



– Active Membership Fee Code – Can be used on new Fee Records.



– Inactive Membership Fee Code – Cannot be used on new Fee Records.

## Add/Edit Membership Fees

Home » Management » School Administration » Fees Administration » Membership Fees

### Membership Fees Maintenance

From this screen, you can display, add, change and delete data pertaining to Membership Fees.

Fee Code:

Fee Description:

Membership Group: - Select a Membership Group -

Membership: - Select a Membership -

Grade Year:

Gender:

Fee Amount:

Accounting Code:

Active:

Save Save and New Cancel

### Add/Edit Membership Fees Maintenance Screen

**Fee Code** (required) – Enter up to 8 character alphanumeric Program Fee Code. If you try to use an existing inactive Membership Fee Code, you will be prompted to reactivate this inactive Membership Fee Code if you wish.

**Fee Description** (required) – Enter the name or description of the Membership Fee.

**Membership Group** (required) – Choose the Membership Group from the drop-down list that this Membership Fee applies to. Any number of fees may be configured for a Membership group. Any student associated with a membership will have all fees for the membership assessed.

**Membership** (required) – Choose the Membership from the drop-down list to which this Membership Fee applies.

**Grade Year** (optional) – Choose the grade from the drop-down list to which this Membership Fee applies.

**Gender** (optional) – Choose the gender from the drop-down list that this Membership Fee applies to. Please Note: Gender “C” is only for community schools when they do not report an element.

**Fee Amount** (required) – Enter the Fee amount.

**Accounting Code** (optional) – Choose the appropriate previously defined Accounting Code from the drop-down list.

**Active** (optional) – If checked, Membership Fee Code is active and can be used on new Fee records.

---

## Fee Batch Processes

### Clear Fees

#### Navigation: Home – Management – Ad-Hoc Updates – Clear Fees

This batch process allows you to zero all fees with a credit balance. The process will apply an unrefunded payment (type “U”) to fees with a credit balance. An additional option will allow the user to zero all outstanding fees. This will be performed at the end of the school year in a building that does not wish to carry outstanding fee balances forward for the next school year. Fee payment records with a pay status of “A” (Amnesty) will be posted. This batch process may only be used by schools using the Fees Accounting Application.

**See *ProgressBook StudentInformation Ad-Hoc Updates Guide* for detailed information about the Clear Fees Batch Process.**

### Student Fee Assignment

#### Navigation: Home – Management – Ad-Hoc Updates – Student Fee Assignment

This batch process generates fee entries for students based on defined general fees; course fees based on each student’s course schedule; membership fees for students belonging to specific membership groups; and program fees for students enrolled in specific programs. The fee types to be assigned can be selected in any combination. Fees will be assigned only to students who are enrolled in the working school for the current school year as displayed in the context year. This process can be run only if the Finalize School Year process has been completed. This can be determined by checking the appropriate flag on the school record.

## Select Students By: Search Criteria

The screenshot shows the 'Student Fee Assignment' interface. At the top, there is a breadcrumb trail: Home » Management » Ad-Hoc Updates » Student Fee Assignment. Below this is the title 'Student Fee Assignment' and a subtitle 'Create and update student fee assignments in bulk'. There are five tabs: 'Students', 'Assignments', 'Options', 'Confirmation', and 'Results'. Under the 'Students' tab, there are two radio buttons: 'Search Criteria' (selected) and 'Ad-Hoc Membership'. Below these are four sections, each with a list of options and a corresponding empty box for selection:

- Grade Level:** PS - PS, KG - KG, 01 - 01, 02 - 02, 03 - 03
- Homerroom:** 1JN - NUMBERS (Full Year Term), 2LO - OVERTON (Full Year Term), 3PP - PRUIT (Full Year Term), 4CS - SAVAGE (Full Year Term), KMM - MANLEY (Full Year Term)
- Student Status:** A - ACTIVE RES, D - DELETED, I - INACTIVE, N - NON-RES, O - OTH NONRES
- Gender:** C, F, M

At the bottom left is a 'Cancel' button and at the bottom right is a 'Next >' button.

### Student Fee Assignment Screen – Search by Criteria

**Select Students By** (optional) – Choose selection by Search Criteria or selection by Ad-Hoc Membership.

**Grade Level** (optional) – If no Grade Levels are selected, the assignment will select all Grades Levels. You can also filter by selecting specific Grade Levels for the assignment.

**Homerroom** (optional) – If no Homerrooms are selected, the assignment will select all Homerrooms. You can also filter by selecting specific Homerrooms for the assignment.

**Student Status** (optional) – If no Student Statuses are selected, the assignment will select all Student Statuses. You can also filter by selecting specific Student Status for your assignment.

**Gender** (optional) – If no Genders are selected, the assignment will select all Genders. You can also filter by selecting specific Genders for your assignment.

## Select Students By: Ad-Hoc Membership

The screenshot shows the 'Student Fee Assignment' screen with the 'Students' tab selected. The breadcrumb trail is 'Home > Management > Ad-Hoc Updates > Student Fee Assignment'. The title is 'Student Fee Assignment' with the subtitle 'Create and update student fee assignments in bulk'. Below the tabs, there are two radio buttons for 'Select Students By:': 'Search Criteria' (unselected) and 'Ad-Hoc Membership' (selected). Under 'Ad-Hoc Membership', there is a dropdown menu and a lightning bolt icon. At the bottom, there are 'Cancel' and 'Next >' buttons.

Student Fee Assignment Screen - Search by Ad-Hoc Membership

**Ad-Hoc Membership** (required) – Select from the pre-defined Ad-Hoc Memberships listed.

 – Find/Build an Ad-Hoc Membership. For more detail on Ad-Hoc Memberships, please refer to *ProgressBook StudentInformation Getting Started Guide*.

**Cancel** – Cancel out of Student Fee Assignment and return to Ad-Hoc Updates menu.

**Next>** – Process student selection on Students tab and proceed to Assignments tab.

The screenshot shows the 'Student Fee Assignment' screen with the 'Assignments' tab selected. The breadcrumb trail is 'StudentInformation > Management > Ad-Hoc Updates > Student Fee Assignment'. The title is 'Student Fee Assignment' with the subtitle 'Create and update student fee assignments in bulk'. Below the tabs, there is a 'Fee Date' field with a calendar icon and a lightning bolt icon, showing '7/30/2014'. Under 'Fee Types to Assign:', there are five checkboxes: 'General Fees', 'Course Fees (schedule result must be finalized)', 'Program Fees', 'Membership Fees', and 'Miscellaneous Fees'. Under 'Existing Fee Assignments:', there are six radio buttons: 'Skip fee assignment if assignment already exists' (selected), 'Replace fee assignments if fee definition has changed (non-Misc fees)', 'Create adjustment fees/waivers if fee definition has changed (non-Misc fees)', 'Ignore existing assignments, possibly creating duplicate assignments', 'Reset Fees - Remove fee assignments and don't create new assignments', 'Clear Fee Balances - Zero fee balances with credits/debits', and 'Apply All Waviers'. At the bottom, there are 'Cancel', '< Back', and 'Next >' buttons.

Assignments Tab on the Student Fee Assignment Screen

**Fee Date** (required) – Enter the date that the fee will be assigned to this fee. This field will default to today’s date.

**Fee Types to Assign** (optional) – Choose one or more fee types (General, Course, Program, Membership, Miscellaneous) to assign to the selected students. Please note that Course Fees can only be assigned after the schedule result set is finalized.

**Existing Fee Assignments** (required) – Choose one from the following:

- **Skip fee assignment if assignment already exists** - If a student was already assigned the fee they will not get a duplicate assignment of this fee. The fees are matched based on Fee ID plus the amount.
- **Replace fee assignments if fee definition has changed (non-Misc Fees)** - If you changed a fee amount after fees were already assigned you could run the bulk assignment with this option checked. As a result, the new fee amount would be charged, replacing the old amount, provided the student has not made any payments or had any waivers applied to the fee definition that changed. This does not apply to Miscellaneous Fees. The fees are matched based on just the Fee ID, so any assignment of that fee, for whatever amount, counts as a duplicate.
- **Create adjustment fees/waivers if fee definition has changed (non-Misc Fees)** – If a specific fee has already been assigned to the student and subsequently, the fee amount has changed, this option will create an adjustment or waiver fee for the difference between the old and new fee. It will not adjust the existing fee amount. This does not apply to Miscellaneous Fees. The fees are matched based on just the Fee ID, so any assignment of that fee, for whatever reason, counts as a duplicate.

**Example 1:** The General Fee 11 increased from \$35 to \$49. The existing General Fee 11 for \$35 will stay as is and an adjustment fee for \$14 will be created.

The following fee assignments were made

Student	Grade	Status	Fee Type	Fee Code	Fee Amount	Details
EYE, MAGNUM P.	11	A	General Fee	11	\$49.00	Adjustment fee created for \$14.00. The existing fee total was \$35.00, but the defined fee has an amount of \$49.00.

**Example 2:** The General Fee Tech decreased from \$5 to \$3. The existing General Fee Tech for \$5 will stay as is and an automatic adjustment waiver for \$3 will be created.

The following fee assignments were made

Student	Grade	Status	Fee Type	Fee Code	Fee Amount	Details
EYE, MAGNUM P.	11	A	General Fee	Tech	\$3.00	Adjustment waiver made for \$2.00. The existing fee total was \$5.00, but the defined fee has an amount of \$3.00.

- **Ignore existing assignments, possibly creating duplicate assignments** - USE THIS FEATURE WITH CAUTION! If students were already assigned fees and you choose to run the bulk assignment of fees with this option checked then the student fees will most likely double as a result.

- **Reset Fees – Remove fee assignments and do not create new assignments** - Use this option to delete all fees in order to start over again with fee assignments.

**Important: If the fee has been paid or a waiver has been applied, the fee cannot be deleted.**

- **Clear Fee Balances – Zero fee balances with credits/debits** - Provides the same functionality as the Home – Management – Ad-Hoc – Clear Fees feature. The fees will still remain on the student's fee page (whereas Reset Fees deletes them) but will show the student owes zero.
- **Apply All Waivers** – Applies all fee waivers (except for miscellaneous fees), including retroactively waiving fees for students with free or reduced lunch status

**Cancel** – Cancel out of Student Fee Assignment and return to Ad-Hoc Updates menu.

**<Back** – Do not process Assignments tab and go back to Students tab.

**Next>** – Process Assignments tab and proceed to Options tab.

**Options Tab on the Student Fee Assignment Screen**

The Options tab displays differently depending on which “Fee Types to Assign” were selected.

**If General Fees were selected:** if no options are selected the assignment will default to General Fees.

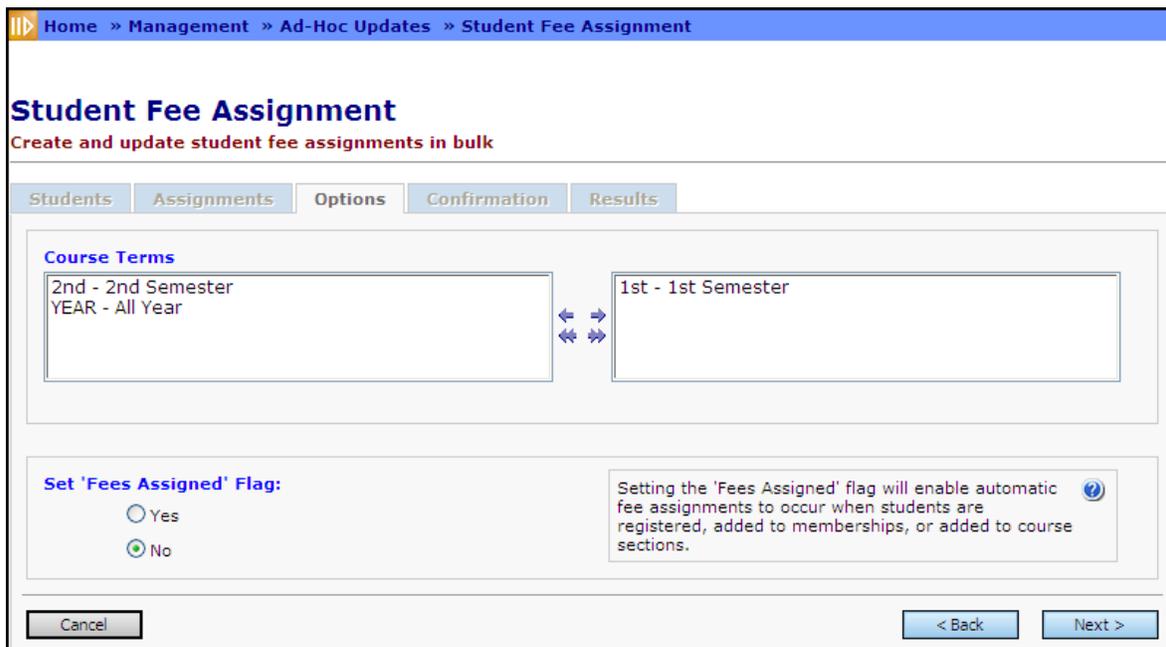


The screenshot shows the 'Student Fee Assignment' screen with the 'Options' tab selected. The breadcrumb trail is 'Home » Management » Ad-Hoc Updates » Student Fee Assignment'. The title is 'Student Fee Assignment' with the subtitle 'Create and update student fee assignments in bulk'. Below the tabs, there is a section titled 'Set 'Fees Assigned' Flag:' with two radio buttons: 'Yes' (unselected) and 'No' (selected). To the right, a help box explains: 'Setting the 'Fees Assigned' flag will enable automatic fee assignments to occur when students are registered, added to memberships, or added to course sections.' At the bottom, there are 'Cancel', '< Back', and 'Next >' buttons.

Options Tab on the Student Fee Assignment Screen – General Fees Selected

**If Course Fees were selected:**

**Course Terms** (optional) – If no Course Terms are selected, the assignment will select Courses in all Course Terms. You can also filter by selecting specific Course Terms for the assignment.



The screenshot shows the 'Student Fee Assignment' screen with the 'Options' tab selected. The breadcrumb trail is 'Home » Management » Ad-Hoc Updates » Student Fee Assignment'. The title is 'Student Fee Assignment' with the subtitle 'Create and update student fee assignments in bulk'. Below the tabs, there is a section titled 'Course Terms' with two text boxes. The left box contains '2nd - 2nd Semester' and 'YEAR - All Year'. The right box contains '1st - 1st Semester'. Between the boxes are four arrows: two pointing left and two pointing right. Below this, there is a section titled 'Set 'Fees Assigned' Flag:' with two radio buttons: 'Yes' (unselected) and 'No' (selected). To the right, a help box explains: 'Setting the 'Fees Assigned' flag will enable automatic fee assignments to occur when students are registered, added to memberships, or added to course sections.' At the bottom, there are 'Cancel', '< Back', and 'Next >' buttons.

Options Tab on the Student Fee Assignment Screen - Course Fees Selected

**If Program Fees were selected:**

**Programs** (optional) – If no Programs are selected, the assignment will select all Programs.

Home » Management » Ad-Hoc Updates » Student Fee Assignment

## Student Fee Assignment

Create and update student fee assignments in bulk

Students | **Assignments** | Options | Confirmation | Results

**Set 'Fees Assigned' Flag:**

Yes

No

Setting the 'Fees Assigned' flag will enable automatic fee assignments to occur when students are registered, added to memberships, or added to course sections.

Cancel < Back Next >

Options Tab on the Student Fee Assignment Screen – Program Fees Selected

**If Membership Fees were selected:**

**Memberships** (optional) – If no Memberships are selected, the assignment will select all Memberships. You can also filter by selecting specific Memberships for the assignment.

Home » Management » Ad-Hoc Updates » Student Fee Assignment

## Student Fee Assignment

Create and update student fee assignments in bulk

Students | **Assignments** | Options | Confirmation | Results

**Memberships**

Academic Intracurricular Descriptions (Vocational - B) ↔

Academic Intracurricular Descriptions (Vocational - C) ↔

Academic Intracurricular Descriptions (Vocational - D) ↔

Academic Intracurricular Descriptions (Vocational - F) ↔

Academic Intracurricular Descriptions (Vocational - F) ↔

**Set 'Fees Assigned' Flag:**

Yes

No

Setting the 'Fees Assigned' flag will enable automatic fee assignments to occur when students are registered, added to memberships, or added to course sections.

Cancel < Back Next >

Options Tab on the Student Fee Assignment Screen - Membership Fees Selected

**If Miscellaneous Fees were selected:**

**Miscellaneous Fee** (required) – Select the type of the Miscellaneous Fee to be assigned to the selected students.

Home » Management » Ad-Hoc Updates » Student Fee Assignment

## Student Fee Assignment

Create and update student fee assignments in bulk

Students Assignments Options Confirmation Results

Miscellaneous Fee:  ⚡

Miscellaneous Fee Amount:  ⚡

Set 'Fees Assigned' Flag:

Yes

No

Setting the 'Fees Assigned' flag will enable automatic fee assignments to occur when students are registered, added to memberships, or added to course sections. ⓘ

Cancel < Back Next >

### Options Tab on the Student Fee Assignment Screen - Miscellaneous Fee Selected

**Miscellaneous Fee Amount** (required) – Enter the amount of the Miscellaneous Fee to be assigned to the selected students.

**Set “Fees Assigned” Flag** (required) – Yes or No; Setting the Fees Assigned flag will enable automatic fee assignments to occur when students are registered, added to memberships, or added to course sections.

**Cancel** – Cancel out of Student Fee Assignment and return to Ad-Hoc Updates menu.

**<Back** – Do not process Options tab and go back to Assignments tab.

**Next>** – Process Options tab and proceed to Confirmation tab.

Home » Management » Ad-Hoc Updates » Student Fee Assignment

## Student Fee Assignment

Create and update student fee assignments in bulk

Students Assignments Options Confirmation Results

Fee Date: 7/21/2006

Included General Fees: 4

Included Course Fees: 1

Included Miscellaneous Fees: 5

Included Program Fees: 0

Included Membership Fees: 0

Students to be Processed: 1

Existing Fee Assignments: 8

Existing Fee Handling: Replace fee assignments if fee definition has changed

Cancel < Back Finish

### Confirmation Tab on the Student Fee Assignment Screen

**Fee Date** – The date that the fee will be assigned to this fee.

**Included General Fees** – Number of General Fees that will be assigned to students.

**Included Course Fees** – Number of Course Fees that will be assigned to students.

**Included Miscellaneous Fees** – Number of Miscellaneous Fees that will be assigned to students.

**Included Membership Fees** – Number of Membership Fees that will be assigned to students.

**Students to be Processed** – Number of students that will be assigned fees.

**Existing Fee Assignments** – Number of existing fee assignments on students.

**Existing Fee Handling** – Description of how existing fees will be handled with this new student fee assignment.

**Cancel** – Cancel out of Student Fee Assignment and return to Ad-Hoc Updates menu.

**<Back** – Do not process Student Fee Assignment and go back to Options tab.

**Finish** – Process Student Fee Assignment and assign fees to students to selected students.

The process will determine the appropriate fees for each student using the student record, the student's course schedule, the student's program, and the student's memberships in conjunction with all defined fees for the current school year. If the student already has a particular fee assigned, the process will not assess duplicate fees to students. If the definition for a particular fee (identified by its fee ID) has changed, those changes are not written to the student's fee records; the original values recorded in the fee record will remain.

The process will examine the student record for students who are eligible for "free or reduced workbooks". These students are eligible to have all fees waived for their full amounts, or are eligible to have all fees waived at a prorated amount. If a student is eligible to have all fees waived for the full amount, the processes assigning fees will also assign waiver payments (type "W") for each fee assessed in the full amount of the fee. If a student is eligible to have all fees waived for a prorated amount, the processes assigning fees will look up the prorated waiver ratio (this is the same value for all students eligible for reduced fees within a given district) and calculate the waiver amount for each fee and assign a waiver payment (type "W") for each fee assessed.

The process will not prorate any fees. All applicable fees will be assigned for the full amount defined at the time the process is run.

Home » Management » Ad-Hoc Updates » Student Fee Assignment				
Student Fee Assignment				
Create and update student fee assignments in bulk				
Students	Assignments	Options	Confirmation	Results
The following assignments could not be made				
Student	Fee Type	Fee Code	Fee Amount	Reason for Failure
BREWER, SEAN CONORY	General Fee	02	\$38.00	The student already has this fee assigned
BREWER, SEAN CONORY	Course Fee	ART~1	\$30.00	The student already has this fee assigned

### Student Fee Assignment Results

The user will be presented with fee assignments that could NOT be made.

**Student** – Name of student who could not be assigned fee.

**Fee Type** – Type of fee that could not be assigned.

**Fee Code** – Code of fee that could not be assigned.

**Fee Amount** – Amount of fee that could not be assigned.

**Reason for Failure** – Description of fee assignment failure.

**26 Records Displayed**– The total number of assignments that could NOT be made.

The following fee assignments were made						
Student	Grade	Status	Fee Type	Fee Code	Fee Amount	Details
CONTRARY, JASON WILLIAM	09	A			\$4.32	New student fee created
Contrary, Jesse	10	A			\$4.32	New student fee created
Contrary, Jesse	10	A	General Fee	99	\$5.00	New student fee created
Contrary, Jesse	10	A	General Fee	98	\$3.00	New student fee created

The user will also be presented with fee assignments that were made and successfully assigned to the student.

**Student** – Name of student with assigned fee.

**Grade** – Grade of student with assigned fee.

**Status** – Status of student with assigned fee.

**Fee Type** – Type of assigned fee.

**Fee Code** – Code of assigned fee.

**Fee Amount** – Amount of assigned fee.

**Details** – Description of fee assignment.

**26 Records Displayed** – The total number of assignments that were successful.

**Start Over** – Return to the Students tab and start another Student Fee Assignment selection.

---

## Student Fees

### Students Needing Adjustment

#### Navigation: Home – SIS – Fees – Students Needing Adjustment

Students Needing Adjustment is an interactive fees screen where all students in the building with fees marked as needing adjustment are listed. Typically, fees needing adjustment are fees with a credit balance and require attention and possible adjustment. Payments on these fees may be refunded, zeroed, or transferred to other fees.

Home >> SIS >> Fees >> Students Needing Adjustment			
<b>Students Needing Adjustment</b>			
From this screen, you can view students overpaid fee's.			
Total Fees: \$25.00			
Student ^	Grade	Homeroom	Fees Flagged
Smith, Sally (Sally)			\$25.00
<input checked="" type="checkbox"/> Include Prior Years			

**Students Needing Adjustment Screen**

**Sorting** – You may sort by any column (Student, Grade, Homeroom, Fees Flagged) in ascending or descending order by clicking on the column header.

**Student** – Name of student with open fees. Click on the Student and you will be taken to the Student Open Fees screen for this student. See [“Student Open Fees”](#) for more detail on Student Open Fees.

**Grade** – Grade of student with open fees.

**Homeroom** – Homeroom of student with open fees.

**Fees Flagged** – Total amount of open unpaid fees assigned to this student.

**Total Fees: \$25.00** – This page displays the total amount of outstanding fees needing adjustment.

**Include Prior Years** – When this box is checked, all outstanding fees needing adjustment will be displayed. Uncheck the box to display only current year fees needing adjustment.

# Outstanding Fees

## Navigation: Home – SIS – Fees – Outstanding Fees

Outstanding Fees is an interactive fees screen where all students in the building with outstanding fees (credit or debit) are listed.

The screenshot shows the 'Outstanding Fees' web interface. At the top, there is a breadcrumb trail: Home » SIS » Fees » Outstanding Fees. Below this is the title 'Outstanding Fees' and a sub-header: 'From this page, you can view students' outstanding fees.' The main area contains several filter sections:

- Membership Group:** A dropdown menu.
- Membership:** A dropdown menu with a checkbox for 'Public and Private'.
- Students Owing Fees:** A checked checkbox and a text input for 'Minimum Amount Owed'.
- Course Terms:** A list with radio buttons for '1st Semester', '2nd Semester', and 'All Year'.
- Accounting Code:** A list of codes with a search icon and arrows: 001-1720-0000-000000-001 WKBK, 001-1740-0000-020000-001 ART, 001-1740-0000-036000-001 BUS, 001-1740-0000-031700-001 COMP.
- General Fee Code:** A list with radio buttons: 99 - class fee, 07 - STUDENT PLANNER.
- Membership Fee Code:** A list with radio buttons: sport - sports.
- Program Fee Code:** A list with radio buttons: prog - program fee.
- Misc Fee Code:** A list with radio buttons: 901 - GRADE 9 CLASS FEE, 10 - PARKING PERMIT, 11 - PARKING PERMIT, 12 - PARKING PERMIT.
- Course:** A list with radio buttons: 011 - ART I, 012 - PAINTING, 013 - DRAWING, 016 - ART II.
- Course Section:** A list with radio buttons: 011 - ART I (Section: 1), 011 - ART I (Section: 3), 011 - ART I (Section: 9), 012 - PAINTING (Section: 41).
- Students With Credits:** A checkbox.
- Minimum Credit Amount:** A text input.

On the right side, there is a 'Fee Options' section with three checked checkboxes: 'Show Fees from Past School Years:', 'Show Fees from Future School Years:', and 'Show Fees from All Buildings:'. A 'Search' button is located at the bottom right of the form area.

### Outstanding Fees Screen

On this page, you can set several criteria to filter the list of students. Filter criteria only apply to the year in context.

**Membership Group / Membership** – List students with a particular Membership

**Public and Private** – If checked, will include both public and private Memberships in the drop-down list. If not checked, will include only user's private memberships.

**Students Owing Fees** – When this box is checked, you can also enter a **Minimum Amount Owed** for students to appear on the list.

**Course Terms** – If no Course Terms are selected, the outstanding fees list will select fees in all Course Terms. You can also filter by selecting specific Course Terms for the outstanding fees list.

**Accounting Code** – If no Accounting Codes are selected, the outstanding fees list will select all Accounting Codes. You can also filter by selecting specific Accounting Codes for your list.

**General Fee Code** – If no General Fee Codes are selected, the outstanding fees list will select all General Fees. You can also filter by selecting specific General Fees for the outstanding fees list.

**Membership Fee Code** – If no Membership Fee Codes are selected, the outstanding fees list will select all Membership Fees. You can also filter by selecting specific Membership Fees for the outstanding fees list.

**Program Fee Code** – If no Program Fee Codes are selected, the outstanding fees list will select all Program Fees. You can also filter by selecting specific Program Fees for the outstanding fees list.

**Misc Fee Code** – If no Miscellaneous Fee Codes are selected, the outstanding fees list will select all Miscellaneous Fees. You can also filter by selecting specific Miscellaneous Fees for the outstanding fees list.

**Course** – If no Courses are selected, the outstanding fees list will select all Courses. You can also filter by selecting specific Course for the outstanding fees list.

**Course Section** – If no Course Sections are selected, the outstanding fees list will select all Course Sections. You can also filter by selecting specific Course Sections for the outstanding fees list.

**Students With Credits** – When this box is checked, you can also enter a **Minimum Credit Amount** for students to appear on the list.

If either of the two check boxes is unchecked (Students Owing Fees or Students With Credits), you will not be able to enter a minimum value for that criterion.

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

***Note:** The Fee Options control whether fees from past years, future years, and other buildings will display. The defaults are set at the school level, and previously applied to the screen without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, it is possible for users to edit these values each time they access the screen.*

**Search** – Display students that match the selected criteria.

Clicking on a student's name will take you to that student's Student Open Fees page (**Home – SIS – Student – Fees**).

**Total Fees Owed: \$203.01** – Displays the total fees owed by all students matching the selected criteria.

Total Fees Owed: \$203.01					
Student ^	Status	Grade	Homeroom	Fees Flagged	
ALEXANDRA	A - ACTIVE RES	11	IN14	\$10.00	
KEL	A - ACTIVE RES	12	IN19	\$12.63	
CHELSEY	A - ACTIVE RES	11	IN14	\$7.63	
RO	N - NON-RES	12	IN19	\$5.00	
JOSHUA	A - ACTIVE RES	09	IN02	\$5.00	
JEREMY	A - ACTIVE RES	12	IN20	\$30.00	
MORGAN	A - ACTIVE RES	11	IN15	\$15.25	
CODY	A - ACTIVE RES	11	IN15	\$37.50	
MAKENZIE	A - ACTIVE RES	10	IN10	\$10.00	
DALTON	A - ACTIVE RES	12	IN22	\$35.00	
RILEY	A - ACTIVE RES	11	IN16	\$5.00	
ISAAC	A - ACTIVE RES	11	IN17	\$10.00	
TORI	N - NON-RES	11	IN17	\$10.00	
DYLAN	N - NON-RES	12	IN23	(\$10.00)	
JACOB	A - ACTIVE RES	10	IN13	\$10.00	

Outstanding Fees by Student

## Student Open Fees

### Navigation: Home – SIS – Student – Fees

This screen is the main entry to the Fees Accounting Application for student fees. The screen will display all fees for the selected student (from the context area) that are either unpaid or have a credit balance.

Home » SIS » Student » Fees																																																						
Student Open Fees										Advanced Search   Feedback   Mgmt																																												
This page lists all of the student's fees that have a balance or credit due										I want to...																																												
<table border="0"> <tr> <td><b>Total Fees Assessed</b> \$241.00</td> <td colspan="10"></td> </tr> <tr> <td>P - Payment \$196.50</td> <td colspan="10"></td> </tr> <tr> <td>W - Waiver \$3.00</td> <td colspan="10"></td> </tr> <tr> <td><b>Overall Balance \$41.50</b></td> <td colspan="10"></td> </tr> </table>											<b>Total Fees Assessed</b> \$241.00											P - Payment \$196.50											W - Waiver \$3.00											<b>Overall Balance \$41.50</b>										
<b>Total Fees Assessed</b> \$241.00																																																						
P - Payment \$196.50																																																						
W - Waiver \$3.00																																																						
<b>Overall Balance \$41.50</b>																																																						
<table border="0"> <tr> <td colspan="11"><b>Fee Options</b></td> </tr> <tr> <td>Show Fees from Past School Years:</td> <td colspan="10"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Show Fees from Future School Years:</td> <td colspan="10"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Show Fees from All Buildings:</td> <td colspan="10"><input checked="" type="checkbox"/></td> </tr> </table>											<b>Fee Options</b>											Show Fees from Past School Years:	<input checked="" type="checkbox"/>										Show Fees from Future School Years:	<input checked="" type="checkbox"/>										Show Fees from All Buildings:	<input checked="" type="checkbox"/>									
<b>Fee Options</b>																																																						
Show Fees from Past School Years:	<input checked="" type="checkbox"/>																																																					
Show Fees from Future School Years:	<input checked="" type="checkbox"/>																																																					
Show Fees from All Buildings:	<input checked="" type="checkbox"/>																																																					
School Year	Grade Level	Fee Type	Fee Code	Date	Course	Section	Description	Amount Assessed	Amount Paid	Amount Owed	School Code																																											
2010	12	Course Fee	122~2	Sep 14, 2010	ENGLISH III (GEN)		WB-VOC WORKSHOP	\$9.50	\$0.00	\$9.50																																												
2010	12	Course Fee	122~1	Sep 14, 2010	ENGLISH III (GEN)		WB-WRITE FOR COLLEGE	\$24.00	\$0.00	\$24.00																																												
2010	12	Course Fee	124~1	Sep 14, 2010	ENGLISH IV (GENERAL)		WB-JOB HUNTING HANDBOOK	\$3.00	\$0.00	\$3.00																																												
2010	12	Course Fee	110~5	Sep 07, 2010	HOME MAINTENANCE		F-HOME MAINTENANCE	\$5.00	\$0.00	\$5.00																																												
<b>Total</b>								<b>\$41.50</b>	<b>\$0.00</b>	<b>\$41.50</b>																																												

Student Open Fees Screen

**Sorting** – You may sort by any column (School Year, Grade Level, Fee Type, Fee Code, Date, Course, Section, Description, Amount Assessed, Amount Paid, Amount Owed, School Code) in ascending or descending order by clicking on the column header.

**I want to...** – This drop-down menu will allow you to perform fee maintenance on this student's open fees. Options include "Add Fees," "Apply a Payment," "Issue a Refund," "Transfer a Payment," "Apply a Waiver," "Issue a Misc Credit" and "View Fee Details."

**Total Fees Assessed** – The total of all fees originally assessed for this student.

**D - Drop** – The total of all drop payments for this student.

**P – Payment** – The total of all fee payments for this student.

**W – Waiver** – The total of all waivers for this student.

**Overall Balance** – The overall fee balance for this student using the calculation  
Overall Balance = Total Fees Assessed – (Drops + Payments + Waivers).

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

***Note:** The Fee Options control whether fees from past years, future years, and other buildings will display. The defaults are set at the school level, and previously applied to the screen without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, it is possible for users to edit these values each time they access the screen.*

**Fee Type** – The specific Fee Type – could be General Fee, Course Fee, Miscellaneous Fee, Program Fee, or Membership Fee.

***Note:** Fees assessed at a school other than the current school will be displayed with a notifying icon in the Fee Type. Hovering the mouse pointer over this icon displays a pop-up title window that will show the name of the school at which the fee was assessed. If the student has outstanding fees that were assessed by a school other than the current school, a check box will be displayed below the Fees grid allowing the user to hide fees assessed at other schools. Selecting the check box will update the grid with only the fees assessed by the current school. By default, the check box is deselected.*

**School Year** – The School Year in which the fee was assigned.

**Grade Level** – The Grade Level of the student when the fee was assigned.

**Fee Code** – The Fee Code which is dependent up on the Fee Type.

**Date** – The Date that the fee was assigned.

**Course** – For Course Fees only, the Course Number assigned to this fee.

**Section** – For Course Fees only, the Course Section Number assigned to this fee.

**Description** – The description of this fee specific to the Fee Code.

**Amount Assessed** – The amount assessed for this specific fee.

**Amount Paid** – The amount paid on this specific fee.

**Amount Owed** – The amount owed on this specific fee on this date.

**School Code** – The School Code where the fee was incurred.

**Show Fees for Current School Only** – If checked will show Open Fees for the current school year only; if unchecked will show all Open Fees.

## Add Fees

### Navigation: Home – SIS – Student – Fees

Select “I want to....” Add Fees from the Student Open Fees screen or Student Fee Details screen.

This screen allows a user to manually add a new fee to a student’s record. The user may manually assign general fees, course fees, miscellaneous fees, program fees, or membership fees.

<b>DASL</b>	<a href="#">Banana, Hannah</a>	<b>ID:</b> 48652258	<b>Counselor:</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2005-2006	<b>Gender:</b> F	<b>Homeroom:</b>
	<b>Calendar:</b> 1	<b>Grade:</b> 11	<b>Status:</b> A  

Home » SIS » Student » Fees » Add Fees

### Add a Student Fee

Select the type of fee and fee to add.

**Fee Type:** - Select a Fee Type - 

**Fee:** -- Select a Fee -- 

**Fee Amount:** 0.00

**Fee Date:** 7/21/2006 

#### Add a Student Fee Screen

**Fee Type** (required) – Select a Fee Type from the drop-down list – could be General Fee, Course Fee, Miscellaneous Fee, Program Fee, or Membership Fee.

**Fee** (required) – Select a previously defined Fee (specific to the Fee Type selected) from the drop-down list.

**Note:** When adding a Miscellaneous Fee, once the Fee is chosen, a Misc Fee Description field displays allowing the user to enter a description (free form text) for the Miscellaneous Fee.

**Fee Amount** (required) – The Fee Amount will default from the previously defined Fee Maintenance table. For Miscellaneous Fees, you can change the Fee Amount if needed. General Fees, Course Fees, Membership Fees, and Program Fees may only be assessed for the configured amount of the fee. The fee amount for the

selected fee of these types will be displayed as a label and may not be changed. The Fee amount cannot be negative.

**Fee Date** (optional) – Enter the date the fee was assigned.

**Submit** – Add the Student Fee and return to Student Open Fees.

**Cancel** – Do not add the Student Fee.

## Apply Payment

### Navigation: Home – SIS – Student – Fees

Select “I want to....” Apply a Payment from the Student Open Fees screen or Student Fee Details screen.

This Apply a Student Payment screen allows a user to post a full or partial payment against the student’s unpaid fees.

Home » SIS » Student » Fees » Apply Payment

### Apply a Student Payment

Enter the total payment amount and apply the payment to fees

Total Payment Amount:   Press GO to allocate payment

Payment Type:

Payment Date:

Reference Description:

Fee Type	Fee Code	Date	Course	Section	Description	Amount	
Course Fee	122~1	Sep 14, 2010	ENGLISH III (GEN)		WB-WRITE FOR COLLEGE	\$24.00	<input type="text" value="24.00"/>
Course Fee	124~1	Sep 14, 2010	ENGLISH IV (GENERAL)		WB-JOB HUNTING HANDBOOK	\$3.00	<input type="text" value="3.00"/>
General Fee	99	Sep 14, 2010			class fee	\$10.00	<input type="text" value="10.00"/>

Payment Amount Remaining:

Show Receipt

### Apply a Student Payment Screen

**Total Payment Amount** (required) – Enter the amount of the full or partial payment. Will default to the total fee amount owed – the user can enter any amount including a partial payment. The application will compare the payment amount entered in the total payment amount textbox at the top to the total amount of the outstanding fees at screen load and any time the user changes the amount in the textbox. If the amount is the same (full payment), the textboxes in the fee table will be disabled. If the amount is less (partial payment), the textboxes in the fee table will be enabled and the user will enter the amount of the payment to be applied to each fee. Overpayments can be entered, but the overpayment value must be fully allocated to the fees. The Payment Amount Remaining value must be zero before the payment can be made.

**Payment Type** (optional) – Choose a Payment Type. Options are: Blank, Cash, Check, Credit, Online Payment, Transfer Payment, Miscellaneous and Waiver.

**Payment Date** (optional) – Enter the date the fee is paid.

**Reference Description** (optional) – Enter a description of this payment.

**Fee Type** – The specific Fee Type – could be General Fee, Course Fee, Miscellaneous Fee, Program Fee, or Membership Fee.

***Note:** Fees assessed at a school other than the current school will be displayed with a notifying icon in the Fee Type. Hovering the mouse pointer over this icon displays a pop-up title window that will show the name of the school at which the fee was assessed. If the student has outstanding fees that were assessed by a school other than the current school, a check box will be displayed below the Fees grid allowing the user to hide fees assessed at other schools. Selecting the check box will update the grid with only the fees assessed by the current school. By default, the check box state will match the state of the same check box on the Student Open Fees screen if that screen directly preceded the Student Open Fees – Apply Payment screen.*

**Fee Code** – The Fee Code which is dependent upon the Fee Type.

**Date** – The Date that the fee was assigned.

**Course** – For Course Fees only, the Course Number assigned to this fee.

**Section** – For Course Fees only, the Course Section Number assigned to this fee.

**Description** – The description of this fee specific to the Fee Code. This reference description is applied to each student payment record.

**Amount** – The amount of this specific fee incurred on this date.

– Enter the amount of the payment you are making on this specific fee. This fee payment amount only becomes active if the Total Payment amount is changed to an amount less than the total fee amount owed (partial payment).

**Payment Amount Remaining** – Payment Amount Remaining will automatically be calculated as you enter in payment amounts for specific fees.

**Make Payments** – Apply the payments entered to the student fee record. A standard payment (type “P”) will be used for each student payment record. After processing, you will return to the Apply Payments screen.

When the user selects the Make Payments button, if the user has allocated payments manually (partial payment) the application will total the amounts manually allocated by the user. If the total amount allocated differs from the amount of total payment amount entered at the top of the page the application will notify the user that the total amount allocated to the individual fees does not match the total payment amount entered, and require the user to correct this before continuing. If you wish to allocate a partial payment, you must allocate the entire amount of the partial payment.

**Cancel** – Do not apply the Student Payment.

**Show Receipt** – If checked, will display the Student Fee Details screen when the Make Payments button is clicked. The Student Fee Details screen will show payments made and the open fee balance. If not checked, the payment will be made and the Student Open Fees screen will be displayed.

Home » SIS » Student » Fees » View Fee Details

### Student Fee Details

I want to... ▼

**View/Delete fees and fee activity for the student**

Select a School Year and/or Fee Status to filter the fees listed. Optionally filter results by Payment Date.

School Year Enrolled: -- All --    Fee Status: -- All --    Filter By Payment Date: 5/16/2011 Filter

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

<b>Total Balance:</b>	<b>(\$5.00)</b>
Total Assessed:	\$346.50
Total Waived:	\$18.00
Total Dropped:	\$0.00
Total Paid:	\$333.50

Display Active fees:

**2010**

School	Student Grade Level	Code	Grade Year	Gender	Date	Type	Status	Amount	Balance
	12	12	12		Sep 14, 2010	General Fee	Paid	\$5.00	\$0.00
✖	Oct 04, 2010	W - Waiver				DOESN'T DRIVE			\$5.00
School	Student Grade Level	Code	Grade Year	Gender	Date	Type	Status	Amount	Balance
	12	07			Sep 14, 2010	General Fee	Paid	\$5.50	\$0.00
✖	Oct 04, 2010	P - Payment				CASH			\$5.50
School	Student Grade Level	Code	Name	Section	Date	Type	Status	Amount	Balance
	12	058~5	VIDEO PRODUCTION		Jan 24, 2011	Course Fee	Balance Due	\$10.00	\$5.00
✖	Sep 15, 2010	P - Payment	Check			partial payment - # 1234			\$5.00
School	Student Grade Level	Code	Name	Section	Date	Type	Status	Amount	Balance
	12	011~5	ART I		Sep 14, 2010	Course Fee	Credit	\$25.00	(\$10.00)
✖	Sep 16, 2010	P - Payment	Cash			overpayment			\$35.00

**Student Fee Details Screen**

## Issue a Refund

### Navigation: Home – SIS – Student – Fees

Select “I want to....” Issue a Refund from the Student Open Fees screen or Student Fee Details screen.

This screen allows a user to issue a refund for student fees. All fees with a credit balance will be listed in a table for the chosen student.

<b>DASL</b>	<a href="#">BREWER, SEAN CONORY</a>	ID: 00001007	Counselor:	<input type="text"/>
<b>DASL User</b>	DASL ELEMENTARY SCHOOL 2005-2006	Gender: M	Homeroom: 2LO	
	Calendar: 1	Grade: 02	Status: A	\$

Home » SIS » Student » Fees » Issue Refund

### Issue a Student Refund

Enter the total refund amount and apply the refund to fees

Total Refund Amount

Refund Date:

Reference Description

Fee Type	Fee Code	Date	Course	Section	Description	Amount
General Fee	01	Aug 01, 2005			GRADE 1 FEES (\$68.00)	<input type="text" value="68.00"/>
Refund Amount Remaining:						<input type="text" value="0.00"/>

Standard Refund Payment  Unrefunded Payment

Show Receipt

### Issue a Student Refund Screen

**Total Refund Amount** (required) – Enter the amount of the refund. This field will default to the total amount of credit balances. The user cannot apply a refund to an individual fee greater than the amount of the fee, nor can the user indicate a total refund amount greater than the sum of the credit balances on all fees.

**Refund Date** (optional) – Enter the date of the fee refund.

**Reference Description** (optional) – Enter a description of this payment.

**Fee Type** – The specific Fee Type – could be General Fee, Course Fee, Miscellaneous Fee, Program Fee, or Membership Fee.

**Fee Code** – The Fee Code which is dependent up on the Fee Type.

**Date** – The Date that the fee was assigned.

**Course** – For Course Fees only, the Course Number assigned to this fee.

**Section** – For Course Fees only, the Course Section Number assigned to this fee.

**Description** – The description of this fee specific to the Fee Code. This reference description is applied to each student payment record.

**Amount** – The amount of this specific fee incurred on this date.

– Enter the amount of the refund you are making on this specific fee. This fee payment amount only becomes active if the Total Refund amount is changed to an amount less than the total fee credit amount.

**Refund Amount Remaining** – Refund Amount Remaining will automatically be calculated as you enter in payment amounts for specific fees.

**Standard Refund Payment or Unrefunded Payment** (required) – Standard Refund Payment indicates that this refund will be disbursed to the student. Unrefunded Payment indicates that the refund will be applied but not disbursed to the student. The default is Standard Refund Payment.

**Submit** – Apply the refunds entered to the student fee record. A Refund (type “R”) will be used for each student activity record.

**Cancel** – Do not apply the Refund.

Name	Section	Date	Type	Status	Amount	Balance
DRAWING		Oct 17, 2004	Course Fee	Credit	\$20.00	(\$10.00)
×		Jan 02, 2005	R - Refund			(\$10.00)
×		Nov 18, 2004	D - Drop			\$20.00
×		Nov 18, 2004	D - Drop			\$0.00
×		Nov 18, 2004	D - Drop			\$0.00
×		Nov 19, 2004	D - Drop			\$0.00
×		Oct 21, 2004	D - Drop			\$20.00

**Drawing Fee with Refund Applied**

The detail screen shows the drawing fee and the refund once applied.

## Transfer a Payment

### Navigation: Home – SIS – Student – Fees

Select “I want to....” Transfer a Payment from the Student Open Fees screen or Student Fee Details screen.

This screen allows the user to transfer payments from fees with credit balances to any unpaid fees.

<b>DASL</b>		<b>BREWER, SEAN CONORY</b>	<b>ID: 00001007</b>	<b>Counselor:</b>
<b>DASL User</b>		DASL ELEMENTARY SCHOOL 2004-2005	<b>Gender: M</b>	<b>Homeroom:</b>
Calendar: 1			<b>Grade: 01</b>	<b>Status: A</b>

Home » SIS » Student » Fees » Transfer Payment

### Transfer a Student Payment

Enter the total transfer amount and apply the refunds and payments

**Total Transfer Amount**

**Transfer Date:**

**Reference Description**

**Fees with Credit Balances**

Fee Type	Fee Code	Date	Course	Section	Description	Amount
General Fee	01	Aug 01, 2005			GRADE 1 FEES (\$68.00)	<input type="text" value="30.00"/>
Refund Amount Remaining:						<input type="text" value="0.00"/>

**Outstanding Fees**

Fee Type	Fee Code	Date	Course	Section	Description	Amount
Misc Fee	2	May 01, 2005			TEXT BOOK FINE \$30.00	<input type="text" value="30.00"/>
Payment Amount Remaining:						<input type="text" value="0.00"/>

#### Transfer a Student Payment Screen

**Total Transfer Amount** (required) – Enter the amount of the transfer. Will default to the total credit amount available to be transferred or to the total amount of outstanding fees – whichever is lower – as this is the maximum amount that can be transferred. If the value in the Total Transfer Amount equals the total credit balance of the fees with credit balances, the textboxes in the table of fees with credit balances will be disabled; otherwise these textboxes will be enabled. If the value in the Total Transfer Amount equals the sum of the outstanding balances for the outstanding fees, the textboxes in the table of outstanding fees will be disabled; otherwise these textboxes will be enabled. Any time the value entered in the Total Transfer Amount changes, the application will examine the amount entered against the total fees with credit balances and the total outstanding fees and enable/disable the textboxes in the tables as described above. The user cannot enter a transfer amount in excess of the total amount of fees with credits or the total outstanding fees – whichever is lower.

**Transfer Date** (optional) – Enter the date of the transfer.

**Reference Description** (optional) – Enter a description of this transfer.

**Fee Type** – The specific Fee Type – could be General Fee, Course Fee, Miscellaneous Fee, Program Fee, or Membership Fee.

**Fee Code** – The Fee Code which is dependent upon the Fee Type

**Date** – The Date that the fee was assigned.

**Course** – For Course Fees only, the Course Number assigned to this fee.

**Section** – For Course Fees only, the Course Section Number assigned to this fee.

**Description** – The description of this fee specific to the Fee Code. This reference description is applied to each student payment record.

**Amount** – The amount of this specific fee incurred on this date. Credits are showed in the Fees with Credit Balances grid and amounts due are shown in the Outstanding Fees grid.

– Enter the amount of the transfer you are making on this specific fee. This fee payment amount only becomes active if the Total Transfer Amount is changed to an amount less than the total of the Outstanding Fees.

**Refund Amount Remaining** – Refund Amount Remaining will automatically be calculated as you enter transfer amounts for specific fees.

**Payment Amount Remaining** – Payment Amount Remaining will automatically be calculated as you enter transfer amounts for specific fees.

**Process Transfer** – Apply the transfers entered to the student fee record. A negative transfer payment (type “T”) will be applied to each of the fees with a credit balance and transfer amount; and a positive transfer payment (type “T”) will be applied to each of the outstanding fees with a transfer amount. After processing, you will return to the Student Open Fees screen.

When the user selects the Process Transfer button, the application will verify that the total transfer amount indicated at the top of the screen matches the total transfer payments allocated to the fees with credit balances and matches the total transfer payments allocated to outstanding fees. If the total amount of the fees with credit balances allocated to transfer matches the total transfer payments allocated to outstanding fees, and this amount does not match the total transfer amount indicated in the total transfer amount textbox at the top of the screen, the transfer operation can still continue, but the user will be notified and must confirm. The application will not permit the user to continue if the total amount of the fees with credit balances allocated to transfer does not equal the total transfer payments allocated to outstanding fees.

**Cancel** – Do not apply the Transfer Payment.

## Apply a Waiver

### Navigation: Home – SIS – Student – Fees

Select “I want to....” Apply a Waiver from the Student Open Fees screen or Student Fee Details screen

The Apply a Waiver screen is used to apply fee waivers (payment no longer required) for the selected student.

<b>DASL</b>	<a href="#">BREWER, SEAN CONORY</a>	<b>ID:</b> 00001007	<b>Counselor:</b>	<input type="button" value="X"/>
<b>DASL User</b>	DASL ELEMENTARY SCHOOL 2005-2006	<b>Gender:</b> M	<b>Homeroom:</b> 2LO	
	<b>Calendar:</b> 1	<b>Grade:</b> 02	<b>Status:</b> A	\$

Home » SIS » Student » Fees » Apply Waiver

### Apply a Student Waiver

Enter the total Waiver amount and apply the Waiver to fees

**Total Waiver Amount**

**Waiver Date:**

**Reference Description**

Fee Type	Fee Code	Date	Course	Section	Description	Amount
Misc Fee	3	Jul 21, 2006			LIBRARY FINE	\$1.00 <input type="text" value="1.00"/>

Waiver Amount Remaining:

### Apply a Student Waiver Screen

**Total Waiver Amount** (required) – Enter the total amount of the waiver- will default to the total fee amount owed. All outstanding fees for the student will be displayed in the Fee grid.

**Waiver Date** (required) – Enter the date the waiver is issued.

**Reference Description** (optional) – Enter a description of this waiver.

**Fee Type** – The specific Fee Type – could be General Fee, Course Fee, Miscellaneous Fee, Program Fee, or Membership Fee.

**Fee Code** – The Fee Code which is dependent up on the Fee Type.

**Date** – The Date that the fee was assigned.

**Course** – For Course Fees only, the Course Number assigned to this fee.

**Section** – For Course Fees only, the Course Section Number assigned to this fee.

**Description** – The description of this fee specific to the Fee Code.

**Amount** – The amount of this specific fee incurred on this date.

– Enter the amount of the waiver you are making on this specific fee. This fee waiver amount only becomes active if the Total Waiver amount is changed to an amount less than the total fee amount owed.

**Waiver Amount Remaining** – Waiver Amount Remaining will automatically be calculated as waiver amounts are entered for specific fees.

**Apply Waivers** – Apply the Waivers entered to the student fee record with a payment type “W” and return to Student Open Fees.

**Cancel** – Do not apply the Student Waivers.

If a waiver cannot be applied, you will receive the following message.

Home » SIS » Student » Fees » Apply Waiver

## Apply a Student Waiver

Enter the total Waiver amount and apply the Waiver to fees

Student does not have any outstanding fees

### No Outstanding Fees Message

## Issue a Miscellaneous Credit

### Navigation: Home – SIS – Student – Fees

You can issue a miscellaneous credit to a student as a refund or waiver even if the student has no outstanding fee balance (for example: a student who paid for a trip but now cannot attend).

1. On the **Student Open Fees** screen, in the **I want to...** drop-down list, select "Issue a Misc Credit."

StudentInformation > SIS > Student > Fees

Student Open Fees

This page lists all of the student's fees that have a balance or credit due

<b>Total Fees Assessed</b>	\$155.00
P - Payment	\$86.00
W - Waiver	\$3.00
<b>Overall Balance</b>	<b>\$66.00</b>

**Fee Options**

- Show Fees from Past School Years:
- Show Fees from Future School Years:
- Show Fees from All Buildings:

I want to...

- I want to...
- Add Fees
- Apply a Payment
- Issue a Refund
- Transfer a Payment
- Apply a Waiver
- Issue a Misc Credit**
- View Fee Details

### I want to... Issue a Misc Credit

- On the **Issue a Misc Credit** screen, the student's fees, waivers and credit information display in a grid.
2. In the **Total Misc Credit Amount** field, enter the total amount of the credit.
  3. In the **Credit Date** field, enter or select the date on which you are issuing the credit.
  4. Optional: In the **Reference Description** field, enter a description of this credit.
  5. Click **Go**.

StudentInformation > SIS > Student > Fees > Miscellaneous Credit

### Issue a Misc Credit

Enter the total Misc Credit amount and apply the credit to fees

Total Misc Credit Amount:

Credit Date:

Reference Description:

Fee Type	Fee Code	Date	Course	Section	Description	Fee Amount	Total Waivers	Existing Misc Credit	Max Misc Credit	
Course Fee	Bio lab	Aug 20, 2014	BIOLOGY		BIOLOGY LAB FEES	\$3.00	\$0.00	\$0.00	\$3.00	0.00
Course Fee	CHR FEES	Aug 20, 2014	CHOIR		CHOIR FEES	\$8.00	\$0.00	\$0.00	\$8.00	0.00
Misc	WRSTLNG	Dec 06, 2014			WR T'S & SUCH	\$70.00	\$0.00	\$0.00	\$70.00	0.00
Misc	Art (+)	Aug 20, 2014			Art fee, art all year	\$3.00	\$3.00	\$0.00	\$3.00	0.00
Misc	CLASS	Dec 06, 2014			CLASS DUES/FUNDRAISER	\$5.00	\$0.00	\$0.00	\$5.00	0.00

Credit Amount Remaining:

Show Receipt

### Issue a Misc Credit Screen

The screen updates to show the amount you entered as the **Credit Amount Remaining**.

- In the final column, enter the amount(s) to assign to the appropriate fee type(s) until the **Credit Amount Remaining** is "0.00."
- Click **Issue Misc Credit**.

StudentInformation > SIS > Student > Fees > Miscellaneous Credit

### Issue a Misc Credit

Enter the total Misc Credit amount and apply the credit to fees

Total Misc Credit Amount:

Credit Date:

Reference Description:

Fee Type	Fee Code	Date	Course	Section	Description	Fee Amount	Total Waivers	Existing Misc Credit	Max Misc Credit	
Course Fee	Bio lab	Aug 20, 2014	BIOLOGY		BIOLOGY LAB FEES	\$3.00	\$0.00	\$0.00	\$3.00	0.00
Course Fee	CHR FEES	Aug 20, 2014	CHOIR		CHOIR FEES	\$8.00	\$0.00	\$0.00	\$8.00	8.00
Misc	WRSTLNG	Dec 06, 2014			WR T'S & SUCH	\$70.00	\$0.00	\$0.00	\$70.00	0.00
Misc	Art (+)	Aug 20, 2014			Art fee, art all year	\$3.00	\$3.00	\$0.00	\$3.00	0.00
Misc	CLASS	Dec 06, 2014			CLASS DUES/FUNDRAISER	\$5.00	\$0.00	\$0.00	\$5.00	0.00

Credit Amount Remaining:

Show Receipt

### Assign Miscellaneous Credit

The **Student Fee Details** screen displays the applied miscellaneous credit.

StudentInformation > SIS > Student > Fees > View Fee Details

### Student Fee Details

I want to...

**View/Delete fees and fee activity for the student**

Select a School Year and/or Fee Status to filter the fees listed. Optionally filter results by Payment Date.

School Year Enrolled: -- All -- Fee Status: -- All -- Filter By Payment Date: 09/17/2014

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

<b>Total Balance:</b>	<b>\$58.00</b>
Total Assessed:	\$155.00
Total Waived:	\$3.00
Total Dropped:	\$0.00
Total Paid:	\$89.00

Display Active Fees:

**2014**

School	Student Grade Level	Code	Name	Section	Date	Type	Status	Amount	Balance
DAHS	10	CHR FEES	CHOIR		Aug 20, 2014	Course Fee	Credit	\$8.00	(\$8.00)
<div style="border: 1px solid black; padding: 2px;"> <span style="color: red; font-weight: bold;">X</span> Sep 17, 2014 M - Misc Credit Not competing (\$8.00)                 </div>									
<div style="border: 1px solid black; padding: 2px;"> <span style="color: red; font-weight: bold;">X</span> Aug 21, 2014 P - Payment \$8.00                 </div>									

#### Miscellaneous Credit Applied

## View Fee Details

### Navigation: Home – SIS – Student – Fees

Select “I want to....” View Fee Details from the Student Open Fees screen or Student Fee Details screen.

This screen will display all fees and any associated payments for the student. This screen can be used to delete fees and payments.

Home » SIS » Student » Fees » View Fee Details

## Student Fee Details

I want to... ▼

View/Delete fees and fee activity for the student

Select a School Year and/or Fee Status to filter the fees listed. Optionally filter results by Payment Date.

School Year Enrolled: -- All -- Fee Status: -- All -- Filter By Payment Date: 5/13/2011 Filter

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

Display Active fees:

<b>Total Balance:</b>		<b>\$41.50</b>
Total Assessed:		\$241.00
Total Waived:		\$3.00
Total Dropped:		\$0.00
Total Paid:		\$196.50

2010

School	Student Grade Level	Code	Grade Year	Gender	Date	Type	Status	Amount	Balance
	12	12	12		Sep 14, 2010	General Fee	Paid	\$5.00	\$0.00
<span style="border: 1px solid gray; padding: 2px;">✖</span> Apr 14, 2011 P - Payment Miscellaneous \$5.00									
School	Student Grade Level	Code	Name	Section	Date	Type	Status	Amount	Balance
	12	122~3	ENGLISH III (GEN)		Sep 14, 2010	Course Fee	Paid	\$3.00	\$0.00
<span style="border: 1px solid gray; padding: 2px;">✖</span> Apr 14, 2011 W - Waiver \$3.00									
School	Student Grade Level	Code	Name	Section	Date	Type	Status	Amount	Balance
✖		12	122~2	ENGLISH III (GEN)		Sep 14, 2010	Course Fee	Balance Due	\$9.50

### Accessing Fee Details from the Student Fee Details Screen

**I want to...** – This drop-down menu will allow you to perform Fee maintenance on this student's open fees.

**School Year Enrolled** – Choose the School Year from the drop-down list. The drop-down list will contain all school years for which the student has a registration record for the current school.

**Fee Status** – Choose the Fee Status (-- All --, Open, Paid, Credit Due, Balance Due) from the drop-down list.

**Filter By Payment Date** – All of the student's fee activity displays based on the School Year Enrolled and Fee Status chosen. If you wish to limit the display of the student's fee activity by a specific Payment Date, choose a date to filter the display based on a specific payment date and then click the Filter button. If you do choose to filter on a specific payment date and click the Filter button, then a Remove Filter button displays. You can then click the Remove Filter button to display all the student's fee details.

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

**Note:** The Fee Options control whether fees from past years, future years, and other buildings will display. The defaults are set at the school level, and previously applied to the screen without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, it is possible for users to edit these values each time they access the screen.

**Total Balance** – Total fee balance

**Total Assessed** – Total of fees assessed.

**Total Waived** – Total of fees waived.

**Total Dropped** – Total of fees dropped.

**Total Paid** - Total of fees paid.

**Display Active Fees** – If checked, only active fees will display. If unchecked, only deleted/inactive fees will display. As of 11.3.0.1154, deleted fees are set to Inactive and not hard deleted. With the Display Active Fees option unchecked, you can view inactivated fees for historical reasons.

	School	Student Grade Level	Code	Name	Section	Date	Type	Status	Amount	Balance
X		12	122~2	ENGLISH III (GEN)		Sep 14, 2010	Course Fee	Balance Due	\$9.50	\$9.50

**Example of an Open Course Fee**

	School	Student Grade Level	Code	Grade Year	Gender	Date	Type	Status	Amount	Balance
X		12	12	12		Sep 14, 2010	General Fee	Balance Due	\$5.00	\$5.00

**Example of an Open General Fee**

	School	Student Grade Level	Code	Grade Year	Gender	Date	Type	Status	Amount	Balance
		12	12	12		Sep 14, 2010	General Fee	Paid	\$5.00	\$0.00
X			Sep 15, 2010	W - Waiver						\$5.00

**Example of a Paid General Fee with a Waiver**

	School	Student Grade Level	Code	Grade Year	Gender	Date	Type	Status	Amount	Balance
		12	99			Sep 14, 2010	General Fee	Paid	\$10.00	\$0.00
X			Sep 15, 2010	P - Payment	Cash					\$10.00

**Example of a Paid General Fee with Payment**

Click X to delete a Fee. Fees may only be removed if no payment is applied to the fee. If the fee has associated payments, then the delete icon will not be visible. It is possible to delete a fee with payments if all associated payments are first removed. Student fee records created prior to the implementation of StudentInformation cannot be removed. Fees for school years prior to the school's current year also cannot be removed.

Click **X** to inactivate a payment. You can only inactivate payment types Payment (P), Refund (R), Unrefunded (U) and Waiver (W). You cannot inactivate payment records created prior to the implementation of StudentInformation or payments for school years prior to the school's current year.

Home » SIS » Student » Fees » View Fee Details

## Student Fee Details

I want to... ▾

**View/Delete fees and fee activity for the student**

---

**Are you sure you want to delete this fee?**

Ok Cancel

### Deletion Confirmation Message

**Ok** – Delete the Fee. You will be returned to the Student Fee Details screen where the Total Balance will be adjusted reflecting the deleted fee, payment, refund or waiver.

**Cancel** – Do Not Delete the Fee.

Home » SIS » Student » Fees » View Fee Details

## Student Fee Details

I want to... ▾

**View/Delete fees and fee activity for the student**

---

Select a School Year and/or Fee Status to filter the fees listed. Optionally filter results by Payment Date.

School Year Enrolled: -- All -- Fee Status: -- All -- Filter By Payment Date: 5/16/2011 Filter

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

**Fee has been deleted successfully**

<b>Total Balance:</b>	<b>\$27.00</b>
Total Assessed:	\$236.50
Total Waived:	\$8.00
Total Dropped:	\$0.00
Total Paid:	\$201.50

Display Active fees:

**2010**

School	Student Grade Level	Code	Grade Year	Gender	Date	Type	Status	Amount	Balance
	12	12	12		Sep 14, 2010	General Fee	Paid	\$5.00	\$0.00
		Sep 15, 2010	W - Waiver						\$5.00
	12	99			Sep 14, 2010	General Fee	Paid	\$10.00	\$0.00
		Sep 15, 2010	P - Payment	Cash					\$10.00

### Successful Deletion Message

## Homeroom Fee Collection

Navigation: Home – Teacher Menu – Homeroom Fee Collection

The Homeroom Fee Collection facilitates the collection of student fees in the student's homeroom. The teacher may accept only the full amount of fees due through this function. If the student is making a partial payment or the student is presenting a payment in excess of the total fees to be collected for the individual student, then the fees cannot be collected in the classroom; the student must pay their fees with the payment clerk or in the office as appropriate for the individual school.

**See *ProgressBook StudentInformation Teacher Menu Guide* for detailed information about Homeroom Fee Collection.**

---

## **Fee Reports**

### **Fee Payments by Accounting Code Detail**

**Navigation: Home – SIS – Fees – Fee Reports – Fee Payments by Accounting Code Detail**

This report generates a fee payment listing by account code and prints details and subtotals of all fees by accounting code. The report breaks on the combination of accounting code and allocation code, and prints both on the group header. This is necessary since different schools or years can assign different combinations of accounting codes and allocation codes.

## Fee Payments By Accounting Code Detail

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

Selection Criteria   Selection Summary   Load Settings

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

**Payment Date Range:** FROM 7/30/2014 TO 7/30/2014

**Homeroom Date:** 7/30/2014

**Payment Method**

Cash  
Check  
Credit  
Online Payment

**Accounting Code**

ART - ART SUPPLIES  
BIO - BIOLOGY SUPPLIES  
BIODE - BIO DE COURSE COST  
BND - BAND FEES

**Sorting Options**

Student Name (ASC)  
Student Name (DESC)  
Student Number (ASC)  
Student Number (DESC)

**Delivery Method:** Pickup

**Email Address:**

**Report Format:** Adobe PDF

**Description:**

### Fee Payments By Accounting Code Detail Report Parameters Screen

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings

**Note:** *The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Payment Date Range** (required) – Specify the date range in which to look for fee payments. Both the “From” and “To” fields will default to today’s date.

**Homeroom Date** (required) – Specify the date to use to retrieve student’s homeroom. This field will default to today’s date.

**Payment Method** (optional) – If no Payment Methods are selected, the report will select all Payment Methods. You can also filter by selecting specific Payment Methods for your report.

**Accounting Code** (optional) – If no Accounting Codes are selected, the report will select all Accounting Codes. You can also filter by selecting specific Accounting Codes for your report. Because some fees do not have accounting codes, the accounting code selection now includes the option of “(none) – (none)”, which means that no accounting code was assigned. The accounting codes and allocation codes are shown together for selection. All codes for all buildings for past and future years will be shown that are associated with students enrolled in the school for this year. In other words, all codes associated with all fees, past and future, for the current year’s students will be showing for selection. This allows the user to isolate any subset of fees that may have had activity during the relevant time period.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

**Fee Payments By Accounting Code Detail**

Account: 100 - 001-1720-0000-000000-001 WKBK Payment Date: 09-15-2010 to 09-15-2010

Student Name	Std. Number	Grade	Homeroom	Fee Code	Pmt. Date	Ref. Number	Pmt. Amount
EMIL	11108	12	IN19	116-1	09-15-2010		\$ 15.50
BRITTANY	11122	12	IN22	116-1	09-15-2010		\$ 15.50
SAM	11149	12	IN24	116-1	09-15-2010		\$ 15.50
MOLLY	11539	12	IN21	116-1	09-15-2010		\$ 15.50
JENNA	11807	12	IN23	116-1	09-15-2010		\$ 15.50

**Total Receipts for 100 - 001-1720-0000-000000-001 WKBK: \$ 77.50**

Account: 203 - 001-1740-0000-031700-001 COMP Payment Date: 09-15-2010 to 09-15-2010

Student Name	Std. Number	Grade	Homeroom	Fee Code	Pmt. Date	Ref. Number	Pmt. Amount
RO	11659	12	IN19	058-5	09-15-2010	partial payment - # 1234	\$ 5.00

**Total Receipts for 203 - 001-1740-0000-031700-001 COMP: \$ 5.00**

Account: 900 - 018-2421-510-9819-000000-001 PRINCIPAL Payment Date: 09-15-2010 to 09-15-2010

Student Name	Std. Number	Grade	Homeroom	Fee Code	Pmt. Date	Ref. Number	Pmt. Amount
BILL	11590	12	IN19	12	09-15-2010		\$ 5.00

**Total Receipts for 900 - 018-2421-510-9819-000000-001 PRINCIPAL: \$ 5.00**

**Gross Receipts for All Accounts: \$ 87.50**

**Fee Payments By Accounting Code Detail Screen**

## Fee Payments by Accounting Code Summary

**Navigation: Home – SIS – Fees – Fee Reports – Fee Payments by Accounting Code Summary**

This report generates a summary fee payment listing by Accounting Code. The report breaks on the combination of accounting code and allocation code, and prints both on the group header. This is necessary since different schools or years can assign different combinations of accounting codes and allocation codes.

## Fee Payments By Accounting Code Summary

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

Selection Criteria	Selection Summary	Load Settings												
<b>Fee Options</b> <ul style="list-style-type: none"> <li>Show Fees from Past School Years: <input checked="" type="checkbox"/></li> <li>Show Fees from Future School Years: <input checked="" type="checkbox"/></li> <li>Show Fees from All Buildings: <input checked="" type="checkbox"/></li> </ul>														
<b>Payment Date Range:</b> 7/30/2014  TO 7/30/2014 														
<b>Payment Method</b> <table border="1"> <tr> <td>Cash</td> <td>↔</td> <td></td> </tr> <tr> <td>Check</td> <td>↔</td> <td></td> </tr> <tr> <td>Credit</td> <td>↔</td> <td></td> </tr> <tr> <td>Online Payment</td> <td>↔</td> <td></td> </tr> </table>			Cash	↔		Check	↔		Credit	↔		Online Payment	↔	
Cash	↔													
Check	↔													
Credit	↔													
Online Payment	↔													
<b>Accounting Code</b> <table border="1"> <tr> <td>ART - ART SUPPLIES</td> <td>↔</td> <td></td> </tr> <tr> <td>BIO - BIOLOGY SUPPLIES</td> <td>↔</td> <td></td> </tr> <tr> <td>BIODE - BIO DE COURSE COST</td> <td>↔</td> <td></td> </tr> <tr> <td>BND - BAND FEES</td> <td>↔</td> <td></td> </tr> </table>			ART - ART SUPPLIES	↔		BIO - BIOLOGY SUPPLIES	↔		BIODE - BIO DE COURSE COST	↔		BND - BAND FEES	↔	
ART - ART SUPPLIES	↔													
BIO - BIOLOGY SUPPLIES	↔													
BIODE - BIO DE COURSE COST	↔													
BND - BAND FEES	↔													
<b>Primary Sorting Options</b> <table border="1"> <tr> <td>Account Code (DESC)</td> <td>↔</td> <td>Account Code (ASC)</td> <td>↕</td> </tr> <tr> <td>Account Name (ASC)</td> <td>↔</td> <td></td> <td>↕</td> </tr> <tr> <td>Account Name (DESC)</td> <td>↔</td> <td></td> <td>↕</td> </tr> </table>			Account Code (DESC)	↔	Account Code (ASC)	↕	Account Name (ASC)	↔		↕	Account Name (DESC)	↔		↕
Account Code (DESC)	↔	Account Code (ASC)	↕											
Account Name (ASC)	↔		↕											
Account Name (DESC)	↔		↕											
<b>Secondary Sorting Options</b> <table border="1"> <tr> <td>Payment Date (ASC)</td> <td>↔</td> <td></td> <td>↕</td> </tr> <tr> <td>Payment Date (DESC)</td> <td>↔</td> <td></td> <td>↕</td> </tr> </table>			Payment Date (ASC)	↔		↕	Payment Date (DESC)	↔		↕				
Payment Date (ASC)	↔		↕											
Payment Date (DESC)	↔		↕											
<b>Delivery Method:</b> Pickup  <input type="button" value="Set As Default"/>														
<b>Email Address:</b> <input type="text"/>														
<b>Report Format:</b> Adobe PDF 														
<b>Description:</b> <input type="text"/>														
<input type="button" value="Submit"/>														

### Fee Payments By Accounting Code Summary Report Parameters Screen

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings

**Note:** *The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Payment Date Range** (required) – Specify the date range in which to look for fee payments. Both the “From” and “To” fields will default to today’s date.

**Payment Method** (optional) – If no Payment Methods are selected, the report will select all Payment Methods. You can also filter by selecting specific Payment Methods for your report.

**Accounting Code** (optional) – If no Accounting Codes are selected, the report will select all Accounting Codes. You can also filter by selecting specific Accounting Codes for your report. Because some fees do not have accounting codes, the accounting code selection now includes the option of “(none) – (none)”, which means that no accounting code was assigned. The accounting codes and allocation codes are shown together for selection. All codes for all buildings for past and future years will be shown that are associated with students enrolled in the school for this year. In other words, all codes associated with all fees, past and future, for the current year’s students will be showing for selection. This allows the user to isolate any subset of fees that may have had activity during the relevant time period.

**Primary Sorting Options** (optional) – Choose one or more primary (accounting code) sort options for your report.

**Secondary Sorting Options** (optional) – Choose one or more secondary (payment) sort options for your report.

**Note:** *The separate sets of sorting options is to avoid the garbled formatting that would arise if a report was sorted by payment date and then subtotaled by allocation code.*

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

**Fee Payments By Accounting Code Summary**

Account: 100 - 001-1720-0000-000000-001 WKBK

Payment Date: 09-15-2010 to 10-01-2010

Payment Date	Payment Amount
09-15-2010	\$ 77.50
09-16-2010	\$ 62.00
09-17-2010	\$ 362.00
09-20-2010	\$ 2,170.00
09-21-2010	\$ 2,713.25
09-22-2010	\$ 966.50
09-23-2010	\$ 312.00
09-24-2010	\$ 1,661.25
09-27-2010	\$ 1,436.00
09-28-2010	\$ 3,013.75
09-29-2010	\$ 679.75
09-30-2010	\$ 1,159.50
10-01-2010	\$ 4,416.75
10-01-2010	\$ 27.00

Total Receipts for 100 - 001-1720-0000-000000-001 WKBK: \$ 19,057.25

**Fee Payments By Accounting Code Summary Report**

**Outstanding Fee Balances by Account Code (Report Builder)**

**Navigation: Home – Local – Report Builder Links – Report Builder Reports**

The Outstanding Fee Balances by Account Code Report Builder report lists the outstanding fees for students by account code.

Home » Local » Report Builder Advanced Search | Feedback

**Report Builder**  
 From this screen, you can manage Regular and User Reports created in ProgressBook Report Builder

[ Hide Regular Reports ]

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	<b>Outstanding Fee Balances by Account Code</b>	Provides a list of outstanding student fees and groups them by account code.
	Period G Student Core Summary Report	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	Period K NonGraduate Core Summary Report	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	Course Fee Analysis	Fee report that shows the outstanding balance, if any, of a student's course fees in each course fees were assessed.
	Discipline Action	Discipline Action report that filters on selected discipline actions and when the punishment is to be served.
	Locker Combinations	Locker report listing all lockers and the all combinations assigned to each one.
	Payments Posted by User	Fee reporting listing payments posted by username for balancing receipts.
	Student Location	Student report that shows where a student is at in the building each period of the day.

[ Hide User Reports ]

View Report	Name	Description
	Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.
	My Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.

Run Icon

**Outstanding Fee Balances by Account Code Report on the Report Builder Reports Screen**

1. With the school or district for which you want to run the report in context, on the Report Builder screen, click the **run icon** in the View Report column for the Outstanding Fee Balances by Account Code report.

The StudentInformation Report Viewer screen displays.

**Update Report Headers**

Report Header: Outstanding Fee Balances by Account Code

**Select Required Parameters**

Show Past Years:  Yes  No

Show Future Years:  Yes  No

Show All Buildings:  Yes  No

FeeType: General Fee, Course Fee, Misc, Program, Membership

**Set Optional Filters**

Field Name	Operation	Value
Last Name	Begins With	B

**Add & Remove Columns**

No columns are available to add or remove.

View Report

#### Outstanding Fee Balances by Account Code Report on the Report Viewer Screen

2. In the **Report Header** field, modify the heading you want to display at the top of the report, if desired.
3. In the Select Required Parameters area, select one of the following **Show Past Years** options:
  - **Yes** – Include outstanding fees for students from past school years.
  - **No** – Do not include outstanding fees for students from past school years.
4. Select one of the following **Show Future Years** options:
  - **Yes** – Include outstanding fees for students from a future school year.
  - **No** – Do not include outstanding fees for students from a future school year.
5. Select one of the following **Show All Buildings** options:
  - **Yes** – Include outstanding fees for students from all of the buildings in the district.
  - **No** – Do not include the outstanding fees for students from all of the buildings in the district.

**Note:** The Show All Buildings option only applies when the report is run with a building in context. If a district is in context, the report will always return the outstanding fees for the student from all of the buildings in the district.

6. In the **Fee Type** field, select the fee type(s) you want to display on the report.
7. If you would like to apply an additional filter to the report results, in the Set Optional Filters area, perform the following steps:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the Field Name drop-down list. For more information about the filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.
  - c. Enter or select the appropriate value in the **Value** field, if applicable.
 

**Note:** The available options and acceptable values vary depending on the option you selected in the Field Name drop-down list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name drop-down list. If you selected an option in the Field Name drop-down list that requires a date, a calendar becomes available in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation drop-down list, then the Value field is unavailable.
  - d. To add an additional filter, repeat [step 7\(a\)](#) through [step 7\(c\)](#) in the line below the previous filter.
8. Click **View Report**.

The report displays at the bottom of the window.

Account Code:								
Student Id	Last Name	First Name	Middle Name	Fee Type	Fee Code	Fee Description	Balance	Home School
268257	ACOSTA	JIMMIE		Misc	ENGLISH	ENGLISH TEXTBOOK	\$25.00	
190237	ADAMS	MITCHELL		Misc	ENGLISH	ENGLISH TEXTBOOK	\$15.19	
190237	ADAMS	MITCHELL		Misc	HISTORY	HISTORY TEXTBOOK	\$30.00	
190237	ADAMS	MITCHELL		Misc	LIBRARY	LIBRARY	\$13.41	
777500	ALBERT	DONNA		Misc	ENGLISH	ENGLISH TEXTBOOK	\$52.43	
590184	ALEXANDER	ARMANDO		Misc	MATH	MATH TEXTBOOK	\$24.00	
794049	ALSTON	BEVERLY		Misc	LIBRARY	LIBRARY	\$12.40	
192049	ANTHONY	JEFFREY		Misc	HEALTH	HEALTH TEXTBOOK	\$60.00	
192049	ANTHONY	JEFFREY		Misc	ENGLISH	ENGLISH TEXTBOOK	\$52.43	
192049	ANTHONY	JEFFREY		Misc	ENGLISH	ENGLISH TEXTBOOK	\$4.50	
192049	ANTHONY	JEFFREY		Misc	DAMAGE	BOOK DAMAGE	\$2.00	
590137	ATKINSON	CARLOS		Misc	ENGLISH	ENGLISH TEXTBOOK	\$58.25	
590137	ATKINSON	CARLOS		Misc	DAMAGE	BOOK DAMAGE	\$8.50	

**Generated Outstanding Fee Balances by Account Code Report Code**

9. To save the report with your selected parameters and filters, perform the following steps:
  - a. Click **Save Setup As**.
  - b. Enter a unique report name in the **New report name** field.

- c. Enter a description of the report in the **New description** field.
- d. Click **Save**.

The following message displays at the bottom of the screen: “Report setup saved successfully.”

The report is saved. You can now run it directly from the User Reports area on the Report Builder Reports screen.

10. Click the **close** button to close the StudentInformation Report Viewer screen and return to the Report Builder Reports screen.

## Course Fee Analysis Report (Report Builder)

### Navigation: Home – Local – Report Builder Links – Report Builder Reports

The Course Fee Analysis report lists the unpaid course fees for students. You can select to display past and future unpaid course fees in addition to the course fees for the current year.

Home » Local » Report Builder Advanced Search | Feedback

### Report Builder

From this screen, you can manage Regular and User Reports created in ProgressBook Report Builder

[ Hide Regular Reports ]

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.
	Period G Student Core Summary Report	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	Period K NonGraduate Core Summary Report	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	<b>Course Fee Analysis</b>	Fee report that shows the outstanding balance, if any, of a student's course fees in each course fees were assessed.
	Discipline Action	Discipline Action report that filters on selected discipline actions and when the punishment is to be served.
	Locker Combinations	Locker report listing all lockers and the all combinations assigned to each one.
	Payments Posted by User	Fee reporting listing payments posted by username for balancing receipts.
	Student Location	Student report that shows where a student is at in the building each period of the day.

[ Hide User Reports ]

View Report	Name	Description
	✗ Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.
	✗ My Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.

**Run Icon** →

### Course Fee Analysis Report on the Report Builder Reports Screen

1. With the school or district for which you want to run the report in context, on the **Report Builder** screen, click the run icon in the **View Report** column for the Course Fee Analysis report.

The StudentInformation **Report Viewer** screen displays.

The screenshot shows the 'Report Viewer' window for 'Course Fee Analysis'. The interface includes a top navigation bar with the ProgressBook logo and 'Student Information' text. Below the navigation bar are three buttons: 'Hide Setup', 'Save Setup As...', and 'View Report'. The 'Report Name: Course Fee Analysis' is displayed in the top right corner. The main content area is divided into four sections:

- Update Report Headers:** A text input field containing 'Course Fee Analysis'.
- Select Required Parameters:** Four radio button options:
  - Show Past Years:  Yes  No
  - Show Future Years:  Yes  No
  - Show All Buildings:  Yes  No
  - Expand All Details:  Yes  No
- Set Optional Filters:** A table with three columns: 'Field Name', 'Operation', and 'Value'. The table is currently empty.
- Add & Remove Columns:** A text area containing the message 'No columns are available to add or remove.'

A 'View Report' button is located at the bottom center of the interface.

### Course Fee Analysis Report on the Report Viewer Screen

2. In the **Report Header** field, modify the heading as you want it to display at the top of the report, if desired.

3. In the **Select Required Parameters** area, for the **Show Past Years** options, select one of the following:
  - **Yes** – Include unpaid course fees from past school years.
  - **No** – Do not include unpaid course fees from past school years.
4. For the **Show Future** Years options, select one of the following:
  - **Yes** – Include unpaid course fees in future school years.
  - **No** – Do not include unpaid course fees in future school years.
5. For the **Show All Buildings** options, select one of the following:
  - **Yes** – Include unpaid course fees for students from all of the buildings in the district.
  - **No** – Do not include the unpaid course fees for students from all of the buildings in the district.

***Note:** The Show All Buildings option only applies when the report is run with a building in context. If a district is in context, the report will always return the unpaid course fees for the student from all of the buildings in the district.*

6. For the **Expand All Details** options, select one of the following:
  - **Yes** – Displays the unpaid course fees for each course by student in the report by default.
  - **No** – Displays the total amount of unpaid course fees for each course in the report by default.

***Note:** You can expand and collapse the details in the generated report as desired by clicking the plus and minus signs next to the user. This option sets the default state of the report when it is run.*

6. If you would like to apply an additional filter to the report results, in the **Set Optional Filters** area, perform the following steps:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the **Field Name** drop-down list. For more information about the filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.
  - c. In the Value field, enter or select the appropriate value, if applicable.

***Note:** The available options and acceptable values vary depending on the option you selected in the **Field Name** drop-down list. If you selected an option that requires a date, a calendar is available in the **Value** field. If you selected Has a Value or Does Not Have a Value in the **Operation** drop-down list, then the **Value** field is unavailable.*

- d. To add an additional filter, repeat [step 7\(a\)](#) through [step 7\(c\)](#) in the line below the previous filter.

7. Click **View Report**.

The report displays at the bottom of the window.

Course Fee Analysis								
Fee Code: 722, Film Photography II								
Student Id	Student Name	Home School	Homeroom	Grade	Accounting Code	Assessed	Paid	Balance
323787	KNOWLES, MICHELE		HR25	10	FE1741	\$22.00	\$0.00	\$22.00
Sub Total:						\$22.00	\$0.00	\$22.00
Fee Code: 704, Art IV								
Student Id	Student Name	Home School	Homeroom	Grade	Accounting Code	Assessed	Paid	Balance
370593	KNAPP, ERICA			12	FE1741	\$22.00	\$0.00	\$22.00
Sub Total:						\$22.00	\$0.00	\$22.00
Fee Code: 108, English 12								
Student Id	Student Name	Home School	Homeroom	Grade	Accounting Code	Assessed	Paid	Balance
230615	KOCH, CARL		HR12	12	FE1741	\$17.00	\$7.00	\$10.00
Sub Total:						\$17.00	\$7.00	\$10.00
Fee Code: 724, Photography-Digital								
Student Id	Student Name	Home School	Homeroom	Grade	Accounting Code	Assessed	Paid	Balance
230615	KOCH, CARL		HR12	12	FE1741	\$14.00	\$0.00	\$14.00
Sub Total:						\$14.00	\$0.00	\$14.00
Fee Code: 320, Honors Biology								
Student Id	Student Name	Home School	Homeroom	Grade	Accounting Code	Assessed	Paid	Balance
247248	KIRBY, CAROLYN		HR10	10	FE1741	\$12.00	\$0.00	\$12.00
Sub Total:						\$12.00	\$0.00	\$12.00
Grand Total:						\$87.00	\$7.00	\$80.00

12/7/2012 12:24:37 PM

**Course Fees Analysis Report with Details Expanded**

8. To save the report with your selected parameters and filters, perform the following steps:

- a. Click **Save Setup As**.
- b. In the **New report name** field, enter a unique report name.
- c. In the **New description** field, enter a description of the report.
- d. Click **Save**.

The following message displays at the bottom of the screen: "Report setup saved successfully."

The report is saved. You can now run it directly from the User Reports area on the Report Builder Reports screen.

9. To close the StudentInformation **Report Viewer** screen and return to the **Report Builder Reports** screen, click the close button.

## **Students Eligible for a Refund**

**Navigation: Home – SIS – Fees – Fee Reports – Students Eligible for a Refund**

This report generates a list of students who are eligible for a refund. An unrefunded fee is generated in any of the following circumstances:

- A student pays an assessed fee and then drops the course for which the fee was assessed.
- A miscellaneous credit is issued.
- An overpayment of a fee has occurred.

These scenarios result in a credit balance. The building can choose to either refund the money or apply the amount to another fee for the selected student.

## Students Eligible for a Refund

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

Ad-Hoc Membership: -- Select an Ad-Hoc Membership --

Public And Private

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Homeroom Date: 12/30/2014

### Fee Options

- Show Fees from Past School Years:
- Show Fees from Future School Years:
- Show Fees from All Buildings:

### Grade

09 - 09 10 - 10 11 - 11 12 - 12	<< >> <<< >>>	
--	------------------	--

### Student Status

A - ACTIVE RES ACCA - ASHLAND ACADEMY AE - ACTIVE ELSEWHERE D - DELETED	<< >> <<< >>>	
--	------------------	--

### Program

** - NOT APPLICABLE 01 - Multiple Disabilities 02 - Deaf-Blindness 03 - Hearing Impairments	<< >> <<< >>>	
--	------------------	--

### Fee Type

General Fee Course Fee Misc Program	<< >> <<< >>>	
--	------------------	--

### Sorting Options

Student Name (DESC) Program Code (DESC) Grade (ASC) Grade (DESC)	<< >> <<< >>>	Student Name (ASC)	<>
---	------------------	--------------------	----

Delivery Method: Pickup

Email Address:

Report Format: Adobe PDF

Description:

Students Eligible for a Refund Report Parameters Screen

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the Public And Private check box to view Memberships created by other users in your drop-down list.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Fee Options** – Options available to limit which fee details display. The defaults for these options are set at the school level on the **DASL Options** screen **Fees** tab. However, you can change the report settings here, and your selected values will be saved.

**Show Fees from Past School Years** – If selected, shows fees from past school years.

**Show Fees from Future School Years** – If selected, shows fees from future school years.

**Show Fees from All Buildings** – If selected, shows fees from all buildings.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Status. You can also filter by selecting specific Student Statuses for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

Students Eligible for a Refund

Fee Type	Fee Code	Fee Description	Fee Amount	Fee Balance	Date	Payment	Pmt/Cr	Unrefunded Amount
			Grade: 10 Status: R Gender: F					
			Home District Name: Ashland City Schools					
General	10	GENERAL	\$ 3.75	\$ 3.75	12/17/2014			
Course	260~1	CHEMISTRY	\$ 16.00		12/17/2014	P	\$ 16.00	
Miscellaneous	SCIENCE	SCIENCE TEXTBOOK	\$ 1.00	-\$ 5.00	12/17/2014	P	\$ 5.00	\$ 4.00
					12/17/2014	M	\$ 1.00	\$ 5.00
Totals:			\$20.75	-\$1.25			\$22.00	\$1.25

Students Eligible for a Refund Report

## Student Fees Requiring Adjustment

### Navigation: Home – SIS – Fees – Fee Reports – Student Fees Requiring Adjustment

This report generates a detailed listing of students needing a payment adjustment for the selected school year. Payment adjustments are needed when a student has paid their fees in full and then has a schedule change where a portion or the entire fee amount originally charted to the student is dropped or credit to the student's account causing the school to owe the student money. The student may or may not have a credit balance depending on whether the student has other outstanding fee amounts on this account. This report can only be generated if the school is using Fee Accounting. Records will be selected only for the school year displayed in the context area.

Home » SIS » Fees » Fee Reports » Student Fees Requiring Adjustment

## Student Fees Requiring Adjustment

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Homeroom Date: 7/29/2008

**Grade**

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

**Student Status**

A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 JVS - Student Attending JVS

**Program**

JAB - Jr Auto Body  
 JAG - Jr AG Mechanics  
 JCOS - Jr Cosmetology  
 SAB - Sr Auto Body

**Fee Type**

General Fee  
 Course Fee  
 Misc  
 Program

**Sorting Options**

Grade (DESC)  
 Student Name (DESC)   Grade (ASC)  
 Student Name (ASC)

**Delivery Method:** Pickup   Set As Default

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Submit

### Student Fees Requiring Adjustment Report Parameters Screen

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the "Public And Private" check box to view Memberships created by other users in your drop-down list.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Status. You can also filter by selecting specific Student Statuses for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application.

Report: SFRQA			ASHLAND HIGH SCHOOL					
Printed Fri, Dec 19, 2014, 3:10 PM			2014-2015					
Student Fees Requiring Adjustment								
			Grade: 10	Status: A	Gender: M	Homeroom:		
			Program: Ashland City Schools					
Fee Type	Fee Code	Fee Description	Fee Amount	Fee Balance	Date	Payment	Pmt.	Adjustment
General	01	GENERAL FEES	\$ 28.00		02/28/2007	P	\$ 28.00	
General	01	HANDBOOK	\$ 5.00		10/04/2013	P	\$ 5.00	
General	02	HANDBOOK	\$ 5.00	\$ 5.00	08/19/2014			
General	04	grade level fees 08-09	\$ 42.13		10/16/2008	P	\$ 42.13	
General	05	grade level fees 09-10	\$ 31.00		10/15/2009	P	\$ 31.00	
General	06	grade level fees 10-11	\$ 5.00		10/29/2010	P	\$ 5.00	
General	10	Homework Organizer	\$ 5.00		09/01/2011	P	\$ 5.00	
General	10	GENERAL	\$ 3.75		10/04/2013	P	\$ 3.75	
General	11	GENERAL	\$ 3.75	\$ 3.75	08/19/2014			
General	14	LOCK	\$ 4.25		10/04/2013	P	\$ 4.25	
General	20	Homework Organizer	\$ 5.00		08/17/2012	P	\$ 5.00	
Course	0610~1	Ag. Science I	\$ 5.00		10/04/2013	P	\$ 5.00	
Course	0610~2	Ag. Science I Dues	\$ 15.00		10/04/2013	P	\$ 15.00	
Course	0800~1	Introduction to Art	\$ 40.00		10/04/2013	P	\$ 40.00	
Course	241~1	PHYSICAL SCIENCE I	\$ 3.00		10/04/2013	P	\$ 3.00	
Course	242~1	PHYSICAL SCIENCE II	\$ 3.00	-\$ 1.50	10/04/2013	P	\$ 3.00	
					04/02/2014	D	\$ 1.50	\$ 1.50
Course	250~1	BIOLOGY	\$ 12.50	\$ 12.50	08/19/2014			
Course	344~1	Practical Geometry	\$ 6.75	\$ 6.75	08/19/2014			
Course	633~1	DECISIONS LIV	\$ 10.00	\$ 10.00	08/19/2014			
Course	7200~1	Language Arts 7	\$ 2.00		09/01/2011	P	\$ 2.00	
Course	7210~1	Science 7	\$ 4.00		09/01/2011	P	\$ 4.00	
Course	7251~2	Computer	\$ 6.00		09/01/2011	P	\$ 6.00	
Course	7330~1	Art 7	\$ 6.00		09/01/2011	P	\$ 6.00	
Course	8110~1	Science 8	\$ 4.00		08/17/2012	P	\$ 4.00	
Course	8120~1	Computer App.	\$ 5.00		08/17/2012	P	\$ 5.00	
Course	8301~1	French Workbook	\$ 18.50		08/17/2012	P	\$ 18.50	
Course	8305~1	Art II	\$ 10.00		08/17/2012	P	\$ 10.00	
Totals:			\$288.63	\$36.50			\$252.13	\$1.50

**Student Fees Requiring Adjustment Report**

See the Batch/Report Management documentation for further details.

## **Student Fee Payment (R111)**

**Navigation: Home – SIS – Fees – Fee Reports – Student Fee Payment (R111)**

This report generates a listing of payment received from each student. This report can only be generated if the school is using Fee Accounting.

The user will have the option to exclude students with no fees for the fee type selected. If the user chooses not to exclude students with no fees from the report, any student with no fees will have a message printed indicating that the student has no fees.

Student fees will be validated against the list of valid fees. Any student with fees assessed that do not have corresponding valid fee IDs for the school year being reporting on will be printed at the top of the report listing the student's ID, the fee code, and a message "No Matching Fee Record Found – Record Bypassed."

Home » SIS » Fees » Fee Reports » Student Fee Payment (R111)

### Student Fee Payment (R111)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

Entering one or more Student Numbers will limit the report to the those students.

Student Numbers:

If not limiting to an Ad-Hoc Membership Group or one or more Student Numbers, you may select as many other criteria as desired. Each selection will limit your results further.

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

Homeroom Date: 5/17/2011

**Payment Date Range**

FROM TO

4/1/2011 5/17/2011

**Grade**

07 - 07  
08 - 08  
09 - 09  
10 - 10

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

Student Fee Payment (R111) Report Parameters Screen (First Half)

<b>Administrative Homeroom</b>	
AUT - (Full Year Term) IN00 - (Full Year Term) IN01 - (Full Year Term) IN02 - (Full Year Term)	
<b>Program</b>	
AOC - ALTERNATIVE OPPORTUNITY CENTER AOCF - ALTERNATIVE OPPORTUNITY CENTER - FF AOCR - ALTERNATIVE OPPORTUNITY CENTER - R AUT - AUTISM STUDENTS	
<b>Fee Type</b>	
General Fee Course Fee Misc Program	
<b>Payment Method</b>	
Cash Check Credit Online Payment	
<b>Payment Type</b>	
Amnesty Drop Payment Refund	
<b>Home School</b>	
007278 - Local High School (Sch) 049320 - Local SD (Dist) 024810 - High School (Sch) 028910 - High School (Sch)	
<b>Include students with a zero balance:</b> <input checked="" type="checkbox"/>	
<b>Print only one student per page:</b> <input checked="" type="checkbox"/>	
<b>Student Sorting Options</b>	
Grade (DESC) Home School (ASC) Home School (DESC) Student Name (DESC)	Student Name (ASC)
<b>Fee Sorting Options</b>	
Fee Type (ASC) Fee Type (DESC) Fee Code (ASC) Fee Code (DESC)	Payment Type (ASC)
<b>Delivery Method:</b>	Pickup <input type="button" value="Set As Default"/>
<b>Email Address:</b>	amy@noacsc.org
<b>Report Format:</b>	Adobe PDF
<b>Description:</b>	
<input type="button" value="Submit"/>	

### Student Fee Payment (R111) Report Parameters Screen (Second Half)

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the "Public And Private" check box to view Memberships created by other users in your drop-down list.

**Student Numbers** (optional) – If fee detail is needed for individual students, the student Numbers may be input here, separated by a comma, and fee details will only be produced for those individuals.

**Note:** *The Student Number list and the Ad Hoc Membership selection are mutually exclusive: you can only use one at a time.*

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

***Note:** The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Payment Date Range** (required) – Specify the date range to look for fee payments. This will default to the range from the school year's start to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Payment Method** (optional) – If no Payment Methods are selected, the report will select all Payment Methods. You can also filter by selecting specific Payment Methods for your report.

**Payment Type** (optional) – If no Payment Types are selected, the report will select all Payment Types. You can also filter by selecting specific Payment Types for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Include students with a zero balance** (optional) – If checked, will show all students in building. If unchecked, will not show students that have a zero fee balance.

**Print only one student per page** (optional) – If checked, will page break after each student. If unchecked, no page breaks between students.

**Student Sorting Options** (optional) – Choose one or more student sort options for your report.

**Fee Sorting Options** (optional) – Choose one or more fee sort options for your report.

*Note: The separate sets of sorting options is to avoid the garbled formatting that would arise if a report was sorted by Fee Code and then subtotaled by Student.*

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

<i>Report: R111</i>						XXXXXXXXX HIGH SCHOOL		
<i>Printed Mon, Oct 03, 2011, 10:11 AM</i>								
Date Range: 8/23/2011 - 10/3/2011						Student Fee Payment		
999999	LAST, FIRST		Grade: 09 Sts: A		Gender: F HmRm: 5-101			
Fee Type	Fee Code	Fee Description	Fee Date	Fee Amt.	Pmt. Date	Pmt. Reference	Type	Amt.
Course	859~1	SYMPHONIC CHOIR	08/22/2011	\$ 5.00	09/02/2011	321	P	\$ 5.00
General	14	LOCK	08/22/2011	\$ 4.25	09/02/2011	321	P	\$ 4.25
General	01	HANDBOOK	08/22/2011	\$ 5.00	09/02/2011	321	P	\$ 5.00
Course	241~1	PHYSICAL SCIENCE I	08/22/2011	\$ 3.00	09/02/2011	321	P	\$ 3.00
Course	242-1	PHYSICAL SCIENCE II	08/22/2011	\$ 3.00	09/02/2011	321	P	\$ 3.00
Course	870~1	PE I	08/22/2011	\$ 5.00	09/02/2011	321	P	\$ 5.00
General	10	GENERAL	08/22/2011	\$ 3.75	09/02/2011	321	P	\$ 3.75
Total Assessed:								\$29.00
Total Paid Within Date Range:								\$29.00
Outstanding Balance Within Date Range:								\$0.00
Outstanding Balance To Date:								\$0.00

**Student Fee Payment (R111) Report**

## Student Fee Detail (R109)

### Navigation: Home – SIS – Fees – Fee Reports – Student Fee Detail (R109)

This report generates a detailed listing of the fees assessed for each applicable student. Details may be printed for each and any combination of fees. This report can only be generated if the school is using Fee Accounting.

The user will have the option to exclude students with no fees for the fee type selected. If the user chooses not to exclude students with no fees from the report, any student with no fees will have a message printed indicating that the student has no fees.

The report will include all students. It is not limited to students currently enrolled so students with fees that were recently withdrawn will also display on the report.

Home » SIS » Fees » Fee Reports » Student Fee Detail (R109)

### Student Fee Detail (R109)

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

Selection Criteria | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

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

Entering one or more Student Numbers will limit the report to the those students.

Student Numbers:

If not limiting to an Ad-Hoc Membership Group or one or more Student Numbers, you may select as many other criteria as desired. Each selection will limit your results further.

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

Homeroom Date: 5/18/2011

**Grade**

07 - 07	
08 - 08	
09 - 09	
10 - 10	

**Student Status**

A - ACTIVE RES	
D - DELETED	
I - INACTIVE	
N - NON-RES	

**Administrative Homeroom**

AUT -	(Full Year Term)	
IN00 -	(Full Year Term)	
IN01 -	(Full Year Term)	
IN02 -	(Full Year Term)	

Student Fee Detail (R109) Report Parameters Screen (First Half)

<b>Program</b>		
AOC - ALTERNATIVE OPPORTUNITY CENTER	← →	
AOCF - ALTERNATIVE OPPORTUNITY CENTER - FF	← →	
AOCR - ALTERNATIVE OPPORTUNITY CENTER - RI	← →	
AUT - AUTISM STUDENTS		
<b>Fee Type</b>		
General Fee	← →	
Course Fee	← →	
Misc	← →	
Program		
<b>Home School</b>		
007278 - Local High School (Sch)	← →	
049320 - Local SD (Dist)	← →	
024810 - High School (Sch)	← →	
028910 - High School (Sch)		
<b>Display Payment Information:</b>		<input checked="" type="checkbox"/>
<b>Display Students with Zero Balance:</b>		<input checked="" type="checkbox"/>
<b>Display Only Students with Outstanding Fees:</b>		<input checked="" type="checkbox"/>
<b>Print only one student per page:</b>		<input type="checkbox"/>
<b>Student Sorting Options</b>		
Grade (DESC)	← →	Student Name (ASC) ↑ ↓
Student Name (DESC)	← →	
Home School (ASC)	← →	
Home School (DESC)		
<b>Fee Sorting Options</b>		
Fee Code (ASC)	← →	↑ ↓
Fee Code (DESC)	← →	
Fee Date (ASC)	← →	
Fee Date (DESC)		
<b>Delivery Method:</b>	Pickup	<input type="button" value="Set As Default"/>
<b>Email Address:</b>	amy@noacsc.org	
<b>Report Format:</b>	Adobe PDF	
<b>Description:</b>		
<input type="button" value="Submit"/>		

### Student Fee Detail (R109) Report Parameters Screen (Second Half)

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the "Public And Private" check box to view Memberships created by other users in your drop-down list.

**Student Numbers** (optional) – If fee detail is needed for individual students, the student Numbers may be input here, separated by a comma, and fee details will only be produced for those individuals.

***Note:** The Student Number list and the Ad Hoc Membership selection are mutually exclusive: you can only use one at a time.*

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

**Note:** *The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Display Payment Information** (optional) – If checked, will show student payment information. If unchecked, will not show student payment information.

**Display Students with Zero Balance** (optional) – If checked, will show all students in building. If unchecked, will not show students that have a zero fee balance.

**Display Only Students with Outstanding Fees** (optional) – If checked, will show only students with an outstanding fee balance. If unchecked, will show all students in building.

**Print only one student per page** (optional) – If checked, will page break after each student. If unchecked, no page breaks between students.

**Student Sorting Options** (optional) – Choose one or more student sort options for your report.

**Fee Sorting Options** (optional) – Choose one or more fee sort options for your report.

**Note:** The separate sets of sorting options is to avoid the garbled formatting that would arise if a report was sorted by Fee Code and then subtotaled by Student.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

Report: R109		HIGH SCHOOL					
Printed Wed, May 18, 2011, 10:14 AM		2010-2011					
<b>Student Fee Detail</b>							
13589 , TOR		Grade: 10	Status: N	Gender: F	Homeroom: IN08		
<b>General Fees</b>							
Fee Code	Fee Description	Date	Fee Amount	Payment Date	Payment Type	Pmt. Amt.	Balance
901	GRADE 9 CLASS FEE	09/16/2009	\$ 2.00	10/02/2009 3270	P	\$ 2.00	\$ 0.00
07	STUDENT PLANNER	09/16/2009	\$ 5.50	10/02/2009 3270	P	\$ 5.50	\$ 0.00
07	STUDENT PLANNER	09/13/2010	\$ 5.50	10/01/2010 572	P	\$ 5.50	\$ 0.00
10	PARKING PERMIT	09/13/2010	\$ 5.00	10/01/2010 572	P	\$ 5.00	\$ 0.00
Total Fees: \$ 18.00			Total Payments: \$ 18.00	Total Adjustments: \$ 0.00	Balance: \$ 0.00		
<b>Course Fees</b>							
Fee Code	Fee Description	Date	Fee Amount	Payment Date	Payment Type	Pmt. Amt.	Balance
064~1	WB-GERMAN I	09/16/2009	\$ 15.25	10/02/2009 3270	P	\$ 15.25	\$ 0.00
064~2	WB-DICTIONARY ETC.	09/16/2009	\$ 2.25	10/02/2009 3270	P	\$ 2.25	\$ 0.00
120~2	WB-WRITERS INC	09/16/2009	\$ 25.00	10/02/2009 3270	P	\$ 25.00	\$ 0.00
180~5	F-PEC SCIENCE	09/16/2009	\$ 3.00	10/02/2009 3270	P	\$ 3.00	\$ 0.00
120~1	WB-VOC WORKSHOP	09/16/2009	\$ 9.25	10/02/2009 3270	P	\$ 9.25	\$ 0.00
065~1	WB-GERMAN II	09/13/2010	\$ 15.50	10/01/2010 572	P	\$ 15.50	\$ 0.00
182~5	F-BIOLOGY	09/13/2010	\$ 10.00	10/01/2010 572	P	\$ 10.00	\$ 0.00
011~5	F-ART I	09/13/2010	\$ 25.00	10/01/2010 572	P	\$ 25.00	\$ 0.00
121~1	WB-VOC WORKSHOP	09/13/2010	\$ 9.50	10/01/2010 572	P	\$ 9.50	\$ 0.00
Total Fees: \$ 114.75			Total Payments: \$ 114.75	Total Adjustments: \$ 0.00	Balance: \$ 0.00		
<b>Total fees: \$ 132.75</b>		<b>Total payments: \$ 132.75</b>		<b>Total adjustments: \$ 0.00</b>		<b>Total unpaid balance: \$ 0.00</b>	

**Student Fee Detail Report**

# Student Fees Summary (R110)

**Navigation: Home – SIS – Fees – Fee Reports – Student Fee Summary (R110)**

This report generates a summary by student and fee type of all fees that are currently outstanding for a selected school year. The report will display a grand total for all fee types at the end of the report. This report can only be generated if the school is using Fee Accounting.

Home » SIS » Fees » Fee Reports » Student Fees Summary (R110)

### Student Fees Summary (R110)

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

Selection Criteria | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

Entering one or more Student Numbers will limit the report to the those students.

Student Numbers:

If not limiting to an Ad-Hoc Membership Group or one or more Student Numbers, you may select as many other criteria as desired. Each selection will limit your results further.

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

Homeroom Date: 5/17/2011

**Grade**

07 - 07		
08 - 08		
09 - 09		
10 - 10		

**Student Status**

A - ACTIVE RES		
D - DELETED		
I - INACTIVE		
N - NON-RES		

**Administrative Homeroom**

AUT -	(Full Year Term)	
IN00 -	(Full Year Term)	
IN01 -	(Full Year Term)	
IN02 -	(Full Year Term)	

**Student Fees Summary (R110) Report Parameters Screen (First Half)**

<b>Program</b>	
AOC - ALTERNATIVE OPPORTUNITY CENTER AOCF - ALTERNATIVE OPPORTUNITY CENTER - FF AOCR - ALTERNATIVE OPPORTUNITY CENTER - RI AUT - AUTISM STUDENTS	← →
<b>Fee Type</b>	
General Fee Course Fee Misc Program	← →
<b>Home School</b>	
007278 - Local High School (Sch) 049320 - Local SD (Dist) 024810 - High School (Sch) 028910 - High School (Sch)	← →
<b>At least 1 Checkbox must be checked</b>	
<b>Include Students that have Outstanding Fee Balances:</b>	<input checked="" type="checkbox"/>
<b>Include Students that have Zero Fee Balances:</b>	<input type="checkbox"/>
<b>Sorting Options</b>	
Grade (DESC) StudentName (DESC) Program (ASC) Program (DESC)	Grade (ASC) StudentName (ASC)
<b>Delivery Method:</b>	Pickup <input type="button" value="Set As Default"/>
<b>Email Address:</b>	amy@noacsc.org
<b>Report Format:</b>	Adobe PDF
<b>Description:</b>	
<input type="button" value="Submit"/>	

### Student Fees Summary (R110) Report Parameters Screen (Second Half)

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the "Public And Private" check box to view Memberships created by other users in your drop-down list.

**Student Numbers** (optional) – If fee detail is needed for individual students, the student Numbers may be input here, separated by a comma, and fee details will only be produced for those individuals.

***Note:** The Student Number list and the Ad Hoc Membership selection are mutually exclusive: you can only use one at a time.*

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings

**Note:** *The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Include Students that have Outstanding Fee Balances** (optional) – If checked, will show students with an outstanding fee balance. If unchecked, will not show students that have an outstanding fee balance.

**Include Students that have Zero Fee Balances** (optional) – If checked, will show all students in building. If unchecked, will not show students that have a zero fee balance.

**Note:** *At least one of the Include options must be checked to submit the report.*

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

Report: R110											HIGH SCHOOL		
Printed Tue, May 17, 2011, 3:46 PM											2010-2011		
											Student Fee Summary Report		
Student Name	Student Number	Gender	Status	Grade	Homeroom	Pgm	Home School	Fees			Program	Membership	Total
								General	Course	Misc			
KAITLIN	14142	F	A	09	IN02			\$ 7.50	\$ 55.50	\$ 0.00	\$ 0.00	\$ 0.00	\$ 63.00
ALEXANDRIA	14575	F	A	09	IN02	FREE		\$ 5.50	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5.50
JOSHUA	14518	M	A	09	IN02			\$ 5.50	\$ 47.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 52.50
JULIAN	14516	M	A	09				\$ 5.50	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5.50
KATHRYN	14303	F	N	09	IN05			\$ 5.50	\$ 57.30	\$ 0.00	\$ 0.00	\$ 0.00	\$ 62.80

### Student Fee Summary Report

## Student Fee Invoice (R108-C)

### Navigation: Home – SIS – Fees – Fee Reports – Student Fee Invoice (R108-C)

This report is used to print a list of fees assessed to students. This report will commonly be used as an aid in collecting fees. The list will include student information and a summary of fees assessed and payments by type. The report is structured so that only one student is printed per page and the report can act as a receipt for fees paid.

Home » SIS » Fees » Fee Reports » Student Fee Invoice (R108-C)

## Student Fee Invoice

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

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

Entering one or more Student Numbers will limit the report to those students.

Student Numbers:

If not limiting to an Ad-Hoc Membership Group or one or more Student Numbers, you may select as many other criteria as desired. Each selection will limit your results further.

Homeroom Date: 5/18/2011

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

**Grade**

07 - 07	
08 - 08	
09 - 09	
10 - 10	

**Student Status**

A - ACTIVE RES	
D - DELETED	
I - INACTIVE	
N - NON-RES	

**Course Term**

1st Semester	
All Year	
2nd Semester	

Student Fee Invoice (R108-C) Report Parameters Screen (First Half)

<b>Administrative Homeroom</b>		
AUT - (Full Year Term)		
IN00 - (Full Year Term)		
IN01 - (Full Year Term)		
IN02 - (Full Year Term)		
<b>Fee Type</b>		
General Fee		
Course Fee		
Misc		
Program		
<b>Home School</b>		
007278 - Local High School (Sch)		
049320 - Local SD (Dist)		
024810 - High School (Sch)		
028910 - High School (Sch)		
<b>Free-Form Text</b>		
<input type="text"/>		
<b>Include Students that have Outstanding Fee Balances:</b> <input checked="" type="checkbox"/>		
<b>Include Students that have Negative Fee Balances:</b> <input checked="" type="checkbox"/>		
<b>Include Students that have Zero Fee Balances:</b> <input checked="" type="checkbox"/>		
<b>Student Sorting Options</b>		
Grade (DESC)		Student Name (ASC)
Student Name (DESC)		
Home School (ASC)		
Home School (DESC)		
<b>Fee Sorting Options</b>		
Fee Code (ASC)		
Fee Code (DESC)		
<b>Output:</b> <input type="radio"/> Report <input checked="" type="radio"/> Labels <input type="radio"/> Both Report and Labels		
<b>Label Type:</b> Avery Label 5160 - 1" X 2 5/8" 3-columns		
<b>Address:</b> <input checked="" type="radio"/> Use Student Address <input type="radio"/> Use Parent Address		
<input type="checkbox"/> Use custom address text <input type="text"/>		
<b>Include Copied On Correspondence:</b> <input type="radio"/> Yes <input checked="" type="radio"/> No		
<b>Delivery Method:</b> Pickup <input type="button" value="Set As Default"/>		
<b>Email Address:</b> amy@noacsc.org		
<b>Report Format:</b> Adobe PDF		
<b>Description:</b> <input type="text"/>		
<input type="button" value="Submit"/>		

### Student Fee Invoice (R108-C) Report Parameters Screen (Second Half)

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the "Public And Private" check box to view Memberships created by other users in your drop-down list.

**Student Numbers** (optional) – If fee detail is needed for individual students, the student Numbers may be input here, separated by a comma, and fee details will only be produced for those individuals.

***Note:** The Student Number list and the Ad Hoc Membership selection are mutually exclusive; you can only use one at a time.*

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

***Note:** The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Free-Form Text** (optional) – Enter any text that you would like to display on each page of the report. Currently, there is no limit to the number of characters allowed in the Free-Form Text box.

**Include Students that have Outstanding Fee Balances** (optional) – If checked, will show students with an outstanding fee balance. If unchecked, will not show students that have an outstanding fee balance.

**Include Students that have Negative Fee Balances** (optional) – If checked, will show students with a negative fee balance. If unchecked, will not show students that have a negative fee balance.

**Include Students that have Zero Fee Balances** (optional) – If checked, will show all students in building. If unchecked, will not show students that have a zero fee balance.

**Student Sorting Options** (optional) – Choose one or more student sort options for your report.

**Fee Sorting Options** (optional) – Choose one or more fee sort options for your report.

***Note:** The separate sets of sorting options is to avoid the garbled formatting that would arise if a report was sorted by Fee Code and then subtotaled by Student.*

**Output** (required) – Choose Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

***Note:** If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** (required if using Labels) – Choose the correct label type and size.

**Address** (required) – Choose Student Address or Parent Address.

**Include Copied on Correspondence** – Yes or No; Selecting Yes will include address labels for contacts marked as “Copied on Correspondence” when creating labels.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

Report: R108C Printed Wed, May 18, 2011, 10:37 AM			HIGH SCHOOL 2010-2011 <b>Student Fee Invoice</b>		
			. HALEY		
			13669      Gender: F		
			Grade: 10      Status: N		
			Homeroom: IN08		
			Received/Residence IRN:		
<i>General Fees</i>			<i>Course Fees</i>		
Fee	Fee Description	Balance	Fee	Fee Description	Balance
10	PARKING PERMIT	\$5.00	185*5	F-GENERAL	\$7.00
07	STUDENT PLANNER	\$5.50		BIOLOGY	
			033*2	WB-ACCT 1 FJ	\$27.50
			033*1	WB-ACCT 1	\$24.00
			121*1	WB-VOC WORKSHOP	\$9.50
			020*5	F-CERAMICS	\$30.00
			180*5	F-PEC SCIENCE	\$3.00
		<b>\$10.50</b>			<b>\$101.00</b>
			Total Owed:      \$ 111.50		

**Student Fee Invoice Report**

**Student Fee Collection Summary (R108-B)**

**Navigation: Home – SIS – Fees – Fee Reports – Student Fee Collection Summary (R108-B)**

This report is used to print a list of fees assessed to students. This report will commonly be used as an aid in collecting fees. The list will include student information, all fees assessed, and their detail information – fee code, fee type, fee description, and fee amount.

This report may be used by schools not using the Fees Accounting Application to specifically track fees and corresponding payments. The source of the data for the reports will differ if a school that has not been configured to use the Fees Accounting application uses the report. If the school is configured for Fees Accounting, fees are determined from the student fee records. If Fees Accounting is not being used then the fees are projected from the fee definitions and student profile information.

Records will be selected only for the school year displayed in the context area.

Home » SIS » Fees » Fee Reports » Student Fee Collection Summary (R108-B) Advanced S

## Student Fee Collection List Summary (R108-B)

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

---

Selection Criteria   **Selection Summary**   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the the students associated with that membership group. All other criteria will be ignored.

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

---

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Homeroom Date:** 7/28/2009  

---

**Fee Options**

Show Fees from Past School Years:  

Show Fees from Future School Years:  

Show Fees from All Buildings:  

---

**Grade**

07 - 07 08 - 08 09 - 09 10 - 10	← → ⇐ ⇐ ⇒ ⇒	
--	-------------------	--

---

**Student Status**

A - ACTIVE RES D - DELETED I - INACTIVE N - NON-RES	← → ⇐ ⇐ ⇒ ⇒	
--	-------------------	--

---

**Administrative Homeroom**

AUT - Teacher1173 (Full Year Term) IN01 - Teacher1102 (Full Year Term) IN02 - Teacher1126 (Full Year Term) IN03 - Teacher1163 (Full Year Term)	← → ⇐ ⇐ ⇒ ⇒	
---	-------------------	--

---

**Program**

AOC - ALTERNATIVE OPPORTUNITY CENTER AUT - AUTISM STUDENTS MH - MULTI-HANDICAPPED STUDENTS MS - MILLSTREAM STUDENTS	← → ⇐ ⇐ ⇒ ⇒	
--	-------------------	--

---

**Fee Type**

General Fee Course Fee Misc Program	← → ⇐ ⇐ ⇒ ⇒	
--	-------------------	--

---

**Home School**

	← → ⇐ ⇐ ⇒ ⇒	
--	-------------------	--

---

**Sorting Options**

Grade (DESC) Student Name (DESC) Homeroom (ASC) Homeroom (DESC)	← → ⇐ ⇐ ⇒ ⇒	Grade (ASC) Student Name (ASC)
--	-------------------	-----------------------------------

---

**Delivery Method:**   Pickup  

**Email Address:**   amy@noacsc.org

**Report Format:**   Adobe PDF

---

**Description:**  

---

**Student Fee Collection List Summary (R108-B) Report Parameters Screen**

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the "Public And Private" check box to view Memberships created by other users in your drop-down list.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

***Note:** The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

Report: R108B											HIGH SCHOOL		
Printed Tue, Jul 28, 2009, 2:00 PM											2009-2010		
Student Fee Collection List - Summary													
Student Name	Student Nbr	Gender	Status	Grade	Homeroom	Pgm	Home School	Fees				Total	
								General	Course	Misc	Program		Membership
Student24216, MORGAN	00012188	F	A	10				\$ 2.00	\$ 3.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5.00
Student24349 JR, STEVEN	00011658	M	U	11				\$ 10.25	\$ 52.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 62.25
Student24351, NOE (JOEL)	00011656	M	A	11				\$ 10.25	\$ 80.75	\$ 0.00	\$ 0.00	\$ 0.00	\$ 71.00
Student24400, JEREMY	00011525	M	A	11				\$ 18.25	\$ 98.80	\$ 0.00	\$ 0.00	\$ 0.00	\$ 117.05
Student24403, JACOB	00011522	M	U	11				\$ 10.25	\$ 41.75	\$ 0.00	\$ 0.00	\$ 0.00	\$ 52.00
Student24417, AMANDA	00011204	F	A	11				\$ 0.00	\$ 25.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 25.00
Student24556, EVONNE	00010588	F	N	11				\$ 13.13	\$ 74.05	\$ 0.00	\$ 0.00	\$ 0.00	\$ 87.18
Student24480, STEPHANIE	00010835	F	A	12				\$ 0.00	\$ 0.02	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.02
Student24555, BRETT (BRETT)	00010591	M	A	12				\$ 0.00	\$ 18.75	\$ 0.00	\$ 0.00	\$ 0.00	\$ 18.75
Student24573, JEREMY	00010540	M	A	12				\$ 16.25	\$ 219.55	\$ 0.00	\$ 0.00	\$ 0.00	\$ 235.80
Student24633, TYLER (TYLER)	00010156	M	A	12				\$ 16.25	\$ 176.25	\$ 0.00	\$ 0.00	\$ 0.00	\$ 192.50
								\$ 98.83	\$ 789.92	\$ 0.00	\$ 0.00	\$ 0.00	\$ 888.55

### Student Fee Collection List Summary (R108-B) Report

## Student Fee Collection List Detail (R108-A)

**Navigation: Home – SIS – Fees – Fee Reports – Student Fee Collection Detail (R108-A)**

This report is used to print a list of fees assessed to students. This report will commonly be used as an aid in collecting fees. The list will include student information, all fees assessed, and their detail information – fee code, fee type, fee description, and fee amount.

This report may be used by schools not using the Fees Accounting Application to specifically track fees and corresponding payments. The source of the data for the reports will differ if a school that has not been configured to use the Fees Accounting application uses the report. If the school is configured for Fees Accounting, fees are determined from the student fee records. If Fees Accounting is not being used then the fees are projected from the fee definitions and student profile information.

Records will be selected only for the school year displayed in the context area.

## Student Fee Collection List Detail (R108-A)

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

Selection Criteria    Selection Summary    Load Settings

**Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.**

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

**If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.**

**Homeroom Date:** 7/28/2009

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

**Grade**

07 - 07    ⇄ ⇄ ⇄

08 - 08    ⇄ ⇄ ⇄

09 - 09    ⇄ ⇄ ⇄

10 - 10    ⇄ ⇄ ⇄

**Student Status**

A - ACTIVE RES    ⇄ ⇄ ⇄

D - DELETED    ⇄ ⇄ ⇄

I - INACTIVE    ⇄ ⇄ ⇄

N - NON-RES    ⇄ ⇄ ⇄

**Administrative Homeroom**

AUT - Teacher1173 (Full Year Term)    ⇄ ⇄ ⇄

IN01 - Teacher1102 (Full Year Term)    ⇄ ⇄ ⇄

IN02 - Teacher1126 (Full Year Term)    ⇄ ⇄ ⇄

IN03 - Teacher1163 (Full Year Term)    ⇄ ⇄ ⇄

**Program**

AOC - ALTERNATIVE OPPORTUNITY CENTER    ⇄ ⇄ ⇄

AUT - AUTISM STUDENTS    ⇄ ⇄ ⇄

MH - MULTI-HANDICAPPED STUDENTS    ⇄ ⇄ ⇄

MS - MILLSTREAM STUDENTS    ⇄ ⇄ ⇄

**Fee Type**

General Fee    ⇄ ⇄ ⇄

Course Fee    ⇄ ⇄ ⇄

Misc    ⇄ ⇄ ⇄

Program    ⇄ ⇄ ⇄

**Home School**

⇄ ⇄ ⇄

**Student Sorting Options**

Grade (DESC)    ⇄ ⇄ ⇄    Student Name (ASC)    ⇄

Homeroom (ASC)    ⇄ ⇄ ⇄

Homeroom (DESC)    ⇄ ⇄ ⇄

Home School (ASC)    ⇄ ⇄ ⇄

**Fee Sorting Options**

Fee Code (ASC)    ⇄ ⇄ ⇄

Fee Code (DESC)    ⇄ ⇄ ⇄

**Output:**     Report     Labels     Both Report and Labels

**Label Type:**    Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**     Use Student Address     Use Parent Address

Use custom address text

**Include Copied On Correspondence:**     Yes     No

**Delivery Method:**    Pickup   

**Email Address:**    amy@noacsc.org

**Report Format:**    Adobe PDF

**Description:**   

**Student Fee Collection List Detail (R108-A) Report Parameters Screen**

**Ad-Hoc Membership** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored. Check the "Public And Private" check box to view Memberships created by other users in your drop-down list.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. This field will default to today's date.

**Fee Options** – Options available to limit which fee details display.

**Show Fees from Past School Years** – If checked, shows fees from past school years.

**Show Fees from Future School Years** – If checked, shows fees from future school years.

**Show Fees from All Buildings** – If checked, shows fees from all buildings.

***Note:** The Fee Options control whether fees from past years, future years, and other buildings will show on the report. The defaults are set at the school level, and previously applied to the report without the user being notified or having control over it. Although, the initial values for the check boxes are set from DASL Options – Fees, when the report settings are saved, the values selected will be saved. So it is possible for users to work with a custom set of values. However, each report that shows these check boxes saves the values separately, so different reports can use different sets of settings.*

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Fee Type** (optional) – If no Fee Types are selected, the report will select all Fee Types. You can also filter by selecting specific Fee Types for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report.

**Student Sorting Options** (optional) – Choose one or more student sort options for your report.

**Fee Sorting Options** (optional) – Choose one or more fee sort options for your report.

***Note:** The separate sets of sorting options is to avoid the garbled formatting that would arise if a report was sorted by Fee Code and then subtotaled by Student.*

**Output** (required) – Choose Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

***Note:** If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** (required if using Labels) – Choose the correct label type and size.

**Address** (required) – Choose Student Address or Parent Address.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

## Payments Posted by User Report (Report Builder)

**Navigation: Home – Local – Report Builder Links – Report Builder Reports**

The Payments Posted by User report lists the payments made on a specified day by the users who posted the payments.

Home » Local » Report Builder Advanced Search | Feedback

### Report Builder

From this screen, you can manage Regular and User Reports created in ProgressBook Report Builder

[ Hide Regular Reports ]

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.
	Period G Student Core Summary Report	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	Period K NonGraduate Core Summary Report	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	Course Fee Analysis	Fee report that shows the outstanding balance, if any, of a student's course fees in each course fees were assessed.
	Discipline Action	Discipline Action report that filters on selected discipline actions and when the punishment is to be served.
	Locker Combinations	Locker report listing all lockers and the all combinations assigned to each one.
	<b>Payments Posted by User</b>	Fee reporting listing payments posted by username for balancing receipts.
	Student Location	Student report that shows where a student is at in the building each period of the day.

[ Hide User Reports ]

View Report	Name	Description
	Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.
	My Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.

**Run Icon** →

### Payments Posted by User Report on the Report Builder Reports Screen

1. With the school or district for which you want to run the report in context, on the **Report Builder** screen, click the run icon in the **View Report** column for the **Payments Posted by User** report.

The StudentInformation **Report Viewer** screen displays.

ProgressBook StudentInformation Report Viewer

Hide Setup Save Setup As... View Report Report Name: Payments Posted by User Report

**Update Report Headers**

Report Header: Payments Posted by User

**Select Required Parameters**

Fee Type: General Fee, Course Fee, Misc, Program, Membership

Date: 12/07/2012

Expand All Details:  Yes  No

**Set Optional Filters**

Field Name	Operation	Value

**Add & Remove Columns**

No columns are available to add or remove.

### Payments Posted by User Report on the Report Viewer Screen

2. In the **Report Header** field, modify the heading as you want it to display at the top of the report, if desired.
3. In the **Select Required Parameters** area, in the **Fee Type** drop-down list, select the fee type(s) you want to display in the report.
4. In the **Date** field, enter the date for which you want to view the posted fees in the report.

***Note:** You can also click the date picker in the **Date** field to select a date from a calendar.*

5. For the **Expand All Details** options, select one of the following:
  - **Yes** – Displays the details of each payment posted by user in the generated report by default.
  - **No** – Displays the total amount posted by each user in the generated report by default.

***Note:** You can expand and collapse the details in the generated report as desired by clicking the plus and minus signs next to the user. This option sets the default state of the report when it is run.*

7. If you would like to apply an additional filter to the report results, in the **Set Optional Filters** area, perform the following steps:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the **Field Name** drop-down list. For more information about the filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.
  - c. In the Value field, enter or select the appropriate value, if applicable.

***Note:** The available options and acceptable values vary depending on the option you selected in the **Field Name** drop-down list. If you selected an option that requires a date, a calendar is available in the **Value** field. If you selected *Has a Value* or *Does Not Have a Value* in the **Operation** drop-down list, then the **Value** field is unavailable.*

- d. To add an additional filter, repeat [step 6\(a\)](#) through [step 6\(c\)](#) in the line below the previous filter.

10. Click **View Report**.

The report displays at the bottom of the window.

**Payments Posted by User**

Report For:	12/7/2012				
User Name	School Name	Fee Accounting Code	Fee Description	Fee Type	Fee Sum
Emhoff, Heidi	BLACK RIVER HIGH SCHOOL	001-1740-9910-000000-010	108 - English 12	Course Fee	\$7.00
		200-1620-9013-000000-010	2015 - Class of 2015 fee	General Fee	\$10.00
		001-1740-9910-000000-010	Lock - Lock fee	General Fee	\$5.00
		<b>Total</b>			
Test, QA	BLACK RIVER HIGH SCHOOL	001-1740-9910-000000-010	1000 - Woods 1	Course Fee	\$18.00
		001-1740-9910-000000-010	1002 - Woods II	Course Fee	\$18.00
		001-1740-9910-000000-010	1003 - Woods III	Course Fee	\$18.00
			11 wood - 11-12 Wood purchased	Misc	\$49.00
		200-1620-9012-000000-010	2012 - Class of 2012 fee	General Fee	\$8.00
		200-1620-9014-000000-010	2014 - Class of 2014 fee	General Fee	\$20.00
		200-1620-9013-000000-010	2015 - Class of 2015 fee	General Fee	\$10.00
		001-1740-9910-000000-010	300 - Physical Science	Course Fee	\$7.00
		001-1740-9910-000000-010	302 - Biology I	Course Fee	\$54.00
		001-1740-9910-000000-010	500 - Spanish I	Course Fee	\$15.00
		001-1740-9910-000000-010	616 - Personal Finance	Course Fee	\$1.00
		001-1740-9910-000000-010	710 - Graphic Design III	Course Fee	\$5.00
		001-1740-9910-000000-010	712 - Graphic Design IV	Course Fee	\$5.00
		001-1740-9910-000000-010	806 - Life Planning/Fin. Lit.	Course Fee	\$8.00
		001-1740-9910-000000-010	900 - Physical Education	Course Fee	\$5.00
		001-1740-9910-000000-010	910 - Health	Course Fee	\$2.00
			FFA - FFA Fundraiser	Misc	\$91.00
			FFA shop - FFA shop project	Misc	\$18.00
		001-1740-9910-000000-010	Guidance - Guidance Fee	General Fee	\$2.00
		001-1740-9910-000000-010	Handbook - Student Handbook	General Fee	\$20.00
			Lib Fee - Library Fee	Misc	\$15.00
		001-1740-9910-000000-010	Lock - Lock fee	General Fee	\$5.00
		<b>Total</b>			
<b>Total</b>					<b>\$416.00</b>

12/7/2012 3:52:09 PM

**Payments Posted by User Report with Details Expanded**

11. To save the report with your selected parameters and filters, perform the following steps:

- a. Click **Save Setup As**.
- b. In the **New report name** field, enter a unique report name.
- c. In the **New description** field, enter a description of the report.
- d. Click **Save**.

The following message displays at the bottom of the screen: "Report setup saved successfully."

The report is saved. You can now run it directly from the User Reports area on the Report Builder Reports screen.

12. To close the StudentInformation **Report Viewer** screen and return to the **Report Builder Reports** screen, click the close button.

---

# ProgressBook StudentInformation Graduation/Eligibility Guide



# **ProgressBook StudentInformation Graduation/Eligibility Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44114

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Graduation/Eligibility Guide* have been made.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .

This page intentionally left blank.

# Table of Contents

Change Log .....	i
Table of Contents.....	iii
Graduation/Eligibility Overview .....	1
Understanding the Graduation/Eligibility Module .....	1
Graduation/Eligibility Outline and Flow .....	1
Graduation/Eligibility Maintenance.....	2
Miscellaneous Item Maintenance .....	2
Add/Edit Graduation / Eligibility Miscellaneous Items .....	3
CORE Overflow Maintenance .....	3
Create CORE Overflow Rules.....	4
Rule Maintenance .....	5
Add/Edit Rule.....	6
Add CORE Overflow Rule to the Graduation/Eligibility Rule .....	8
Setup Rule Details .....	9
Add/Edit Line Item.....	10
Delete Line Item .....	10
Line Item Element Setup.....	12
Add/Edit Line Item Element.....	21
Add/Edit Assessment Element.....	22
Add/Edit Community Service Element .....	23
Add/Edit Course Element.....	23
Add/Edit Exemption Element.....	24
Add/Edit GPA Element.....	24
Add/Edit Miscellaneous Element.....	25
Add/Edit Total Credits Element .....	26
Add/Edit Total CORE Credits Element.....	27
Delete Line Item Element.....	28
Copy Rule .....	29
Delete Rule .....	31
Graduation/Eligibility .....	32

Assigning Graduation/Eligibility Rules .....	32
Eligibility Rule Assignments .....	32
Student Search Criteria .....	32
Mass Update Options .....	33
Search Result .....	34
Student Profile Bulk Update .....	34
Student Profile – Additional Tab .....	35
Student Graduation/Eligibility .....	36
Miscellaneous Values .....	36
Student Eligibility Details .....	36
Eligibility .....	38
Assessments .....	38
Assignments .....	39
Community Service .....	40
Course History .....	40
GPA History .....	41
Miscellaneous Eligibility .....	42
Requests .....	42
Eligibility Report (R208) .....	44
Eligibility Letters .....	48

---

## Graduation/Eligibility Overview

Graduation/Eligibility is used as a method of checking if students have met all the requirements for graduation eligibility. Graduation/Eligibility Rules include one or more line items, and students are assigned Rules. Students can have up to two (2) rules, one primary and one secondary. For example, a student might have one rule for basic graduation requirements, while having a second rule that will qualify them as an honors graduate.

---

## Understanding the Graduation/Eligibility Module

Rules are defined for a school, and then assigned to any number of students in that school as either the student's primary rule or secondary rule.

A user with appropriate security access can run an Eligibility Report on a set of students, based on criteria, which will validate the students to a selected rule, or to each student's Primary Rule, Secondary Rule, or both. A user may also check on individual students' status for their selected Rules, or for a different Rule.

Some R700 report card formats print the student's graduation rule name and whether or not they are on track to graduate. The R702 transcript prints a credit summary box detailing how many credits the student earned for each line item in the specified graduation rule.

Miscellaneous Items are those items that cannot be defined in other areas of StudentInformation. These are defined by users with appropriate security access, and values for each Miscellaneous Item can be entered for each student. Miscellaneous Items may be included in a Rule's setup once created.

---

## Graduation/Eligibility Outline and Flow

1. **Graduation/Eligibility Maintenance**
  - A. **Miscellaneous Item Maintenance** – Manage specific criteria not covered by the standard categories
  - B. **Rule Maintenance** – Manage Graduation Eligibility Rules
    1. **Add/Edit Rule**
    2. **Setup Rule Details** – Manage Line Item Elements within each Rule and Line Item
    3. **Copy Rule**
    4. **Delete Rule**
2. **Graduation/Eligibility**
  - A. **Assigning Graduation/Eligibility Rules**
    1. **Eligibility Rule Assignments** – Assign eligibility rules to many students at once

2. **Student Profile Bulk Update** - Assign eligibility rules to ad-hoc memberships
  3. **Student Profile Additional tab** – Assign eligibility rules to a single student
- B. Student Graduation/Eligibility**
1. **Miscellaneous Values** – View/edit student values for Miscellaneous Items
  2. **Student Eligibility Detail** – View single student eligibility and underlying details
- C. Eligibility Report (R208)** – Generate report of selected students for a particular rule
- D. Eligibility Letters** – Generate eligibility letters for selected students for a particular rule.

## Graduation/Eligibility Maintenance

### Miscellaneous Item Maintenance

**Navigation: Home – Management – School Administration – Graduation/Eligibility – Miscellaneous Items**

Graduation/Eligibility Rule Line Items can include several different types of pre-defined elements, or they can include any miscellaneous items. You can create and maintain those Miscellaneous Items from this screen.

Home » Management » School Administration » Graduation / Eligibility » Miscellaneous Items

### Graduation / Eligibility Miscellaneous Items

From this screen users can view / edit / and delete graduation / eligibility miscellaneous items.

Add Item

	Code ^	Name	Description	Data Type	Active
 	Couns	Counselor Discussion	Discussion with Counselor regarding future plans	True/False	
 	MDItem	Misc District Item		Numeric	

Show Active Only

#### Graduation/Eligibility Miscellaneous Items Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Data Type, Active) in ascending or descending order by clicking on the column header.

 – This Miscellaneous Item was created at a higher level, and cannot be edited or deleted at this level.

## Add/Edit Graduation / Eligibility Miscellaneous Items



Home >> Management >> School Administration >> Graduation / Eligibility >> Miscellaneous Items

### Graduation / Eligibility Miscellaneous Items

From this screen users can view / edit / and delete graduation / eligibility miscellaneous items.

**Code:**  ⚡

**Name:**  ⚡

**Description:**

**Data Type:**  Numeric  True/False

**IsActive:**

Save Save and New Cancel

### Add/Edit Graduation/Eligibility Miscellaneous Items Screen

**Code** (required) – Enter a code (up to eight characters) for this Miscellaneous Item.

**Name** (required) – Enter a name for this Miscellaneous Item.

**Description** (optional) – Enter a description for this Miscellaneous Item.

**Data Type** (required) – Select Numeric or True/False. Numeric Items will require an integer value entered if used as a Line Item criterion.

## CORE Overflow Maintenance

**Navigation:** Home – Management – School Administration – Graduation/Eligibility – CORE Overflow

**Note:** The CORE Overflow Maintenance screen only works with the Total CORE Credits line item. See [“Add/Edit Total CORE Credits.”](#)

The CORE overflow feature defines the CORE subject area to which StudentInformation counts the excess course credits a student earns over the required credits for a CORE subject area. The CORE Overflow screen enables you to create new and modify existing CORE overflow rules.

In order to use a CORE overflow rule, you must set up the following in the Graduation/Eligibility Rule:

- Select the CORE overflow rule on the Total CORE Credits Line Item Options tab. See [“Add CORE Overflow Rule to the Graduation/Eligibility Rule.”](#)
- Set up the Total CORE Credits line item element. See [“Add/Edit Total CORE Credits.”](#)

### Create CORE Overflow Rules

1. On the CORE Overflow screen, click **Add New Overflow**.

A grid displays on the right side of the screen listing the CORE subject areas and the required values for the current year by default.

2. In the **Overflow Name** field, enter a name for the new CORE overflow rule.

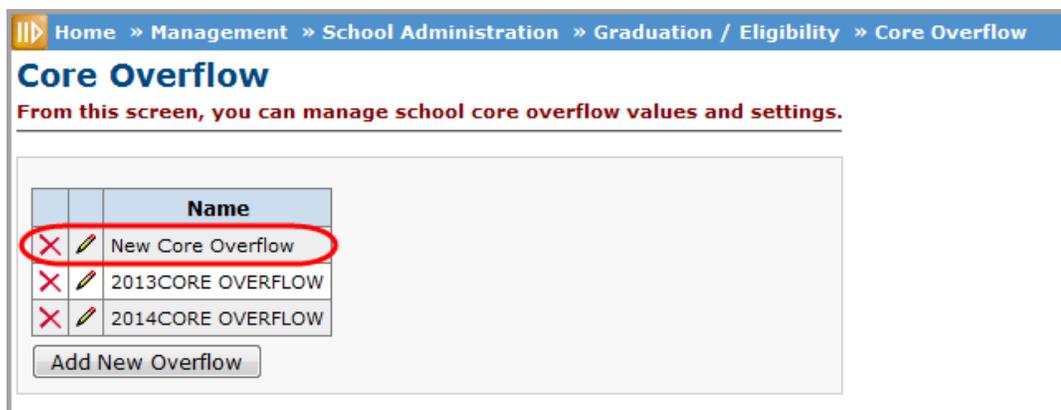
Core Subject Area	Core Required Value	Subject Area Overflow
BUS	1.00	ELE
CTA	0.00	***
ELE	0.00	***
ENG	4.00	ELE
FAR	0.00	***
FLR	0.00	***
HEC	1.00	ELE
HTH	0.50	ELE
JTC	0.00	***
MTA	1.00	ELE
MTO	3.00	ELE
PHE	0.50	ELE
SCA	1.00	ELE
SCL	1.00	ELE
SCO	1.00	ELE
SCP	1.00	ELE
SOG	0.50	ELE
SOH	0.50	ELE
SOO	2.00	ELE
TEC	0.00	ELE

#### Adding a New Overflow Rule

3. In the **CORE Required Value** field in the row of a CORE subject area for which you want to define the core overflow, modify the required value, if desired.

- In the **Subject Area Overflow** drop-down list in the row of the same CORE subject area, select the CORE subject area to which you want StudentInformation to count excess credits.
- Repeat [step 3](#) and [step 4](#) for each CORE subject area for which you want to define the core overflow rule.
- Click **Save**.

The new rule displays in the grid on the CORE Overflow screen.



New CORE Overflow Rule on the CORE Overflow Screen

## Rule Maintenance

**Navigation: Home – Management – School Administration – Graduation/Eligibility – Rule Maintenance**

Graduation/Eligibility Rules contain line items that are checked to see if a student passes or fails the rule. A single rule can contain many line items, if necessary.



Graduation/Eligibility Rule Maintenance Screen

**Sorting** – You may sort by any column (Code, Name, Description, Is Active) in ascending or descending order by clicking on the column header.

– Delete this Graduation/Eligibility Rule.

– Edit this Graduation/Eligibility Rule.

– Setup Details for this Graduation/Eligibility Rule.

– Copy this Graduation/Eligibility Rule.

 – This Rule was created at a higher level (district or ITC), and cannot be edited, deleted, or have its details changed at this level.

 – Active Graduation/Eligibility Rule – can be used on new Student Records.

 – Inactive Graduation/Eligibility Rule – cannot be used on new Student Records.

**Show Active Only** – If checked, will show only active Graduation/Eligibility Rules; if not checked, will show both active and inactive Graduation/Eligibility Rules.

**Add Rule** – Adds a Graduation/Eligibility Rule.

## Add/Edit Rule

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance**

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.



Code ^	Name	Description	Is Active
  	DRule	District Graduation Rule	
  	Rule 1	Main Graduation Rules	

### Graduation/Eligibility Rule Maintenance Screen

Click the appropriate button to **Add** or **Edit** a Graduation/Eligibility Rule.

### Add/Edit Graduation/Eligibility Rule Maintenance Screen

**Code** (required) – Code for this Graduation/Eligibility Rule; up to eight characters.

**Name** (required) – Name for this Graduation/Eligibility Rule.

**Description** (optional) – Description of this Graduation/Eligibility Rule.

**Meets requirements text** (optional) – This text will be used by report cards when the student meets the requirements for this Graduation/Eligibility Rule.

**Does not meet requirements text** (optional) – This text will be used by report cards when the student fails to meet the requirements for this Graduation/Eligibility Rule.

**Is Active** – Yes or No; Graduation/Eligibility Rules must be Active to use on new Student Records. This box is checked by default.

**Save** – Will save current Graduation/Eligibility Rule and return to Graduation/Eligibility Rule Maintenance listing where you will see the updated information.

**Cancel** – Will clear out data already entered and return to the Graduation/Eligibility Rule Maintenance listing.

**Go to setup** – Save and go to Setup Details for this Graduation/Eligibility Rule. See [“Line Item Element Setup.”](#)

**Maximum Credit Groups** – Currently, this tab is not functional.

**Total CORE Credits Line Item Options** – Click this tab to view or edit the CORE overflow settings for this Graduation/Eligibility Rule. This tab only applies to Total CORE Credit line items. For more information, see [“Add CORE Overflow Rule to the Graduation/Eligibility Rule.”](#)

## Add CORE Overflow Rule to the Graduation/Eligibility Rule

The Total CORE Credit Line Item Options tab defines the CORE overflow rule to apply to the Graduation/Eligibility Rule. For more information about CORE overflow rules, see “

CORE Overflow Maintenance.”

**Note:** The CORE overflow rules only work with the Total CORE Credits line item. See “Add/Edit Total CORE Credits.”

The screenshot shows the 'Graduation / Eligibility Rule Maintenance' screen. The breadcrumb trail is 'Home > Management > School Administration > Graduation / Eligibility > Rule Maintenance'. The page title is 'Graduation / Eligibility Rule Maintenance'. Below the title is a description: 'The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.' The 'Total CORE Credits Line Item Options' tab is selected. The 'Rule Selection' section has a dropdown for 'CORE Overflow Rule' set to '2013CORE OVERFLOW'. A note states: 'Overflow rule to apply to credit selection. This tab only works in conjunction with Total CORE Credits Line Items'. The 'Credit Selection' section has four rows: 'Include Current Courses' (checked), 'Missing Marks Handling' (set to 'Project Pass'), 'Include Current Requests' (unchecked), and 'High school credit only' (checked). Each row has a corresponding description and a checkbox. At the bottom are 'Save', 'Cancel', and 'Go to setup' buttons.

### Total CORE CORE Credits Line Item Options Tab on the Add/Edit Graduation/Eligibility Rule Maintenance Screen

**CORE Overflow Rule** (required) – Select the CORE overflow rule you want to apply to this Graduation/Eligibility Rule.

**Include Current Courses** – Select to include in the CORE overflow count credits for courses the student is currently taking.

**Missing Marks Handling** – Select how you want StudentInformation to count current courses for which the marks are missing.

- **Project Pass** – The credits for a course with missing marks are included in the CORE credits calculation as though the student has passed the course.
- **Project Fail** – The credits for a course with missing marks are not included in the CORE credits calculation as though the student has failed the course.

**Include Current Requests** – Select to include credits from the student’s active course requests in the core overflow calculation.

**High school credit only** – Select to include only courses in which the **Is High School Credit** check box is selected.

## Setup Rule Details

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance**

Home > Management > School Administration > Graduation / Eligibility > Rule Maintenance

**Graduation / Eligibility Rule Maintenance**

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

Add Rule

Code	Name	Description	Is Active
DRule	District Graduation Rule		
Rule 1	Main Graduation Rules		

Show Active Only    Setup Rule    Copy Rule

### Graduation/Eligibility Rule Maintenance Screen

Click to setup details for a specific Graduation/Eligibility Rule, or click **Go to Setup** from a Rule's Add/Edit page.

Home > Management > School Administration > Graduation / Eligibility > Rule Setup

**Graduation / Eligibility Rule Setup - Rule 1 - Main Graduation Rules**

From this screen users can set up the criteria for a rule

Line Item
Course Requirements
Assessment Requirements

Setup Line Item

Add Line Item    Back to Rules

### Editing a Line Item

**Add Line Item** – Adds Line Item.

**Back to Rules** – Returns to the Graduation/Eligibility Rules page.

– Edits Line Item.

– Deletes Line Item.

– Setup Line Item Elements.

There may be a slight delay when displaying the right side of the screen (after clicking anything on the left side). In this case, a Loading message will display on the right:

**Loading Line Item Elements...**

### Loading Line Item Elements Message

## Add/Edit Line Item

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance – Rule Setup**

This page has standard add record, edit record and delete record controls.

Home » Management » School Administration » Graduation / Eligibility » Rule Setup

### Graduation / Eligibility Rule Setup - Rule 1 - Main Graduation Rules

From this screen users can set up the criteria for a rule

Line Item	
	Course Requirements
	Assessment Requirements

Setup Line Item

### Graduation/Eligibility Rule Setup Maintenance Screen

Click the appropriate button to **Add** or **Edit** a new Line Item.

Home » Management » School Administration » Graduation / Eligibility » Rule Setup Advanced Search | Feedback | Mgmt | Help | Print

### Graduation / Eligibility Rule Setup - Rule 1 - Main Graduation Rules

From this screen users can set up the criteria for a rule

Line Item	
	Course Requirements
	Assessment Requirements

Setup Line Item

[Add Line Item](#)

Description:

Sort Order:

### Adding and Editing a Line Item

**Description** (required) – Description of this Line Item.

**Sort Order** (required) – The order in which this Line Item displays. When adding a new Line Item, Sort Order defaults to 1 greater than the highest existing Line Item. If you enter a Sort Order that an existing Line Item has, that Line Item and any Line Items with higher Sort Order numbers will each increase by 1. **Example:** Line Items with Sort Orders of 1, 2 and 3 already exist. Enter 2 for the new Line Item's Sort Order. The original Line Item with Sort Order 2 moves to Sort Order 3, and the original Line Item with Sort Order 3 moves to Sort Order 4.

**Save** – Save this Line Item. The right side box will display the following confirmation message:

**Line Item Saved**

**Save and Details** – Save this Line Item and open Setup Line Item Elements for this Line Item.

**Cancel**– Clear data entered and close the Add Line Item box.

## Delete Line Item

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance – Rule Setup**

Home » Management » School Administration » Graduation / Eligibility » Rule Setup

## Graduation / Eligibility Rule Setup - Rule 1 - Main Graduation Rules

From this screen users can set up the criteria for a rule

Line Item	
  	Course Requirements
  	Assessment Requirements
	Setup Line Item

### Graduation/Eligibility Rule Setup Maintenance Screen

Click the  icon to delete a Line Item. The Delete Line Item box appears on the right side of the screen.

Home » Management » School Administration » Graduation / Eligibility » Rule Setup Advanced Search | Feedback | Mgmt | Help | Print

## Graduation / Eligibility Rule Setup - Rule 1 - Main Graduation Rules

From this screen users can set up the criteria for a rule

Line Item	
  	Course Requirements
  	Assessment Requirements
	Setup Line Item

[Delete Line Item](#)

Are you sure you want to delete the following line item?

**Assessment Requirements**

### Deleting a Line Item

**Continue** – Delete the Line Item.

**Cancel** – Do Not Delete the Line Item.

This process will change the right-side box to a processing message followed by a confirmation message:

**Line Item Deleted** 



**Deleted Line Items are removed completely rather than deactivated, so if you delete a Line Item by accident, you will need to re-create the Line Item and any Elements it included.**

## Line Item Element Setup

Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance – Rule Setup

Home > Management > School Administration > Graduation / Eligibility > Rule Setup

### Graduation / Eligibility Rule Setup - Rule 1 - Main Graduation Rules

From this screen users can set up the criteria for a rule

Line Item	
	Course Requirements
	Assessment Requirements

Setup Line Item

### Graduation/Eligibility Rule Setup Maintenance Screen

Click the icon to set up elements for a Line Item. The Setup Line Item Elements box appears on the right side of the screen.

Home > Management > School Administration > Graduation / Eligibility > Rule Setup

### Graduation / Eligibility Rule Setup - Rule1 - Main Graduation Rule

From this screen users can set up the criteria for a rule

Line Item	
	Course Requirements
	Assessment Requirements

Setup Line Item

Line Item: Course Requirements

Element	
	Course [LANGUAGE ARTS] required. IC IR
	And Course [ART] required.
	Or ( Total Credits >= 1 Std[art] IC HS
	And Total Credits >= 1 Sub[FA] )

Move Up Move Down Outdent Indent

Std: Areas of Study      IC: Include current courses  
Sub: Subject Areas      IR: Include requests  
Dept: Departments      HS: High School credit courses only

[Select type to add]

### Adding Elements to a Line Item

**Select type to add/Add Element** – Select an Element Type from the drop-down menu, then click this button to add a new Line Item Element.

**Close** – Closes the Line Item Element box.

– Edits this Line Item Element.

– Deletes this Line Item Element.

- Move this Line Item Element up or down to easily reorder the line item elements.

– Outdent or Indent this Line Item Element. Indentation works with the Operators at the start of each line after the first line, and each set of indented elements, taken together, is equivalent to one single element with the operator at the start of the indented section.

**Split Group/Start New Group**- Split Group operator. It is only available for lines that are part of a group and are not the first line in the group. By clicking this icon, you cause the group to be split into two groups. To achieve a rule line item with conditions in the form (a OR b OR c) AND (d OR e OR f), use the user interface to

set up a rule in the form (a OR b OR c AND d OR e OR f). Then, click on the )( Split Group option by the line with the AND operator. This will split the group into two groups of ORed conditions, joined by the AND operator. There is not “undo split” operator, but you can outdent the first line of the group that has been split, and then indent it again. The groups below and above the line you are working on will join back onto one group.

**How to Read and Set up Indentation**

If the requirement has multiple options, use a parenthesis to separate each requirement within a line item. The following sections provide example scenarios for correctly setting up the line items for specific graduation requirements.

**Example 1**

Students are required to take the following courses to fulfill a health/physical education requirement:

1. Health
2. Freshmen Girls PE or Freshmen Boys PE
3. Sophomore Girls PE or Sophomore Boys PE
4. 1 credit in courses where the Area of Study is Physical Education or Health

The following figure shows the correct setup for this requirement.

Line Item: Physical Ed. & Health						Element	
						Course [HEALTH] required. IC	1
						And ( Course [PHYS ED 9 G] required. IC Or Course [PHYS ED 9 - B] required. IC )	2
						And ( Course [PHYS ED 10 - G] required. IC Or Course [PHYS ED 10 B] required. IC )	3
						And Total Credits >= 1 Std[PE,HEA] IC MM-Pass HS	4

Move Up  
 Move Down  
 Outdent  
 Indent  
 )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Total Credits

**Example 1 - Physical Education Requirements**

## Example 2

Students are required to take the following courses to fulfill a science requirement:

1. Physical Science or Physical Science Investigation or Chemistry
2. Biology I or AP Biology
3. 3 credits in courses where the Area of Study is Science

The following figure shows correct setup for this requirement.

Line Item: Science							
Element							
					( Course [PHYS SCIENCE] required. IC		
						) (	Or Course [PHYS SCI INVEST] required. IC
						) (	Or Course [CHEMISTRY] required. IC )
							And ( Course [BIOLOGY I] required. IC
						) (	Or Course [AP BIOLOGY] required. IC )
							And Total Credits >= 3 Std[SCI] IC MM-Pass HS

Move Up Move Down Outdent Indent ( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Total Credits

Example 2 - Science Requirements

## Example 3

Students are required to take the following courses to fulfill an English requirement:

1. English 9 or Advanced English 9
2. English 10 or Advanced English 10
3. English 11 or Advanced English 11
4. English 12 or Advanced Comp/Brit Lit or AP English or Success
5. 4 credits in courses where the Area of Study is English.

The following figure shows the correct setup for this requirement.

**Line Item:** English

Element						
	X		↓	←	→	( Course [ENG-9] required. IC
	X	↑	↓	←	→	) ( Or Course [ADV ENGLISH 9] required. IC )
	X	↑	↓	←	→	And ( Course [ENG-10] required. IC
	X	↑	↓	←	→	) ( Or Course [ADV ENGLISH 10] required. IC )
	X	↑	↓	←	→	And ( Course [ENG-11] required. IC
	X	↑	↓	←	→	) ( Or Course [ADV ENGLISH 11] required. IC )
	X	↑	↓	←	→	And ( Course [ENG-12] required. IC
	X	↑	↓	←	→	) ( Or Course [AD BRIT LI/COMP] required. IC
	X	↑	↓	←	→	) ( Or Course [AP ENGLISH 12] required. IC
	X	↑	↓	←	→	) ( Or Course [SUCCESS] required. IC )
	X	↑			→	And Total Credits >= 4 Std[ENG] IC MM-Pass

↑ Move Up ↓ Move Down ← Outdent → Indent )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Total Credits  Add Element Close

**Example 3 - English Requirements**

**Example 4**

Students are required to take .5 credits in a course where the Subject Area is art, music, or business to fulfill an elective requirement.

The following figure shows correct setup for this requirement.

**Line Item:** 1/2 Foreign Lang/Fine Art/Bus Tech

Element						
	X		↓	←	→	( Total Credits >= 0.5 Sub[ART] IC MM-Pass HS
	X	↑	↓	←	→	) ( Or Total Credits >= 0.5 Sub[MUS] IC MM-Pass HS
	X	↑		←	→	) ( Or Total Credits >= 0.5 Sub[BUS] IC MM-Pass HS )

↑ Move Up ↓ Move Down ← Outdent → Indent )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Total Credits  Add Element Close

**Example 4 - Elective Requirement**

### Example 5

Students are required to take the following courses to fulfill part of the school's graduation requirements:

1. Government
2. Keyboarding
3. HS Health
4. HS American History or US History or American History DI

The following figure shows correct setup for this requirement.

Line Item: Graduation Requirements							
Element							
[Edit]	[X]	[Down]	[Right]	Course [USGOVERNMENT] required. IC	1		
[Edit]	[X]	[Up]	[Down]	[Right]	And Course [KEYBOARDING] required. IC	2	
[Edit]	[X]	[Up]	[Down]	[Right]	And Course [HS HEALTH] required. IC	3	
[Edit]	[X]	[Up]	[Down]	[Left]	[Right]	And ( Course [HS AM HISTORY] required. IC	4
[Edit]	[X]	[Up]	[Down]	[Left]	[Right]	) Or Course [U.S. HIST] required. IC	
[Edit]	[X]	[Up]	[Left]	[Right]	) Or Course [AM HIST DI] required. IC )		

↑ Move Up ↓ Move Down ← Outdent → Indent )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Course [ ] Add Element Close

Example 5 - School's Graduation Requirements

### Example 6

Students are required to take the following courses to fulfill a social studies requirement:

1. World History
2. American History
3. Government & Economics

The following figure shows the correct setup for this requirement.

**Line Item:** Social Studies

							Element	
							Course [WORLD HIST] required. IC	1
							And Course [AMER HISTORY] required. IC	2
							And Course [GOVT & ECON] required. IC	3

Move Up  
 Move Down  
 Outdent  
 Indent  
 )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Course        

**Example 6 - Social Studies Requirement**

### Example 7

Students are required to take the following courses to fulfill a science requirement:

1. Physical Science
2. Biology I
3. Biology II or Zoology or Anatomy or Chemistry or Physics or Geology/Astronomy

The following figure shows the correct setup for this requirement.

**Line Item:** Science

							Element	
							Course [PHYS SCIENCE] required. IC	1
							And Course [BIOLOGY I] required. IC	2
							And ( Course [BIOLOGY II] required. IC	3
						)(	Or Course [ZOOLOGY] required. IC	
						)(	Or Course [ANT & PHYS] required. IC	
						)(	Or Course [CHEMISTRY] required. IC	
						)(	Or Course [PHYSICS] required. IC	
					)(		Or Course [GEO/ASTRO] required. IC )	

Move Up  
 Move Down  
 Outdent  
 Indent  
 )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

[Select type to add]        

**Example 7 - Science Requirements**

### Example 8

Students are required to take the following courses to fulfill an English requirement:

1. English 9
2. English 10
3. English 11C (college prep) or English 11
4. English 12C (college prep) or AP English 12 or English 12

The following figure shows the correct setup for this requirement.

Line Item: English					Element	
					Course [ENG-9] required. IC IR	1
					And Course [ENG-10] required. IC IR	2
					And ( Course [ENG-11] required. IC IR	3
					Or Course [ENGLISH 11C] required. IC IR )	
					And ( Course [ENG-12] required. IC IR	4
					Or Course [ENGLISH 12C] required. IC IR )	
					Or Course [AP ENGLISH 12] required. IC IR )	

Move Up Move Down Outdent Indent ( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Course

Example 8 - English Requirements

### Example 9

Students are required to take the following courses to fulfill a foreign language requirement:

1. Spanish I and Spanish II and Spanish III  
OR
2. French I and French II and French III  
OR
3. 4 credits in courses where the Area of Study is Foreign Language (FLR) or Language (LAN)

The following figure shows the correct setup for this requirement.

**Line Item:** Foreign Language

Element						
						( Course [SPAN-I] required. IC IR
						) ( And Course [SPAN-II] required. IC IR
						) ( And Course [SPAN-III] required. IC IR )
						Or ( Course [FRENCH 1] required. IC IR
						) ( And Course [FRENCH II] required. IC IR
						) ( And Course [FRENCH III] required. IC IR )
						Or Total Credits >= 4 Std[FLR,LAN] IC MM-Pass IR HS

Move Up  
 Move Down  
 Outdent  
 Indent  
 Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

[Select type to add]   Add Element   Close

**Example 9 - Foreign Language Requirements**

**Example 10**

Students are required to take the following courses to fulfill a senior studies requirement:

1. AP U.S. Government  
OR
2. U.S. Government and American Politics  
OR
3. American Foreign Policy  
OR
4. Economics  
OR
5. International Diplomacy

The following figure shows the correct setup for this requirement.

**Line Item:** Senior Social Studies

						Element	
			↓	→		Course [AP US GOV & POL] required. IC IR	1
		↑	↓	←	→	Or ( Course [USGOVERNMENT] required. IC IR	2
		↑	↓	←	→	And Course [AMER POLITICS] required. IC IR )	
		↑	↓	→		Or Course [AMER FOR POLICY] required. IC IR	3
		↑	↓	→		Or Course [ECONOMICS] required. IC IR	4
		↑		→		Or Course [INT'L DIPLOMACY] required. IC IR	5

↑ Move Up   ↓ Move Down   ← Outdent   → Indent   )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Course      

**Example 10 - Senior Social Studies Requirement**

**Example 11**

Students are required to take the following courses to fulfill a science requirement:

1. 2 credits in courses where the Subject Area is BSC and 1 credit in a course where the Subject Area is PSC
- OR
2. 1 credit in courses where the Subject Area is BSC and 2 credits in courses where the Subject Area is PSC

The following figure shows the correct setup for this requirement.

**Line Item:** Science

						Element	
			↓	←	→	( Total Credits >= 2 Sub[BSC] IC MM-Pass HS	1
		↑	↓	←	→	And Total Credits >= 1 Sub[PSC] IC MM-Pass HS )	
		↑	↓	←	→	Or ( Total Credits >= 1 Sub[BSC] IC MM-Pass HS	2
		↑		←	→	And Total Credits >= 2 Sub[PSC] IC MM-Pass HS )	

↑ Move Up   ↓ Move Down   ← Outdent   → Indent   )( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

Total Credits      

**Example 11 - Science Requirements**

## Example 12

Students in 9<sup>th</sup> grade are required to take the following:

1. English
2. Algebra I
3. Biology I
4. Biology II
5. Boys Health 9 or Girls Health 9
6. Boys Physical Education 9 or Girls Physical Education 9
7. Social Studies I

The following figure shows the correct setup for this requirement.

Line Item: 9th Grade						Element	
						Course [ENG-9] required.	1
						And Course [ALGEBRA I] required.	2
						And Course [BIOLOGY I] required.	3
						And Course [BIOLOGY II] required.	4
						And ( Course [HEALTH 9 B] required.	5
						Or Course [HEALTH 9 G] required. )	
						And ( Course [PHYS ED 9 G] required.	6
						Or Course [PHYS ED 9 B] required. )	
						And Course [SOC STUDIES I] required.	7

Move Up Move Down Outdent Indent ( Split Group / Start New Group

**Std:** Areas of Study      **IC:** Include current courses  
**Sub:** Subject Areas      **IR:** Include requests  
**Dept:** Departments      **HS:** High School credit courses only

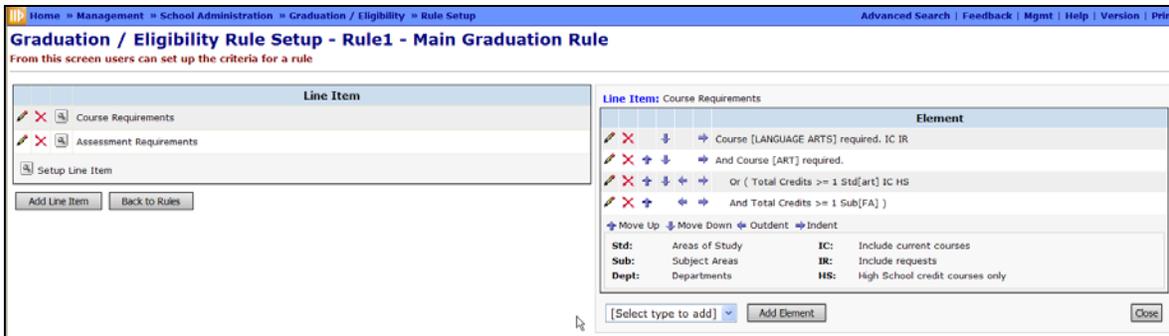
Course

Example 12 - 9th Grade Requirements

### Add/Edit Line Item Element

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance**

Graduation/Eligibility Rules contain line items that are checked to see if a student passes or fails the rule. A single rule can contain many line items, if necessary, and each line item may contain multiple line item elements.



### Adding and Editing Line Item Elements

This page has standard add record, edit record and delete record controls.

Select an Element type (Assessment, Community Service, Course, Exemption, GPA, Miscellaneous or Total Credits) and click the appropriate button to **Add** or **Edit** a Line Item Element.

### Common Features to Adding/Editing All Element Types

All Add Line Item Elements panes have certain common features:

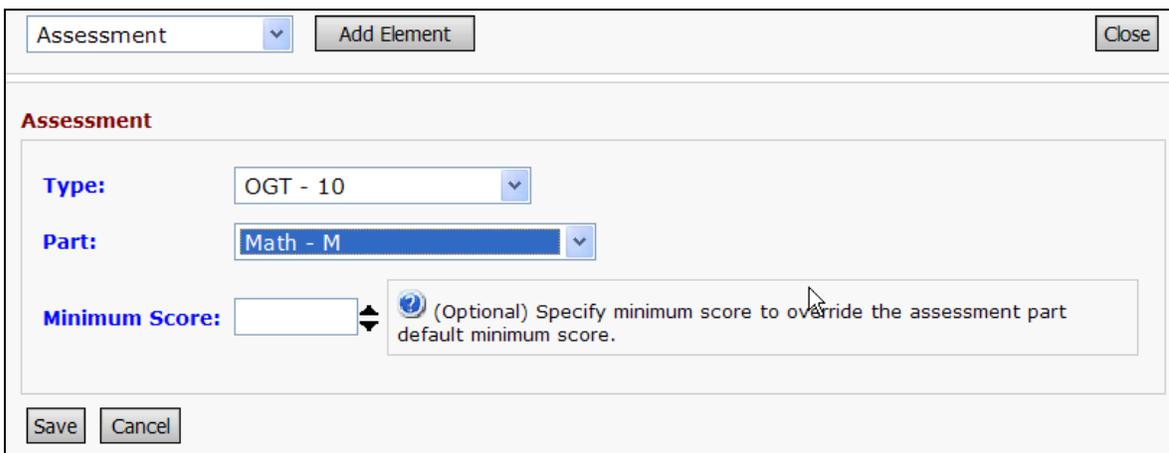
**Operator** (required) – Select And or Or, to determine how this Line Item Element interacts with the previously entered Line Item Element. For more information on operators and indenting/outdenting, see [“Line Item Element Setup.”](#)

**Save** – Save this Line Item Element. A confirmation message will replace the Add/Edit Line Item Element pane:



**Cancel** – Clears all data entered and close the Add/Edit Line Item Element pane.

### Add/Edit Assessment Element



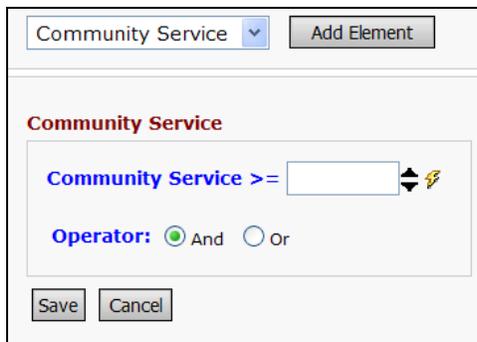
### Adding and Editing an Assessment Element

**Type** (required) – Select type of test (8<sup>th</sup> Achievement, OGT, etc.).

**Part** (required or not applicable) – On multi-part tests, select part of test from the drop-down menu; this menu changes for each test.

**Minimum Score** (optional) – Specify minimum score to override the assessment part default minimum score. You can leave this blank, and it will use the default minimum score for that assessment part.

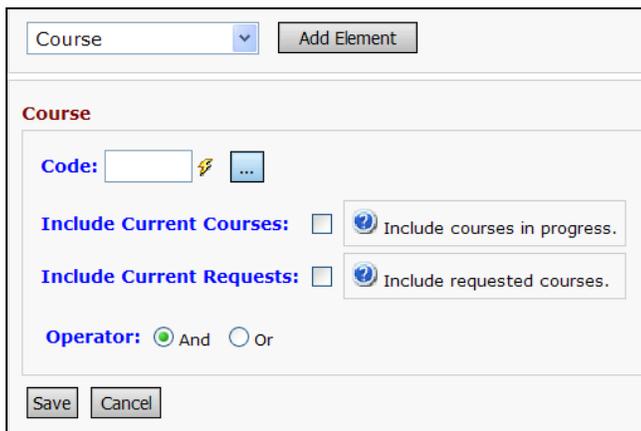
### Add/Edit Community Service Element



Adding and Editing a Community Service Element

**Community Service >=** (required) – Enter a minimum number of Community Service hours required to pass this Line Item Element, or use the arrows to change the number up and down.

### Add/Edit Course Element



Adding and Editing a Course Element

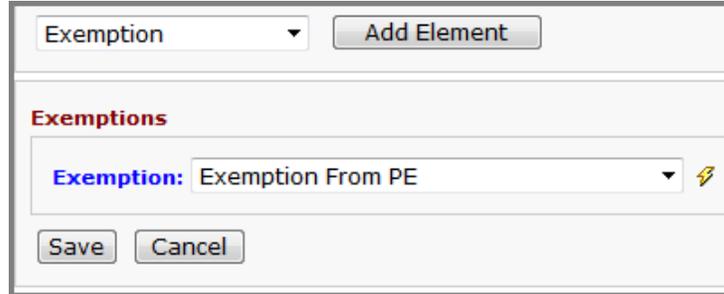
**Code** (required) – Enter a course code.

 – Open the Course Selection Wizard (for more information on the Course Selection Wizard, see *ProgressBook StudentInformation Scheduling Guide*).

**Include Current Courses** – Yes or No; check this box to count courses currently in progress for passing this Line Item Element. Will be notated as IC in the Line Item Element. When looking at current courses, StudentInformation will look at the latest mark of the Mark Type chosen and if the student has a passing mark, they will pass the line item. If no marks have been entered yet StudentInformation assumes the student will pass the line item.

**Include Current Requests** – Yes or No; check this box to count active course requests for passing this Line Item Element. Will be notated as IR in the Line Item Element.

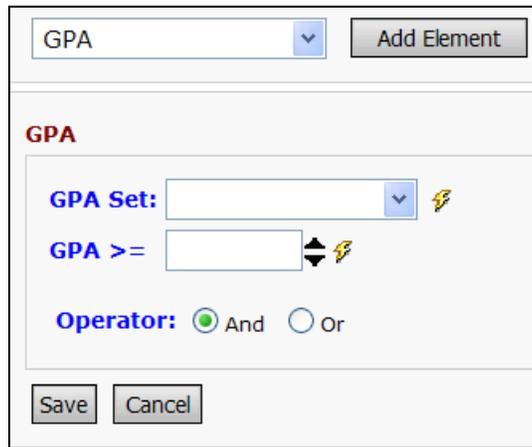
### Add/Edit Exemption Element



**Adding and Editing an Exemption Element**

**Exemption** (required) – Enter an exemption code. Available options are Exemption From PE, Exemption From Fine Arts and Exemption From Econ/Financial Literacy.

### Add/Edit GPA Element



**Adding and Editing a GPA Element**

**GPA Set** (required) – Select a GPA Set from the drop-down menu.

**GPA >=** (required) – Enter a minimum GPA required to pass this Line Item Element.

## Add/Edit Miscellaneous Element

The screenshot shows a dialog box titled "Miscellaneous" with a dropdown menu set to "Miscellaneous". The "Add Element" button is highlighted. The main content area is titled "Miscellaneous" and contains the following fields:

- Miscellaneous Item:** A dropdown menu showing "Senior Profile". A lightning bolt icon is next to it. A help box to the right says "Select the required miscellaneous item".
- Value:** Radio buttons for "True" and "False". "False" is selected. A help box to the right says "The chosen miscellaneous item requires a true or false value".
- Handle missing values:** Radio buttons for "Treat missing as True" and "Treat missing as False". "Treat missing as False" is selected. A help box to the right says "If the student has no value for the miscellaneous item, use this value for that student".

At the bottom, there are "Save" and "Cancel" buttons.

### Adding and Editing a Miscellaneous Element – Senior Profile

**Miscellaneous Item** (required) – Select a Miscellaneous Item from the drop-down menu; these are defined on the Miscellaneous Items Maintenance screen (see “[Miscellaneous Item Maintenance](#)”).

**Value** (required) – Select True or False. If True, this Miscellaneous Item is required to pass this Line Item Element. If False, this Line Item Element passes unless this Miscellaneous Item has been checked for the student.

**Handle missing values** (required) – Select Treat missing as True or Treat missing as False. If the student has no value for the miscellaneous item, use this value for that student.

The screenshot shows a dialog box titled "Miscellaneous" with a dropdown menu set to "Miscellaneous". The "Add Element" button is highlighted. The main content area is titled "Miscellaneous" and contains the following fields:

- Miscellaneous Item:** A dropdown menu showing "Meet with Counselor". A lightning bolt icon is next to it. A help box to the right says "Select the required miscellaneous item".
- Value:** A numeric input field with up/down arrows and a lightning bolt icon. A help box to the right says "The chosen miscellaneous item requires an integer value".
- Handle missing values:** A numeric input field with up/down arrows and a lightning bolt icon. A help box to the right says "If the student has no value for the miscellaneous item, use this value for that student".

At the bottom, there are "Save" and "Cancel" buttons.

### Adding and Editing a Miscellaneous Element – Meet with Counselor

**Miscellaneous Item** (required) – Select a Miscellaneous Item from the drop-down menu; these are defined on the Miscellaneous Items Maintenance screen (see “[Miscellaneous Item Maintenance](#)”).

**Value** (required) – Enter a minimum integer value for this Miscellaneous item to pass this Line Item Element.

**Handle missing values** (required) – Enter a value to be used if the student has no value for the miscellaneous item.

### Add/Edit Total Credits Element

### Adding and Editing Total Credits Element

**Total Credits >=** (required) – Enter a minimum number of credits required to pass this Line Item Element.

**Include Current Courses** – Yes or No; check this box to count courses currently in progress for passing this Line Item Element. Will be notated as IC in the Line

Item Element. When looking at current courses, StudentInformation will look at the latest mark of the Mark Type chosen and if the student has a passing mark, they will pass the line item. If no marks have been entered yet StudentInformation assumes the student will pass the line item.

**Missing Marks Handling** – This option determines how marks missing from the included current courses (previous option) are interpreted. Project Pass means that it is assumed that the student will pass the course. Project Fail means that it is assumed that the student will fail the course.

**Include Current Requests** – Yes or No; check this box to count active course requests for passing this Line Item Element. Will be notated as IR in the Line Item Element.

**High school credit only** – Yes or No; check this box to include only courses that have been marked as “In High School Credit” for passing this Line Item Element. Will be notated as HS in the Line Item Element. This allows the eligibility module to be used by elementary and middle schools if needed.

**Areas of Study** (optional) – If you wish to limit this Line Item Element to particular Areas of Study, move the Area of Study codes to be included to the right box. Credit will be counted only for courses in the indicated Areas of Study. No selection in the right box causes all courses to be used. Will be notated as Std in the Line Item Element.

**Subject Areas** (optional) – If you wish to limit this Line Item Element to particular Subject Areas, move the Subject Area codes to be included to the right box. Credit will be counted only for courses in the indicated Subject Areas. No selection in the right box causes all courses to be used. Will be notated as Sub in the Line Item Element.

**Departments** (optional) – If you wish to limit this Line Item Element to particular Departments, move the Departments to be included to the right box. Credit will be counted only for courses in the indicated Departments. No selection in the right box causes all courses to be used. Will be notated as Dept in the Line Item Element.

***Note:** Manual courses do not have a Department field and cannot be included in the total credits when Department is used.*

**CORE Subject Area** (optional) – If you wish to limit this Line Item Element to particular CORE subject areas, move the CORE subject area to the right box. Credit will be counted only for courses in the indicated CORE subject areas. No selection in the right box causes courses to be used. The selections available for this option are identical to those listed in the EMIS Subject Area For Credit field on the Manually Entered Course screen.

### **Add/Edit Total CORE Credits Element**

The Total CORE Credits line item element defines how StudentInformation calculates the overflow credits for the CORE subject area(s). To use this line item element, you must assign a CORE overflow rule to this Graduation/Eligibility Rule.

For more information, see [“Add CORE Overflow Rule to the Graduation/Eligibility Rule.”](#)

### Total CORE Credits Line Item Element

**Total CORE Credits > =** – Enter the total number of credits required for the selected CORE subject area(s). Once a student has earned more credits than entered, the extra credits are counted in the CORE subject area selected in the **Subject Area Overflow** drop-down list on the CORE Overflow Maintenance screen. For more information, see [“CORE Overflow Maintenance.”](#)

**CORE Subject Area** – Select the CORE subject area(s) to which the line item element applies.

### Delete Line Item Element

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance**

Graduation/Eligibility Rules contain line items that are checked to see if a student passes or fails the rule. A single rule can contain many line items, if necessary, and each line item may contain multiple line item elements.

### Graduation/Eligibility Rule Setup Screen

Click the **X** icon to delete a Line Item Element. The Delete Line Item Element pane appears below the Line Item Elements list pane.

**Delete Line Item Element**

Are you sure you want to delete the following line item element?  
**Miscellaneous Item (Soc) required value 2**

**Delete Line Item Element Confirmation Message**

**Continue** – Delete this Line Item Element.

**Cancel** – Do Not Delete this Line Item Element.

Deleting a Line Item Element will reload the Line Item Elements list pane and display a confirmation message in place of the Delete Line Item Element pane.

**Loading Line Item Elements...**



---

**Line Item Element Deleted** ✕

**Reloading Line Items Message**

**Copy Rule**

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance**

Home » Management » School Administration » Graduation / Eligibility » Rule Maintenance Advanced Search | Feedback

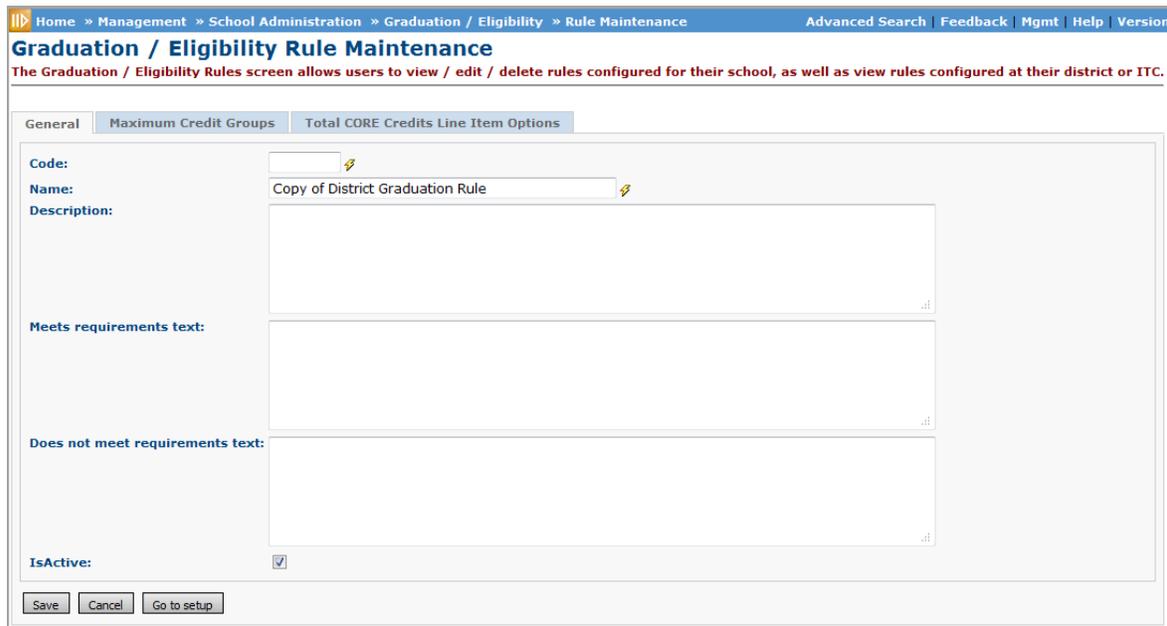
**Graduation / Eligibility Rule Maintenance**

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

	Code ^	Name	Description	Is Active
   	DRule	District Graduation Rule		
  	Rule 1	Main Graduation Rules		

Show Active Only  Setup Rule  Copy Rule

Click  to copy a specific Graduation/Eligibility Rule.



The screenshot shows a web application interface for "Graduation / Eligibility Rule Maintenance". The breadcrumb trail is "Home > Management > School Administration > Graduation / Eligibility > Rule Maintenance". The page title is "Graduation / Eligibility Rule Maintenance" and a subtitle reads: "The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC." The form has three tabs: "General", "Maximum Credit Groups", and "Total CORE Credits Line Item Options". The "General" tab is active. The form fields are: "Code:" (empty), "Name:" (filled with "Copy of District Graduation Rule"), "Description:" (empty), "Meets requirements text:" (empty), "Does not meet requirements text:" (empty), and "Is Active:" (checked). At the bottom are buttons for "Save", "Cancel", and "Go to setup".

### Copying a Rule

**Code** (required) – Code for this Graduation/Eligibility Rule; up to eight characters

**Name** (required) – Name for this Graduation/Eligibility Rule; defaults to “Copy of” followed by the name of the rule being copied.

**Description** (optional) – Description of this Graduation/Eligibility Rule

**Meets requirements text** (optional) – This text will be used by report cards when the student meets the requirements for this Graduation/Eligibility Rule

**Does not meet requirements text** (optional) – This text will be used by report cards when the student fails to meet the requirements for this Graduation/Eligibility Rule.

**Is Active** – Yes or No; Graduation/Eligibility Rules must be Active to use on new Student Records. This box is checked by default.

**Save** – Will save current Graduation/Eligibility Rule and return to Graduation/Eligibility Rule Maintenance listing where you will see the updated information.

**Cancel** – Will clear out data already entered and return to the Graduation/Eligibility Rule Maintenance listing.

**Go to setup** – Save and go to Setup Details for this Graduation/Eligibility Rule. See [“Line Item Element Setup.”](#)

**Maximum Credit Groups** – Currently, this option is not functional.

**Total CORE Credits Line Item Options**– See [“Add CORE Overflow Rule to the Graduation/Eligibility Rule.”](#)

## Delete Rule

**Navigation: Home – Management – School Administration – Graduation / Eligibility – Rule Maintenance**

Home » Management » School Administration » Graduation / Eligibility » Rule Maintenance Advanced Search | Feedback

### Graduation / Eligibility Rule Maintenance

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

	Code ^	Name	Description	Is Active
	DRule	District Graduation Rule		
	Rule 1	Main Graduation Rules		

Show Active Only

### Graduation/Eligibility Rule Maintenance Screen

Click to delete (deactivate) a specific Graduation/Eligibility Rule.

Home » Management » School Administration » Graduation / Eligibility » Rule Maintenance Advanced Search | Feedback

### Graduation / Eligibility Rule Maintenance

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

Are you sure you want to mark the following rule as inactive: Copy - Copy of Main Graduation Rule.  
Warning - marking the rule inactive will delete the student assignments of this rule.

### Delete Rule Confirmation Message

**Ok** – Delete this Graduation/Eligibility Rule.

**Cancel** – Do Not Delete this Graduation/Eligibility Rule.

Home » Management » School Administration » Graduation / Eligibility » Rule Maintenance Advanced Search | Feedback

### Graduation / Eligibility Rule Maintenance

The Graduation / Eligibility Rules screen allows users to view / edit / delete rules configured for their school, as well as view rules configured at their district or ITC.

The rule was successfully deleted

	Code ^	Name	Description	Is Active
	Rule 1	Main Graduation Rule		

Show Active Only

### Successful Deletion of Role Message

**Note:** A Graduation/Eligibility Rule is not actually deleted – it is made Inactive as notated by the gray grid area. Show both Active and Inactive Graduation/Eligibility Rules by un-deselecting the Show Active Only check box. To re-activate an Inactive Graduation/Eligibility Rule, see [“Add/Edit Rule.”](#)

# Graduation/Eligibility

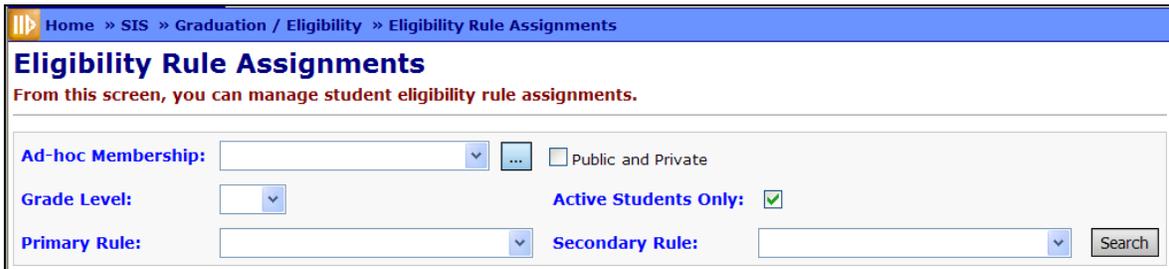
## Assigning Graduation/Eligibility Rules

Once Graduation/Eligibility Rules exist, you can assign them to students either by the Eligibility Rule Assignment page, via the Student Profile Bulk Update, or individually on the Student Profile – Additional tab. You can change Graduation/Eligibility Rules for a student at any time during the school year.

## Eligibility Rule Assignments

**Navigation: Home – SIS – Graduation / Eligibility – Eligibility Rule Assignments**

The Eligibility Rule Assignments page can be used to search for students missing primary and/or secondary rules, or with a specified rule or grade level. Selected students can then be bulk assigned primary or secondary rules with a choice of overriding existing rules.



The screenshot shows a web interface for "Eligibility Rule Assignments". At the top, there is a breadcrumb trail: "Home » SIS » Graduation / Eligibility » Eligibility Rule Assignments". Below this is the title "Eligibility Rule Assignments" and a sub-header: "From this screen, you can manage student eligibility rule assignments." The form contains several search criteria:

- Ad-hoc Membership:** A dropdown menu with a blue arrow, followed by a blue button with three dots "...". To the right is a checkbox labeled "Public and Private".
- Grade Level:** A dropdown menu with a blue arrow.
- Active Students Only:** A checkbox that is checked with a green checkmark.
- Primary Rule:** A dropdown menu with a blue arrow.
- Secondary Rule:** A dropdown menu with a blue arrow.
- A "Search" button is located to the right of the Secondary Rule dropdown.

Eligibility Rule Assignments Search Criteria

### Student Search Criteria

**Ad-Hoc Membership** (optional) – Search on an Ad-Hoc Membership selected from the drop-down menu, or click the  button to view the Ad-Hoc Membership Maintenance page and create or view existing Ad-Hoc Memberships.

**Public and Private** – Yes or No; Check this box to include public Memberships from other users in the selections for the Ad-Hoc Membership drop-down menu.

**Grade Level** (optional) – Search on a specific grade level; leave blank to search on all grade levels in the drop-down list

**Active Students Only** - Check this box to search on active students only; deselect this box to search both active and inactive students.

**Primary Rule** (optional) – Search for students with the specified Primary Rule.

**Secondary Rule** (optional) – Search for students with the specified Secondary Rule.

**Search** – Search for students using the selected criteria.

**Eligibility Rule Assignments**  
From this screen, you can manage student eligibility rule assignments.

**Mass Update Options:** New Search

Primary Rule:   Override current primary rule

Secondary Rule:   Override current secondary rule Update Selected

**Search Results:**

<input type="checkbox"/>	Number	Student	Grade Level ^	Primary Rule	Secondary Rule
<input type="checkbox"/>	48652258	Banana, Hannah	09		
<input type="checkbox"/>	48652281	Contrary, Jesse	09		
<input type="checkbox"/>	5001	CONTRARY, MARY M.	09	Rule1 - Main Graduation Rule	test2 - tests
<input type="checkbox"/>	122445	EYE, PRIVA	09		

**Eligibility Rule Assignments Screen**

The Mass Update Options appear and the students returned by the search criteria are displayed in the Search Results grid.

**New Search** – Go back to the search criteria screen and start over.

### Mass Update Options

**Primary Rule** (optional) – Select a Graduation Rule from the drop-down to assign to all select student’s Primary Rule. If you leave the Primary Rule blank, existing Primary Rule assignments will not be cleared unless the **Override current primary rule** check box is checked.

**Secondary Rule** (optional) – Select a Graduation Rule from the drop-down to assign to all select student’s Secondary Rule. If you leave the Secondary Rule blank, existing Secondary Rule assignments will not be cleared unless the **Override current secondary rule** check box is checked.

**Override current primary rule** – Check this box to override the selected students’ current primary rule (including blanking existing primary rule assignments if the Primary Rule is left blank). If unchecked, students with an existing Primary Rule will not be updated with a new or blank Primary Rule.

**Override current secondary rule** – Check this box to override the selected students’ current secondary rule (including blanking existing secondary rule assignments if the **Secondary Rule** field is left blank). If unchecked, students with an existing Secondary Rule will not be updated with a new or blank Secondary Rule.

## Search Result

The following information is displayed Search Results grid for each student that matched the search criteria

- Number – Student Number from the Student Profile
- Student – Student Name
- Grade Level – Current grade level from the Student Profile
- Primary Rule – Current primary rule from the Student Profile
- Secondary Rule – Current secondary rule from the Student Profile

**Number** – Check this box to select all students in the Search Results grid. All students can be de-selected by unchecking this box.

48652258 – Check this box next to a specific’s Student Number to select a single student in the Search Results grid. Single students can be deselected by unchecking this box.

**Update Selected** – Update selected (checked) students with the selected Primary Rule and Secondary Rule and respecting the two Override check boxes. The Search Results grid will refresh and show the updated information.

**Search Results:**

<input type="checkbox"/>	Number	Student	Grade Level ^	Primary Rule	Secondary Rule
<input type="checkbox"/>	48652258	Banana, Hannah	09	Rule1 - Main Graduation Rule	
<input type="checkbox"/>	48652281	Contrary, Jesse	09		
<input type="checkbox"/>	5001	CONTRARY, MARY M.	09	Rule1 - Main Graduation Rule	test2 - tests
<input type="checkbox"/>	122445	EYE, PRIVA	09		

Search Results on the Eligibility Assignments Screen

## Student Profile Bulk Update

**Navigation: Home – Management – Ad-Hoc Updates – Student Profile Bulk Update**

You can update the Primary Graduation Rule or Alternate Graduation Rule of selected students via the Student Profile Bulk Update.

**See the Student Profile Bulk Update Procedural Checklist for the details regarding the use of the Student Profile Bulk Update page.**

Graduation Rule Fields on the Student Profile Bulk Update Screen

## Student Profile – Additional Tab

Navigation: Home – SIS – Student – Edit Profile

You can manually select or change Graduation/Eligibility Rules for a student on the Additional tab of the student's Profile.

See *ProgressBook StudentInformation Student and Registration Guide* for the details regarding the use of the Student Profile page.

Graduation Rule Fields on the Edit Student Profile Screen

**Pri. Graduation Rule** – Select the Graduation/Eligibility Rule to use as this student's Primary Rule.

**Alt. Graduation Rule** – Select the Graduation/Eligibility Rule to use as this student's Secondary Rule.

---

## Student Graduation/Eligibility

### Miscellaneous Values

**Navigation: Home – SIS – Student – Graduation / Eligibility – Miscellaneous Values**

This page is used to define the values for each student for any Miscellaneous Items. If a Miscellaneous Item is not needed for the student's Graduation/Eligibility Rules, it can be left blank.

<b>DASL</b>	<a href="#">Banana, Hannah</a>	<b>ID:</b> 48652258	<b>Counselor:</b>									
<b>DASL User</b>	DASL HIGH SCHOOL 2005-2006	<b>Gender:</b> F	<b>Homeroom:</b>									
	<b>Calendar:</b> 1	<b>Grade:</b> 11	<b>Status:</b> A									
> Home » SIS » Student » Graduation / Eligibility » Miscellaneous Values												
<b>Graduation / Eligibility Miscellaneous Values</b>												
Users can view / edit / delete student graduation / eligibility miscellaneous items from this screen.												
	<table border="1"><thead><tr><th>Code</th><th>Name</th><th>Value</th></tr></thead><tbody><tr><td>✗ Couns</td><td>Counselor Conference</td><td>True <input type="button" value="v"/></td></tr><tr><td>✗ Vol</td><td>Volunteer Hours</td><td>4 <input type="text"/></td></tr></tbody></table>	Code	Name	Value	✗ Couns	Counselor Conference	True <input type="button" value="v"/>	✗ Vol	Volunteer Hours	4 <input type="text"/>		
Code	Name	Value										
✗ Couns	Counselor Conference	True <input type="button" value="v"/>										
✗ Vol	Volunteer Hours	4 <input type="text"/>										
<input type="button" value="Save"/>												

#### Graduation/Eligibility Miscellaneous Values Screen

✗ – Clear the value field for this Miscellaneous Item. This clearing process will not actually take place in the student's data until you save changes with the Save button.

**Value** – Select True or False for True/False Miscellaneous Items, or enter a numeric value for Numeric Miscellaneous Items. Any items entered will not be saved until you save changes with the Save button.

**Save** – Save changes made to student Miscellaneous Values.

### Student Eligibility Details

**Navigation: Home – SIS – Student – Graduation / Eligibility – Student Eligibility Details**

This screen allows users to run Eligibility Rules “on the fly” and to view the details behind the eligibility rules for a selected student.

<b>DASL</b>	<a href="#">CONTRARY, MARY M.</a>	ID: 00005001	Counselor: ALLEN, MARK
	DASL HIGH SCHOOL 2007-2008	Gender: F	Homeroom:
	Calendar: am	Grade: 09	Status: A

Home » SIS » Student » Graduation / Eligibility » Student Eligibility Details

### Eligibility Rule - CONTRARY, MARY M.

This screen allows you to review student eligibility details

<input type="checkbox"/> Active view. Click to hide filter.	<input type="checkbox"/> Active view. Click to show filter.	<input type="checkbox"/> Active view. No filters available.
<b>Std:</b> Areas of Study	<b>Sub:</b> Subject Areas	<b>Dept:</b> Departments
<b>IR:</b> Include requests	<b>IC:</b> Include current courses	<b>HS:</b> High School credit courses only

[Eligibility](#) ^  
 [Assessments](#)  
 [Assignments](#)  
 [Community](#)  
 [Crs History](#)  
 [GPA History](#)  
 [Misc Elig](#)  
 [Requests](#)

<b>Rule:</b>	<input type="text"/>	Choose the rule to run.
<b>Mark Type:</b>	<input type="text"/>	The mark type to use for current year credits.
<b>Recalculate:</b>	<input checked="" type="checkbox"/>	Check recalculate to refresh the student's values.
<b>Show Details:</b>	<input checked="" type="checkbox"/>	Check to show the line item criteria results in the report

### Student Eligibility Rule Details Screen

There are three parts to the Student Eligibility Details screen:

#### 1 - Legend

<input type="checkbox"/> Active view. Click to hide filter.	<input type="checkbox"/> Active view. Click to show filter.	<input type="checkbox"/> Active view. No filters available.
<b>Std:</b> Areas of Study	<b>Sub:</b> Subject Areas	<b>Dept:</b> Departments
<b>IR:</b> Include requests	<b>IC:</b> Include current courses	<b>HS:</b> High School credit courses only

#### Legend on the Student Eligibility Rule Details Screen

**Close Legend** – Will close the Legend.

**Show Legend** – Will show the Legend (default).

#### 2 – Menu

<a href="#">Eligibility</a>	<a href="#">Assessments</a>	<a href="#">Assignments</a>	<a href="#">Community</a>	<a href="#">Crs History</a>	<a href="#">GPA History</a>	<a href="#">Misc Elig</a>	<a href="#">Requests</a>
-----------------------------	-----------------------------	-----------------------------	---------------------------	-----------------------------	-----------------------------	---------------------------	--------------------------

#### Menu on the Student Eligibility Rule Details Screen

**Close Menu** – Closes the menu.

**Show Menu** – Shows the Menu (default).

#### 3 – Student Details

The student details is based on the menu item that is chosen – Eligibility, Assessments, Assignments, Community, Course History, GPA History, Miscellaneous Eligibility, Requests.

## Eligibility

Displays the current status of any Eligibility Rule for this student. Click on **Eligibility** on the Menu.

The screenshot shows a navigation menu with the following items: Eligibility (with a caret), Assessments, Assignments, Community, Crs History, GPA History, Misc Elig, and Requests. Below the menu is a form with the following fields:

- Rule:** A dropdown menu set to "Main Graduation Rule (Student Primary)" with a lightning bolt icon. To its right is a text box containing "Choose the rule to run."
- Mark Type:** A dropdown menu set to "Avg - Average mark" with a lightning bolt icon. To its right is a text box containing "The mark type to use for current year credits."
- Recalculate:** A checked checkbox. To its right is a text box containing "Check recalculate to refresh the student's values."
- Show Details:** A checked checkbox. To its right is a text box containing "Check to show the line item criteria results in the report"

At the bottom left of the form is a button labeled "View Eligibility".

### Eligibility Menu on the Student Eligibility Details Screen

**Rule** (required) – Choose the eligibility rule to run.

**Mark Type** (required) – Choose the mark type to use for current year credits.

*Note: Grad Ver only looks at earned manually entered course history.*

**Recalculate** (optional) – Check recalculate to refresh the student's values.

**Show Details** (optional) – Check to show the line item criteria results in the display.

**View Eligibility** – View this student's selected eligibility information

Description	Student	Required	Result
<b>Rule: Main Graduation Rule</b>			<b>Not Met</b>
Line Item: Course Requirements			-
Course [LANGUAGE ARTS] required. IC IR	052	052	Met
And Course [ART] required.		2007	-
Or ( Total Credits >= 1 Std[art] IC HS	.00	1.00	-
And Total Credits >= 1 Sub[FA] )	.00	1.00	-
Line Item: Assessment Requirements			Met

### Viewing the Selected Eligibility Information for the Student

Line Items in green indicate that the student has Met that Line Item criteria.

## Assessments

Displays the Assessment information for this student. Click on **Assessments** on the Menu.

The screenshot shows a navigation menu with the following items: Eligibility, Assessments (with a caret), Assignments, Community, Crs History, GPA History, Misc Elig, and Requests. Below the menu is a form with the following fields:

- Test Type:** A dropdown menu set to "- All -". To its right is a button labeled "View Assessments".

### Assessments Menu on the Student Eligibility Details Screen

**Test Type** (required) – Choose All or a specific Test Type to view

**View Assessments** – View this student's selected Assessment information

Testing Date	Test	Part	Test Type	Raw Score	Scaled Score	Reported Score	Passing	Building IRN
05/2008	08A	MATH	STR	060	363.00	363		
05/2008	08A	READ	STR	160	387.00	387		
05/2008	08A	SCI	STR	190	388.00	388		
05/2008	08A	SSC	STR	160	375.00	375		
05/2007	07A	MATH	STR	070	364.00	364		
05/2007	07A	READ	STR	160	388.00	388		
05/2007	07A	WRI	STR	190	394.00	394		
03/2006	06A	MATH	STR	10	365.00	365		
03/2006	06A	READ	STR	80	366.00	366		
03/2005	05A	READ	STR	080	340.00	340		
03/2004	04P	MATH	STR	****	175.00	175		
03/2004	04P	SCI	STR	****	180.00	180		
03/2004	04P	SSC	STR	****	188.00	188		
03/2004	04P	WRI	STR	****	2.00	020		
10/2003	04P	READ	STR	****	179.00	179		

**Viewing Selected Assessment Information for the Student**

**Assignments**

Displays the Course Section Assignments and credit information for this student. Click on **Assignments** on the Menu

<a href="#">Eligibility</a>	<a href="#">Assessments</a>	<a href="#">Assignments ^</a>	<a href="#">Community</a>	<a href="#">Crs History</a>	<a href="#">GPA History</a>	<a href="#">Misc Elig</a>	<a href="#">Requests</a>
<b>Area of Study:</b>	<b>Subject Area:</b>	<b>Department:</b>	<b>Show assignments with these statuses:</b>		<b>Show assignments with these attributes:</b>		
- Show All - ▾	- Show All - ▾	- Show All - ▾	<input checked="" type="checkbox"/> Assigned	<input type="checkbox"/> Dropped	<input checked="" type="checkbox"/> In Crs Hist Only	<input type="checkbox"/> HS Cred Only	
			<input type="checkbox"/> Removed		<input type="checkbox"/> In Grad/Elig Only		
View Assignments							

**Assignments Menu on the Student Eligibility Details Screen**

**Area of Study** (optional) – Choose –Show All- or a specified course Area of Study on which to filter.

**Subject Area** (optional) – Choose –Show All- or a specified course Subject Area on which to filter.

**Department** (optional) – Choose –Show All- or a specified course Department on which to filter.

**Show assignments with these statuses** (optional) – Check Assigned, Dropped and/or Removed to filter on those specified course section assignment statuses.

**Show assignments with these attributes** (optional) – Check In Crs Hist Only, HS Cred Only and/or In Grad/Elig Only to filter on those specified attributes.

**View Assignments** – View this student’s selected Course Section Assignments information.

[Eligibility](#)
[Assessments](#)
[Assignments](#)
[Community](#)
[Crs History](#)
[GPA History](#)
[Misc Elig](#)
[Requests](#)

**Area of Study:** **Subject Area:** **Department:**

- Show All -    - Show All -    - Show All -

**Show assignments with these statuses:**
 Assigned     Dropped  
 Removed

**Show assignments with these attributes:**
 In Crs Hist Only     HS Cred Only  
 In Grad/Elig Only

View Assignments

Total Assigned Course Credits: 6.75    Total Earned Course Credits: 0.50    Total Credits Remaining To Be Earned: 6.25

Code	Course	Area Std	Subj Area	Dept	Crs Term	In Crs Hist	HS Cred	In Grad/Elig	Status	Start Date	End Date	Crs Credits	Earned Credits
205	WORLD STUDIES	SS		SS	All Year	✓	✓	✓	Assigned	Aug 24, 2009		1.00	
078	HEALTH	HPE		HPE	1st Semester	✓	✓	✓	Assigned	Aug 24, 2009		0.50	0.50
074	SPORTS/GAMES	HPE	PE	HPE	2nd Semester	✓	✓	✓	Assigned	Jan 19, 2010		0.25	
011	ART I	ART		ART	All Year	✓	✓	✓	Assigned	Aug 24, 2009		1.00	
143	ALG II	MTH		MTH	All Year	✓	✓	✓	Assigned	Aug 24, 2009		1.00	
180	PEC SC	SCI		SCI	All Year	✓	✓	✓	Assigned	Aug 24, 2009		1.00	
120	ENG I	ENG		ENG	All Year	✓	✓	✓	Assigned	Aug 24, 2009		1.00	
064	GERMAN I	FL		FL	All Year	✓	✓	✓	Assigned	Aug 24, 2009		1.00	

### Viewing Selected Assignments for the Student

## Community Service

Displays the Community Service Hours for this student. Click on **Community** on the Menu.

[Eligibility](#)
[Assessments](#)
[Assignments](#)
[Community](#)
[Crs History](#)
[GPA History](#)
[Misc Elig](#)
[Requests](#)

Refresh Community Service

School Year	Date Served	Description	In Grad.	Hours
2007 - 2008			(3.00)	3.00
2007-2008	03/01/2008	Pick up trash in park	✓	3.00

### Community Menu on the Student Eligibility Details Screen

**Refresh Community Service** – Refresh the community service grid and display the latest information.

## Course History

Displays the Course History and credit information for this student. Click on **Crs. History** on the Menu.

[Eligibility](#)
[Assessments](#)
[Assignments](#)
[Community](#)
[Crs History](#)
[GPA History](#)
[Misc Elig](#)
[Requests](#)

**Area of Study:** **Subject Area:** **Department:** **Credit Type:**

- Show All -    - Show All -    - Show All -    [Dropdown]

In Crs Hist Only     HS Credit Only     In Grad/Elig Only

View Course History

### Course History Menu on the Student Eligibility Details Screen

**Area of Study** (optional) – Choose –Show All- or a specified course Area of Study on which to filter.

**Subject Area** (optional) – Choose –Show All- or a specified course Subject Area on which to filter.

**Department** (optional) – Choose –Show All- or a specified course Department on which to filter.

**Credit Type** (required) – Choose –All- or a specified Credit Type on which to filter.

**In Crs Hist Only** (optional) – Check to filter on course history for courses that are flagged Is In Update History.

**HS Credit Only** (optional) – Check to filter on course history for courses that are flagged Is High School Credit.

**In Grad/Elig Only** (optional) – Check to filter on course history for courses that are flagged In Graduation / Eligibility.

**View Course History** – View this student’s selected Course History information.

School	School Year	Code	Course	Area	Std	Subj Area	Dept	Rpt Term	Mark Type	Mark	In Crs Hist	HS Cred	In Grad/Elig	Attempted	Earned
HIGH SCHOOL	2009-2010	078	HEALTH	HPE			HPE	Fin	Final Mark	A-	✓	✓	✓	0.50	0.50
School	2008-2009	140	ALG I				MA	F	Final Mark	A	✓	✓	✓	1.00	1.00

**Viewing Selected Course History for the Student**

## GPA History

Displays the GPA History information for this student. Click on **GPA History** on the Menu.

**GPA History Menu on the Student Eligibility Details Screen**

**GPA Set** (required) – Choose the specific school year and GPA Set on which to filter.

**View GPA History** – View this student’s selected GPA History information.

GPA Set	Formula	Reporting Terms	Mark Credit Types	Add-On	Difficulty Points	Prev. Years
Cumulative	Standard GPA Calculation (Alpha)		Earned			✓

Calculation	Date	Points	Credits	GPA
GPA based on current GPA configuration	03/31/2008 3:17 PM	29.000	11.500	2.522

Year	Code	Abbr	Term	Course			Mark				Calculation Values				
				In Cum Credit	In Cum GPA	Is HS Credit	Type	Mark	Crđ Type	Is Earned	In GPA	Pt Val	Crđ Att	Crđ Earn	Crđ Crđ
2002-2003	233	ANATOMY		✓	✓	✓	Avg	B	Earned	✓	✓	3.000	1.000	1.000	1.000
2002-2003	281	LATIN II		✓	✓	✓	Avg	C	Earned	✓	✓	2.000	.500	.500	.500
2002-2003	282	FR II		✓	✓	✓	Avg	C	Earned	✓	✓	2.000	1.000	1.000	1.000
2002-2003	320	B AM GOV		✓	✓	✓	Avg	A	Earned	✓	✓	4.000	.500	.500	.500
2002-2003	440	CALC-AP		✓	✓	✓	Avg	B	Earned	✓	✓	3.000	1.000	1.000	1.000
2002-2003	H ENG~	H ENG 10		✓	✓	✓	Avg	B	Earned	✓	✓	3.000	1.000	1.000	1.000
2004-2005	273	DRAWING	2Sem	✓	✓	✓	Average mark	A	Earned	✓	✓	4.000	.500	.500	.500
2004-2005	314	B ENG 11	Year	✓	✓	✓	Average mark	B	Earned	✓	✓	3.000	.500	.500	1.000
2004-2005	314	B ENG 11	Year	✓	✓	✓	Average mark	B	Earned	✓	✓	3.000	.500	.500	1.000

**Viewing Selected GPA Set for the Student**

### Miscellaneous Eligibility

Displays the Miscellaneous Eligibility rules and values for this student. Click on **Misc. Elig** on the Menu.

Code	Name	Value
CounDisc	Counselor Discussion	False
Mentor	3 Mentoring Sessions Required	

**Miscellaneous Eligibility Menu on the Student Eligibility Details Screen**

**Refresh Miscellaneous Eligibility Data** – Refresh the miscellaneous eligibility data and display the latest information.

### Requests

Displays the Course Requests and credit information for this student. Click on **Requests** in the Menu.

Area of Study:	Subject Area:	Department:		
- Show All -	- Show All -	- Show All -	<input checked="" type="checkbox"/> Include Current Year	<input checked="" type="checkbox"/> Include Future Years
View Requests				

**Requests Menu on the Student Eligibility Details Screen**

**Area of Study** (optional) – Choose –Show All- or a specified course Area of Study to filter on.

**Subject Area** (optional) – Choose –Show All- or a specified course Subject Area to filter on.

**Department** (optional) – Choose –Show All- or a specified course Department to filter on.

**Include Current Year** (optional) – Check to include requests from the current year.

**Include Future Years** (optional) – Check to include requests from future years.

**View Requests** – View this student’s selected Course Requests information.

SchoolYear	Code	Course	Priority	Request Status	Area Std	Subj Area	Dept	In Crs	Hist	HS Cred	In Grad/Elig	Assigned Section	Course Credits
2009-2010	011	ART I	6	Approved	ART		ART	✓	✓	✓		3	1.00
2009-2010	064	GERMAN I	7	Approved	FL		FL	✓	✓	✓		9	1.00
2009-2010	074	SPORTS/GAMES	9	Approved	HPE	PE	HPE	✓	✓	✓		22	0.25
2009-2010	078	HEALTH	9	Approved	HPE		HPE	✓	✓	✓		21	0.50
2009-2010	120	ENG I	9	Approved	ENG		ENG	✓	✓	✓		8	1.00
2009-2010	143	ALG II	9	Approved	MTH		MTH	✓	✓	✓		44	1.00
2009-2010	180	PEC SC	9	Approved	SCI		SCI	✓	✓	✓		5	1.00
2009-2010	205	WORLD STUDIES	9	Approved	SS		SS	✓	✓	✓		1	1.00
2009-2010	LUNCH	LUNCH	3	Approved								6	0.00

**Viewing Selected Course Requests for the Student**

# Eligibility Report (R208)

Navigation: Home – SIS – Graduation / Eligibility – Eligibility Report (R208)

Home » SIS » Graduation / Eligibility » Eligibility Report (R208) Advanced

### Eligibility Report (R208)

From this screen users can submit an Eligibility Report job.

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Student Ids (comma separated):

Graduation Years (comma separated): 2013

Eligibility:  Eligible  Ineligible  Both

Home school IRN:

**Counselor**

FREEMAN, MS  
FITZGERALD, MS  
MONTGOMERY, MS

**Program**

-- NOT APPLICABLE  
01 - Multiple Disabilities  
02 - Deaf-Blindness  
03 - Hearing Impairments

**Student Status**

A - ACTIVE RES  
ACCA - ASHLAND ACADEMY  
AE - ACTIVE ELSEWHERE  
D - DELETED

**Current Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Team**

**Membership Group**

11 - Intervention  
12 - Post-secondary Enrollment Options  
15 - 15  
16 - 16

**Membership**

15 - Student received intervention provi-  
15 - Student received intervention provi-  
16 - Student placement by a district in a  
30 - Prev. reported as a dropout in repo-

**Special Education Services**

215001 - Adapted Physical Education Se-  
215002 - Aide Services  
215003 - Attendant Services  
215004 - Audiological Services

**Disability Condition**

-- Not Applicable  
01 - Multiple Disabilities (other than Dea-  
02 - Deaf-Blindness  
03 - Deafness (Hearing Impairments)

**Rule Options:**  Primary Rule  Secondary Rule  Choose rule

Chosen Rule:

**Schedule Result:** Default Schedule - 12-13 Result Set

**Recalculate:**

**Show Details:**

**Mark Type:**

Show Counselor  Show GPA  Show Class Rank

**Sorting Options**

Student Name (ASC)  
Student Name (DESC)  
Student Number (ASC)  
Student Number (DESC)

**Delivery Method:** Pickup

**Email Address:** EmhoffH@software-answers.com

**Description:**

Eligibility Report Parameters Screen

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the “Public And Private” check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Student Ids** (optional) – Enter specific student IDs if you wish to run the report for only a specific set of students. Multiple student IDs are comma separated.

**Graduation Years** (optional) – Enter any Graduation Years you wish to specifically include in the report, separated by commas. Leaving this blank will include all graduation year. This refers to the Graduation Year on the Student Profile - Additional tab. If the Graduation Year on the Student Profile is not used or not kept updated, you will want to leave the Graduate Years filter blank.

**Eligibility** (required) – Choose students who are eligible, ineligible, or both for the selected eligibility rules.

**Home School IRN** (optional) – Enter an IRN if you wish to filter by the student’s Home School IRN (on the Student Profile – General tab. Click on the magnifying glass to go to open the ODE IRN Search Page.

**Counselor** (optional) – If no Counselors are selected, the report will select all Counselors. You can also filter by selecting specific Counselors for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Current Grade** (optional) – If no Current Grades are selected, the report will select all Current Grades. You can also filter by selecting specific Current Grades for your report.

**Team** (optional) – If no Teams are selected, the report will select all Teams. You can also filter by selecting specific Teams for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Disability Condition** (optional) – If no Disability Conditions are selected, the report will select all Disability Conditions. You can also filter by selecting specific Disability Conditions for your report.

**Rule Options** – Check the boxes next to Primary Rule or Secondary Rule to run the report for the primary and/or secondary Rules for the included students, and/or check the box next to Choose Rule to select a Rule (see Chosen Rule).

**Chosen Rule** – If you check “Choose Rule” in the Rule Options, select a Rule from the drop-down menu. The report will run for the selected Rule for all included students.

**Schedule Result** (required) – Choose this school year’s schedule result set to be used in total credit and required course determination. Past school years will use the finalized schedule result set.

**Recalculate** (optional) – Check recalculate to refresh the student’s values (slower) or uncheck Recalculate to view the student’s cached values (faster).

**Show Details** (optional) – Check to show the line item criteria results in the report. Uncheck to view only line item results.

**Mark Type** (required) – Choose the mark type to use in the current year’s total credits calculation.

**Show Counselor** (optional) – Check to show the student’s counselor on the report. Uncheck to now show the student’s counselor on the report.

**Show GPA** (optional) – Check to show student GPAs on the report. If you check this box, you must select a GPA Set from the drop-down menu beside this option.

**Show Class Rank** – Check to show student class rank on the report (only available if “Show GPA” is checked and a GPA Set is selected from the drop-down list).

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R208 Printed Wed, Mar 26, 2008, 10:32 AM										High School Eligibility Report
Id	Student Name Program	Counselor Team	Sex	Status Home School IRN	Grad Year	Grade	GPA	Rank	Birth	
9300	ANDREW Student49561 ** - Not applicable	ALLEN Teacher1319	M	A		12	3.2220		11/12/1989	
Description						Student Value	Required Value	Result		
<b>to Grad - Requirements to graduate</b>								<b>Unmet</b>		
Total credit needed to graduate								Met		
Total Credits >= 20 IC HS						23.50	20.00	Met		
And GPA [CUM] >= 2.0						3.22	2.00	Met		
Math courses needed to graduate								Met		
Course [ALGEBRA I] required. IC						1015	1015	Met		
And Course [ACC GEOMETRY] required. IC						1027	1027	Met		
And Course [ALGEBRA 2] required. IC						1035	1035	Met		
Foreign Language								Met		
Course [SPANISH I] required. IC						612	612	Met		
And Course [SPANISH II] required. IC						622	622	Met		
Misc Courses								Met		
Course [KEYBOARDING] required. IC						300	300	Met		
Or ( Course [MIXED CHORUS] required. IC						1120	1120	Met		
Or Course [CHAMBER CHOIR] required. )						1130	1130	Met		
And Course [AP PSYCHOLOGY] required. IC						1350	1350	Met		
PE / Health								Met		

Page 1 of 2

### Eligibility Report

<b>Summary</b>			
Rule	Eligible	Ineligible	
to Grad - Requirements to graduate	0	15	

### Eligibility Report – Summary Section

# Eligibility Letters

Navigation: Home – SIS – Graduation / Eligibility – Eligibility Letters

Home » SIS » Graduation / Eligibility » Eligibility Letters

## Eligibility Letters

From this screen users can submit an Eligibility Letters job.

Selection Criteria | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

Ad-Hoc Membership:    
 Public  Private

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Rule Options:  Primary Rule  Secondary Rule  Select any combination of rules to view.   
 Choose rule

Chosen Rule:

Schedule Result:    
 Choose this school year's schedule result set to be used in total credit and required course determination. Past school years will use the finalized schedule result set.

Recalculate:    
 Check recalculate to refresh the student's values (slower) or Uncheck recalculate to view the student's cached values (faster).

Mark Type:    
 Choose the mark type to use in current year's total credits calculation.

Student Ids (comma separated):

Graduation Years (comma separated):

Counselor

Current Grade

Student Status

Homeroom

Homeroom Date:

Eligibility:  Eligible  Ineligible  Both

Print School Address on Letter:  Yes  No

Print Address On Letter:  Yes  No

Sorting Options

Output:  Report  Labels  Both Report and Labels

Label Type:

Address:  Use Student Address  Use Parent Address   
 Use custom address text

Include Copied On Correspondence:  Yes  No

Delivery Method:

Email Address:

Description:

Eligibility Letters Parameters Screen

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the “Public And Private” check box to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

**Rule Options** – Check the boxes next to Primary Rule or Secondary Rule to run the report for the primary and/or secondary Rules for the included students, and/or check the box next to Choose Rule to select a Rule (see Chosen Rule).

**Chosen Rule** – If you check “Choose Rule” in the Rule Options, select a Rule from the drop-down menu. The report will run for the selected Rule for all included students.

**Schedule Result** (required) – Choose this school year’s schedule result set to be used in total credit and required course determination. Past school years will use the finalized schedule result set.

**Recalculate** (optional) – Check recalculate to refresh the student’s values (slower) or uncheck Recalculate to view the student’s cached values (faster).

**Mark Type** (required) – Choose the mark type to use in the current year’s total credits calculation.

**Student Ids** (optional) – Enter specific student IDs if you wish to run the report for only a specific set of students. Multiple student IDs are comma-separated.

**Graduation Years** (optional) – Enter any Graduation Years you wish to specifically include in the report, separated by commas. Leaving this blank will include all graduation year. This refers to the Graduation Year on the Student Profile - Additional tab. If the Graduation Year on the Student Profile is not used or not kept updated, you will want to leave the Graduate Years filter blank.

**Counselor** (optional) – If no Counselors are selected, the report will select all Counselors. You can also filter by selecting specific Counselors for your report.

**Current Grade** (optional) – If no Current Grades are selected, the report will select all Current Grades. You can also filter by selecting specific Current Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Homeroom Date** (optional) – Specify the date to use to retrieve student’s homeroom.

**Eligibility** (required) – Choose students who are eligible, ineligible, or both for the selected eligibility rules.

**Print School Address on Letter** (required) – Select Yes to print school address on Eligibility Letter.

**Print Address on Letter** (required) – Select Yes to print student address on Eligibility Letter.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** (optional) – Select one option for the intended output for this run of the report. Options are Report, Labels or both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection.

**Address** (optional) – Indicate which address should be used if labels are created in the output. Options are: Use Student Address or Use Parent Address.

**Use Custom Address Text** (optional) – If you check this box, the custom text entered in the text field will print at the top of each address field on the report.

**Include Copied on Correspondence** – Yes or No; Selecting Yes will include address labels for contacts marked as “Copied on Correspondence” when creating labels.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

High School  
645 S Main  
Lima OH, 45806  
(419) 555-1212

To the Parent/Guardian of:  
ANDREW Student49561  
645 S Main St  
Lima, OH 45804-1241

Wednesday, March 26, 2008

Homerom:  
Counselor: ALLEN Teacher1319

ANDREW Student49561 has been assessed to see if he or she meets the requirements to be eligible to graduate.

to Grad - Requirements to Unmet  
graduate

ANDREW Student49561 is not eligible to graduate

---

**Eligibility Letters**

This page intentionally left blank.

---

# ProgressBook StudentInformation Marks Guide



# **ProgressBook StudentInformation Marks Guide**

(This document is current for ProgressBook StudentInformation v14.3.0 or later.)

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

## Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Marks Guide* have been made.

Product Version	Heading	Page	Reason
14.3.0	Global	N/A	Updated Heading 1, 2 and 3 formats to match ProgressBook Suite formatting.  Removed outline numbers to conform to heading format of the ProgressBook Suite.  Removed icons to match ProgressBook Suite formatting.  Removed references to archived <i>General Use Guide</i> .
14.3.0	“Marks Documentation Key”	N/A	Removed section because the icons are no longer included in the guide.
14.3.0	“ <i>Class List Formatter</i> ”	101	Updated image and added description of new <b>Suppress Drops</b> option.
14.3.0	“Non-Custom Report Card Formats (R700)”	N/A	Removed section.
14.3.0	“ <i>Report – Report Card Formatter (R700)</i> ”	109	Removed some references to non-custom formats.
13.5.0	“ <i>Report – Honor Roll (R303)</i> ”	81	Added note to Output field about printing labels for Firefox users.
13.5.0	“ <i>Report – Student with Specified Marks by Student (R302A)</i> ”	87	Added note to Output field about printing labels for Firefox users.
13.5.0	“ <i>Report – Student with Specified Marks By Teacher (R302B)</i> ”	92	Added note to Output field about printing labels for Firefox users.
13.5.0	“ <i>Report – Class List Formatter (R703)</i> ”	101	Added note to Output field about printing labels for Firefox users.
13.5.0	“Non-Custom Report Card Formats (R700)”	N/A	Added note to Output field about printing labels for Firefox users.
13.5.0	“ <i>Custom Report Card Formats (R700)</i> ”	110	Added note to Output field about printing labels for Firefox users.
13.5.0	“ <i>Permanent Record Labels (R700)</i> ”	123	Added note to Output field about printing labels for Firefox users.

This page intentionally left blank.

## Table of Contents

Change Log.....	i
Table of Contents.....	iii
Marks Overview .....	1
Understanding the Marks Module .....	1
Marks System Maintenance.....	1
Reporting Terms Maintenance.....	1
Mark Type Codes Maintenance .....	5
Marks Maintenance.....	6
Marking Pattern Maintenance .....	8
Marking Pattern Rules Maintenance.....	11
Course Marking Pattern Maintenance.....	13
Combined Mark Group Maintenance .....	17
Combined Mark Maintenance .....	18
Course Difficulty Maintenance .....	19
Difficulty Point Scale Maintenance.....	19
Add-On Level Code Maintenance .....	20
GPA Add-On Points Maintenance.....	21
Student Exception Credit Maintenance.....	22
Teacher Menu – Marks Tasks .....	24
Course Section Exception Credit.....	24
Course Section Mark Entry.....	25
GPA Set Maintenance .....	25
GPA Set Maintenance – General Tab .....	26
GPA Set Maintenance – Calculations Tab .....	27
GPA Set Maintenance – CRCT GPA by Course Count Formula .....	29
GPA Set Maintenance – STDA Standard GPA Calculation (Alpha) Formula	31
GPA Set Maintenance – RAWN Raw Numeric GPA Calculation Formula ....	33
GPA Set Maintenance – STDN Standard GPA Calculation (Numeric) Formula	
.....	34
GPA Set Maintenance – FNDLY Findlay Method Formula .....	36

GPA Set Maintenance – HNRS Honors GPA Formula .....	39
GPA Set Maintenance – JKSN Jackson Method Formula .....	42
GPA Set Maintenance – MTV Mount Vernon Method Formula.....	44
GPA Set Maintenance – QP Quality Points Formula .....	46
GPA Set Maintenance – WAPK Wapak Method Formula .....	47
GPA Set Maintenance – Rank Tab.....	49
Standard Marks Comments Maintenance.....	51
Grade Level Credit Multiplier Maintenance .....	53
Honor Roll Maintenance .....	54
Honor Roll Mark Inclusion/Exclusion Rule .....	56
Honor Roll Memberships .....	58
Mark Bump Code .....	59
Automatic Mark Maintenance .....	61
Automatic Mark Calculation Dates .....	64
Student Marks Records.....	67
Student Marks.....	67
Counselor Comments .....	69
Teacher Comment .....	73
Marks Reports.....	77
Report – Marks Analysis (R301) .....	77
Report – Honor Roll (R303) .....	81
Report – Student with Specified Marks by Student (R302A).....	87
Report – Student with Specified Marks By Teacher (R302B) .....	92
Report – Student Composite (R112).....	97
Report – Class List Formatter (R703) .....	101
Report – Report Card Formatter (R700) .....	109
Custom Report Card Formats (R700).....	110
Permanent Record Labels (R700).....	123
Appendix A. R700 Format Example .....	142

---

## Marks Overview

Marks are commonly referred to as grades. So as to avoid confusion with other entities referred to as grades (a student's grade level) Marks will be used as the common reference throughout the StudentInformation application.

A Mark is a measure of performance for a student in a specific course section. Marks are defined by multiple types, such as average, exam, final, etc. Mark types then define how the mark will behave (calculated or not in GPA, weight, etc.) in various mark reporting scenarios.

---

## Understanding the Marks Module

The Marks module has four distinct parts – Marks System Maintenance, Student Marks Records, Teacher Marks screens and Marks Reports. Teacher Marks Screens will be discussed in a separate document titled Teacher Menu Documentation.

Marks System Maintenance is composed of several tables that must be defined and maintained. Code tables include: Mark Type, Marks, Marking Pattern, Marking Pattern Rules, Combined Mark Groups, Combined Marks, Course Difficulty, Level of Difficulty Point Scale, Add-On Level Codes, GPA Add-On Points, GPA Sets, Grade Level Credit Multiplier, Automatic Marks, Honor Rolls and Honor Roll Rules and Memberships. All of these tables may not be required for Marks reporting but will enable the building to define various ways to collect marks and create reports and GPA calculations. These tables and codes can be modified, changed and deleted as necessary.

Student Marks Records will be where individual student information can be viewed or maintained for specific students. These screens include the ability to view student marks, stipulate exception credit for students as well as input and view counselor and teacher comments (standard and freeform).

Marks Reports are available in numerous formats to show Marks data in both detail and summary form. The data on each report can be filtered, sorted, and grouped with various date ranges and sorting options.

---

## Marks System Maintenance

### Reporting Terms Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Reporting Terms Maintenance**

Reporting terms are used to break out a school year in segments for marks reporting. There are two types of reporting terms, **virtual** and **non-virtual** reporting terms.

A **Non-Virtual Reporting Term** represents a time span or collection of days making up a grading period.

A **Virtual Reporting Term** is used to create a placeholder for a mark, such as Semester 1 Average, or Exam. There are no calendar days associated with a virtual reporting term.

Non-Virtual Reporting Terms are created when the Master Calendar is created. For more information on the initial creation of reporting terms see the School Setup & Configuration documentation.

Home » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance												
Reporting Terms Maintenance												
From this screen, you can display and change data pertaining to reporting terms.												
<input type="button" value="Add Virtual Term"/> <input type="button" value="Save Changes"/> <input type="button" value="Cancel Changes"/>												
	Code	Exp Code	Name	Start Date	End Date	Planned Days	Actual Days	Sort Order	Marks	Start Date	Marks Cutoff Date	Active
	Qtr1		Quarter 1	Aug 27, 2007	Nov 02, 2007	49.00	49.00	1				
	Qtr2		Quarter 2	Nov 05, 2007	Jan 18, 2008	44.00	44.00	2				
	Qtr3		Quarter 3	Jan 22, 2008	Mar 28, 2008	46.00	46.00	3				
	Qtr4		Quarter 4	Mar 31, 2008	May 28, 2008	42.00	42.00	4				
<input checked="" type="checkbox"/> Show Active Only												

**Sorting** – Sorting on this screen is accomplished by using the and arrows to move the Reporting Terms up or down in the grid (changes to sort order are not saved until you click the Save Changes button). Click Cancel Changes to clear changes.

**Note:** Date ranges for virtual reporting terms are considered identical to the next previous real reporting term. This means, if you use virtual reporting terms for Interims, you will have to have each Interim **after** the main reporting term, such as: Qtr1, Int1, Qtr2, Int2, 1Ex, 1Avg, Qtr3, Int3, Qtr4, Int4, 2Ex, 2Avg, Fin. This will not change the sort order in your Marking Pattern Rules (the marking pattern rules maintenance screen will appear out of order, but the report card will print correctly if you have the correct Sequence on the Marking Pattern Rules screen, with the order Int1, Qtr1, Int2, Qtr2, and so on).

– This indicates a Non-Virtual Reporting Term that cannot be deleted.

## Add/Edit Virtual Reporting Term

The screenshot shows a web browser window with the following content:

- Navigation path: Home » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance
- Section title: **Reporting Terms Maintenance**
- Instruction: From this screen, you can display and change data pertaining to reporting terms.
- Form fields:
  - Code: [Text input field]
  - Export Code: [Text input field]
  - Name: [Text input field]
  - Description: [Large text area]
  - Marks Start Date: [Date picker]
  - Marks Cutoff Date: [Date picker]
  - Is Active:
- Buttons: Save, Save and New, Cancel

**Code** (required) – Enter up to 4 characters, alphanumeric, for the new Virtual Reporting Term Code.

**Export Code** (optional) – If you will be exporting attendance for a Home School on SIS (using the Home School Export), you will want to enter an Export Code in Reporting Terms Maintenance. If you will not be exporting attendance for a Home School on SIS, you can leave this field blank.

Enter the SIS term/reporting period combination that corresponds to each StudentInformation Reporting Term. For example, for Reporting Term QTR1, type in 101 for the Export Code. This will correctly translate into SIS as term 1 reporting period 01. When you run Home School Export for attendance, you will be given an option to use Report Term or Report Term Export Code for the export file.

**Name** (required) – Enter Name of Virtual Reporting Term.

**Description** (optional) – Enter a description of the Virtual Reporting Term.

**Marks Start Date** – Enter a date to indicate the first date teachers may enter marks. The date specified is inclusive. If the date entered falls after the marks cut-off date, this would result in zero (0) days when marks could be calculated, completely locking out marks entry. If Marks Start Date is empty, marks may be entered at any time up to the Marks cut-off date.

***Note:** If the Marks Start Date is greater than the Marks Cutoff Date, this will result in zero days and the fields on the Marks Entry pages will be grayed out and not available for entry.*

**Marks Cutoff Date** (optional) – Enter a Marks Cutoff Date. This Virtual Reporting Term will become locked for Marks Entry by teachers after this date. **An empty marks cut-off date means that teachers may change marks until the end of the term, starting with the Marks Entry Start Date.**

## Edit Non-Virtual Reporting Term

The screenshot shows a web application interface for "Reporting Terms Maintenance". At the top, a navigation breadcrumb reads: Home » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance. Below this is the title "Reporting Terms Maintenance" and a sub-header: "From this screen, you can display and change data pertaining to reporting terms." The form contains several fields: "Code" with the value "Qtr1", "Name" with "Quarter 1", and a large empty "Description" text area. Below these are date and day fields: "Start Date" (8/29/2006), "End Date" (10/27/2006), "Planned Days" (41.00), and "Actual Days" (41.00). There are also two dropdown menus for "Marks Start Date" and "Marks Cutoff Date". At the bottom left, there are "Save" and "Cancel" buttons.

**Code** (required) – Enter up to 4 alphanumeric characters for the Reporting Term Code.

**Name** (required) – Enter Name of Reporting Term.

**Description** (optional) – Enter a description of the Virtual Reporting Term.

**Start Date** (non-modifiable) – Start date for the Reporting Term is displayed.

**End Date** (non-modifiable if in past) – End date for the Reporting Term is displayed, or enter end date for the Reporting Term. If you change the End Date of the Reporting Term, this will change the End Date of the Schedule Term that ends on the same date as this Reporting Term's original End Date. This will also change the Start Date of the next Schedule Term and Reporting Term to the first attending day after the newly-entered End Date.

**Note:** *If reporting term dates need changed, use the calendar date wizard to modify reporting term start and end dates (See School Setup and Configuration Chapter).*

**Planned Days** (non-modifiable) – Number of planned attendance days as defined on the Master Calendar for the selected Reporting Term.

**Actual Days** (non-modifiable) – Number of actual attendance days as defined on the Master Calendar for the selected Reporting Term.

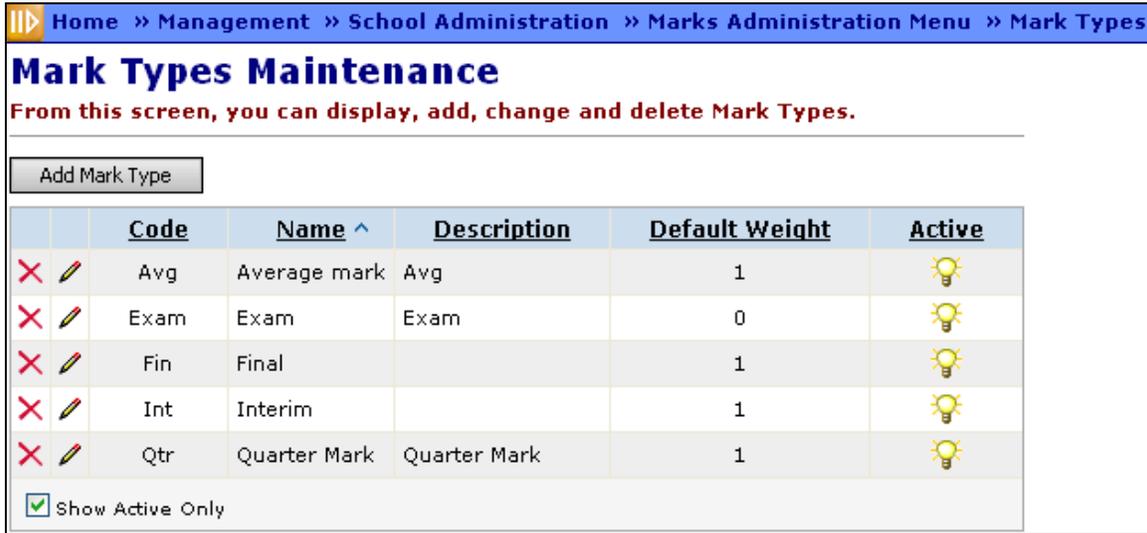
**Marks Start Date** – Enter a date to indicate the first date teachers may enter marks. The date specified is inclusive (See Add/Edit Virtual Reporting Term for more details).

**Marks Cut-Off Date** – Enter a Marks Cut-Off Date. This Virtual Reporting Term will become locked for Marks Entry by teachers after this date.

## Mark Type Codes Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Mark Types**

Mark Types are used to categorize marks given to a student in a course section. They also specify a default weight for the Mark Type for mark averaging and GPA calculations.



Home » Management » School Administration » Marks Administration Menu » Mark Types

### Mark Types Maintenance

From this screen, you can display, add, change and delete Mark Types.

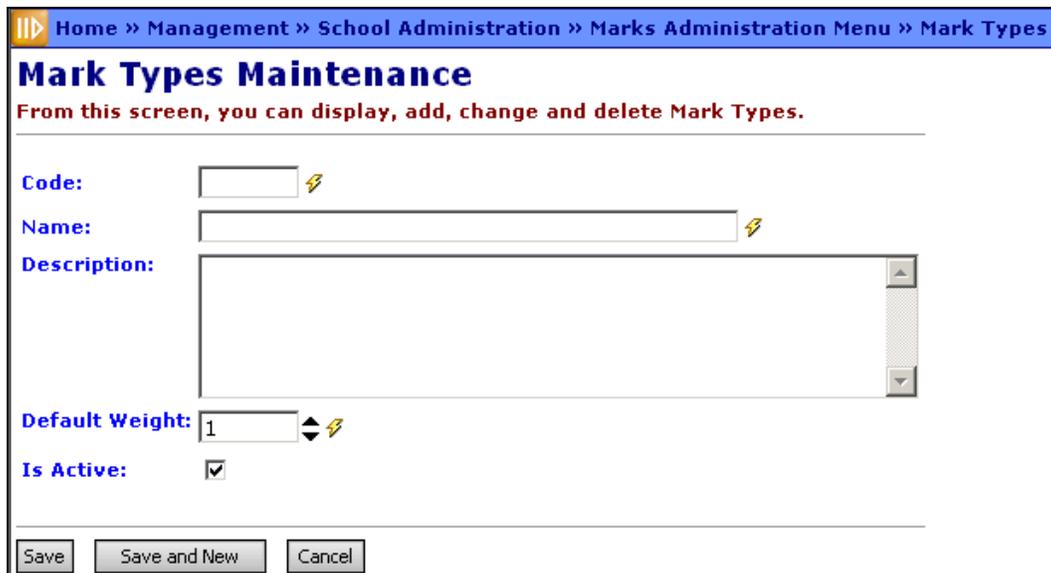
		Code	Name ^	Description	Default Weight	Active
		Avg	Average mark	Avg	1	
		Exam	Exam	Exam	0	
		Fin	Final		1	
		Int	Interim		1	
		Qtr	Quarter Mark	Quarter Mark	1	

Show Active Only

**Sorting** – You may sort by any column (Code, Name, Description, Default Weight, Active) in ascending or descending order by clicking on the column header.

– This Code has been entered at the Global Level or District Level and cannot be changed at the Building Level.

### Add/Edit Mark Type



Home » Management » School Administration » Marks Administration Menu » Mark Types

### Mark Types Maintenance

From this screen, you can display, add, change and delete Mark Types.

**Code:**

**Name:**

**Description:**

**Default Weight:**

**Is Active:**

**Code** (required) – Enter up to 4 characters (alphanumeric) Mark Type Code. If you try to use an existing inactive Mark Type Code, you will be prompted to reactivate this inactive Mark Type Code if you wish.

**Name** (required) – Enter Name of Mark Type Code (up to 30 characters).

**Description** (optional) – Enter Description of Mark Type Code (up to 200 characters).

**Default Weight** (required) – Enter a default weight to be used when a mark is designated with this Mark Type.

## Marks Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Marks**

Marks are also commonly referred to as grades and may be defined by alpha or numeric values.

Home » Management » School Administration » Marks Administration Menu » Marks												Advanced Search	Feedback	Mgmt	Help	Print
Marks Maintenance												From this screen, you can display, add, change and delete data pertaining to marks for the current school year.				
<input type="button" value="Add Mark"/>																
Mark ^	Mark Name	Description	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dq Mark	Active				
	A	A	EXCELLENT	3.990000	3.850000	91.50	100.00	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	A-	A-		3.700000	3.500000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	A+	A+		4.000000	3.990000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	B	B	ABOVE AVERAGE	3.000000	2.850000	82.50	91.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	B-	B-		2.700000	2.500000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	B+	B+		3.300000	3.150000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	C	C	AVERAGE	2.000000	1.850000	73.50	82.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	C-	C-		1.700000	1.500000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	C+	C+		2.300000	2.150000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	D	D	BELOW AVERAGE	1.000000	0.850000	64.50	73.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	D-	D-		0.700000	0.550000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	D+	D+		1.300000	1.150000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	F	F	FAILURE	0	0	0	64.49	1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	H	H	OUTSTANDING	5.000000	4.500000			1.000000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	INC	INC	INCOMPLETE	0				1.000000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	O	O	OUTSTANDING	4.000000	4.000000			1.000000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	S	S	SATISFACTORY	0				1.000000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	TI	TI	TERM INCOMPLETE	0				1.000000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	U	U	UNSATISFACTORY	0				0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	W/D	W/D	WITHDRAW	0				0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
	WDF	WDF	WITHDRAW FAIL	0				0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
	WP	WP	WITHDRAW PASS	0				1.000000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Show Active Only  
 22 Records Displayed [Back To Top](#)

**Sorting** – You may sort by any column (Mark, Mark Name, Description, Point Value, Average Point Threshold, Min Numeric Mark, Max Numeric Mark, Credit Multiplier, Is Alt Mark, Is Credit Earned, Is Included in GPA, Is Dq Mark, Active) in ascending or descending order by clicking on the column header.

The above example shows an alpha marks school. The following is an example of a Marks table for a numeric marks school:

Home » Management » School Administration » Marks Administration Menu » Marks Advanced Search | Feedback | Mgmt | Help | Print

### Marks Maintenance

From this screen, you can display, add, change and delete data pertaining to marks for the current school year.

Mark	Mark Name	Description	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dq Mark	Active
X	A	A	4.000000	3.850000	94.50	97.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	A-	A-	3.700000	3.500000	91.50	94.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	A+	A+	4.300000	4.150000	97.50	125.00	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	B	B	3.000000	2.850000	85.50	88.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	B-	B-	2.700000	2.500000	82.50	85.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	B+	B+	3.300000	3.150000	88.50	91.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	BLK	BLK	BLANK MARK	0			1.000000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
X	C	C	2.000000	1.850000	76.50	79.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	C-	C-	1.700000	1.500000	73.50	76.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	C+	C+	2.300000	2.150000	79.50	82.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	D	D	1.000000	0.850000	67.50	70.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	D-	D-	0.700000	0.700000	64.50	67.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	D+	D+	1.300000	1.150000	70.50	73.49	1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	F	F	0		1.00	64.49	1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	I	Incomplete	0		0	0.99	1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
X	P	P	0				1.000000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
X	U	U	UNGRADED	0			1.000000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
X	W	W	0				1.000000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Show Active Only 18 Records Displayed [Back To Top](#)

## Add/Edit Mark

Home » Management » School Administration » Marks Administration Menu » Marks

### Marks Maintenance

From this screen, you can display, add, change and delete data pertaining to marks for the current school year.

Mark:

Name:

Description:

Point Value:

Average Point Threshold:

Min Numeric Mark:

Max Numeric Mark:

Credit Multiplier:

Is Alternate Mark:

Is Credit Earned:

Is Included in GPA:

Is Disqualified Mark:

Is Active:

**Mark** (required) – Enter up to 4 characters to define the new Mark. If you try to use an existing inactive Mark, you will be prompted to reactivate this inactive Mark if you wish.

**Name** (required) – Enter up to 30 characters to define the Name of the Mark.

**Description** (optional) – Enter up to 200 characters as a Description of the Mark.

**Point Value** (required) – Define the point value of the new Mark. May use the up and down arrows to increase or decrease the number by 0.10 with each click, or may manually type number formatted 0.00. Value can be 0-10.

**Average Point Threshold** (optional) – Average point value assigned to the new Mark. Used for grade average – determines the midpoint between two marks. This point value is used for Automatic Marks.

**Min Numeric Mark** (required for numeric schools) – Minimum numeric mark value to correspond with this alpha mark. This value may be blank if the school is not configured for numeric marks. Valid range is set by the DASL Options page (Home -> Management -> School Administration -> DASL Options), and can fall into the range 0-999. There should be no gaps between each grade's maximum and the next higher grade's minimum, and there should be no overlaps.

**Max Numeric Mark** (required for numeric schools) – Maximum numeric mark value to correspond with this alpha mark. This value may be blank if the school is not configured for numeric marks. Valid range is set by the DASL Options page (Home -> Management -> School Administration -> DASL Options), and can fall into the range 0-999. There should be no gaps between each grade's maximum and the next higher grade's minimum, and there should be no overlap.

**Credit Multiplier** (required) – Credit multiplier for this mark formatted as 0.00. Valid range is 0-5.

**Is Alternate Mark** (optional) – Yes or No; when using Numeric Marks, this check-box must be checked if this Mark will be available as an Alternative Mark.

**Is Credit Earned** (optional) – Yes or No; must be checked if this mark, when used, is to have earned credit.

**Is Included in GPA** (optional) – Yes or No; must be checked if this mark is to be included in GPA calculations.

**Is Disqualified Mark** (optional) – Yes or No; if this is checked, any student receiving this mark for any class will receive a 0 GPA, regardless of other marks earned in this or any other class.

## Marking Pattern Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Marking Pattern**

Marking patterns define specific mark types that are required to be created for specific course terms for each reporting period.

***Note:** Once marks have been entered in a slot in the marking pattern – marking patterns cannot be changed for that period. Marks will become disassociated.*

Home » Management » School Administration » Marks Administration Menu » Marking Patterns

## Marking Patterns

From this screen, you can display, add, change and delete data pertaining to marking patterns.

Add Marking Pattern -- All Course Terms --

			Code	Name ^	Description	Course Terms	Active
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem1	1st Semester	1st Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Tn1	1st Trimester	All Year	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem2	2nd Semester	2nd Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	pso	post secondary	All Year	

Show Active Only

**Sorting** – You may sort by most columns (Code, Name, Description and Active) in ascending or descending order by clicking on the column header.

**Marking Pattern Rules** – View Marking Pattern Rules.

**Marking Pattern Courses** – View a list of courses in the linked Course Term(s).

– Default Marking Pattern.

**All Course Terms** – Select a specific Course Term from the dropdown list to view Marking Patterns for that term only instead of all Course Terms.

### Add/Edit Marking Pattern

Home » Management » School Administration » Marks Administration Menu » Marking Patterns

## Marking Patterns

From this screen, you can display, add, change and delete data pertaining to marking patterns.

**Code:**

**Name:**

**Description:**

**Is Active:**

**Pattern Type:**

Include	Course Term Name	Set As Default
<input type="checkbox"/>	1st Semester	<input type="checkbox"/>
<input type="checkbox"/>	2nd Semester	<input type="checkbox"/>
<input type="checkbox"/>	All Year	<input type="checkbox"/>

Save Save and New Return to Marking Patterns

**Code** (required) – Enter up to 4 characters (alphanumeric) for Marking Pattern Code. If you try to use an existing inactive Marking Pattern Code, you will be prompted to reactivate this inactive Marking Pattern if you wish.

**Name** (required) – Enter Name of Marking Pattern Code.

**Description** (optional) – Enter Description of Marking Pattern Code.

**Pattern Type** (optional) – The default value of this drop-down is Percentage, which will cause the marking pattern and marking pattern rules to function as normal, with the credit ratio being a percentage value (value/100). Selecting the second option, Ratio, will add a new field beside the Pattern Type field: Ratio Denominator. This allows you to set a specific ratio denominator (rather than the default 100) for credit ratios.

Include	Course Term Name	Set As Default
<input type="checkbox"/>	1st Semester	<input type="checkbox"/>
<input type="checkbox"/>	2nd Semester	<input type="checkbox"/>
<input type="checkbox"/>	All Year course	<input type="checkbox"/>

Check the appropriate box on the left to determine which Course Terms include this Marking Pattern. Check the appropriate box on the right if this Marking Pattern is the default for each Course Term. NOTE: Only one Course Term can be linked to a Marking Pattern.

Example: Do not link 1<sup>st</sup> Semester, 2nd Semester and All Year Course Term to the All Year Marking Pattern. Only the All Year Course Term should be linked to the All Year Marking Pattern.

**Return to Marking Patterns** – Will return to Marking Patterns grid without adding the new Marking Pattern.

**View Pattern Rules** – Link to Marking Pattern Rules maintenance screen (Edit only).

**View Pattern Courses** – Link to Courses with this Marking Pattern where additions or deletions can be made (Edit only).

## Marking Pattern Rules Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Marking Patterns – Marking Pattern Rules**

Marking Pattern Rules are defined for the Marking Patterns to determine how specific marking patterns behave including if they are included on GPA. The Marking Pattern Rules can be accessed only from the Marking Pattern Screen, as it is a “nested screen.”

**Note:** Currently, a marking pattern rule may not contain any two Significance Types in the same Reporting Term other than 1 Progress Level and 1 “Not Used” type. An error will occur if multiples are assigned to a reporting term within the same pattern.

Home » Management » School Administration » Marks Administration Menu » Marking Patterns							
Marking Patterns							
From this screen, you can display, add, change and delete data pertaining to marking patterns.							
Add Marking Pattern						-- All Course Terms --	
			Code	Name ^	Description	Course Terms	Active
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem1	1st Semester	1st Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Tn1	1st Trimester	All Year	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem2	2nd Semester	2nd Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	pso	post secondary	All Year	
<input checked="" type="checkbox"/> Show Active Only							

Click **Marking Pattern Rules** to view, add or modify specific Marking Pattern Rules for the selected Marking Pattern.

Click **Marking Pattern Courses** to view a list of courses in the linked Course Term(s)

– Default Marking Pattern.

Home » Management » School Administration » Marks Administration Menu » Marking Pattern Rules Maintenance								
Marking Pattern Rules - 1st Semester								
From this screen, you can display, add, change and delete data pertaining to marking pattern rules.								
Add Pattern Rule			Cancel					
	Name	Mark Type	Sequence Number	Reporting Term ^	Significance	Credit Percentage	Marks Start Date	Marks Cutoff Date
		1st Qtr	Quarter Mark	2	Quarter 1	Progress 1	50	
		1st Interim	Interim	1	1st Interim	Not Used	0	
		2nd Qtr	Quarter Mark	4	Quarter 2	Progress 1	50	
		2nd Interim	Interim	3	2nd Interim	Not Used	0	
		Exam	Exam	5	Exam1	Not Used	0	
		Sem 1 Avg	Average	6	Sem1 AVG	Progress 2	100	
		Final	Final	7	Final	Earned	100	

**Sorting** – You may sort by any column (Name, Mark Type, Sequence Number, Reporting Term, Significance, Credit Percentage) in ascending or descending order by clicking on the column header.

## Add/Edit Marking Pattern Rule

Home » Management » School Administration » Marks Administration Menu » Marking Pattern Rules Maintenance

### Marking Pattern Rules - 1st Semester

From this screen, you can display, add, change and delete data pertaining to marking pattern rules.

Name:

Mark Type:

Sequence:

Reporting Term:

Significance:

Credit %:

Marks Start Date:

Marks Cutoff Date:

**Name** (required) – Enter Name for the Marking Pattern Rule.

**Mark Type** (required) – Select from the dropdown menu of available Marking Types. For more information on the options in the dropdown see also section 1C. Mark Type Codes Maintenance.

**Sequence** (required) – Type in a number to determine in what order this Marking Pattern Rule will apply within the Marking pattern. **Please Note:** Date ranges for virtual reporting terms are considered identical to the next previous real reporting term. This means that, for those using virtual reporting terms for Interims, quarter terms will display above interim terms. However, if you set the sequence correctly (Qtr1 as sequence 2, Int1 as sequence 1, Qtr2 as sequence 4, Int2 as sequence 3, and so on), the report card will print correctly.

**Reporting Term** (required) – Select from the dropdown list, which reporting term this required rule will display. As of DASL V10.0.1, if the Reporting Term is changed, the marks will still remain associated with this marking pattern rule.

**Significance** (required) – Select the significance factor of this rule. Valid options are Not Used, Progress 1, Progress 2 and Earned. This is called “Credit Type” in other modules. The possible options and their common uses are:

**Not Used** – This could reference a mark which is not intended to be included in credit calculations, such as an interim or exam mark.

**Progress 1** – This could reference a reporting period grade, such as a 9 weeks grade. This Mark Credit Type is a partial credit. If you wish this Mark Credit Type to be included in the GPA calculation, then select this option.

**Progress 2** – This could reference a grade type other than final or grading period, such as a semester average grade. This Mark Credit Type is a partial credit. If you wish this Mark Credit Type to be included in the GPA calculation, then select this option.

**Progress 3** – This can be used to reference an additional grade type, such as a temporary Credit Type to produce a 7-semester GPA. This Mark Credit Type is a partial credit. If you wish this Mark Credit Type to be included in the GPA calculation, then select this option.

**Progress 4** – This can be used to reference an additional grade type. This Mark Credit Type is a partial credit. If you wish this Mark Credit Type to be included in the GPA calculation, then select this option.

**Earned** – This Mark Credit Type is a full credit type, such as a final grade. If you wish to use final grades in the GPA calculation then this Mark Credit Type should be checked.

**Credit % (required)** – Input a percent amount from 0-100. This signifies the ratio of the affected courses' attempted credit that will be granted based upon the mark value. Each Significance factor should total to 100 for a given Marking Pattern.

**Marks Start Date** – Select a start date for the marking pattern rule.

**Marks Cutoff Date** – Select an end date for the marking pattern rule.

## Course Marking Pattern Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Marking Patterns – Course Marking Pattern**

Course Marking Patterns are used to view, delete and add course sections as members of a marking pattern. If a course section is added to a pattern, it is automatically disassociated with the default pattern.

			Code	Name ^	Description	Course Terms	Active
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem1	1st Semester	1st Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Tn1	1st Trimester	All Year	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem2	2nd Semester	2nd Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	pso	post secondary	All Year	

Show Active Only

Click **Marking Pattern Courses** to view, add or modify specific Course Marking Pattern for the selected Marking Pattern.

Home » Management » School Administration » Marks Administration Menu » Marking Patterns » Course Marking Pattern

### Course Marking Pattern - 1st Semester

From this screen, you can display, add, and delete courses associated with a specific marking pattern.

**Search Criteria:**

Course Code:

Department:

Area of Study:

Subject Area:

Grade Level:

Include Honors

Search Cancel

**Search Results:**

Add

[Hide Course Search]

	Course Code ^	Course Name	Department	Grade	Honor Course
X	022	COMMUNICATIONS I (1)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (2)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (3)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (4)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (5)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (6)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (7)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (8)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (9)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (10)	COMMUNICATIONS	09	<input type="checkbox"/>

**Sorting** – You may sort by any column (Course Code, Course Name, Department, Honor Course) in ascending or descending order by clicking on the column header.

**X** – Delete this Course from the selected Marking Pattern.

**Search** – Search for a Course(s) that match the Search Criterion and display those results in the Search Results list box.

**Cancel** – Will cancel the any selection or action and return user to the Marking Pattern Screen.

**Add** – Add the Course Section(s) to the selected Marking Pattern.

Home » Management » School Administration » Marks Administration Menu » Marking Patterns » Course Marking Pattern

### Course Marking Pattern - 1st Semester

From this screen, you can display, add, and delete courses associated with a specific marking pattern.

[Show Course Search]

	Course Code ^	Course Name	Department	Grade	Honor Course
X	022	COMMUNICATIONS I (1)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (2)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (3)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (4)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (5)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (6)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (7)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (8)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (9)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (10)	COMMUNICATIONS	09	<input type="checkbox"/>

The Course Code (circled in example above) is a link to the Course Maintenance page. Course Maintenance is discussed in the Scheduling Documentation.

## Add Course to Marking Pattern

Home » Management » School Administration » Marks Administration Menu » Marking Patterns » Course Marking Pattern

### Course Marking Pattern - 1st Semester

From this screen, you can display, add, and delete courses associated with a specific marking pattern.

**Search Criteria:**

Course Code:

Department:

Area of Study:

Subject Area:

Grade Level:

Include Honors

**Search Results:**

[\[Hide Course Search\]](#)

	Course Code ^	Course Name	Department	Grade	Honor Course
X	022	COMMUNICATIONS I (1)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (2)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (3)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (4)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (5)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (6)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (7)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (8)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (9)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (10)	COMMUNICATIONS	09	<input type="checkbox"/>

**Search Criteria** – Make selections from the listed options, to search and create a list of courses, from which you may make selections to add to the Marking Pattern. Valid search options are: Course Code, Department, Area of Study, Subject Area and Grade Level.

**Include Honors** – Check this box if you wish to only include courses marked as Honors in the search results.

**Hide Course Search/Show Course Search** – Clicking this link will hide the search criteria from view as shown below, or re-display the criteria.

After making selections from the appropriate dropdown search options, click the **Search** button to produce a list of courses that match the criteria.

Home » Management » School Administration » Marks Administration Menu » Marking Patterns » Course Marking Pattern

### Course Marking Pattern - 1st Semester

From this screen, you can display, add, and delete courses associated with a specific marking pattern.

**Search Criteria:**

Course Code:

Department:

Area of Study:

Subject Area:

Grade Level:

Include Honors

**Search Results:**

Now you may choose a course or courses by selecting those from the Search Results list box as shown below. (See getting started documentation for instructions on selecting single, range, etc. items from a list box).

Home » Management » School Administration » Marks Administration Menu » Marking Patterns » Course Marking Pattern

### Course Marking Pattern - 1st Semester

From this screen, you can display, add, and delete courses associated with a specific marking pattern.

**Search Criteria:**

Course Code:

Department:

Area of Study:

Subject Area:

Grade Level:

Include Honors

**Search Results:**

- 171 - ART II (2)
- 171 - ART II (3)
- 171 - ART II (4)
- 171 - ART II (5)
- 171 - ART II (6)
- 171 - ART II (7)
- 171 - ART II (8)
- 172 - ART III (1)
- 172 - ART III (2)

[Hide Course Search]

	Course Code ^	Course Name	Department	Grade	Honor Course
X	022	COMMUNICATIONS I (1)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (2)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (3)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (4)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (5)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (6)	COMMUNICATIONS	09	<input type="checkbox"/>
X	022	COMMUNICATIONS I (7)	COMMUNICATIONS	09	<input type="checkbox"/>

Click **Add** to add the selected (highlighted) courses to the Marking Pattern.

Home » Management » School Administration » Marks Administration Menu » Marking Patterns » Course Marking

### Course Marking Pattern - 1st Semester

From this screen, you can display, add, and delete courses associated with a specific marking pattern.

The selected course sections were successfully associated with the marking pattern.

**Search Criteria:**

Course Code:

Department:

Area of Study:

Subject Area:

Grade Level:

Include Honors

**Search Results:**

You will receive a confirmation that the course section(s) has successfully been associated with the selected marking pattern. The newly added course section will be included in the list.

Adding a Course to a Marking Pattern removes it from other Marking Patterns.

Continue adding course sections as needed. When finished adding click the **Cancel** button to return to the Marking Pattern maintenance screen.

## Combined Mark Group Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Combined Mark Group**

Combined Mark Group is used to group like grades together for reporting and GPA and honor roll purposes. Marks entered in the group can then be totaled together in reports.

Home » Management » School Administration » Marks Administration Menu » Combined Mark Groups

### Combined Mark Group Maintenance

From this screen, you can display, add, change and delete data pertaining to combined mark groups.

Add Combined Mark Group

			<u>Code</u> ^	<u>Name</u>	<u>Description</u>	<u>Point Value</u>	<u>Active</u>
			A's	All A's		4.000000	
			B's	All B's		3.000000	
			C's	All C's		2.000000	

Show Active Only

**Sorting** – You may sort by any column (Code, Name, Description, Point Value, Active) in ascending or descending order by clicking on the column header.

– View Combined Marks that make up this Combined Mark Group.

### Add/Edit Combined Mark Group

Home » Management » School Administration » Marks Administration Menu » Combined Mark Groups

### Combined Mark Group Maintenance

From this screen, you can display, add, change and delete data pertaining to combined mark groups.

**Code:**

**Name:**

**Description:**

**Point Value:**

**Is Active:**

**Code** (required) – Enter up to 4 characters – alphanumeric for the Combined Mark Group code. If you try to use an existing inactive Combined Mark Group code, you will be prompted to reactivate this inactive Combined Mark Group code if you wish.

**Name** (required) – Enter Name of Combined Mark Group code.

**Description** (optional) – Enter Description of Combined Mark Group code.

**Point Value** (required) – Enter point value amount that this Combined Mark Group will be worth for GPA calculations. Valid range is 0-10.

## Combined Mark Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Combined Marks**

Combined Marks make up the combined marks group. The combined marks maintenance screen is “nested” in the Combined Mark Group maintenance screen, so to view, add or modify the combined marks; you must first select the Combined Mark Group.

		Code ^	Name	Description	Point Value	Active
X		A's	All A's		4.000000	
X		B's	All B's		3.000000	
X		C's	All C's		2.000000	

Show Active Only

Click to view, add or modify the Combined Marks that make up this Combined Mark Group.

Mark:

	Mark ^	Mark Name
X	B	B
X	B-	B-
X	B+	B+

**Sorting** – You may sort by any column (Mark, Mark Name) in ascending or descending order by clicking on the column header.

**Mark** – Select a Mark to add to the Combined Marks Group, and click the **Add Mark** button to add the Mark to the Combined Marks Group.

**Back to Mark Groups** – Return to the Combined Mark Groups list.

## Course Difficulty Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Difficulty**

Course Difficulty codes are used to denote courses of elevated or possibly remedial stature. A school may elect to award alternate points for marks earned in specific courses based on the level of difficulty assigned for the course. A Course Difficulty Code is a “wrapper” for a Difficulty Point Scale.

The screenshot shows the 'Course Difficulty Maintenance' interface. At the top, there is a breadcrumb trail: Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Difficulty. Below the title, a message states: 'From this screen, you can display, add, change and delete Course Difficulty codes.' There is an 'Add Code' button. A table displays the following data:

	Code ^	Name	Description	Active
✕ ✎	A	Difficulty Level A		💡
✕ ✎	B	B	B	💡

At the bottom of the table, there is a checkbox labeled 'Show Active Only' which is checked.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

### Add/Edit Course Difficulty Code

The screenshot shows the 'Course Difficulty Maintenance' interface for adding or editing a code. It includes the same breadcrumb trail and title as the previous screenshot. Below the title, the same message is present: 'From this screen, you can display, add, change and delete Course Difficulty codes.' The form contains the following fields:

- Code:** A text input field with a lightning bolt icon.
- Name:** A text input field with a lightning bolt icon.
- Description:** A large text area with a scroll bar.
- Is Active:** A checkbox that is checked.

At the bottom of the form, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

**Code** (required) – Enter up to 4 character alphanumeric Course Difficulty Code. If you try to use an existing inactive Course Difficulty Code, you will be prompted to reactivate this inactive code if you wish.

**Name** (required) – Enter Name of Course Difficulty Code (up to 30 characters).

**Description** (optional) – Enter Description of Course Difficulty Code (up to 200 characters).

## Difficulty Point Scale Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Difficulty Point Scale**

Difficulty Point Scale defines an alternate point value for individual marks, for courses defined with a specific Course Difficulty Code (see 1G thru 1G-3).

Home » Management » School Administration » Marks Administration Menu » Difficulty Point Scale

### Difficulty Point Scale Maintenance

From this screen, you can maintain the point values for each mark designated by the difficulty level.

Add Point Value

	Level of Difficulty	Mark ^	Combined Mark Group	Point Value
 	A	A		4.333000
 	A	B		4.000000

**Sorting** – You may sort by any column (Level of Difficulty, Mark, Combined Mark Group, Point Value) in ascending or descending order by clicking on the column header.

### Add/Edit Difficulty Point Value

Home » Management » School Administration » Marks Administration Menu » Difficulty Point Scale

### Difficulty Point Scale Maintenance

From this screen, you can maintain the point values for each mark designated by the difficulty level.

Level of Difficulty:  

Point Value:  

Mark:

Combined Mark Group:

Save Save and New Cancel

**Level of Difficulty** (required) – Select a level of Difficulty (Course Difficulty Codes) which this value is being added.

**Point Value** (required) – Type in the point value to be associated with this Difficulty Point Value. This can be a decimal value between 0 and 1000 with a decimal precision of two (i.e. 3.55).

**Mark** – Either a Mark or Combined Mark Group must be selected from the appropriate dropdown menu, but not both.

**Combined Mark Group** – Either a Mark or Combined Mark Group must be selected from the appropriate dropdown menu, but not both.

### Add-On Level Code Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Add-On Level Codes**

An Add-On Level Code is used as a course property. Add-On Level along with GPA Add-On Points will determine if a student may be awarded additional points to his/her final GPA for a specific course based on the mark received for the course.

Home » Management » School Administration » Marks Administration Menu » Add-On Level Codes Advanced S

## Add-On Level Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to add on level codes.

Add

	Code ^	Name	Active	Use Credit Percentage
 	H	Honors Course		<input type="checkbox"/>

Show Active Only

**Sorting** – You may sort by some columns (Code, Name, Active) in ascending or descending order by clicking on the column header.

### Add/Edit Add-On Level Code

Home » Management » School Administration » Marks Administration Menu » Add-On Level Codes Advanced Search

## Add-On Level Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to add on level codes.

Code:  

Name:  

Is Active:

Use Credit Percentage:

Save Save and New Cancel

**Code** (required) – Enter up to 4 character alphanumeric Add-On Level Code. If you try to use an existing inactive Add-On Level Code, you will be prompted to reactivate this inactive Add-On Level if you wish.

**Name** (required) – Enter Name of Add-On Level Code (up to 30 characters).

**Use Credit Percentage** (optional) – This is used for FNDLY Findlay Method Custom GPA Formula. When the flag is checked, it multiplies the add-on point value times the credit percentage as defined on the Marking Pattern Rule.

### GPA Add-On Points Maintenance

**Navigation:** Home – Management – School Administration – Marks Administration Menu – Add-On GPA

GPA add on points are awarded only for specified marks and optionally may be awarded based on a student's grade level as well. GPA Add-On Points may be

assigned to individual marks or to a combined mark group. GPA Add-on Points are added to the resulting GPA.

	Add On Level ^	Mark	Combined Mark Group	Student Grade Level	Additional GPA Point Value
	A	C			0.098700
	A	A			0.125000
	A	B			0.102000

**Sorting** – You may sort by any column (Add-On Level, Mark, Combined Mark Group, Student Grade Level, Additional GPA Point Value) in ascending or descending order by clicking on the column header.

### Add/Edit Add-On GPA

**Add On Level** (required) – Select the appropriate Add-On Level (see 1J thru 1J-3.) from the dropdown list of available Add-On Levels.

**Mark** – Either a Mark or Combined Mark Group must be selected from the appropriate dropdown menu, but not both.

**Combined Mark Group** – Either a Mark or Combined Mark Group must be selected from the appropriate dropdown menu, but not both.

**Student Grade Level** (optional) – Select a grade level from the dropdown list, if the Add-On GPA is to be awarded ONLY if the student's Grade level is the selected grade level.

**Additional GPA Point Value** (required) – Input an Additional GPA point value between 0 and 10, inclusive with decimal precision of three (i.e. 0.345). This is the points that will be given for this Add-On GPA.

### Student Exception Credit Maintenance

**Navigation:** Home – SIS – Student – Marks – Student Exception Credit

A credit exception may be established for an individual student in a specific course section. The specified exception credit amount will be applied as the attempted credit value for calculation of GPA and reporting course history for the student.

**Note:** Student Exception Credit values are dominant where an Exception Credit is specified for an individual student in a course section that ALSO has a course section exception credit specified.

<b>DASL</b>	<a href="#">FONT, ELLA JANE</a>	ID: 00004002	Counselor:	
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: F	Homeroom: A110	
		Grade: 12	Status: A	

Home » SIS » Student » Marks » Student Exception Credit

### Student Exception Credit

From this screen, you can display, add, change and delete data pertaining to a student's configured exception credits.

Add Exception Credit

	Course Code ^	Course Name	Section	Teacher	Course Credit	Exception Credit
	275	PAINTING	2	HANDLEY, MARK	0.500000	0.250000

**Sorting** – You may sort by any column (Course Code, Course Name, Section, Teacher, Course Credit, Exception Credit) in ascending or descending order by clicking on the column header.

### Add/Edit Student Exception Credit

<b>DASL</b>	<a href="#">FONT, ELLA JANE</a>	ID: 00004002	Counselor:	
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: F	Homeroom: A110	
		Grade: 12	Status: A	

Home » SIS » Student » Marks » Student Exception Credit

### Student Exception Credit

From this screen, you can display, add, change and delete data pertaining to a student's configured exception credits.

Course Section:

Course Credit:

Teacher:

Exception Credit:

Save Save and New Cancel

**Course Section** – Choose a course section from the dropdown list of the selected student's courses. After selecting a course section from the dropdown list, the Course Credit and Teacher fields will be auto populated with the applicable information, as shown below.

<b>DASL</b>	FONT, ELLA JANE	ID: 00004002	Counselor:
DASL User	DASL HIGH SCHOOL	Gender: F	Homeroom: A110
	2004-2005 (8/24/2004 - 6/1/2005)	Grade: 12	Status: A

Home » SIS » Student » Marks » Student Exception Credit

### Student Exception Credit

From this screen, you can display, add, change and delete data pertaining to a student's configured exception credits.

Course Section: TRIG: Section 1

Course Credit: 0.500000

Teacher: LAYMAN, LAURA

Exception Credit:

Save Save and New Cancel

**Course Credit** (auto assigned) – Default course credit that has been defined for this course section.

**Teacher** (auto assigned) – Name of the teacher who has been assigned to teach this course section.

**Exception Credit** (required) – Enter the Exception Credit amount to be used for this student for this course section.

## Teacher Menu – Marks Tasks

### Navigation: Home – Teacher Menu

From the Teacher Menu, teachers can perform two Marks-related tasks. Course Section Exception Credits (navigate to the Course Section Exception Credits page from the Teacher Course List), and Course Section Mark Entry.

Home » Teacher Menu

### Teacher Menu

Please make a menu selection

<a href="#">Course Section Mark Entry</a>	<a href="#">Period Attendance</a>
<a href="#">Daily Attendance</a>	<a href="#">Report Card Attendance</a>
<a href="#">Homeroom Fee Collection</a>	<a href="#">Teacher Comments</a>
<a href="#">Medical Alerts</a>	<a href="#">Teacher Course List</a>
<a href="#">Medications</a>	

For more information on Course Section Exception Credits and Course Section Mark Entry, see the *ProgressBook StudentInformation Teacher Menu Guide*.

### Course Section Exception Credit

### Navigation: Home – Teacher Menu – Teacher Course List – Course Section Exception Credits

A teacher may establish a credit exception for individual students in a specific course section, or for all students in a specific course section. The specified exception credit amount will be applied as the attempted credit value for calculation of GPA and reporting course history for the student.

## Course Section Mark Entry

**Navigation: Home – Teacher Menu – Course Section Mark Entry**

The Teacher and any other authorized user can use the Course Section Mark entry page to enter and edit marks for students in a specific course section.

## GPA Set Maintenance

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets**

GPA Set Maintenance screen is where the building defines the configuration required for calculating GPA and Rank.

		Name ^	Modified	Last Calculated
X			1st Qtr GPA	7/17/2007 8:53:00 AM
X			2nd Qtr GPA	7/17/2007 8:53:00 AM
X			3rd Qtr GPA	7/17/2007 8:53:00 AM
X			4th Qtr GPA	7/17/2007 8:53:00 AM
X			Cumulative GPA	7/17/2007 8:53:00 AM
X			HONOR SOCIETY 1ST	7/17/2007 8:53:00 AM

**Sorting** – You may sort by any column (Name, Modified, Last Calculated) in ascending or descending order by clicking on the column header.

**Modified** – The date that the GPA Set parameters were last modified through GPA Set Maintenance.

**Last Calculated** – The date that the GPA Set was last calculated either through GPA Set Maintenance or Report Card Formatting (R700).

– Refresh GPA Set. Recalculates the GPAs based on latest marks.

**Note:** *The Refresh GPA Set process may take a few minutes to complete. The Last Calculated column will display the correct date and time when the process is finished, but this page will not automatically refresh. Refresh this page by clicking its name in the breadcrumb trail after a few minutes to confirm that the GPA Set has been refreshed, or continue working in StudentInformation prior to returning to this page.*

## GPA Set Maintenance – General Tab

Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – General Tab

## Add/Edit GPA Set – General Tab

Home >> Management >> School Administration >> Course History Administration >> GPA Sets

### GPA Set Maintenance

From this screen, you can display, add, change and delete data pertaining to GPA sets.

General Calculations Rank

Next >

**GPA Set:**

Code: CUM Description: CUM GPA

Name: Cumulative GPA

**Mark Credit Types:**

Not Used  Progress 1  Progress 2  Progress 3  Progress 4  Earned

**Previous Years:**

Not Used  Progress 1  Progress 2  Progress 3  Progress 4  Earned

**Grade Levels:**

07  08  09  10  11  12  GR  23  30  31  IN

**Reporting Terms:** **Mark Type:**

Quarter 1 1st Interim Quarter 2 2nd Interim

Final Mark Average Mark Interim Mark Quarter Mark

Final Mark

**Ad-Hoc Membership:**

-- Select an Ad-Hoc Membership --

Public And Private

**Code** (required) – Enter up to 4 characters, alphanumeric to designate this GPA Set Code.

**Name** (required) – Enter Name of GPA Set Code (up to 30 characters).

**Description** (optional) – Enter Description of GPA Set Code (up to 200 characters).

**Mark Credit Types** (required) – This determines which mark credit types will be included in the GPA Set. Check each credit type to be included in the GPA Calculation for the current year. (For more information on Mark Credit Types, see the "Significance" field definition in Marking Pattern Rules Maintenance section above.)

**Previous Years** (optional) – This determines which mark credit types from course history will be included in the GPA Set. Check each credit type to be included in the GPA Calculation from course history. (For more information on Mark Credit Types, see the "Significance" field definition in Marking Pattern Rules Maintenance section above.)

**Grade Levels** (required) – Check the boxes for each grade level of students to be included in this GPA Set. Other students will not receive a GPA from this GPA Set.

**Reporting Terms** (required) – Select appropriate reporting terms from the left list box to be included in this GPA calculation for the current year, and move to the right. Only selected Reporting Terms with the appropriate Mark Credit Type will be included for the current year, even if you include Reporting Terms with Mark Credit Types that are not marked.

**Note:** This field does not filter previous years' course history marks.

**Mark Type** (required) – Select appropriate mark types from the left list box to be included in this GPA calculation for the current year, and move to the right. Only marks of the selected Mark Types with the appropriate Mark Credit Type will be included for the current year, even if you include Mark Types for Mark Credit Types that are not marked. **NOTE:** This field does not filter previous years' course history marks.

**Note:** The above filters for Mark Credit Types, Reporting Terms and Mark Type are all additive filters for current year marks. ONLY marks which are one of the selected mark types, with a selected mark credit type, and in a selected reporting term, will be included in the GPA Calculation. MAKE SURE you select mark types, mark credit types and reporting terms that can be used together (if you select mark types, mark credit types and reporting terms, which do not match and cannot match, your GPA calculations will error).

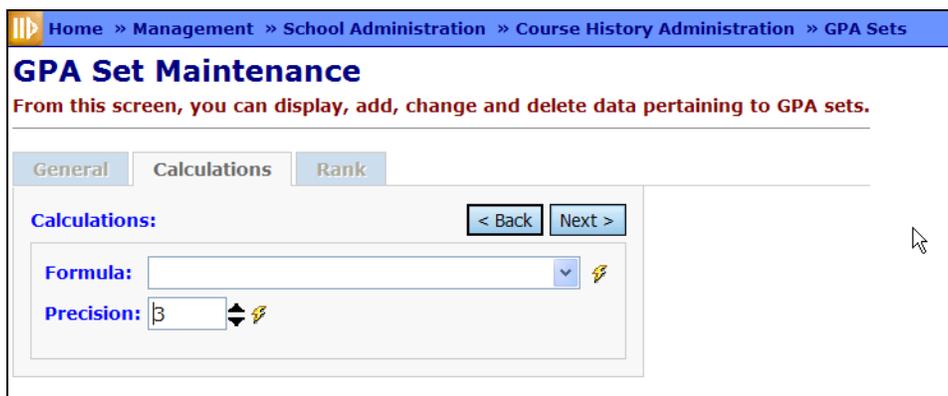
**Ad-Hoc Membership** (optional) – If you select an Ad-Hoc Membership from the drop-down list, only the students in that Ad-Hoc Membership in the selected grade levels will receive a GPA from this GPA Set. Check the "Public And Private" checkbox to see Memberships created by other users in your drop-down list.

**Next>** – Proceed to the Calculations tab.

## GPA Set Maintenance – Calculations Tab

Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab

### Add/Edit GPA Set – Calculations Tab



The screenshot shows the 'GPA Set Maintenance' interface with the 'Calculations' tab selected. The breadcrumb navigation at the top reads: Home » Management » School Administration » Course History Administration » GPA Sets. Below the title, a red instruction states: 'From this screen, you can display, add, change and delete data pertaining to GPA sets.' The interface has three tabs: 'General', 'Calculations', and 'Rank'. The 'Calculations' tab is active and contains a 'Calculations:' section with a '< Back' button and a 'Next >' button. Below this, there is a 'Formula:' field with a dropdown arrow and a lightning bolt icon, and a 'Precision:' field with the value '3', a spinner control, and a lightning bolt icon.

**<Back** – Return to the General tab.

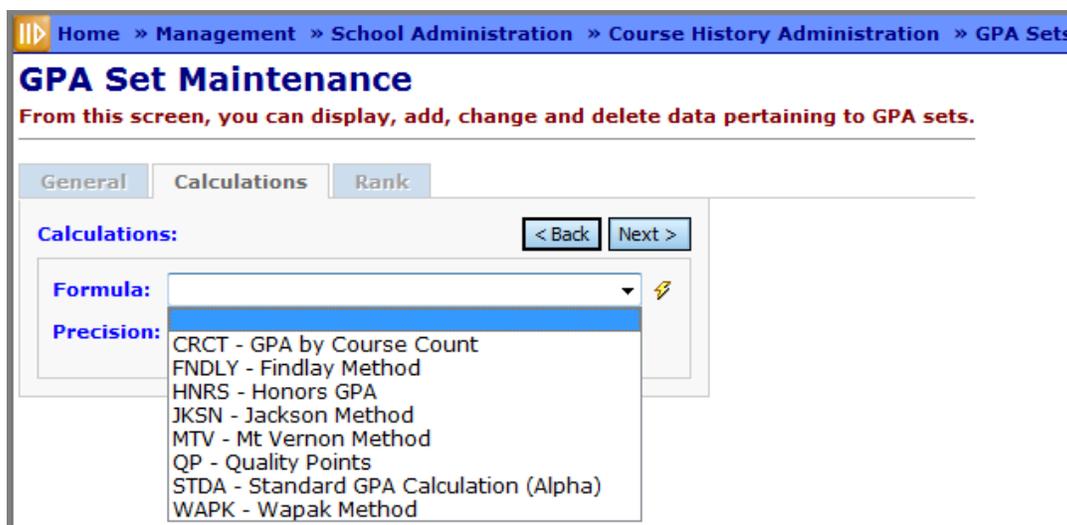
**Next>** – Proceed to the Rank tab.

**Formula** (required) – Choose a formula from the dropdown menu. The available options are determined by your DASL Options Marks type: Alpha or Numeric. Selecting certain formula options will display additional options on this tab. The CRCT, RAWN, STDA and STDN formulas are intended for general use, while the other formulas are custom GPA formulas, and may not be useful outside their specific districts.

**Precision** (required) – Number of decimal places for the GPA Calculation.

**Note:** *If GPA results are different between StudentInformation and SIS, it may be a rounding difference; StudentInformation is more accurate when rounding GPA values than SIS.*

## GPA Set Formula Options for Alpha Schools



The screenshot shows the 'GPA Set Maintenance' interface. The breadcrumb trail is: Home » Management » School Administration » Course History Administration » GPA Sets. The page title is 'GPA Set Maintenance' with a subtitle: 'From this screen, you can display, add, change and delete data pertaining to GPA sets.' There are three tabs: 'General', 'Calculations', and 'Rank'. The 'Calculations' tab is active. Below the tabs, there are '< Back' and 'Next >' buttons. The 'Calculations' section has a 'Formula:' dropdown menu and a 'Precision:' input field. The dropdown menu is open, showing the following options: CRCT - GPA by Course Count, FNDLY - Findlay Method, HNRS - Honors GPA, JKSN - Jackson Method, MTV - Mt Vernon Method, QP - Quality Points, STDA - Standard GPA Calculation (Alpha), and WAPK - Wapak Method.

## GPA Set Formula Options for Numeric Schools

The screenshot shows a web application interface for GPA Set Maintenance. The breadcrumb trail is: Home » Management » School Administration » Course History Administration » GPA Sets. The page title is "GPA Set Maintenance" with a sub-header: "From this screen, you can display, add, change and delete data pertaining to GPA sets." There are three tabs: "General", "Calculations", and "Rank". The "Calculations" tab is active. Below the tabs, there are navigation buttons "< Back" and "Next >". A "Formula:" dropdown menu is open, showing a list of options: CRCT - GPA by Course Count, FNDLY - Findlay Method, HNRS - Honors GPA, JKSN - Jackson Method, MTV - Mt Vernon Method, QP - Quality Points, RAWN - Raw Numeric GPA Calculation, STDA - Standard GPA Calculation (Alpha), STDN - Standard GPA Calculation (Numeric), and WAPK - Wapak Method. A "Precision:" label is also visible next to the dropdown.

### GPA Set Maintenance – CRCT GPA by Course Count Formula

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = CRCT GPA by Course Count**

This formula uses any course flagged as “In GPA” with a mark that is also set “in GPA”. This is the simplest of all GPA calculations and the credit value is not taken into account. This calculation is ideal for middle schools and elementary schools that do not use credit amounts on their courses.

**CRCT GPA Calculation** = The total of all points awarded based on point grading scale for each course divided by the total number of courses included in the GPA.

Home » Management » School Administration » Course History Administration » GPA Sets

## GPA Set Maintenance

From this screen, you can display, add, change and delete data pertaining to GPA sets.

General Calculations Rank

Calculations: < Back Next >

Formula: CRCT - GPA by Course Count ⚡

Precision: 3 ⬆️⬆️⬆️ ⚡

Missing Marks Handling: Ignore Mark ⚡

Use Difficulty Points:

Include Other Schools:

Use Add-on Points:

Use Period Weighting:

Ignore Dropped Course Sections:

Mark Types Multipliers

Final 1 ⬆️⬆️⬆️

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Period Weighting:** This option will apply only to the Course Count GPA calculation. The points earned for a mark in a reporting period will be multiplied by the maximum number of calendar periods the course section meets on any day in the finalized schedule. This weighted value is included in the GPA calculation numerator as normal; the mark count for the individual course section used in the denominator remains one (1).

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

**Multipliers:** This option will apply only to the existing Course Count GPA type. The multiplier value can be in the range of 0.00 to 10.00. The multiplier value will be applied to both the point value for the mark earned as well as the value to be included in the denominator (i.e.  $1 \cdot [\text{specified value}]$ ). If a school includes exam type marks at one half (0.5) the value as other marks, the multiplier value will be set to 0.5; for example, the point value for the mark earned will be one half the value defined in the school's marks configuration, and the mark will be included in the denominator as only 0.5 instead of 1.

### GPA Set Maintenance – STDA Standard GPA Calculation (Alpha) Formula

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = STDA Standard GPA Calculation (Alpha)**

The STDA is the standard GPA calculation using full or partial (prorated) credit. It is the most commonly used GPA calculation and can be used by any school which has credit values on courses. STDA (Alpha) can be used by Alpha or Numeric schools and will yield GPAs on a 4.00 scale (i.e. 3.69, 4.00, etc.) It uses the point value of the mark instead of the numeric value.

**STDA GPA Calculation** – (Sum of the point value of each mark multiplied by the attempted credit amount of the course) divided by the sum of the attempted credits for all courses in the GPA calculation.

Home » Management » School Administration » Course History Administration » GPA Sets

### GPA Set Maintenance

From this screen, you can display, add, change and delete data pertaining to GPA sets.

General Calculations Rank

Calculations: < Back Next >

Formula: STDA - Standard GPA Calculation (Alpha)

Precision: 3

Missing Marks Handling: Ignore Mark

Use Difficulty Points:

Include Other Schools:

Use Add-on Points:

Use Prorated Credit:

Use Manual Course History Mark Credit Detail

Use Manual Course History Course Credit

Ignore Dropped Course Sections:

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark, and is equivalent to the “Divided by Terms” qualifier from SIS. Note that if you want to duplicate the old STDP and NUMP calculations, you should use STDA or STDN, and check this checkbox. If you want to duplicate the old STDF and NUMF calculations, use STDA or STDN and do not check this checkbox.

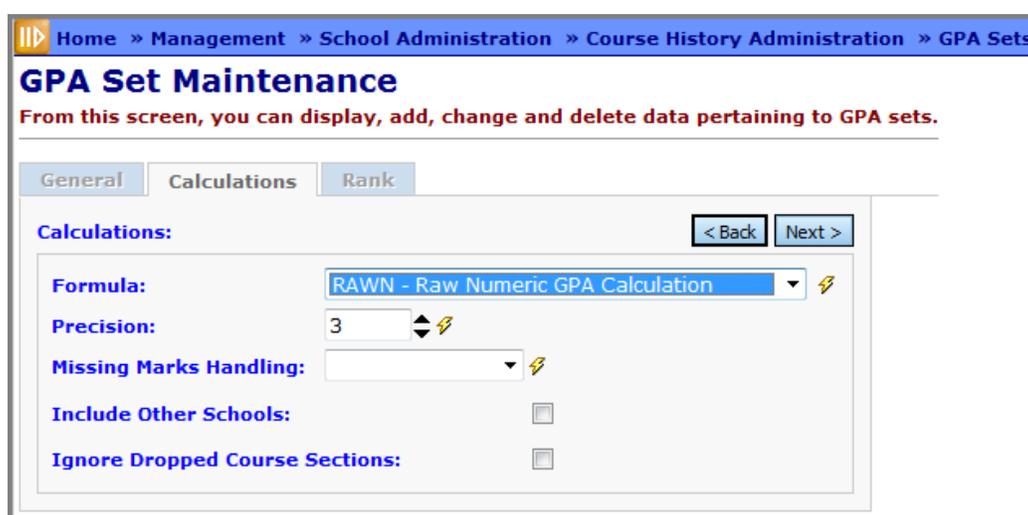
The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

## GPA Set Maintenance – RAWN Raw Numeric GPA Calculation Formula

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = RAWN Raw Numeric GPA Calculation**

This formula uses the numeric point value of a mark instead of the standard point value (the 4.00 scale). Any alpha marks are excluded. Instead of credit ratio or credit percentage, this formula uses 100% of the credit value for every mark included. For instance, if you are including two reporting term marks for the same course in the calculation, the full credit is used for each of those marks. Each numeric mark is multiplied by the credit amount, and then the resulting points are totaled for all courses and divided by the total number of credits for all courses included to find the resulting GPA.



The screenshot shows the 'GPA Set Maintenance' interface. At the top, there is a navigation breadcrumb: Home » Management » School Administration » Course History Administration » GPA Sets. Below this is the title 'GPA Set Maintenance' and a sub-header: 'From this screen, you can display, add, change and delete data pertaining to GPA sets.' There are three tabs: 'General', 'Calculations', and 'Rank'. The 'Calculations' tab is active. In the 'Calculations' section, there are several fields: 'Formula:' with a dropdown menu set to 'RAWN - Raw Numeric GPA Calculation'; 'Precision:' with a numeric input field set to '3'; 'Missing Marks Handling:' with a dropdown menu; 'Include Other Schools:' with an unchecked checkbox; and 'Ignore Dropped Course Sections:' with an unchecked checkbox. There are '< Back' and 'Next >' buttons at the top right of the form area.

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included:  
1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

## GPA Set Maintenance – STDN Standard GPA Calculation (Numeric) Formula

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = STDN Standard GPA Calculation (Numeric)**

### Standard GPA Calculation (Numeric)

The STDA is the standard GPA calculation using full or partial (prorated) credit. It is the most commonly used GPA calculation and can be used by any school which has credit values on courses. STDA (Numeric) can only be used by Numeric schools and will yield GPAs of 98.63, 78.63, etc. This formula should be used when the school is using numeric marks (100 point scale). It uses the numeric value of the mark instead of the point value.

**STDA GPA Calculation** – (Sum of the point value of each mark multiplied by the attempted credit amount of the course) divided by the sum of the attempted credits for all courses in the GPA calculation.

The screenshot shows the 'GPA Set Maintenance' interface with the 'Calculations' tab selected. The breadcrumb trail at the top reads: Home » Management » School Administration » Course History Administration » GPA Sets. Below the title, a red instruction states: 'From this screen, you can display, add, change and delete data pertaining to GPA sets.' The 'Calculations' section includes a '< Back' button and a 'Next >' button. The 'Formula:' dropdown is set to 'STDN - Standard GPA Calculation (Numeric)'. The 'Precision:' is set to 3. The 'Missing Marks Handling:' dropdown is empty. There are five checkboxes for 'Use Difficulty Points', 'Include Other Schools', 'Use Add-on Points', and 'Use Prorated Credit', all of which are unchecked. At the bottom, there are two radio buttons: 'Use Manual Course History Mark Credit Detail' (selected) and 'Use Manual Course History Course Credit' (unchecked). The 'Ignore Dropped Course Sections:' checkbox is also unchecked.

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark, and is equivalent to the “Divided by Terms” qualifier from SIS. Note that if you want to duplicate the old STDP and NUMP calculations, you should use STDA or STDN, and check this checkbox. If you want to duplicate the old STDF and NUMF calculations, use STDA or STDN and do not check this checkbox.

The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

## **GPA Set Maintenance – FNDLY Findlay Method Formula**

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = FNDLY Findlay Method**

### **Findlay Method**

This method was created for Findlay High School (NOACSC), but can be used by anyone. The Findlay Method rewards students taking honors level courses by adding points to the ranking value. Students receive a specified number of add-on points to their GPA value relative to the grade received in the course. In addition, students can earn an additional add-on value based on the number of credits earned in excess of a specified number of credits (Honors Base Credit Value). The excess credits are divided by a specified value (Honors Credit Divisor) to determine the final add-on point value.

### **Findlay Method GPA Calculation**

Standard GPA is calculated using prorated credit. If student has taken an Honors course (Is Honors Course checked), they will receive the specified add-on amount for each course if they receive a grade of O, A, or B. This GPA is then used at Semester time. At the end of the year, the GPA is calculated again using the STDA formula using prorated credit. If the student has taken at least one honors course, regardless of their grade, they receive another add-on based on the number of credits that exceeds the Honors Base Credit Value divided by the Honors Credit Divisor.

### **Required Setup Items**

- Add-On Levels should be set up in the current year and all prior years (Add-On Level Codes Maintenance and Add-On GPA Set Maintenance)
- Courses and Course History should be marked as Is Honors and have an add-on level selected if they receive the extra point value. (Manually Entered Courses and Courses-Marks tab)

Home » Management » School Administration » Course History Administration » GPA Sets

## GPA Set Maintenance

From this screen, you can display, add, change and delete data pertaining to GPA sets.

General Calculations Rank

Calculations: < Back Next >

Formula: FNDLY - Findlay Method ⚡

Precision: 3 ⬆️ ⬆️ ⚡

Missing Marks Handling: Ignore Mark ⚡

Use Difficulty Points:

Include Other Schools:

Use Add-on Points:

Use Prorated Credit:

Use Manual Course History Mark Credit Detail

Use Manual Course History Course Credit

Ignore Dropped Course Sections:

Honors Base Credit Value 20 ⬆️ ⬆️

Honors Credit Divisor 40 ⬆️ ⬆️

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

Please Note: If the “Use Credit Percentage” on the Add-On Level Codes Maintenance is checked, the Add-On Point Value is multiplied times the credit percentage as defined on the Marking Pattern Rule. This is specific to the FNDLY Findlay Method.

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark, and is equivalent to the “Divided by Terms” qualifier from SIS. Note that if you want to duplicate the old STDP and NUMP calculations, you should use STDA or STDN, and check this checkbox. If you want to duplicate the old STDF and NUMF calculations, use STDA or STDN and do not check this checkbox.

The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) – When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

**Honors Base Credit Value** (optional) – The number of credits the student must exceed AND have at least on Honors course to qualify for an extra add-on bonus at the end of the year.

**Honors Credit Divisor** (optional) – The number divided into the number of credits which exceeds the Honors Base Credit Value – used to calculate the extra add-on bonus at the end of the year.

**Example:**

- Honors Base Credit Value = 20
- Honors Credit Divisor = 40
- Student Credits Earned = 29 (at least one of the credits is a honors course)
- Extra Add-On Bonus =  $(29 - 20) / 40 = .225$

## GPA Set Maintenance – HNRS Honors GPA Formula

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = HNRS Honors GPA**

### HNRS Honors GPA

The Honor Grade Point Average (HGPA) is used by LACA school districts. The HGPA is designed to compensate for the inequity that exists in districts that offer Advanced Placement or Honors classes where students can earn higher than normal points for the grade they receive. The GPA for students taking honors course can be harmed when the student takes additional non-honors courses. Honors courses will be determined by using the “Is Honors Course” flag on the Marks tab of the Course Maintenance screen and will be averaged separately.

### HNRS Honors GPA Calculation

$$\frac{[(\text{Weighting Factor}) * (\text{STD GPA w/out Honor Courses included})] + [\text{Sum of (Each Honor Credit * Each Honor Point)}]}{(\text{Weighting Factor} + \text{Total Number of Honor Credits})}$$

### Required Setup Items

- Difficulty Point Scales need set up in the current year and prior years (Difficulty Point Scale Maintenance).
- Difficulty point scales need linked to all course history (Manually Entered Courses). Simply creating a difficulty scale in a prior year and linking the difficulty scale to the course will not automatically link the scale to the course history. A mass update will need to be performed to link the new difficulty scale to the course history.
- Configure Honor GPA Weighting Factor table. The Honor GPA Grade Level Weighting Factor can only be reached thru the GPA Set Calculation tab when the Honors formula is chosen. The Weighting Factor is the minimum number of credits (by grade level) a student should have.
- Courses should be marked as Is Honors as necessary. (Courses-Marks tab)

**Precision** (required) – Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) – Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included:
  - 1) Automatic Marks Calculation Date has passed;
  - 2) Course Term has passed;
  - or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark, and is equivalent to the “Divided by Terms” qualifier from SIS. Note that if you want to duplicate the old STDP and NUMP calculations, you should use STDA or STDN, and check this checkbox. If you want to duplicate the old STDF and NUMF calculations, use STDA or STDN and do not check this checkbox.

The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

## Honor GPA Weighting Factor

Home » Management » School Administration » Course History Administration » GPA Sets » Weighting Factor

### Honor GPA Grade Level Weighting Factor

From this screen, you can add and delete Honor GPA grade level weighting factors.

Grade Level:  Weight Factor:

	Grade Level ^	Weighting Factor
X	09	6.00
X	10	12.00
X	11	18.00
X	12	24.00

**Grade Level** – Select a grade level from this drop-down, enter a Weight Factor, which can range from 0.00 to 50.00 (or increment/decrement the Weight Factor by 1 per click of the arrow buttons), and click the **Add** button to add a Weighting Factor for the selected grade. Note that Weighting Factors are intended for use with the HNRS GPA formula, and should represent the expected number of credits a student should have earned at each grade level.

**X** – Remove this grade level's Weighting Factor.

Return to GPA Set Maintenance – Return to the GPA Set Maintenance page Calculations tab for the GPA Set you were editing.

### GPA Set Maintenance – JKSN Jackson Method Formula

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = JKSN Jackson Method**

This is a custom GPA formula, and is the only formula which uses Mark Substitution and Mark Bumps.

The screenshot shows the 'GPA Set Maintenance' interface with the 'Calculations' tab selected. The breadcrumb trail at the top reads: Home » Management » School Administration » Course History Administration » GPA Sets. Below the title 'GPA Set Maintenance', a red instruction states: 'From this screen, you can display, add, change and delete data pertaining to GPA sets.' The 'Calculations' section includes a '< Back' button and a 'Next >' button. The configuration options are: 'Formula:' set to 'JKSN - Jackson Method'; 'Precision:' set to 3; 'Missing Marks Handling:' set to 'Ignore Mark'; 'Use Difficulty Points:', 'Include Other Schools:', 'Use Add-on Points:', and 'Use Prorated Credit:' all with unchecked checkboxes; 'Use Manual Course History Mark Credit Detail' with a selected radio button; 'Use Manual Course History Course Credit' with an unselected radio button; and 'Ignore Dropped Course Sections:' with an unchecked checkbox.

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark, and is equivalent to the “Divided by Terms” qualifier from SIS. Note that if you want to duplicate the old STDP and NUMP calculations, you should use STDA or STDN, and check this checkbox. If you want to duplicate the old STDF and NUMF calculations, use STDA or STDN and do not check this checkbox.

The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

## GPA Set Maintenance – MTV Mount Vernon Method Formula

Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = MTV Mount Vernon Method

This is a custom GPA Formula.

### MTV Mount Vernon GPA Calculation

(Sum of [(points awarded based on point grade scale for each course + .05) \* (GPA Credits – Minimum Credits)] divided by Sum of GPA Credits) + Any applicable Add-On Points

In the above formula, if Minimum Credits has not been set, the formula will resort to GPA Credits.

Also, the above formula has the potential to give a negative result, in such cases the GPA will be set to 0.

The screenshot shows a web application interface for "GPA Set Maintenance". The breadcrumb navigation is: Home » Management » School Administration » Course History Administration » GPA Sets. The page title is "GPA Set Maintenance" with a subtitle: "From this screen, you can display, add, change and delete data pertaining to GPA sets." There are three tabs: "General", "Calculations", and "Rank". The "Calculations" tab is active. The "Calculations:" section includes a "< Back" button and a "Next >" button. The "Formula:" dropdown is set to "MTV - Mt Vernon Method". The "Precision:" is set to 3. The "Missing Marks Handling:" is set to "Ignore Mark". There are several checkboxes: "Use Difficulty Points:", "Include Other Schools:", "Use Add-on Points:", "Use Prorated Credit:", and "Ignore Dropped Course Sections:". The "Use Manual Course History Mark Credit Detail" radio button is selected. A "Configure GPA Minimum Credits" button is visible at the bottom right. A note at the bottom left states: "This is accessible only after saving your GPA Set."

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark, and is equivalent to the “Divided by Terms” qualifier from SIS. Note that if you want to duplicate the old STDP and NUMP calculations, you should use STDA or STDN, and check this checkbox. If you want to duplicate the old STDF and NUMF calculations, use STDA or STDN and do not check this checkbox.

The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

## GPA Set Maintenance – QP Quality Points Formula

Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = QP Quality Points

This is a custom GPA formula.

The screenshot displays the 'GPA Set Maintenance' web application interface. The breadcrumb navigation at the top reads: Home » Management » School Administration » Course History Administration » GPA Sets. The main heading is 'GPA Set Maintenance' with a sub-heading: 'From this screen, you can display, add, change and delete data pertaining to GPA sets.' Below this are three tabs: 'General', 'Calculations', and 'Rank'. The 'Calculations' tab is active. The 'Calculations:' section includes a '< Back' button and a 'Next >' button. The 'Formula:' field is a dropdown menu set to 'QP - Quality Points'. The 'Precision:' field is a numeric input set to '3'. The 'Missing Marks Handling:' field is a dropdown menu set to 'Ignore Mark'. Below these are several checkboxes: 'Use Difficulty Points', 'Include Other Schools', 'Use Add-on Points', 'Use Prorated Credit', 'Use Manual Course History Mark Credit Detail' (selected), 'Use Manual Course History Course Credit', and 'Ignore Dropped Course Sections'.

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark, and is equivalent to the “Divided by Terms” qualifier from SIS. Note that if you want to duplicate the old STDP and NUMP calculations, you should use STDA or STDN, and check this checkbox. If you want to duplicate the old STDF and NUMF calculations, use STDA or STDN and do not check this checkbox.

The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) - When the option is checked the GPA calculation will include marks and credit in course sections only if the student completed the course, or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

### **GPA Set Maintenance – WAPK Wapak Method Formula**

**Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Calculations Tab – Formula = WAPK – Wapak Method**

This custom formula performs the standard GPA calculation and then uses that GPA value in the following formula to calculate the final GPA value:

**WAPK Wapak Method Calculation** –  $(\text{StandardGPA} * [0.5/4]) + (\text{HonorsCourses} * [0.25/15]) + (\text{MaxACTCompositeScore} * [0.15/36]) + (\text{GPACredits} * [0.1/28])$ .

Home » Management » School Administration » Course History Administration » GPA Sets

## GPA Set Maintenance

From this screen, you can display, add, change and delete data pertaining to GPA sets.

General Calculations Rank

Calculations: < Back Next >

Formula: WAPK - Wapak Method ⚡

Precision: 3 ⚡

Missing Marks Handling: Ignore Mark ⚡

Use Difficulty Points:

Include Other Schools:

Use Add-on Points:

Use Prorated Credit:

Use Manual Course History Mark Credit Detail

Use Manual Course History Course Credit

Ignore Dropped Course Sections:

**Precision** (required) - Designate to what precision the GPA calculation shall be calculated (how many decimal points).

**Missing Marks Handling** (required) - Define how missing marks will be handled in the GPA calculation for this GPA Set:

- **Ignore Mark** – Mark will be excluded from the GPA calculation for the individual student.
- **Ignore Student** – Student will not be included in the Rank and GPA calculations.
- **Use 0** – The Missing Mark will be included with a point value of zero (0). Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Use Difficulty Points** (optional) – Check this box to use this method of adjusting grade points. (See the Difficulty Point Scale and Course Difficulty sections earlier in this document.)

**Include Other Schools** (optional) – Includes courses taken at different schools within the same district in the GPA calculations reported on student transcripts (R702).

**Use Add-on Points** (optional) – Check this box to use this method of adjusting grade points. (See the Add-on Level Code section earlier in this document.)

**Use Prorated Credit** (optional) – Applies credits based on the Mark Credit Ratio configured for the associated Marking Pattern Rule. This option uses the credit percent or credit ratio, depending which is set up. If using percentages, the numeric mark value is multiplied by credit percentage for a resulting point value. If using ratio, the mark is divided by the ratio. For instance, if a trimester school had a ratio of 1:3, it would use one-third of the credit value, times the numeric value of the mark, for one-third of the mark to be included in the calculation. Calculated credits are figured by taking total credit times the percentage or ratio, whichever is set up. Total prorated credits would be used as the divisor in the calculation.

Prorated Credit should only be used when granting credit prior to a Final mark and is equivalent to the “Divided by Terms” qualifier from SIS.

The Use Manual Course History Mark Credit Detail and Use Manual Course History Course Credit options are available when the Use Prorated Credit option is deselected. Selecting the Use Manual Course History Mark Credit Detail option causes the attempted credit value on the Students tab on the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation. Selecting the Use Manual Course History Course Credit option causes the attempted credit value on the Course Details tab of the Manually Entered Course screen to be used for manually entered courses being included in the GPA calculation.

**Ignore Dropped Course Selections** (optional) – When the option is checked, the GPA calculation will include marks and credit in course sections only if the student completed the course or if the student is presently enrolled. Any marks a student receives in classes the student has dropped will not be used in the GPA calculation.

## GPA Set Maintenance – Rank Tab

Navigation: Home – Management – School Administration – Course History Administration – GPA Sets – Rank Tab

### Add/Edit GPA Set – Rank Tab

The screenshot shows the 'Rank' tab of the 'GPA Set Maintenance' screen. The breadcrumb trail at the top reads: Home » Management » School Administration » Course History Administration » GPA Sets. Below the title, a red instruction states: 'From this screen, you can display, add, change and delete data pertaining to GPA sets.' The interface has three tabs: 'General', 'Calculations', and 'Rank'. The 'Ranking:' section includes a '< Back' button. There are two rows of controls: 'Source:' with a dropdown menu set to 'GPA' and a lightning bolt icon, and 'Ties:' with a dropdown menu set to 'Count all students as the same' and a lightning bolt icon. To the right of these are two checkboxes: 'Include inactive students' (unchecked) and 'Include students with no marks' (checked). At the bottom are three buttons: 'Save', 'Save and New', and 'Cancel'.

**<Back** – Return to the Calculations tab.

**Source** (required) – Select a value that will be used as the source for rank. Options are GPA (default), Credits, Points and the custom methods: Lake Method, Mansfield Method and Quality Points.

**GPA** – This default rank method orders students by GPA, students with the highest GPA first.

**Credits** – this rank method orders student by total credits earned, students with the highest credits earned value first.

**Points** – This rank method order students by total grade points earned (prior to averaging into a GPA), students with the highest total grade points earned value first.

**Lake Method** – The Lake method of ranking multiples the GPA by a fixed value and then adds the number of earned credits. However, the number of earned credits used in the calculation may be limited to a specified value. The GPA multiplier and the maximum number of credits that can be earned will be specified in the rank section of the GPA set configuration as shown below. The multiplier value and the maximum credits value will be copied forward with the GPA Set during the School Year Initialization process.

The screenshot shows a software window with three tabs: 'General', 'Calculations', and 'Rank'. The 'Rank' tab is active. Under the heading 'Ranking:', there is a '< Back' button. Below this, there are four fields: 'Source:' is a dropdown menu set to 'Lake Method'; 'Ties:' is a dropdown menu set to 'Count all students as the same'; 'Rank Multiplier' is a numeric input field with a value of '0' and a vertical double-headed arrow; 'Maximum Credits' is a numeric input field with a value of '0' and a vertical double-headed arrow. To the right of these fields are two checkboxes: 'Include inactive students' and 'Include students with no marks', both of which are unchecked. At the bottom of the window are three buttons: 'Save', 'Save and New', and 'Cancel'.

**Mansfield Method** – This is a custom rank formula. The Mansfield Method generates the ranking value in the same manner as the student GPA, but point values of individual marks are multiplied by a Course Rank Weight. See the Scheduling End User Guide for details on Course Rank Weight Maintenance.

The screenshot shows a software window with three tabs: 'General', 'Calculations', and 'Rank'. The 'Rank' tab is active. Under the heading 'Ranking:', there is a '< Back' button. Below this, there are four fields: 'Source:' is a dropdown menu set to 'Mansfield Method'; 'Ties:' is a dropdown menu set to 'Count all students as the same'; 'Rank Multiplier' and 'Maximum Credits' fields are not visible in this view. To the right of the 'Source' and 'Ties' fields are two checkboxes: 'Include inactive students' and 'Include students with no marks', both of which are unchecked. At the bottom of the window are three buttons: 'Save', 'Save and New', and 'Cancel'.

**Quality Points** – This is a custom rank formula. The Quality Points rank method determines the rank value by adding the point values for all marks earned in the reporting periods specified in the GPA Set configuration. The Quality Points rank method will also include the Course Rank Weight multiplier as described above in the Mansfield Method.

The screenshot shows a web interface with three tabs: 'General', 'Calculations', and 'Rank'. The 'Rank' tab is active. Under the heading 'Ranking:', there is a '< Back' button. Below this, there are two rows of settings. The first row has 'Source:' followed by a dropdown menu set to 'Quality Points' and a lightning bolt icon, and a checkbox labeled 'Include inactive students' which is unchecked. The second row has 'Ties:' followed by a dropdown menu set to 'Count all students as the same' and a lightning bolt icon, and a checkbox labeled 'Include students with no marks' which is unchecked. At the bottom of the form are three buttons: 'Save', 'Save and New', and 'Cancel'.

**WAPAK Method** – This is a custom rank formula. The GPA is first calculated using the standard calculation. This is then used for the final GPA calculation/ranking.

$$\text{Final GPA} = (0.5 / 4 * \text{GPA}) + (0.25 / 15 * \text{HonorsCourses}) + (0.15 / 36 * \text{MaxACTComposite}) + (0.1 / 28 * \text{GPACredits})$$

This screenshot is identical in layout to the one above, but the 'Source:' dropdown menu is set to 'WAPAK Method'.

**Ties** (required) – Two options are available for the method that will be used to calculate rank position when ties occur. Select one of the following options:

**Count All Students as the Same** (this method allows ties, so it would rank students with the same GPA as the same rank: for example, if the first four students all had GPA 4.0, and the ranking is using GPA, all four students would be Rank 1, with the next student being Rank 5 (or tied for Rank 5), and so on.)

**Count Each Student Separately** (this method does not allow ties, and will rank each student separately)

**Include inactive students** – Yes or No; check if inactively coded students are to be included in the ranking and GPA calculations.

**Include students with no marks** – Yes or No; check if students without marks are to be included in the ranking and GPA calculations.

## Standard Marks Comments Maintenance

Navigation: Home – Management – School Administration – Marks Administration Menu – Standard Comments Maintenance

The StudentInformation application will provide the ability for Standard and free form comments to be added to the student mark records for individual reporting periods for historical purposes and to be printed on report cards. Free Form Comments are discussed in the Teacher Menu documentation. This section addresses Standard Comments.

Home » Management » School Administration » Marks Administration Menu » Standard Comment Maintenance

### Standard Comment Maintenance

From this screen, you can display, add, change and delete data pertaining to standard comments.

Add Comment

		Code ^	Type	Text	Active
		001	General Mark	High end of grade range	
		002	General Mark	Low end of grade range	
		003	General Mark	Modification as needed	
		004	General Mark	Grade assigned by home instructor	
		005	General Mark	See computer printout, if applicable	
		006	General Mark	Excellent student	
		007	General Mark	Strong academic skills	

**Sorting** – You may sort by any column (Code, Type, Text, Active) in ascending or descending order by clicking on the column header.

### Add/Edit Standard Comment

Home » Management » School Administration » Marks Administration Menu » Standard Comment Maintenance

### Standard Comment Maintenance

From this screen, you can display, add, change and delete data pertaining to standard comments.

Code:

Text:

Type:

Is Active:

Save Save and New Cancel

**Code** (required) – Enter up to 4 characters alphanumeric Standard Comment Code. If you try to use an existing inactive Comment Code, you will be prompted to reactivate this inactive Comment Code if you wish.

**Text** (required) – Input the Comment Text; up to 80 characters.

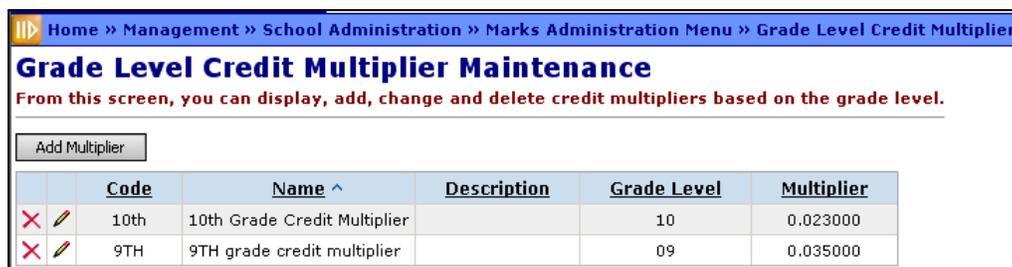
**Type** (required) – Select the applicable comment type. Valid options are General Mark, Effort or Work Habit.

**Note:** If a standard comment definition is changed, all students using that comment will have their comments reflect the change. This allows for typos in standard comments to be corrected and reflected on report cards without having to edit each student's comments.

## Grade Level Credit Multiplier Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Grade Level Credit Multiplier**

The Grade Level Credit Multiplier allows credits to be applied to a student by a ratio based on the student's grade level. This feature works like the Credit Multiplier feature of SIS. **USE THIS FEATURE ONLY IF NEEDED.** It increases ALL Credits in GPA and ALL Course Credits for ALL students in a Grade Level.



Home » Management » School Administration » Marks Administration Menu » Grade Level Credit Multiplier

### Grade Level Credit Multiplier Maintenance

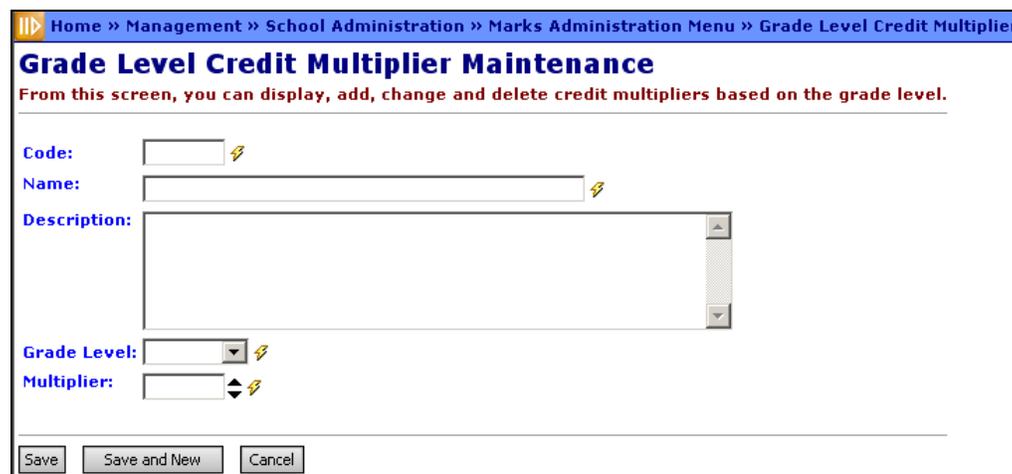
From this screen, you can display, add, change and delete credit multipliers based on the grade level.

Add Multiplier

	Code	Name ^	Description	Grade Level	Multiplier
 	10th	10th Grade Credit Multiplier		10	0.023000
 	9TH	9TH grade credit multiplier		09	0.035000

**Sorting** – You may sort by any column (Code, Name, Description, Grade Level, Multiplier) in ascending or descending order by clicking on the column header.

### Add/Edit Grade Level Credit Multiplier



Home » Management » School Administration » Marks Administration Menu » Grade Level Credit Multiplier

### Grade Level Credit Multiplier Maintenance

From this screen, you can display, add, change and delete credit multipliers based on the grade level.

Code:

Name:

Description:

Grade Level:

Multiplier:

Save Save and New Cancel

**Code** (required) – Enter up to 4 characters, alphanumeric, to define the Grade Level Credit Multiplier Code.

**Name** (required) – Enter Name of Grade Level Credit Multiplier (up to 30 characters).

**Description** (optional) – Enter Description of Grade Level Credit Multiplier (up to 200 characters).

**Grade Level** (required) – Select the applicable grade level from the dropdown menu.

**Multiplier** (required) – Input value from 0-10 (inclusive) with decimal precision of two. (i.e. 0.34) This is the multiplier that will be used for calculations.

## Honor Roll Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Honor Rolls**

A school may define multiple Honor Rolls and each Honor Roll may be defined with different criteria. These Honor Rolls may be point based, GPA based and Mark based.

Honor Rolls are sub-sets of GPA Sets. Honor Rolls work in conjunction to GPA sets. Actual Honor Roll records are created for each student qualifying for an Honor Roll. When GPA sets are recalculated, corresponding Honor Roll sets are rebuilt as well.

Home » Management » School Administration » Marks Administration Menu » Honor Rolls Advanced Search | Feedback | M

### Honor Roll Maintenance

From this screen, you can display, add, change and delete data pertaining to honor rolls.

			Code	Name ^	Type	Description	Min Courses	Min Marks	GPA Required	Precedence	Ignore Precedence	Honor Message
		<a href="#">Exclusion Marks</a>	<a href="#">Memberships</a>	HR 1	Honor Roll 1	GPA	1	1	4.000000	1	<input type="checkbox"/>	Congratulations! Honor Roll I
		<a href="#">Exclusion Marks</a>	<a href="#">Memberships</a>	HR 2	Honor Roll 2	GPA	1	1	3.000000	2	<input type="checkbox"/>	Congratulations! Honor Roll II

**Sorting** – You may sort by any column (Code, Name, Type, Description, Min. Courses, Min. Marks, GPA Required, Precedence, Ignore Precedence or Honor Message) in ascending or descending order by clicking on the column header.

**Exclusion Marks** – View Honor Roll Exclusion Marks (see the following Honor Roll Mark Inclusion/Exclusion Rule section).

**Memberships** – View Honor Roll Memberships (see the following Honor Roll Memberships section).

## Add/Edit Honor Roll

Home » Management » School Administration » Marks Administration Menu » Honor Rolls

### Honor Roll Maintenance

From this screen, you can display, add, change and delete data pertaining to honor rolls.

**Code:**

**Name:**

**Type:** GPA

**Description:**

**Min Number of Courses:**

**Min Number of Marks:**

**Minimum GPA:**

**GPA Set:**

**Precedence:**

**Ignore Precedence:**

**Max Number of Missing Marks:**

**Min Number of Credits:**

**Include Primary Building Students Only:**

**Honor Message:**

**Code** (required) – Enter up to 4 characters alphanumeric Honor Roll Code.

**Name** (required) – Enter Name of Honor Roll (up to 30 characters).

**Type** (required) – The type of Honor Roll being defined, valid responses are; Point Based, GPA Based and Mark Based.

**Description** (optional) – Enter Description of Honor Roll (up to 200 characters).

**Min Number of Courses** (required) – Minimum number of courses that the student must have taken for the reporting period to qualify for this honor roll. Valid range of 0-20 may be used, with zero (0) indicating that no minimum is required.

**Min Number of Marks** (required) – Minimum number of marks that the student must have earned for the reporting period to qualify for this honor roll. Valid range of 0-50 may be used, with zero (0) indicating that no minimum is required.

**Minimum GPA** (optional) – GPA required to qualify for this Honor Roll, with decimal values from 0-100 being used with a precision of two decimal places.

**GPA Set** (required) – Determines the GPA set to be used to determine student GPA. Select valid option from the dropdown menu of previously defined GPA Sets.

**Note:** If you adjust the GPA Set, you will only get accurate Honor Roll information on a report card if you select the correct GPA Set and Honor Roll.

**Precedence** (required) – The precedence of the Honor Roll within Honor Rolls of the same type. The student may qualify for more than one honor roll, and Precedence determines which honor roll the student receives. The honor roll with the lowest precedence value will be selected for a given student.

**Ignore Precedence** (required) – Yes or No; flag indicating that the precedence rule will be ignored for this Honor Roll. A student with all “A” Marks would appear on both an “All A Honor Roll” and an “A/B Honor Roll” if Precedence is ignored.

**Max Number of Missing Marks** (required) – The Maximum number of missing marks allowed by marking pattern rules the student may have for the reporting period to qualify for this honor roll. Valid options are 1-100.

**Min Number of Credits** (required) – The minimum number of points the student must have attempted for the reporting period to qualify for the honor roll. Valid range of 0-100 may be used, allowing for decimal points in increments of 0.1. A zero (0) indicates that no minimum is required.

**Include Primary Building Students Only** – Functionality of this checkbox is not ready yet. Be sure to check this box, as any R303 run for this Honor Roll will be blank otherwise.

**Honor Message** (optional) – Text message that will be printed on report card and various screens to indicate the student qualified for the specified Honor Roll. (A congratulatory Message – up to 200 characters, for example).

## Honor Roll Mark Inclusion/Exclusion Rule

**Navigation: Home – Management – School Administration – Marks Administration Menu – Honor Rolls – Honor Roll Inclusion/Exclusion Rules**

Honor Roll Mark Inclusion/Exclusion allows the school to define specific marks that may include/exclude a student from an Honor Roll. An example is that a student may qualify for an Honor Roll based on his/her GPA, but may have earned a “C” mark that is listed as an exclusion mark for that honor roll. Therefore the student would not qualify for that specific honor roll.

**Note:** The Honor Roll Mark Inclusion/Exclusion is nested within the Honor Roll to which it applies. To add or delete Rules for Honor Roll Mark Inclusion/Exclusion, you must first select the appropriate Honor Roll.

Honor Roll Maintenance											
From this screen, you can display, add, change and delete data pertaining to honor rolls.											
Add Honor Roll											
		Code	Name ^	Type	Description	Min Courses	Min Marks	GPA Required	Precedence	Ignore Precedence	Honor Message
X	Exclusion Marks	Memberships	HR 1	Honor Roll 1	GPA	1	1	4.000000	1	<input type="checkbox"/>	Congratulations! Honor Roll I
X	Exclusion Marks	Memberships	HR 2	Honor Roll 2	GPA	1	1	3.000000	2	<input type="checkbox"/>	Congratulations! Honor Roll II

Select **Exclusion Marks** to view, add or delete Honor Roll Mark Inclusion/Exclusion rules.

**Mark** – Either a Mark or Combined Mark Group must be selected from the appropriate dropdown menu, but not both.

**(Combined) Mark Group** – Either a Mark or Combined Mark Group must be selected from the appropriate dropdown menu, but not both.

**Number Allowed** – Enter the number of selected Marks (or Mark Groups) that may be permitted for this rule:

- 0 – None of the specified Marks or Mark Groups.
- 1 – Only one of the specific Mark or Mark Groups is allowed for the inclusion or exclusion rule.
- 2 or more – More than 1 (as specified) of the specific Mark or Mark Groups are allowed for the inclusion or exclusion rule.

**Include/Exclude** – Select whether this mark or mark group should have a certain number of instances permitted (include) or not be allowed at all (exclude).

**Add Mark** – Add a new Honor Roll Mark Inclusion/Exclusion after entering its values.

**Cancel** – Cancel and return to the Honor Roll Maintenance screen.

**Sorting** – You may sort by any column (Mark, Combined Mark Group, Number Allowed, Rule Type) in ascending or descending order by clicking on the column header.

**X** – Delete this Honor Roll Mark Inclusion/Exclusion Rule.

Click **Add Mark** to add each new Honor Roll Mark Inclusion/Exclusion Rule for the selected Honor Roll.

For example, the rule above excludes all (number allowed – 0) of mark groups C, D, F and mark I. If the Mark Group C had Number Allowed =1 with Rule Type – Include, then a student could have 1 C to be on the A-B Honor Roll. When all rules have been added, click **Cancel** to return to the Honor Roll Maintenance Screen.

## Honor Roll Memberships

**Navigation: Home – Management – School Administration – Marks Administration Menu – Honor Rolls – Honor Roll Memberships**

A student may be excluded or included in a specific Honor Roll by virtue of belonging to a particular Membership Group (for more information on Membership Groups see the Student Registration Documentation 1K thru 1L-3).

The Honor Roll Memberships is nested in the Honor Roll to which it applies. To add or delete Memberships for Honor Roll Membership, you must first select the appropriate Honor Roll.

	Code	Name ^	Type	Description	Min Courses	Min Marks	GPA Required	Precedence	Ignore Precedence	Honor Message	
		<a href="#">Memberships</a>	HR 1	Honor Roll 1	GPA	1	1	4.000000	1	<input type="checkbox"/>	Congratulations! Honor Roll I
		<a href="#">Memberships</a>	HR 2	Honor Roll 2	GPA	1	1	3.000000	2	<input type="checkbox"/>	Congratulations! Honor Roll II

Click on the second **Memberships** icon as shown above to view, delete or add Honor Roll Memberships.

Membership Group:  Membership:

Include  Exclude

	Membership ^	Membership Group	Rule Type
	Football		Include
	Special Prog - other		Exclude

**Membership Group** – Select the Membership Group that the Membership belongs to, from the dropdown menu.

**Membership** – Select applicable Membership that you wish to add to the Honor Roll as Inclusion or Exclusion for the selected Honor Roll.

**Include/Exclude** – Select whether this membership is to include or exclude students from the selected Honor Roll.

**Add Membership** – Add the Honor Roll Membership for the selected Honor Roll.

**Cancel** – Cancel and return to the Honor Roll Maintenance screen.

**Sorting** – You may sort by any column (Membership, Membership Group, Rule Type) in ascending or descending order by clicking on the column header.

 – Delete this Honor Roll Membership.

Click **Add Membership** to add each new Membership Rule for the selected Honor Roll.



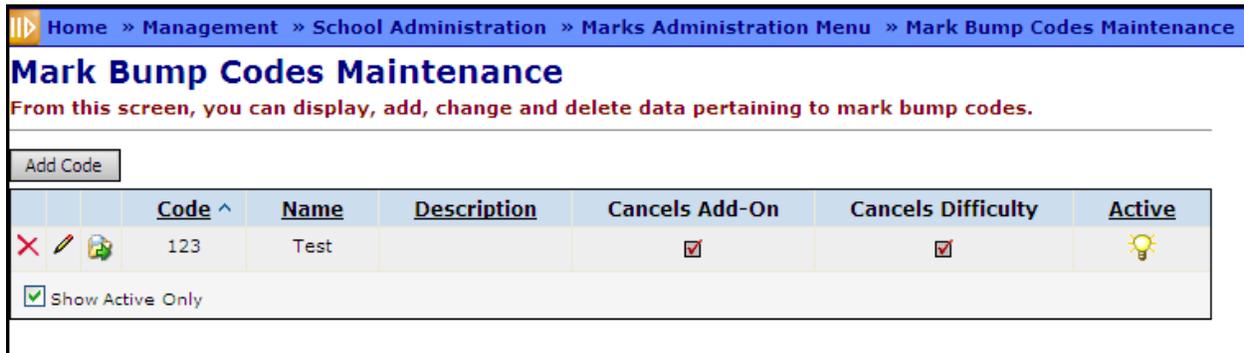
Membership ^	Membership Group	Rule Type
 Football		Include
 Honors Class(es)		Include

When all rules have been added, click **Cancel** to return to the Honor Roll Maintenance Screen.

## Mark Bump Code

**Navigation: Home – Management – School Administration – Marks Administration Menu – Mark Bump Codes Maintenance**

Mark Substitution is another method for increasing a student’s GPA. Unlike Add-on GPA (which adds a value directly to the student’s GPA), Mark Substitution allows a specific mark in one course (such as an A in an AP class) to increase a lower mark in another course to an improved mark for the purpose of GPA calculation only (student report cards and course history will continue to display the original mark value). A common supplement to Mark Substitution is to also set an Add-On GPA to the “All A’s” Combined Mark Group, to slightly increase GPA if no Marks are low enough to be increased in this fashion.



Code ^	Name	Description	Cancels Add-On	Cancels Difficulty	Active
   123	Test		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Show Active Only

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

 – View/Edit Mark Bump Mapping for this Mark Bump Code (see 1U-2. Mark Bump Mapping).

## Add/Edit Mark Bump Code

**Code** (required) – Enter up to 4 characters alphanumeric Mark Bump Code. If you try to use an existing inactive Mark Bump Code, you will be prompted to reactivate this inactive Mark Bump Code if you wish.

**Name** (required) – Enter Mark Bump Code name (up to 30 characters).

**Description** (optional) – Enter a description of the Mark Bump Code.

**Substitution Cancels Addon** (optional) – Checked by default; if this checkbox is checked, this Mark Bump Code will override Add-On GPA.

**Substitution Cancels Difficulty** (optional) – Checked by default; if this checkbox is checked, this Mark Bump Code will override Difficulty Level.

## View Mark Bump Map

Mark Bump Map	Earned In Main Course		Earned In Secondary Course		Mark Substituted
	Mark	Combined Mark Group	Mark	Combined Mark Group	
AP-A - AP A Mark	A		C		B

**Return to Mark Bump Codes Maintenance** – Return to the Mark Bump Codes Maintenance screen.

## Add/Edit Mark Bump Mapping

Home » Management » School Administration » Marks Administration Menu » Mark Substitution

### Mark Bump Mapping - AP-A

From this screen, you can edit a Mark Bump Mappings.

**Choose the Mark or Combined Mark Group that must be earned.**

Mark:

Combined Mark Group:

**Choose the Mark or Combined Mark Group that will be substituted for.**

Mark:

Combined Mark Group:

**Choose the Mark that will be used for substitution.**

Mark:

Save Save and New Cancel

**Choose the Mark or Combined Mark Group that must be Earned** (required) – Select a Mark or Combined Mark Group (but not both) that must be earned in the Course with the Mark Bump assigned to it.

**Choose the Mark or Combined Mark Group that will be substituted for** (required) – Select a Mark or Combined Mark Group (but not both) that will be replaced by the Mark Bump.

**Choose the Mark that will be used for substitution** (required) – Select a Mark that will replace the Mark or Combined Mark Group chosen in the second set of fields. This GPA Calculation process does not change the student’s Mark for report card or course history purposes.

## Automatic Mark Maintenance

**Navigation: Home – Management – School Administration – Marks Administration Menu – Automatic Mark Maintenance**

Automatic Marks represent predefined mark average calculations based on required Marking Patterns. Automatic Mark values calculate on the last day of the reporting term and incorporate changes to the underlying marks immediately and automatically; no user or administrator intervention will be required. However it is possible to override the value of a calculated Automatic Mark, if needed. Any manually-entered or teacher-entered Marks will override Automatic Marks for those Course Sections. Automatic marks will not calculate for a student if the student does not have grades for every physical reporting term.

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Maintenance

## Automatic Mark Maintenance

From this screen, you can display, add, change and delete data pertaining to automatic marks.

Add Automatic Mark

	Code	Name ^	Description	Marking Pattern Rule
 	INC	INCOMPLETE MARKS		Avg

**Note:** If a mark flows into StudentInformation from ProgressBook after automatic marks have been kicked off, the user will need to kick off the job again to update automatic marks.

**Sorting** – You may sort by any column (Code, Name, Description, Marking Pattern Rule) in ascending or descending order by clicking on the column header.

### Add Automatic Mark

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Maintenance

## Automatic Mark Maintenance

From this screen, you can display, add, change and delete data pertaining to automatic marks.

Code:

Name:

Description:

Marking Pattern Rule:

Missing Marks Handling: Ignore Mark

Save Save and Enter Details Save and New Cancel

**Code** (required) – Enter 4 character alphanumeric Automatic Mark Code.

**Name** (required) – Enter Name of Automatic Mark Code.

**Description** (optional) – Enter Description of Automatic Mark Code.

**Marking Pattern Rule** (required) – Select from the dropdown menu the Marking Pattern Rule that this Automatic Mark is to use.

**Missing Marks Handling** (required) – How will the missing marks be handled? Select appropriate option from dropdown menu. Valid responses are:

- Ignore Mark – missing mark is excluded from the calculation for individual student.
- Ignore Student – do not provide an automatic mark for the student.
- Use 0 – the missing mark is included with a zero (0) point value. Only marks associated with one of the following three circumstances will be included: 1) Automatic Marks Calculation Date has passed; 2) Course Term has passed; or 3) Reporting Term has passed.

**Save and Enter Details** – Will save new Automatic Mark Code and return to the Automatic Mark Codes Maintenance – Add New Automatic Mark with the option of adding Members to the new code (as shown in the following example).

### Delete Automatic Mark

When deleting an Automatic Mark, it will also delete all Members of the Automatic Mark.

### Automatic Mark Members

The screenshot shows the 'Automatic Mark Maintenance' interface. At the top, a navigation breadcrumb reads: Home » Management » School Administration » Marks Administration Menu » Automatic Mark Maintenance. Below this is the title 'Automatic Mark Maintenance' and a sub-header: 'From this screen, you can display, add, change and delete data pertaining to automatic marks.' A yellow message box states: 'The automatic mark was saved successfully'. The form contains the following fields: 'Code:' with the value 'INC'; 'Name:' with the value 'INCOMPLETE MARKS'; 'Description:' with an empty text area; 'Marking Pattern Rule:' with a dropdown menu set to 'Sem1: Avg'; and 'Missing Marks Handling:' with a dropdown menu set to 'Use 0'. There is an 'Add Member' button below these fields. At the bottom of the form are three buttons: 'Save', 'Save and New', and 'Cancel'.

Automatic Mark Members represent marking pattern marks that are used in the calculation of the associated Automatic Mark. Each Automatic Mark may define any number of marks (Members) to be included in its calculation.

### Add Automatic Mark Member

The screenshot shows the 'Automatic Mark Maintenance' interface for adding a member. The navigation breadcrumb is: Home » Management » School Administration » Marks Administration Menu » Automatic Mark Maintenance. The title is 'Automatic Mark Maintenance' and the sub-header is: 'From this screen, you can display, add, change and delete data pertaining to automatic marks.' The form contains two fields: 'Marking Pattern Rule:' with a dropdown menu and 'Weight:' with a text input field. At the bottom of the form are three buttons: 'Save', 'Save And New', and 'Cancel'.

**Marking Pattern Rule** (required) – Select the appropriate Marking Pattern Rule to be used for this Automatic Marks Member.

**Weight** (required) – Enter the weight to apply to this member for calculating the final mark value.

Once saved, you will see this Member on the Automatic Marks page.

Home » Management » School Administration » Marks Administration Menu  
» Automatic Mark Maintenance Advanced

## Automatic Mark Maintenance

From this screen, you can display, add, change and delete data pertaining to automatic marks.

**Code:**  ⚡

**Name:**  ⚡

**Description:**

**Marking Pattern Rule:**  ⚡

**Missing Marks Handling:**  ⚡

	Marking Pattern Rule	Weight
✗	Sem1: 1st Quarter Mark	40.000000
✗	Sem1: 1st Semester Exam	20.000000
✗	Sem1: 2nd Quarter Mark	40.000000

✗ – Delete this Member from the Specified Automatic Mark Code/

## Automatic Mark Calculation Dates

**Navigation: Home – Management – School Administration – Marks Administration Menu – Automatic Mark Calculation Dates**

Automatic Mark Calculation Dates is used to set up Automatic Marks to calculate before the last day of the Reporting Term. Each physical or locked reporting term will show on the page. Some examples of when to use Automatic Mark Calculation Date:

- A school wants the 1<sup>st</sup> Semester Average to calculate early for the entire school
- An elementary school wants to hand out report cards to the students on the last day. This means the report cards must be printed and ready to go on the last day of school. Since Automatic Marks do not calculate until the last day the school can setup the Automatic Mark Calculation Dates to make the marks calculate early.
- A school wants to calculate the final grades of the graduating seniors before the end of school for the other grade levels.

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Calculation Dates

## Automatic Mark Calculation Dates

From this screen, you can view, add, change and delete Automatic Mark Calculation Dates.

[\[Hide Reporting Terms\]](#)

Code	Name	Start	Stop	Mark Cutoff
GP1	Quarter 1	08/25/2008	10/24/2008	
GP2	Quarter 2	10/28/2008	01/16/2009	
GP3	Quarter 3	01/20/2009	03/19/2009	
GP4	Quarter 4	03/23/2009	05/28/2009	

To add a calculation date: Select a reporting term, a grade level, a calculation date and click the add button.  
 To delete a calculation date: Click the red X next to the date you would like to remove.  
 To edit a calculation date: Select the reporting term and grade level to edit. Choose a new date and click the add button.

Reporting Term: -- Select Reporting Term -- Grade Level: -- Select Grade Level -- Calculation Date:  Add

Reporting Term	Grade Level	Calculation Date
There are no records to display		

### Add Automatic Mark Calculation Date

To add a calculation date: Select a reporting term, a grade level, a calculation date and click **Add**.

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Calculation Dates

## Automatic Mark Calculation Dates

From this screen, you can view, add, change and delete Automatic Mark Calculation Dates.

[\[Hide Reporting Terms\]](#)

Code	Name	Start	Stop	Mark Cutoff
GP1	Quarter 1	08/25/2008	10/24/2008	
GP2	Quarter 2	10/28/2008	01/16/2009	
GP3	Quarter 3	01/20/2009	03/19/2009	
GP4	Quarter 4	03/23/2009	05/28/2009	

To add a calculation date: Select a reporting term, a grade level, a calculation date and click the add button.  
 To delete a calculation date: Click the red X next to the date you would like to remove.  
 To edit a calculation date: Select the reporting term and grade level to edit. Choose a new date and click the add button.

Reporting Term: GP4 - Quarter 4 Grade Level: 12 - 12 Calculation Date: 5/21/2009 Add

Reporting Term	Grade Level	Calculation Date
There are no records to display		

You will receive a confirmation message as shown in the following figure.

**Calculation date was added successfully**

The new Automatic Mark Calculation Date will display in the Automatic Mark Calculation Dates grid. If the Reporting Terms associated with the Automatic Mark Members have completed or the Early Calculation Date has passed, the mark will be calculated for the Grade Level specified.

To add a calculation date: Select a reporting term, a grade level, a calculation date and click the add button.  
 To delete a calculation date: Click the red X next to the date you would like to remove.  
 To edit a calculation date: Select the reporting term and grade level to edit. Choose a new date and click the add button.

Reporting Term: -- Select Reporting Term -- Grade Level: -- Select Grade Level -- Calculation Date: Add

	Reporting Term	Grade Level	Calculation Date
X	GP4 - Quarter 4	12 - 12	05/21/2009

## Delete Automatic Mark Calculation Date

To delete a calculation date: Click  next to the date you would like to remove.

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Calculation Dates

### Automatic Mark Calculation Dates

From this screen, you can view, add, change and delete Automatic Mark Calculation Dates.

[\[Hide Reporting Terms\]](#)

Code	Name	Start	Stop	Mark Cutoff
GP1	Quarter 1	08/25/2008	10/24/2008	
GP2	Quarter 2	10/28/2008	01/16/2009	
GP3	Quarter 3	01/20/2009	03/19/2009	
GP4	Quarter 4	03/23/2009	05/28/2009	

To add a calculation date: Select a reporting term, a grade level, a calculation date and click the add button.  
 To delete a calculation date: Click the red X next to the date you would like to remove.  
 To edit a calculation date: Select the reporting term and grade level to edit. Choose a new date and click the add button.

Reporting Term: -- Select Reporting Term -- Grade Level: -- Select Grade Level -- Calculation Date: Add

	Reporting Term	Grade Level	Calculation Date
X	GP4 - Quarter 4	12 - 12	05/21/2009

You will be asked to confirm your delete.

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Calculation Dates

### Automatic Mark Calculation Dates

From this screen, you can view, add, change and delete Automatic Mark Calculation Dates.

Are you sure you want to delete the following calculation date?  
 GP4 - 12 - 5/21/2009

Ok Cancel

After clicking OK to process the delete, you will receive the following confirmation message.

**Calculation Date was successfully deleted**

## Edit Automatic Mark Calculation Date

To edit a calculation date: Select the reporting term and grade level to edit. Choose a new date and click **Add**.

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Calculation Dates

## Automatic Mark Calculation Dates

From this screen, you can view, add, change and delete Automatic Mark Calculation Dates.

[\[Hide Reporting Terms\]](#)

Code	Name	Start	Stop	Mark Cutoff
GP1	Quarter 1	08/25/2008	10/24/2008	
GP2	Quarter 2	10/28/2008	01/16/2009	
GP3	Quarter 3	01/20/2009	03/19/2009	
GP4	Quarter 4	03/23/2009	05/28/2009	

To add a calculation date: Select a reporting term, a grade level, a calculation date and click the add button.  
 To delete a calculation date: Click the red X next to the date you would like to remove.  
 To edit a calculation date: Select the reporting term and grade level to edit. Choose a new date and click the add button.

Reporting Term: GP4 - Quarter 4 ⚡ Grade Level: 12 - 12 ⚡ Calculation Date: 5/22/2009 ⚡ Add

	Reporting Term	Grade Level	Calculation Date
X	GP4 - Quarter 4	12 - 12	05/21/2009

You will be asked to confirm your edit.

Home » Management » School Administration » Marks Administration Menu » Automatic Mark Calculation Dates

## Automatic Mark Calculation Dates

From this screen, you can view, add, change and delete Automatic Mark Calculation Dates.

The reporting term and grade level already have a calculation date. Click Ok to update. Click Cancel to return.

Current: GP4 - 12 - 5/21/2009 Proposed: GP4 - 12 - 5/22/2009

Ok Cancel

After clicking OK to process the edit, you will receive a confirmation message.

**Calculation date was added successfully**

## Student Marks Records

### Student Marks

Navigation: Home – SIS – Student – Marks – Student Marks

Home » SIS » Student » Marks » Student Marks

## Student Marks

From this screen, you can view a student's marks for each completed or present course.

Show Completed Courses Only Dropped Withdrawn

Marking Pattern: All Year Course

Course Section	1Int Int	Qtr1 Qtr	2Int Int	Qtr2 Qtr	Ex1 Exam	Sem1 Avg	3Int Int	Qtr3 Qtr	4Int Int	Qtr4 Qtr	Ex2 Exam	Sem2 Avg	FNL F
<a href="#">1350 - AP PSYCHOLOGY Section 2</a>	A	A+		A+	A	A+	A+						
<a href="#">622 - SPANISH II Section 4</a>	A+	A+	A	A+		A+	A+						
<a href="#">630 - ADV LATIN - CICERO Section 1</a>	A+	A+											
<a href="#">950 - AP ENGLISH Section 1</a>	A	A	A	A+	A	A+	A+	A+		A	A	A+	A+

Marking Pattern: 1st Semester

Course Section	1Int Int	Qtr1 Qtr	2Int Int	Qtr2 Qtr	Ex1 Exam	Sem1 Avg	FNL F
<a href="#">1347 - ECONOMICS Section 1</a>		A+	A+	A+	A+		A+
<a href="#">215 - SCULPTURE &amp; CERAMICS Section 2</a>							

Marking Pattern: 2nd Semester

Course Section	3Int Int	Qtr3 Qtr	4Int Int	Qtr4 Qtr	Ex2 Exam	Sem2 Avg	FNL F
<a href="#">1341 - MILITARY HISTORY Section 2</a>	A-	A	A	A	A	A	A
<a href="#">534 - ON YOUR OWN Section 3</a>	A+	A+	A+	A+	A+	A+	A+

The Student Marks screen displays marks for a selected student for each course the student has participated in throughout the year.

Courses are grouped and displayed by Marking Pattern. All courses are displayed by default.

**Show Completed Courses Only** – If checked will list only completed courses. All courses are shown by default.

### Color Coding

- Dropped courses from the current year are highlighted in yellow.
- Withdrawn courses (assuming student is currently withdrawn) from the current year are highlighted in red.

**Marking Pattern** – Marking Pattern for listed courses. Courses with like Marking Patterns will be grouped together in separate Marking Pattern Grids.

**Course** – Course Abbreviation with link to Course Section Mark Summary where grades may be entered.

**Section** – Section Number of Course with link to Course Section Mark Summary where grades may be entered.

**Teacher** – Name of the Teacher teaching the course section. If the course section has multiple teachers, each will be listed.

**Course Section Mark** – Each of the columns with the student’s required mark listed has a heading describing which marking pattern and marking pattern rule is associated to that particular Mark. By hovering over the column heading you can see the full name assigned to the Marking Pattern and Marking Pattern rule for this required Mark.

**Each Mark** displayed in the grid will act as a link to the Course Section Mark Entry page. **To make changes to a grade:**

- Click on a specific mark and you will be able to modify that particular grade from the Student Mark Entry Screen as shown below. For more information on this screen see the *ProgressBook StudentInformation Teacher Menu Guide*.

Home » SIS » Student » Marks » Student Mark Entry

**Student Mark Entry - ADAMS, JULIE**  
This screen is used to perform mark entry for a student

1350 - AP PSYCHOLOGY: Section 2

Course Section	Mark	Value	General
1350 - AP PSYCHOLOGY: Section 2	1st Interim	A	

- Student’s grade may be changed from this screen and saved.

## Counselor Comments

**Navigation: Home – SIS – Student – Marks – Counselor Comment**

Counselor Comment screen is used to view Counselor Comments for the selected student. All users with access to the Counselor Comments can add and delete student comments. Counselor comments are only used on custom report cards (not used on non-custom report cards).

**Note:** *If a standard comment definition is changed, all students using that comment will have their comments reflect the change. This allows for typos in standard comments to be corrected and reflected on report cards without having to edit each student’s comments.*

**DASL**    [CONTRARY, MARY M.](#)    ID: 00005001    Counselor: ALLEN, MARK    DASL HIGH SCHOOL    2007-2008 (LIVE)

DASL HIGH SCHOOL 2007-2008    Gender: F    Homeroom:    [Find Students] Find [Go To] Go

Calendar: am    Grade: 09    Status: A    \$

Home » SIS » Student » Marks » Counselor Comment    Advanced Search | Feedback | Mgmt | Help | Version | Print

### Counselor Comment

From this screen, you can display, add, change and delete data pertaining to student counselor comments.

Counselor comments are only used on custom report cards (not used on non-custom report cards)

Counselor: -- Filter By Counselor --

	Reporting Term ^	Mark Type	Comment Type	Text	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Counselor
	Quarter 3	Quarter Mark	General Mark	Good work habits	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		MARK ALLEN

Show Active Only

**Sorting** – You may sort by any column (Reporting Term, Comment Type, Text, Sort Order, Canceled, Cancel Date, Counselor) in ascending or descending order by clicking on the column header.

– Comment has been canceled and will not be added to the student’s marks record and will not display on Interim or Report Cards.

**Counselor** – Name of Counselor used to filter Comment list.

**Filter** – Select a Counselor from dropdown list for use in filtering the list of Counselor Comments.

**Add Standard Comment** – Add a new Standard Counselor Comment.

**Add FreeForm Comment** – Add a new Freeform Counselor Comment.

### Add Standard Counselor Comment

**DASL**    [CONTRARY, MARY M.](#)    ID: 00005001    Counselor: ALLEN, MARK

DASL HIGH SCHOOL 2007-2008    Gender: F    Homeroom:    \$

Calendar: am    Grade: 09    Status: A

Home » SIS » Student » Marks » Counselor Comment    Advanced Search

### Counselor Comment

From this screen, you can display, add, change and delete data pertaining to student counselor comments.

Counselor:

Type:

Standard Comment: -- Select a Comment Type --

Sort Order:

Reporting Term: Qtr3

Mark Type:

Include On Interim Report Card:

Include On Report Card:

Is Cancelled:

**Counselor** (optional) – Select the counselor from the drop-down menu, or this value may read your associated staff member already.

**Type** (required) – Type of Comment; valid choices are General Mark, Effort and Work Habit.

**Standard Comment** (required) – Choose from the list of Standard Comments (populated after Type has been selected) by Comment Type.

**Sort Order** (required) – Specify the sort order of the comments to control how they will be shown. An update will soon be made to Report Cards so that comments with sort order of 1 and 2 will always be displayed on the Report Card.

**Reporting Term** (required) – Select the appropriate Reporting Period where this comment is to appear.

**Mark Type** – Select the reporting term that this comment will apply to.

**Include On Interim Report Card** (optional) – Yes or No; check if this comment is to be included on the Interim Report Card.

**Include On Report Card** (optional) – Yes or No; check if this comment is to be included on the Report Card.

**Is Canceled** (optional) – check if you wish to cancel this comment (make it inactive). A Cancel Date will then display on the main grid. See information below under Delete Counselor Comment.

## Add Freeform Counselor Comment

<b>DASL</b>	<a href="#">CONTRARY, MARY M.</a>	ID: 00005001	Counselor: ALLEN, MARK
	DASL HIGH SCHOOL 2007-2008	Gender: F	Homeroom:
	Calendar: am	Grade: 09	Status: A

Home » SIS » Student » Marks » Counselor Comment Advanced Search

### Counselor Comment

From this screen, you can display, add, change and delete data pertaining to student counselor comments.

**Counselor:**

**Type:**

**Comment:**

**Sort Order:**

**Reporting Term:**

**Mark Type:**

**Include On Interim Report Card:**

**Include On Report Card:**

**Is Cancelled:**

**Counselor** (optional) – Select the counselor from the drop-down menu, or this value may read your associated staff member already.

**Type** (required) – Type of Comment; valid choices are General Mark, Effort and Work Habit.

**Comment** (required) – Open text area for typing in any freeform comment; up to 200 characters.

**Sort Order** (required) – Specify the sort order of the comments to control how they will be shown. An update will soon be made to Report Cards so that comments with sort order of 1 and 2 will always be displayed on the Report Card.

**Reporting Term** (required) – Select the appropriate Reporting Period where this comment is to appear.

**Mark Type** – Select the reporting term to which this comment applies.

**Include On Interim Report Card** (optional) – Yes or No; check if this comment is to be included on the Interim Report Card

**Include On Report Card** (optional) – Yes or No; check if this comment is to be included on the Report Card.

**Is Canceled** (optional) – check if you wish to cancel this comment (make it inactive). A Cancel Date will then display on the main grid. See information below under Delete Counselor Comment.

## Delete Counselor Comment

Comments applied to a student’s marks record cannot be removed once added, however the comments may be canceled and the cancel date recorded as well as the user canceling the comment. Show both Active and Inactive/Canceled Counselor Comments by un-checking the Show Active Only checkbox.

**DASL** [CONTRARY, MARY M.](#) ID: 00005001 Counselor: ALLEN, MARK  **DASL HIGH SCHOOL** 2007-2008 (LIVE)  
 DASL HIGH SCHOOL 2007-2008 Gender: F Homeroom:  
 Calendar: am Grade: 09 Status: A [Find Students] Find [Go To] Go

Home » SIS » Student » Marks » Counselor Comment Advanced Search | Feedback | Mgmt | Help | Version | Print

### Counselor Comment

From this screen, you can display, add, change and delete data pertaining to student counselor comments.

Counselor comments are only used on custom report cards (not used on non-custom report cards)

Counselor: -- Filter By Counselor --

	Reporting Term ^	Mark Type	Comment Type	Text	Sort Order	On Interim	On Report Card	Cancelled	Cancel Date	Counselor
	Quarter 3	Quarter Mark	General Mark	Good work habits	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Feb 15, 2008	MARK ALLEN

Show Active Only

## Teacher Comment

### Navigation: Home – SIS – Student – Marks – Teacher Comment

The Teacher Comment page allows users to view all comments for a selected student, or filter by Teacher and/or Course Section. All users with access to the Teacher Comments can add and delete student comments.

**Note:** *If a standard comment definition is changed, all students using that comment will have their comments reflect the change. This allows for typos in standard comments to be corrected and reflected on report cards without having to edit each student’s comments.*

Home » SIS » Student » Marks » Teacher Comment

## Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

Teacher:

Course Section:

	Course Name	Course Section	Marking Pattern Rule	Comment Type	Comment	Sort Order	Cancel Date	Teacher	Active
✗	SPANISH II	4	1st Qtr	General Mark	Excellent work.		Not Canceled		
✗	SPANISH II	4	1st Interim	General Mark	Excellent work.		Not Canceled		
✗	SPANISH II	4	2nd Qtr	General Mark	Excellent work.		Not Canceled		
✗	SPANISH II	4	3rd Qtr	General Mark	Excellent work.		Not Canceled		
✗	SPANISH II	4	4th Qtr	General Mark	Excellent work.		Not Canceled		

Show Active Only

**Teacher** – Name of Teacher used to filter Comment list. The Teacher dropdown only shows teachers who teach the student this school year and that the current user has access to work with.

**Course Section** – Name of Course Section used to filter Comment list. The course section dropdown only shows course sections the student is in this school year (or has withdrawn from).

**Filter** – Select a Teacher and Course Section from the drop-down lists for use in filtering the list of Teacher Comments

DASL FONT, ELLA JANE ID: 00004002 Counselor: [X] DA  
 DASL HIGH SCHOOL Gender: F Homeroom: A109 - A109 [F]  
 DASL User 2004-2005 (8/24/2004 - 6/1/2005) Grade: 12 Status: A \$

Home » SIS » Student » Marks » Teacher Comment

## Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

Teacher:

Course Section:

	Course Name	Course Section	Term	Comment Type	Comment	Sort Order	Cancel Date	Teacher	Active
✗	PHYSICS	3	Grading Period 1	General Mark	Works well in groups		Not Canceled		
✗	PHYSICS	3	Grading Period 2	General Mark	Works well in groups		Not Canceled		
✗	PHYSICS	3	Exam 1	General Mark	Good general knowledge		Not Canceled		
✗	PHYSICS	3	Grading Period 3	General Mark	Good general knowledge		Not Canceled		
✗	PHYSICS	3	Grading Period 4	General Mark	Good general knowledge		Not Canceled		
✗	PHYSICS	3	Exam 2	General Mark	Good general knowledge		Not Canceled		
✗	PHYSICS	3	2/09	General Mark	Good general knowledge		Not Canceled		

Show Active Only

**Sorting** – You may sort by any column (Course Name, Course Section, Term, Comment Type, Comment, Sort Order, Cancel Date, Teacher, Active) in ascending or descending order by clicking on the column header.

 – Comment has been canceled and will not be added to the student's marks record or display on Interim or Report Cards.

**Add Standard Comment** – Add a new Standard Teacher Comment.

**Add Freeform Comment** – Add a new Freeform Teacher Comment.

## Add Standard Teacher Comment

Home » SIS » Student » Marks » Teacher Comment

### Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

**Teacher:** KIMBERLY OTTE

**Course Section:** 622 - SPANISH II (4)

**Comment Type:**

**Standard Comment:**

**Sort Order:**

**Marking Pattern Rule:**

**Include On Interim Report Card:**

**Include On Report Card:**

Save Save and New Cancel

**Teacher** (optional) – Select the teacher from the drop-down menu, or this value may read your associated staff member already.

**Course Section** (required) – Select the course section for this comment from the drop-down menu.

**Type** (required) – Type of Comment; valid choices are General Mark, Effort and Work Habit.

**Standard Comment** (required) – Choose from the list of Standard Comments (populated after Type has been selected) by Comment Type.

**Sort Order** (required) – Specify the sort order of the comments to control how they will be shown. An update will soon be made to Report Cards so that comments with sort order of 1 and 2 will always be displayed on the Report Card.

**Reporting Term** (required) – Select the appropriate Reporting Period where this comment is to appear.

**Include On Interim Report Card** (optional) – Yes or No; check if this comment is to be included on the Interim Report Card.

**Include On Report Card** (optional) – Yes or No; check if this comment is to be included on the Report Card.

## Add Freeform Teacher Comment

Home » SIS » Student » Marks » Teacher Comment

### Teacher Comment

From this screen, you can display, add, change and delete data pertaining to student teacher comments.

Teacher: KIMBERLY OTTE

Course Section: 622 - SPANISH II (4)

Comment Type:

Comment:

Sort Order:

Marking Pattern Rule:

Include On Interim Report Card:

Include On Report Card:

Save Save and New Cancel

**Teacher** (optional) – Select the teacher from the drop-down menu, or this value may read your associated staff member already.

**Course Section** (required) – Select the course section for this comment from the drop-down menu.

**Type** (required) – Type of Comment; valid choices are General Mark, Effort and Work Habit.

**Comment** (required) – Open text area for typing in any freeform comment; up to 200 characters.

**Sort Order** (required) – Specify the sort order of the comments to control how they will be shown. An update will soon be made to Report Cards so that comments with sort order of 1 and 2 will always be displayed on the Report Card.

**Reporting Term** (required) – Select the appropriate Reporting Period where this comment is to appear.

**Mark Type** – Select the reporting term to which this comment applies.

**Include On Interim Report Card** (optional) – Yes or No; check if this comment is to be included on the Interim Report Card.

**Include On Report Card** (optional) – Yes or No; check if this comment is to be included on the Report Card.

## **Delete Teacher Comment**

Comments applied to a student's marks record cannot be removed once added, however the comments may be canceled and the cancel date recorded as well as the user canceling the comment. Show both Active and Inactive/Canceled Counselor Comments by un-checking the Show Active Only checkbox.

---

## **Marks Reports**

Please see the Batch/Report Management documentation for more detailed information about running and viewing reports.

### **Report – Marks Analysis (R301)**

**Navigation: Home – SIS – Marks – Marks Reports – Marks Analysis**

The Marks Analysis Report is a distribution list of grades assigned for each teacher/course.

## Mark Analysis (R301)

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

Selection Criteria   Selection Summary   Load Settings

Marks or Mark Groups:  Marks    Mark Groups

### Reporting Term

Qtr1 - Quarter 1	↔	Fin - Final Grade
1Int - 1st Quarter Interim	↔	
Qtr2 - Quarter 2	↔	
2Int - 2nd Quarter Interim	↔	

### Mark Type

Avg	↔	Final Mark
Exam	↔	
Interim Mark	↔	
Quarter Mark	↔	

### Teacher

MS Teacher1030	↔	
POST Teacher1037	↔	
DENISE Teacher1038	↔	
JEAN Teacher1043	↔	

### Department

AOC - ALT OPPORT CENT	↔	
ART - ART DEPARTMENT	↔	
ATH - ATHLETICS	↔	
AUT - COUNTY AUTISM UNIT	↔	

### Course

011 - ART I	↔	
012 - PAINTING	↔	
013 - DRAWING	↔	
016 - ART II	↔	

### Marks

A - A	↔	
A+ - A+	↔	
A- - A-	↔	
AUD - AUD	↔	

### Student Grade Level

07 - 07	↔	11 - 11
08 - 08	↔	
09 - 09	↔	
10 - 10	↔	

Display Mark Counts:

Display Mark Percentages:

Print Totals Only:

Suppress Mark Point Values In Heading:

Display Numeric Mark Ranges In Heading:

Group By: Course   
 'Course': the report will be grouped and sorted by Course Code, and the sections within each course will be sorted by the Section Number.   
 'Teacher': the report will be grouped and sorted by Teacher, and the courses for each teacher will be sorted by the Course Code then Section Number.

### Sorting Options

Course Code (DESC)	↔	Course Code (ASC)
Course Name (ASC)	↔	
Course Name (DESC)	↔	
Teacher Code (ASC)	↔	

Delivery Method: Pickup   Set As Default

Email Address: amy@noacsc.org

Report Format: Adobe PDF

Description:

Submit

**Marks or Mark Group** (required) – Specify if Marks or Mark Groups will be used in the creation of the report.

**Reporting Term** (optional) – If no Reporting Terms are selected, the report will use all Reporting Terms for the report. You can also filter by selecting specific Reporting Terms for your report.

**Mark Type** (optional) – If no Mark Types are selected, the report will use all Mark Types in creation of the report. You can also filter by selecting specific Mark Types for your report.

**Teacher** (optional) – If no Teachers are selected, the report will use all Teachers in creation of the report. You can also filter by selecting specific Teachers for your report.

**Department** (optional) – If no Departments are selected, the report will use all Departments in creation of the report. You can also filter by selecting specific Departments for your report.

**Course** (optional) – If no Courses are selected, the report will use all Courses in creation of the report. You can also filter by selecting specific Courses for your report.

**Marks** (optional) – If no Marks are selected, the report will use all Marks in creation of the report. You can also filter by selecting specific Marks for your report.

**Student Grade Level** (optional) – Choose one or more Student Grade Levels you wish to include in the report. If no student grade levels are selected, all student grade levels will be included in the report.

**Display Mark Counts** (optional) – Defaults to checked. Check if you wish to show the mark count for each mark in each course section, as well as a subtotal of the count under each mark column for each course or teacher group, a subtotal for each reporting term and mark type combination for reporting terms for which there is more than one mark type, and a subtotal for each reporting term.

**Display Mark Percentages** (optional) – Defaults to unchecked. Check if you wish to show the mark percentage for each mark in each course section, as well as a subtotal of the percentage under each mark column for each course or teacher group, a subtotal for each reporting term and mark type combination for reporting terms for which there is more than one mark type, and a subtotal for each reporting term.

If both the Display Mark Counts and Display Mark Percentages options are checked, then the percentages will be shown underneath the counts for each mark column. The report will continue to show the total mark count and average point value for each detail row on the right side of the report, and a subtotal of the total mark count and average point value for all the detail rows for each course and teacher group.

Also, a grand total section has been added at the end of the report that lists the total count and percentage of each mark below each mark column, and the total mark count and average point value for all the detail rows in the report.

If the users choose to show multiple reporting terms and/or mark types, then the highest level grouping in the report will be by reporting term and mark type combination (i.e. a complete separate set of marks information for each reporting term and mark type combination).

**Print Totals Only** (optional) – Check if you wish to only print total Marks and not detailed information.

**Suppress Mark Point Values In Heading** (optional) – Check if you wish to Suppress Mark Point Values.

**Display Numeric Mark Ranges In Heading** (optional) – Check if you wish to show numeric mark ranges as the Marks headers instead of alpha marks.

Also, the Marks columns have been enhanced to have a secondary sort of “Average Point Threshold”, which has been added to the already –existing primary sort of “Point Value”. This will handle the case where the school has for example the “A” and “A+” marks both with a point value of 4.0, in which case the “A” column was previously shown to the left of the “A+” column. If the school has entered Average Point Threshold values for their marks, in which case the “A+” most likely has a higher Average Point Threshold value than the “A”, then the “A+” column will be correctly shown to the left of the “A” column.

**Group By** – You can choose to group and sort by Course or by Teacher. If Course is chosen, the data will be grouped and sorted by Course Code, and the sections within each course will be sorted by the Section Number. A separate group will display for each course, with each course grouping containing the following:

- A group header that shows the course code and name.
- A detail section with a row for each of the teacher and section combinations for that course. The sorting of the course sections within each course group will be by section number. If a course section has multiple teachers, they will be shown in a comma delimited list.
- A group footer that shows the marks subtotals across all the course section detail rows for the course.

If Teacher is chosen, the data will be grouped and sorted by Teacher Code, and the courses for each teacher will be sorted by the Course Code then Section Number. A separate group will display for each teacher, with each teacher grouping containing the following:

- A group header that shows the teacher name and code.
- A detail section with a row for each of the course and section combinations for that teacher. The sorting within each teacher group will be by course first, and then course section.
- A group footer that shows the marks subtotals across all the course and section detail rows for the teacher.

**Note:** In the detail section for each course or teacher group, the sorting was previously alphabetic for the course sections within a course group, so that a course has sections of 10 or above, they were incorrectly sorted ahead of sections 2, 3, etc. The sorting of course sections within each course or teacher group have been changed to be done numerically.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

931	ONU ALGEBRA/TRIGONOMETRY	2	Teacher1053	2 50%	1 25%	1 25%		4
		4	Teacher1053	5 50%	3 30%	2 20%		10
		5	Teacher1053	2 40%	1 20%	1 20%	1 20%	5
		Course Total:			9 47%	5 26%	4 21%	1 5%
932	ONU AMERICAN HISTORY	2	Teacher1072		1 50%	1 50%		2
		Course Total:				1 50%	1 50%	
933	ONU INTRO TO AMERICAN GOV'T	4	Teacher1072			1 100%		1

Page 18 of 20

Report: R301		HIGH SCHOOL															
Printed Tue, Jul 21, 2009, 2:31 PM		2008-2009															
		<b>Mark Analysis</b>															
Reporting Term: Final Grade		Mark Type: Final Mark															
		Marks															
Course	Course Name	Sec	Teacher	A+	A	A-	B+	B	B-	C+	C	C-	D+	D	F	P	Mark Count
		5	Teacher1072			1 100%											1
Course Total:					1 50%			1 50%									2
Final Grade - Final Mark Total:				4	552	25	8	271	6	5	156	4	1	48	27	14	1121
				0%	49%	2%	1%	24%	1%	0%	14%	0%	0%	4%	2%	1%	

## Report – Honor Roll (R303)

**Navigation: Home – SIS – Marks – Marks Reports – Honor Roll**

The Honor Roll Report will list students who have met the selected criterion for the selected Honor Roll. If Marks have changed since the last time this report was run, first Refresh GPA Sets as described in section 1O-4. Refresh GPA Sets.

## Honor Roll (R303)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Grade**

07 - 07	↔	
08 - 08	↔	
09 - 09	↔	
10 - 10	↔	

**GPA Set**

1st Qtr	↔	
1st Sem	↔	
2nd Qtr	↔	
2nd Sem	↔	

**Honor Roll**

3.5	↔	
All A	↔	

**Home School**

	↔	
--	---	--

**Student Status**

A - ACTIVE RES	↔	
D - DELETED	↔	
I - INACTIVE	↔	
N - NON-RES	↔	

**Ethnicity**

A - Asian	↔	
B - Black or African American	↔	
H - Hispanic	↔	
I - American Indian	↔	

**Membership Group**

11 - Intervention	↔	
12 - Post-secondary Enrollment Options Program	↔	
15 - 15	↔	
16 - 16	↔	

**Membership**

15 - Student received intervention provided during regular s	↔	
15 - Student received intervention provided in the summer	↔	
16 - Student placement by a district in a chartered non-pub	↔	
50 - Prev. reported as a dropout in reporting district gradua	↔	

**Special Education Services**

215001 - Adapted Physical Education Services	↔	
215002 - Aide Services	↔	
215003 - Attendant Services	↔	
215004 - Audiological Services	↔	

**Team**

	↔	
--	---	--

**Homeroom Date:** 9/13/2012

**Page Break on First Sort Item:**

**Newspaper format:**

**Include Student Middle Name (Report Only):**

**Reporting Term for Comments:**  Teacher Comments are shown on the report for the selected reporting term. If no Reporting Term is selected, then no comments will be shown.

**Group By:** GPA Set

\*GPA Set\*: the report will be grouped and sorted by GPA Set Name then Honor Roll Name, and the students within each honor roll will be sorted based on the selected Sorting Options below.  
\*Student\*: the report will be grouped by student, and the sorting based on the selected Sorting Options below. (Note: Newspaper Format is not available if Student is selected.)

The screenshot shows a web-based configuration form for a report. It is organized into several sections:

- Sorting Options:** A list on the left contains 'Grade (ASC)', 'Grade (DESC)', 'Gender (ASC)', and 'Gender (DESC)'. A 'Student Name (ASC)' option is shown in a separate box to the right. Double-headed arrows indicate that items can be moved between the list and the box.
- Output:** Radio buttons are selected for 'Report', 'Labels', and 'Both Report and Labels'.
- Label Type:** A dropdown menu is set to 'Avery Label 5160 - 1" X 2 5/8" 3-columns'.
- Address:** Radio buttons are selected for 'Use Student Address' and 'Use Parent Address'. There is a checkbox for 'Use custom address text' with an adjacent text input field.
- Include Copied On Correspondence:** Radio buttons are selected for 'Yes' and 'No'.
- Delivery Method:** A dropdown menu is set to 'Pickup', with a 'Set As Default' button next to it.
- Email Address:** A text input field contains 'amy@noacsc.org'.
- Report Format:** A dropdown menu is set to 'Adobe PDF'.
- Description:** A text input field is currently empty.
- Submit:** A button is located at the bottom left of the form.

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from dropdown menu if you wish to only include students associated with the membership for this run of the report. Check the "Public And Private" checkbox to see Memberships created by other users in your drop-down list. Selecting an Ad-Hoc Membership Group will limit the report to students associate with that membership group. All other criteria will be ignored.

**Grade** (optional) – If no Grades are selected, the report will use all Grades in creation of the report. You can also filter by selecting specific Grades for your report.

**GPA Set** (required) – At least one GPA Set must be selected for reporting filtering.

**Honor Roll** (optional) - If no Honor Roll is selected, the report will use all Honor Rolls in creation of the report. You can also filter by selecting specific Honor Rolls for your report.

**Home School** (optional) – If no Home schools are selected, the report will use all Home Schools in creation of the report. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Student Status** (optional) - If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Ethnicity** (optional) - If no Ethnicity is selected, the report will select all Ethnicities. You can also filter by selecting a specific Ethnicity for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will use all Membership Groups for creation of the report. You can also filter by selecting specific Membership Groups for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Team** (optional) – If no Teams are selected, the report will use all Teams in creation of the report. You can also filter by selecting specific Teams for your report.

**Homeroom Date** (required) – the appropriate date from the dropdown calendar. It will default to the current date.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Page Break on First Sort Item:** (optional) – Yes or No; If this check-box is checked, each separate value for the first item chosen on Sorting Options will cause a new page to be printed in the report. (For instance, a JVS printing this report sorted first on IRN Attending would check this box to have a separate page or pages for each Home School.)

**Newspaper format:** (optional) – Yes or No; If this check-box is checked, then no header or footer information will be shown on the report output, except for the GPA Set and Honor Roll names. Also, only the student name and grade will be shown for each student, in the list of students who have achieved each honor roll.

**Include Student Middle Name (Report Only)** – (optional) - Yes or No; if this check-box is checked, then the student's middle name will display on the report.

**Reporting Term for Comments:** (optional) – If a Reporting Term is chosen, then the Course Code, Course Name, Course Section, and Teacher Comment are shown for each comment that the student has received in the selected Reporting Term, if the selected Reporting Term is associated with the GPA for which the student has an honor roll. If a Reporting is not chosen, then no comments are shown on the report.

**Group By** – You can choose to group and sort by GPA Set or by Student. If GPA Set is chosen, the data will be grouped by GPA Set Name then Honor Roll Name, and the students within each honor roll will be sorted based on the selected Sorting Options.

If Student is chosen, the data will be grouped by Student, and then sorted based on the selected Sorting Options. Each student group will contain the following:

- A group header which contains all the student demographic information.
- A detail section which contains one row for each GPA in which the student qualifies for an honor roll.

***Note:** Newspaper Format is not available if Student is selected.*

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the dropdown list.

**Address** – Select the address to use for labels. If you check "Use custom address text", the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked "Copied on Correspondence."

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

ID	Student Name	GR	Stat	GN	Eth	Prog	Hmrm	Home School Name	HS Code	GPA
<b>GPA Set: 4th Qtr</b>		<b>Honor Roll: All A</b>								
12845	Student24095, BROOKE	09	A	F	W		IN07			4.000
12839	Student24101, KYLIE	09	A	F	W		IN05			4.000
12836	Student24105, JEREMY	09	A	M	W		IN05			4.000
12835	Student24106, KOREY	09	A	M	W		IN05			4.000
12830	Student24113, AMBER	09	A	F	W		IN03			4.000
12828	Student24115, SHELBY	09	A	F	W		IN03			4.000
12823	Student24121, WINSTON	09	A	M	W		IN03			4.000
12817	Student24129, ADAM	09	A	M	W		IN06			4.000
12815	Student24131, AMANDA	09	A	F	W		IN06			4.000
12812	Student24134, SHAELEY	09	A	F	W		IN02			4.000
12808	Student24137, JESSICA	09	A	F	W		IN04			4.000

ID	Student Name	GR	ST	GN	Eth	Prog	Hmrm	Home School Name	HS Code	GPA
<b>GPA Set: 4th Qtr GPA</b>		<b>Honor Roll: A/B HONOR ROLL</b>								
2563	Student48901, AUSTIN	09	A	M	W	**	229			3.636
4081	Student48289, TABITHA	09	A	F	W	**	227			3.478
	<b>Comments:</b>	<u>Course</u>	<u>Course Name</u>				<u>Sec</u>	<u>Comment</u>		
		0613	CP BIOLOGY				2	PLEASURE TO HAVE IN CLASS		
		0910	COMPUTER OFFICE PROGRAM 2				32	CONSCIENTIOUS AND DILIGENT STUDENT		
3760	Student48496, COLE	09	A	M	W	**	229			3.417
	<b>Comments:</b>	<u>Course</u>	<u>Course Name</u>				<u>Sec</u>	<u>Comment</u>		
		0613	CP BIOLOGY				2	CONSCIENTIOUS AND DILIGENT STUDENT		
3743	Student48506, ASHLIE	09	A	F	W	**	227			3.364
	<b>Comments:</b>	<u>Course</u>	<u>Course Name</u>				<u>Sec</u>	<u>Comment</u>		
		0909	COMPUTER OFFICE PROGRAM 1				12	SHOWS DESIRABLE ATTITUDE		

**With Reporting Term Comments**

<b>GPA Set: 4th Qtr GPA</b>	
<b>Honor Roll: A/B HONOR ROLL</b>	
Student48901, AUSTIN	09
Student48289, TABITHA	09
Student48496, COLE	09
Student48506, ASHLIE	09

**Newspaper Format**

## Report – Student with Specified Marks by Student (R302A)

**Navigation: Home – SIS – Marks – Marks Reports – Specified Marks by Student (R302A)**

The Student with Specified Marks by Student lists students with the selected marks and the courses they received those marks in. This report is very useful in generating lists of students with incomplete grades, missing marks or F's. The report will group by student. Each student group will contain the following:

- A group header which contains all the student demographic info.
- A detail section which contains one row for each mark that qualifies to appear on the report for the student.

This condenses the report and shows one line per mark per student. All fields in the group header and detail sections wrap to a second line if the value is too big to fit in the allotted width for the field.

If using automatic marks, the dates which trigger automatic marks to be calculated are the following:

- The automatic mark calculation date for the latest reporting term associated with the marking pattern rules for the members of the automatic mark.
- The stop date for the latest reporting term associated with the marking pattern rules for the members of the automatic mark.
- The course term stop date for the course section.

Home » SIS » Marks » Marks Reports » Specified Marks By Student(R302A)

## Students with Specified Marks By Student(R302A)

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

Selection Criteria   Selection Summary   Load Settings

**Marks to show:**

Only Completed Marks  
 Completed Marks And Missing Marks  
 Only Missing Marks

**Marks or Mark Groups:**  Marks  Mark Groups

**Reporting Term**

Qtr1 - Quarter 1  
1Int - 1st Interim  
Qtr2 - Quarter 2  
2Int - 2nd Interim

**Mark Type**

Avg  
Exam  
Final  
Interim

**Marks**

+ - +  
A - A  
B - B  
C - C

**Course Term**

A-Y

**Membership Group**

12 - Post-secondary Enrollment Options Program  
20 - Specialized Instructions  
21 - Placement Options  
23 - Title I

**Membership**

15 - Student received intervention provided during regular :  
15 - Student received intervention provided in the summer  
16 - Student placement by a district in a chartered non-pub  
50 - Prev. reported as a dropout in reporting district gradu

**Team**

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Teacher**

MS Teacher1096  
POST Teacher1103  
DENISE Teacher1104  
JEAN Teacher1109

**Home School**

**Only include courses marked 'Include in GPA':**

**Include Dropped Courses:**

**Homeroom Date:** 12/22/2009

**Improve Performance by Separating Report Processing by Grade:**

**Grade**

07 - 07  
08 - 08  
GR - GR  
23 - 23

09 - 09  
10 - 10  
11 - 11  
12 - 12

Choose this option for shorter execution time and lower memory usage when running the report for multiple grade levels. A separate interim report will be generated for each selected grade, and then the interim reports for all selected grades will be combined into one final report. When choosing this option, 'Grade' will be the primary student sort order for the final report, in order of the grades selected in the 'Grade' dual select below.  
Note: This option only be implemented if 'Adobe PDF' is chosen for the 'Report Format' option below.

The 'Grade' dual select is only Required if the 'Improve Performance by Separating Report Processing by Grade' option is chosen above.

**Student Sorting Options**

Grade (ASC) Grade (DESC) Gender (ASC) Gender (DESC)	⇐ ⇨ ⇐ ⇨ ⇐ ⇨	Student Name (ASC)	↑ ↓ ↑ ↓
--	-------------------	--------------------	------------

If the 'Improve Performance by Separating Report Processing by Grade' option is chosen above, then the sort order of grades is determined by the order of the grades in the 'Grade' dual select above. In that case the 'Grade' option does not have to be selected in the 'Student Sorting Options' dual select, since the grade will automatically be the first sort criteria.

**Marks Sorting Options**

Course Code (ASC) Course Code (DESC) Teacher Name (ASC) Teacher Name (DESC)	⇐ ⇨ ⇐ ⇨ ⇐ ⇨	[Empty]	↑ ↓ ↑ ↓
--	-------------------	---------	------------

---

**Output:**       Report    Labels    Both Report and Labels

**Label Type:**      Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**       Use Student Address    Use Parent Address

Use custom address text  

**Include Copied On Correspondence:**    Yes    No

---

**Delivery Method:**      Pickup     

**Email Address:**      amy@noacsc.org

**Report Format:**      Adobe PDF

---

**Description:**     

---

**Marks to show:**

- **All Completed Marks** – Shows only completed marks as selected.
- **All Completed Marks – Include Missing Marks** – Shows only completed marks as selected and also show student missing marks.
- **Only Missing Marks** – Shows only student missing marks.

**Marks or Mark Group** (required) – Specify if Marks or Mark Groups will be used in the creation of the report.

**Reporting Term** (optional) – If no Reporting Terms are selected, the report will use all Reporting Terms for creation of the report. You can also filter by selecting specific Reporting Terms for your report.

**Mark Type** (optional) – If no Mark Types are selected, the report will select all Mark Types. You can also filter by selecting specific Mark Types for your report.

**Marks** (optional) – You can filter by selecting specific Marks for your report. If “Include Missing Marks” is not checked, and you do not select any Marks, the report will select all Marks. If “Include Missing Marks” is checked, only the Marks you select will display, and if you do not select any Marks, the report will not include any Marks.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will use all Membership Groups for creation of the report. You can also filter by selecting specific Membership Groups for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Team** (optional) – If no Teams are selected, the report will use all Teams in creation of the report. You can also filter by selecting specific Teams for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Teacher** (optional) – If no Teachers are selected, the report will select all Teachers. You can also filter by selecting specific Teachers for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report.

This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Only include courses marked 'Include in GPA'** (optional) – If checked, will only include courses that are checked as “Include in GPA” on the on the Courses – Marks tab.

**Include Dropped Courses** (optional) – If checked, will include dropped courses.

**Homeroom Date** (required) – Select the appropriate date from the dropdown calendar.

**Improve Performance by Separating Report Processing by Grade (optional)** – Check this option for shorter execution time and lower memory usage when running the report for multiple grade levels. A separate interim report will be generated for each selected grade, and then the interim reports for all selected grades will be combined into one final report. When choosing this option, “Grade” will be the first sort order for the final report, in order of the grades selected in the “Grade” dual select box below.

**Grade** (optional) – If no Grades are selected, the report will use all Grades in creation of the report. You can also filter by selecting specific Grades for your report. The “Grade” dual select is only required if the “Improve Performance by Separating Processing by Grade” option is chosen above.

**Student Sorting Options** (optional) – Choose one or more sort options for your report. These sort options control the student sort within the report.

**Marks Sorting Options** (optional) – Choose one or more sort options for your report. The marks records within a student group will be sorted by the user-selected Marks Sorting Option.

**Output** – Select Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page:

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Sizing Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the dropdown list.

**Address** – Select the address to use for labels. If you check “Use custom address text,” the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked “Copied on Correspondence”

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Students With Specified Marks**

ID	Student Name	ST	GR	GN	Prog	Home School	Disab	Hmrm	Telephone	Team
12827	Student24116, BROOKE	A	09	F			**	IN03	419-523-4398	
	<b>Course</b>	<b>Sec</b>	<b>Course Name</b>	<b>Course Term</b>	<b>Teacher Name</b>	<b>Reporting Term</b>	<b>Mark Type</b>	<b>Mark</b>		
	205	1	WORLD STUDIES	All Year	Teacher1110, TYSON	Final Grade	Fin	B		
	180	2	PEC SCIENCE	All Year	Teacher1080, BRIAN	Final Grade	Fin	B		
	170	3	FRESHMAN CHOIR	All Year	Teacher1044, MR. T.	Final Grade	Fin	A		
	140	9	ALGEBRA I	All Year	Teacher1104, LINDSAY	Final Grade	Fin	A-		
	120	7	ENGLISH I	All Year	Teacher1038, DENISE	Final Grade	Fin	B		
	078	82	HEALTH	2nd Semester	Teacher1176, VICKI	Final Grade	Fin	B		
	068	4	SPANISH I	All Year	Teacher1065, AMANDA	Final Grade	Fin	B		
12826	Student24117, VANESSA	A	09	F			**	IN03	555-555-5555	
	<b>Course</b>	<b>Sec</b>	<b>Course Name</b>	<b>Course Term</b>	<b>Teacher Name</b>	<b>Reporting Term</b>	<b>Mark Type</b>	<b>Mark</b>		
	205	1	WORLD STUDIES	All Year	Teacher1110, TYSON	Final Grade	Fin	B		
	180	7	PEC SCIENCE	All Year	Teacher1080, BRIAN	Final Grade	Fin	B		
	170	3	FRESHMAN CHOIR	All Year	Teacher1044, MR. T.	Final Grade	Fin	A		
	131	8	MATH I	All Year	Teacher1104, LINDSAY	Final Grade	Fin	A-		
	120	6	ENGLISH I	All Year	Teacher1038, DENISE	Final Grade	Fin	C		
	078	21	HEALTH	1st Semester	Teacher1176, VICKI	Final Grade	Fin	B-		
	068	4	SPANISH I	All Year	Teacher1065, AMANDA	Final Grade	Fin	B		

**Students With Specified Marks**

ID	Student Name	ST	GR	GN	Prog	Home School	Disab	Hmrm	Telephone	Team
<b>Marks Summary By Term</b>										
Final Grade										
A- (4.000000)	A+ (4.000000)	A (4.000000)	B- (3.000000)	B+ (3.000000)						
171	17	1727	88	154						
B (3.000000)	C- (2.000000)	C+ (2.000000)	C (2.000000)	D+ (1.000000)						
1085	40	64	653	28						
D (1.000000)	WF (0)	W (0)	P (0)	F (0)						
217	1	1	361	85						
486										

**Report – Student with Specified Marks By Teacher (R302B)**

**Navigation: Home – SIS – Marks – Marks Reports – Students with Specified Marks By Teacher (R302B)**

The Student with Specified Marks By Teacher lists students with the selected marks and the courses they received those marks in. This report is very useful in generating lists of students with incomplete grades, missing marks or F's. The report will group by teacher, then course, then student.

Each teacher, course, student group will contain the following:

- A group header which contains all the student demographic info.
- A detail section which contains one row for each mark that qualifies to appear on the report for the student.

This condenses the report and shows one line per mark per student. All fields in the group header and detail sections wrap to a second line if the value is too big to fit in the allotted width for the field.

If using automatic marks, the dates which trigger automatic marks to be calculated are the following:

- The automatic mark calculation date for the latest reporting term associated with the marking pattern rules for the members of the automatic mark.
- The stop date for the latest reporting term associated with the marking pattern rules for the members of the automatic mark.
- The course term stop date for the course section.

The screenshot displays the configuration interface for the 'Students with Specified Marks By Teacher(R302B)' report. The breadcrumb trail at the top reads: Home » SIS » Marks » Marks Reports » Specified Marks By Teacher(R302B). Below the title, a note states: 'From this screen, you can select parameters to generate a report.' The interface is organized into several sections:

- Selection Criteria:** Includes tabs for 'Selection Criteria', 'Selection Summary', and 'Load Settings'.
- Marks to show:** Radio buttons for 'Only Completed Marks' (selected), 'Completed Marks And Missing Marks', and 'Only Missing Marks'.
- Marks or Mark Groups:** Radio buttons for 'Marks' (selected) and 'Mark Groups'.
- Reporting Term:** A list box containing 'Qtr1 - Quarter 1', '1Int - 1st Interim', 'Qtr2 - Quarter 2', and '2Int - 2nd Interim'.
- Mark Type:** A list box containing 'Avg', 'Exam', 'Final', and 'Interim'.
- Marks:** A list box containing 'A - A', 'B - B', 'BLK - BLK', and 'C - C'.
- Course Term:** A list box containing '1st 9 wks', 'A-Y', '1st Semester', and '234'.
- Membership Group:** A list box containing '12 - Post-secondary Enrollment Options Program', '13 - Other Regular Programs', '20 - Specialized Instructions', and '21 - Placement Options'.

Each list box has up/down arrows and a double-headed arrow icon to its right, indicating selection and movement options.

**Membership**

15 - Student received intervention provided during regular scho  
 15 - Student received intervention provided in the summer  
 16 - Student placement by a district in a chartered non-pub or  
 50 - Prev. reported as a dropout in reporting district graduation

**Team**

**Student Status**

A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 N - NON-RES

**Teacher**

MRS. E. Teacher1567  
 MRS. L. Teacher1568  
 MRS. R. Teacher1575  
 MRS. L. Teacher1579

**Home School**

000067 - Ada High School (Sch)

**Only include courses marked 'Include in GPA':**

**Include Dropped Courses:**

**Homeroom Date:** 3/25/2010

---

**Grade**

07 - 07  
 08 - 08  
 09 - 09  
 10 - 10

**Teacher Sorting Options**

Course Code (ASC)  
 Course Code (DESC)  
 Student Name (ASC)  
 Student Name (DESC)

**Marks Sorting Options**

Reporting Term (ASC)  
 Reporting Term (DESC)  
 Mark (ASC)  
 Mark (DESC)

---

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address  
 Use custom address text

**Include Copied On Correspondence:**  Yes  No

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

**Marks to show:**

- **All Completed Marks** – Shows only completed marks as selected.
- **All Completed Marks – Include Missing Marks** – Shows completed marks as selected and also show student missing marks.
- **Only Missing Marks** – Will only show student missing marks.

**Marks or Mark Group** (required) – Specify if Marks or Mark Groups will be used in the creation of the report.

**Reporting Term** (optional) – If no Reporting Terms are selected, the report will use all Reporting Terms for creation of the report. You can also filter by selecting specific Reporting Terms for your report.

**Mark Type** (optional) – If no Mark Types are selected, the report will select all Mark Types. You can also filter by selecting specific Mark Types for your report.

**Marks** (optional) – You can filter by selecting specific Marks for your report. If “Include Missing Marks” is not checked, and you do not select any Marks, the report will select all Marks. If “Include Missing Marks” is checked, only the Marks you select will display, and if you do not select any Marks, the report will not include any Marks.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will use all Membership Groups for creation of the report. You can also filter by selecting specific Membership Groups for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Team** (optional) – If no Teams are selected, the report will use all Teams in creation of the report. You can also filter by selecting specific Teams for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will select all Student Statuses. You can also filter by selecting specific Student Statuses for your report.

**Teacher** (optional) – If no Teachers are selected, the report will select all Teachers. You can also filter by selecting specific Teachers for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report.

This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Only include courses marked ‘Include in GPA’** (optional) – if checked, will only include courses that are checked as “Include in GPA” on the on the Courses – Marks tab.

**Include Dropped Courses** (optional) – if checked, will include dropped courses.

**Homeroom Date** (required) – Select the appropriate date from the dropdown calendar.

**Grade** (optional) – If no Grades are selected, the report will use all Grades in creation of the report. You can also filter by selecting specific Grades for your report.

**Teacher Sorting Options** (optional) – Choose one or more sort options for your report. These sort options control the teacher sort within the report.

**Marks Sorting Options** (optional) – Choose one or more sort options for your report. The marks records within a teacher, course or student group will be sorted by the user-selected Marks Sorting Option.

**Output** – Select Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the dropdown list.

**Address** – Select the address to use for labels. If you check “Use custom address text,” the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked “Copied on Correspondence.”

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Students With Specified Marks**

**Teacher Name**

Teacher1125, DENISE

Course	Sec	Course Name					Course Term					
120	1	ENGLISH I					All Year					
ID	Student Name	ST	GR	GN	Prog	Home School	Disab	Hmrm	Telephone	Team		
████	████████████████████	A	10	M			**	IN08	419-523-9125			
Reporting Term		Mark Type	Mark									
Quarter 1		Qtr	D									
Course	Sec	Course Name					Course Term					
230	9	YEARBOOK					All Year					
ID	Student Name	ST	GR	GN	Prog	Home School	Disab	Hmrm	Telephone	Team		
████	████████████████████	A	10	F			**	IN13	555-555-5555			
Reporting Term		Mark Type	Mark									
Quarter 1		Qtr	A									

**Students With Specified Marks**

**Marks Summary By Term**

Quarter 1

A- (4.000000)	A+ (4.000000)	A (4.000000)	B- (3.000000)	B+ (3.000000)
55	12	428	25	50
B (3.000000)	C- (2.000000)	C+ (2.000000)	C (2.000000)	D- (1.000000)
214	13	17	92	1
D+ (1.000000)	D (1.000000)	P (0)	I (0)	F (0)
9	27	1	1	5

**Report – Student Composite (R112)**

**Navigation: Home – SIS – Marks – Marks Reports – Student Composite (R112)**

The Student Composite report generates a condensed version of the Report Card Formatter report, without comments.

## Student Composite (R112)

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

Selection Criteria   Selection Summary   Load Settings

Homeroom Date: 9/14/2012

Include Term	Reporting Term	Reporting Term	GPA Set
<input type="checkbox"/>	GP1 - GP1	GP1	<input type="text"/>
<input type="checkbox"/>	INT1 - 1st 9 week interim	1st 9 week interim	<input type="text"/>
<input type="checkbox"/>	GP2 - GP2	GP2	<input type="text"/>
<input type="checkbox"/>	INT2 - 2nd 9 week interim	2nd 9 week interim	<input type="text"/>
<input type="checkbox"/>	EX1 - EX1	EX1	<input type="text"/>
<input type="checkbox"/>	AV1 - AV1	AV1	<input type="text"/>
<input type="checkbox"/>	GP3 - GP3	GP3	<input type="text"/>
<input type="checkbox"/>	INT3 - 3rd 9 week interim	3rd 9 week interim	<input type="text"/>
<input type="checkbox"/>	GP4 - GP4	GP4	<input type="text"/>
<input type="checkbox"/>	INT4 - 4th 9 week interim	4th 9 week interim	<input type="text"/>
<input type="checkbox"/>	EX2 - EX2	EX2	<input type="text"/>
<input type="checkbox"/>	AV2 - AV2	AV2	<input type="text"/>
<input type="checkbox"/>	FIN - FIN	FIN	<input type="text"/>

Refresh GPA Set Results:  Yes  No

Print GPA's:  Yes  No

### Mark Type

Avg  
 Exam  
 Final  
 Grading Period

### Grade

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

### Student Status

A - ACTIVE RES  
 ACCA - ASHLAND ACADEMY  
 AE - ACTIVE ELSEWHERE  
 D - DELETED

### Membership

15 - Student received intervention provided during  
 15 - Student received intervention provided in th  
 16 - Student placement by a district in a charter  
 50 - Prev. reported as a dropout in reporting dis

### Special Education Services

215001 - Adapted Physical Education Services  
 215002 - Aide Services  
 215003 - Attendant Services  
 215004 - Audiological Services

### Membership Group

11 - Intervention  
 12 - Post-secondary Enrollment Options Program  
 15 - 15  
 16 - 16

### Homeroom

2-108 - MAYNARD (Full Year Term)  
 2-124A - WELCH (Full Year Term)  
 2-124B - BRAY (Full Year Term)  
 2-125 - GILL (Full Year Term)

**Program**

\*\* - NOT APPLICABLE  
 01 - Multiple Disabilities  
 02 - Deaf-Blindness  
 03 - Hearing Impairments

**Home School**

**Print Days Absent:**  Yes  No

**Absence Types For Full Days Absent**

A - EXCUSED  
 B - TRUANT  
 C - NOT ABSENT  
 D - DISC CTR

**Print Times Late:**  Yes  No

**Absence Types For Lates\Tardies**

A - EXCUSED  
 B - TRUANT  
 C - NOT ABSENT  
 D - DISC CTR

**Omit Unlisted Phone Numbers:**

**Sorting Options**

Grade (ASC) Student Number (ASC) Student Name (DESC)  
 Grade (DESC) Student Name (ASC)

**Delivery Method:** Pickup

**Email Address:** EmhoffH@software-answers.com

**Report Format:** Adobe PDF

**Description:**

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom. Defaults to today’s date.

**Include Term** (optional) – Yes or No; Check appropriate terms that you wish to be included on this report.

**Reporting Term** – Reporting Term Name displayed.

**GPA Set** (optional) – Select the GPA set that you wish to use with each applicable reporting term.

**Refresh GPA Set Results** (optional) – Yes or No; Check appropriate radio button option.

**Print GPA’s** (required) – Yes or No; Check appropriate radio button option.

**Mark Type** (optional) – If no Mark Types are selected, the report will select all Mark Types to be used in the report creation. You can also filter by selecting specific Mark Types for your report.

**Grade** (optional) – If no Grades are selected, the report will use all Grades in creation of the report. You can also filter by selecting specific Grades for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will use all Student Statuses in creation of the report. You can also filter by selecting specific Student Statuses for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will use all Membership Groups for creation of the report. You can also filter by selecting specific Membership Groups for your report.

**Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Print Days Absent** (optional) – Yes or No; Check appropriate radio button option.

**Absence Types for Full Days Absent** (optional) – Select appropriate Absence Types for the Full/Half Day absences to be printed on the report. If no Absence Types are selected, the report will use all Absence Types.

**Print Times Late** (optional) – Yes or No; Check appropriate radio button option.

**Absence Types for Lates/Tardies** (optional) – Select the appropriate Absence Type to be used for Lates/Tardies. If no Absence Types are selected, the report will use all Absence Types.

**Omit Unlisted Phone Numbers** (optional) – Yes or No; Check if you wish to omit unlisted phone numbers on this report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.



Class List Formatter can be used to create a variety of reports. One of those reports could be a grade verification list to pass out to teachers so that they can verify student marks before the grade cards are printed.

Home » SIS » Marks » Marks Reports » Class List Formatter (R703)

### Class List Formatter (R703)

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

Selection Criteria   Selection Summary   Load Settings

Schedule: Default Schedule ▾

Schedule Result: Default Schedule Result ▾ ⚡

Report Layout: Class List Format 1 ▾

**Course Term**

1st Semester All Year 2nd Semester	↔ ↔	
--	-----	--

**Reporting Term**

Quarter 1 1st Quarter Interim Quarter 2 2nd Quarter Interim	↔ ↔	
--	-----	--

**Mark Type**

Avg Exam Final Mark Interim Mark	↔ ↔	
---	-----	--

**Staff**

MS Teacher1117 POST Teacher1124 DENISE Teacher1125 JEAN Teacher1130	↔ ↔	
--	-----	--

**Course**

011 - ART I 012 - PAINTING 013 - DRAWING 016 - ART II	↔ ↔	
--	-----	--

**Course Section**

011 - ART I (Section: 1) 011 - ART I (Section: 3) 011 - ART I (Section: 4) 012 - PAINTING (Section: 21)	↔ ↔	
--	-----	--

**Period**

1  
2  
3  
4

**Course Types**

C - Class  
L - Lunch  
Z - Study hall  
ESC - ESC course

**Special Education Services**

215001 - Adapted Physical Education Services  
215002 - Aide Services  
215003 - Attendant Services  
215004 - Audiological Services

**Program**

\*\* - NOT APPLICABLE  
01 - Multiple Disabilities  
02 - Deaf-Blindness  
03 - Hearing Impairments

**Homeroom**

5A - BRANCH (Full Year Term)  
5B - BRANCH (Full Year Term)  
6A - BRANCH (Full Year Term)  
6B - BRANCH (Full Year Term)

**Home School**

052860 - Central Christian High School (Sch)

**Homeroom Date:** 2/5/2014

**Suppress Withdrawals:**  Yes  No

**Suppress Drops:**  Yes  No

**Suppress Disability Condition:**  Yes  No

**Suppress Program:**  Yes  No

**Print Student with future assignment for Course from a Current Course Term:**  Yes  No

**Common Text For Class List:**

**Student Sorting Options**

Student Number (DESC)  
Student Name (DESC)  
Grade (ASC)  
Grade (DESC)

**Sorting Options**

Staff Code (DESC)  
Teacher Name (ASC)  
Teacher Name (DESC)  
Course Code (ASC)

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address

Use custom address text

**Include Copied On Correspondence:**  Yes  No

**Delivery Method:** Pickup

**Email Address:** amy@noacsc.org

**Description:**

**Schedule** (optional) – Select the Schedule that you wish to run this class list with. It is important to pick the correct Schedule/Schedule Result combination when running the batch scheduler. This field defaults to the Default Schedule, and is not selectable once a final schedule result has been selected.

**Schedule Result** (required) – Select the Schedule Result that you wish to run this class with. It is important to pick the correct Schedule/Schedule Result combination when running the batch scheduler. This field defaults to the Default Schedule, and is not selectable once a final schedule result has been selected.

**Report Layout** (required) – Select the appropriate format from the dropdown menu. All formats for this report print in portrait orientation.

Formats are as follows:

- Format 1 – Course Mark and Comment Verification Sheet; Landscape
  - Student #, Student Name, Homeroom, Program, Home School, Marks, Comments
- Format 2 – Class Lists (no Artificial Courses); Portrait
  - Student #, Student Name, Grade, Disability Condition, Gender, Homeroom, Program, Home School
- Format 3 – Attendance Collection Sheets; Landscape
  - Student #, Student Name, Homeroom, Program, Home School
- Format 4 – Marks Collection Sheet for Manual Entry of Grades; Landscape
  - Student #, Student Name, Homeroom, Program, Home School, Disability Condition, Marks, Comments
- Format 6 – Class Lists for Courses and Artificial Courses; Portrait
  - Student #, Student Name, Grade, Gender, Homeroom, Program, Home School, Counselor, Locker
- Format 8 – Class Lists for only Artificial Courses; Portrait
  - Student #, Student Name, Grade, Gender, Homeroom, Program, Home School
- Format 10 – Class List; Landscape
  - Student #, Student Name, Address, Phone #, Primary Contact, Birth Date, Gender, Disability Condition, Homeroom, Counselor, Locker
- Format 11 – Lists of Students in each class and provides slots for Excused Absences, Unexcused Absences, And Total Days Present for each student; Portrait
- Format 12 – Shows student totals rather than individual student information; Portrait
- Format 13 – Based on Format 10, but has Counselor and Locker removed and Home School added.

**Course Term** – Select the appropriate Course Term from the dropdown menu.

**Reporting Term** – Select appropriate Reporting Term from dropdown menu. Once reporting term has been selected screen refreshes and only valid Course Section and Course information for the selected Reporting Term will be displayed in each of those list boxes.

**Mark Type** – If no Mark Types are selected, the report will use all Mark Types in creation of the report. You can also filter by selecting specific Mark Types for your report.

**Staff** – If no Staff Members are selected, the report will use all Staff in creation of the report. You can also filter by selecting specific Staff for your report.

**Course** – If no Courses are selected, the report will use all Courses in creation of the report. You can also filter by selecting specific Courses for your report.

**Course Section** – If no specific Course Sections are selected, the report will use all Course Sections in creation of the report. You can also filter by selecting specific Course Sections for your report.

**Period** – If no Periods are selected, the report will use all Periods in creation of the report. You can also filter by selecting specific Periods for your report.

**Course Types** – Select Course Types to be used in the creation of the report. If none are selected, all will be used, if applicable in the Report Layout.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context.*

**Program** - Select Programs to be used in the creation of the report. If none are selected, all will be used, if applicable in the Report Layout.

**Homeroom** – Select Homerooms to be used in the creation of the report. If none are selected, all will be used, if applicable in the Report Layout.

**Home School** - Select Homerooms to be used in the creation of the report. If none are selected, all will be used, if applicable in the Report Layout. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Homeroom Date** – Select the appropriate date from the dropdown calendar.

**Suppress Withdrawals** – Select this option to leave out student withdrawals. Please note that course section assignments that were dropped on a future date will show on the R703, even if the Suppress Withdrawals option is set to “Yes”.

**Suppress Drops** – Select this option to choose whether or not to exclude students who have dropped a class, even if the drop date has not passed.

**Suppress Disability Condition** – Select this option to choose whether or not to suppress the display of student Disability Condition.

**Suppress Program** - Select this option to choose whether or not to suppress the display of student Program. This option only appears when the Report Layout selected is 1, 2, 3, 4, 6 or 8 which are the formats on which the Program is displayed.

**Print Student with Future Assignment for Course from a Current Course Term** – Select this option to choose whether or not to show future assignments in a current course term. Students with assignments in future course terms will always be shown if the future course term is selected in the Course Terms dual select.

**Common Text for Class List** – Type in any text that can be included for all students on the list.

**Student Sorting Options** (optional) – Choose one or more sort options for your report. These sort options control the student sort within each Class List.

**Sorting Options** (optional) – Choose one or more sort options for your report. These sort options control the Class List sort.

**Output** – Select from the following options: Report, Labels or Both.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – Select the type of labels you wish to print if output selected was labels.

**Address** - Select the student or parent address format.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

TEACHER		COURSE NAME		COURSE	SECTION	COURSE TERM		MEETING TIME DESCRIPTION	
AUSTIN, SHARRI		LANGUAGE ARTS		052	2	All Year		9 (108)	

STUDENT NUMBER	STUDENT NAME	HOMEROOM	PROGRAM	HOME SCHOOL	GF QTR	GF QTR	LEX Exa	AVG	GF QTR	GF QTR	LEX Exa	AVG	COMMENTS
7001	CONTRARY, JASON WILLIAM				C	D	A	A	D	D	A	B	Good general knowledge, Works well in groups
7003	RING, NICOLE SUZANNE				C	D	A	B	D	D	A	B	Good general knowledge, Works well in groups
7005	WILLIAMSON, RYAN SETH				C	D	A	B	D	D	A	B	Good general knowledge, Works well in groups

### Report Layout – Class List Format 1 – Course Mark and Comment Verification Sheet

TEACHER		COURSE NAME		COURSE	SECTION	COURSE TERM		MEETING TIME DESCRIPTION	
AUSTIN, SHARRI		LANGUAGE ARTS		052	2	All Year		9 (108)	

STUDENT NUMBER	STUDENT NAME	GRADE	DISABILITY CONDITION	GENDER	HOMEROOM	PROGRAM	HOME SCHOOL
7001	CONTRARY, JASON WILLIAM	09		M			
7003	RING, NICOLE SUZANNE	09		F			
7005	WILLIAMSON, RYAN SETH	09		M			

TOTAL MALES: 2  
 TOTAL FEMALES: 1  
 TOTAL STUDENTS: 3

### Report Layout – Class List Format 2 – Class Lists (no Artificial Courses)

TEACHER		COURSE NAME		COURSE	SECTION	COURSE TERM		MEETING TIME DESCRIPTION	
BERRY, DONALD		PHYSICS		431	3	All Year		- See Schedule -	

STUDENT NUMBER	STUDENT NAME	HR	PROGRAM	HOME SCHOOL	WEEK 1					WEEK 2					
					MON	TUE	WED	THU	FRI	MON	TUE	WED	THU	FRI	
4001	EYE, MAGNUM P.														
4002	FONT, ELLA JANE														
4003	JOHNSON, GEORGE EVAN		Specific learning disable												
4004	POTTS, JORDAN DANIEL														
4005	WELLS, JOBETH														

### Report Layout – Class List Format 3 – Attendance Collection Sheets

TEACHER		COURSE NAME		COURSE	SECTION	COURSE TERM		MEETING TIME DESCRIPTION	
BERRY, DONALD		PHYSICS		431	3	All Year		- See Schedule -	

STUDENT NUMBER	STUDENT NAME	HR	PROGRAM	HOME SCHOOL	DISABILITY CONDITION	GF QTR	GF QTR	LEX Exa	AVG	GF QTR	GF QTR	LEX Exa	AVG	COMMENTS
4001	EYE, MAGNUM P.	A109				B	B	F	D	A	A	A	F	Good general knowledge
4002	FONT, ELLA JANE	A109				B	B	A	D	A	A	A	F	Good general knowledge
4003	JOHNSON, GEORGE EVAN	A109	Specific learning disable			B	B	A	D	A	A	A	F	Good general knowledge
4004	POTTS, JORDAN DANIEL	A109				B	B	A	D	B	A	A	F	Good general knowledge
4005	WELLS, JOBETH	A109				B	B	A	D	B	A	A	F	Good general knowledge

### Report Layout – Class List Format 4 – Marks Collection Sheet for Manual Entry of Grades

TEACHER		COURSE NAME	COURSE	SECTION	COURSE TERM	MEETING TIME DESCRIPTION		
BERRY, DONALD		FRENCH III	382	1	All Year	3,3A (281)		

STUDENT NUMBER	STUDENT NAME	GRADE	GENDER	HOMEROOM	PROGRAM	HOME SCHOOL	COUNSELOR	LOCKER
5001	CONTRARY, MARY M.	11	F	A107				
5002	PERRY, MICHAEL JAY	11	M	A107				
5003	POTTS, IAN MICHAEL	11	M	A107				
5004	SPRAT, JACK JOSEPH	11	M	A107				020
5005	WELLS, JONA RENEE	11	F	A107				

TOTAL MALES: 3  
 TOTAL FEMALES: 2  
 TOTAL STUDENTS: 5

### Report Layout – Class List Format 6 – Class Lists for Courses and Artificial Courses

TEACHER		COURSE NAME	COURSE	SECTION	COURSE TERM	MEETING TIME DESCRIPTION		
BERRY, DONALD		PHYSICS	431	3	All Year	- See Schedule -		

STUDENT NUMBER	STUDENT NAME	GRADE	GENDER	HOMEROOM	PROGRAM	HOME SCHOOL
4001	EYE, MAGNUM P.	12	M	A109		
4002	FONT, ELLA JANE	12	F	A109		
4003	JOHNSON, GEORGE EVAN	12	M	A109	Specific learning disable	
4004	POTTS, JORDAN DANIEL	12	M	A109		
4005	WELLS, JOBETH	12	F	A109		

TOTAL MALES: 3  
 TOTAL FEMALES: 2  
 TOTAL STUDENTS: 5

### Report Layout – Class List Format 8 – Class Lists for only Artificial Courses

TEACHER		COURSE NAME	COURSE	SECTION	COURSE TERM	MEETING TIME DESCRIPTION				
AUSTIN, SHARRI		LANGUAGE ARTS	052	2	All Year	9 (108)				

STUDENT NUMBER	STUDENT NAME	ADDRESS	PHONE NUMBER	PRIMARY CONTACT	BIRTH DATE	GENDER	DISABILITY CONDITION	HOMEROOM	COUNSELOR	LOCKER
7001	CONTRARY, JASON	90 ELM STREET , LIMA, OH 45801	740 493-5555	MARION CONTRARY	02/14/1990	M		A103		
7003	RING, NICOLE SUZANNE	9065 BLISS RD , LIMA, OH 45801		NICHOLAS RING	05/11/1989	F		A103		
7005	WILLIAMSON, RYAN	881 THAYER ROAD , LIMA, OH 45801		JOHN WILLIAMSON	10/15/1989	M		A103		

### Report Layout – Class List Format 10 – Class List

REPORT: R703 FORMAT-11 2004-2005	DASL HIGH SCHOOL CLASS LIST	Run Date: 4:44 PM 8/19/2008			
TEACHER	COURSE NAME	COURSE	SECTION	COURSE TERM	MEETING TIME DESCRIPTION
AUSTIN, SHARRI	LANGUAGE ARTS	052	2	All Year	9 (108)
STUDENT NUMBER	STUDENT NAME	EXCUSED ABSENCES	UNEXCUSED ABSENCES	TOTAL DAYS PRESENT	
7001	CONTRARY, JASON WILLIAM				
7003	RING, NICOLE SUZANNE				
7005	WILLIAMSON, RYAN SETH				

**Class List Format 11 – Lists of Students in each class and provides slots for Excused Absences, Unexcused Absences And Total Days Present for each student**

REPORT: R703 FORMAT-06 2004-2005	DASL HIGH SCHOOL CLASS LIST	Run Date: 4:46 PM 8/19/2008			
TEACHER	COURSE NAME	COURSE	SECTION	COURSE TERM	MEETING TIME DESCRIPTION
BERRY, DONALD	ART 10	1716	1	All Year	Mon, Tue, Wed, Thur: 9 (MSS)
					TOTAL MALES: 2
					TOTAL FEMALES: 3
					TOTAL STUDENTS: 5

**Class List Format 12 – Shows student totals rather than individual student information**

REPORT: R703 FORMAT-13 2009-2010	ADA HIGH SCHOOL CLASS LIST	Run Date: 10:16 AM 3/25/2010							
TEACHER	COURSE NAME	COURSE	SECTION	COURSE TERM	MEETING TIME DESCRIPTION				
Teacher1715, MR. D.	LW-MATH	LWM	2	A-Y	2 (223)				
STUDENT NUMBER	STUDENT NAME	ADDRESS	PHONE NUMBER	PRIMARY CONTACT	BIRTH DATE	GEN	DISABILITY CONDITION	HOMEROOM	HOME SCHOOL
4917	Student76902, SCOTT		555 555-5555	SCOTT Student76902	07/18/1993	M			Ada High School
3619	Student77523, TAYLOR (DAVID)		555 555-5555	LINDA Student77523	10/15/1992	M		228	

**Class List Format 13 – Based on Format 10, with Counselor and Locker removed and Home School added**

**Report – Report Card Formatter (R700)**

**Navigation: Home – SIS – Marks – Marks Reports – Report Card Formatter (R700)**

The Report Card Formatter is used to create report cards, interim reports and permanent record labels for the building, along with the layout of the report card.

Home » SIS » Marks » Marks Reports » Report Card Formatter (R700) Advanced Search | Feedback | Mgmt | Help | Version |

## Report Card Formatter (R700)

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

---

Selection Criteria   Selection Summary   Load Settings

**Formatter Version:**    Custom    Permanent Record Labels    Non-Custom   (Warning: the Non-Custom formats can be used, but state support will no longer be provided.)

### Formatter Version

- Custom – report cards generated with the custom Report Card formatter
- Permanent Record Labels – permanent record labels using fixed formats
- Non-Custom – no longer supported; to remove from submission screen, contact your ITC

**Note:** *Support discontinued for non-custom Report Cards/Transcripts*

At this time, the StudentInformation screens still allow for the submission of non-custom report cards and transcripts. Schools can still execute non-custom report cards/transcripts if desired – however issues encountered with non-custom report cards/transcripts will no longer be supported. All existing non-custom report cards and transcripts have been replicated as custom formats and many issues have been addressed within those custom formats.

### Custom Report Card Formats (R700)

**Navigation:** Home – SIS – Marks – Marks Reports – Report Card Formatter (R700) – Custom Formatter Version

## Report Card Formatter (R700)

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

Selection Criteria
Selection Summary
Load Settings

**Formatter Version:**  Custom  Permanent Record Labels  Non-Custom (Warning: the Non-Custom formats can be used, but state support will no longer be provided.)

**Report Layout:** AllYear2

**Watermark Image:** None **Watermark Alignment:** Top Left

**Footer Location:**  Directly Beneath the Detail Section  At The Bottom of the Last Report Page

**Report Orientation:**  Portrait  Landscape

**Paper Kind:** Letter

**Paper Width:** 8.5 **Paper Height:** 11

**Left Margin:** 0.5 **Top Margin:** 0.5

**Right Margin:** 0.5 **Bottom Margin:** 0.5 **Gutter:** 0.0

---

**School Years For Credits**

2010-2011  
 2009-2010  
 2008-2009  
 2007-2008

⇐ ⇨  
⇐ ⇨  
⇐ ⇨

**Interim Report Card:**  Yes  No

**Reporting Term For Which To Show Comments** **Latest Physical Term Is Used For The Current Reporting Term**

Quarter 1  
 1st Interim  
 Quarter 2  
 2nd Interim

⇐ ⇨  
⇐ ⇨  
⇐ ⇨

---

**Interim Report Card:**  Yes  No

**Reporting Term For Which To Show Comments** **Latest Physical Term Is Used For The Current Reporting Term**

Quarter 1  
 1st Interim  
 Quarter 2  
 2nd Interim

⇐ ⇨  
⇐ ⇨  
⇐ ⇨

**Mark Type For Which To Show Comments**

Avg  
 Exam  
 Final  
 Interim

⇐ ⇨  
⇐ ⇨  
⇐ ⇨

**Reporting Term For Which To Show Marks**

Quarter 1  
 1st Interim  
 Quarter 2  
 2nd Interim

⇐ ⇨  
⇐ ⇨  
⇐ ⇨

**Mark Type For Which To Show Marks**

Avg  
 Exam  
 Final  
 Interim

⇐ ⇨  
⇐ ⇨  
⇐ ⇨

**Course Types**

Class  
 Lunch  
 Study hall  
 ESC course

⇐ ⇨  
⇐ ⇨  
⇐ ⇨

**Mark Credit Type:** All

---

**Show Required Marks Only:**  Yes  No

**Print Report Card If Student Has No Marks Or Comments:**  Yes  No

**Print Regular Course From Prior Course Term That Has No Marks Or Comments:**  Yes  No

**Print Regular Course From Current Course Term That Has No Marks Or Comments:**  Yes  No  
**Print Regular Course From Future Course Term That Has No Marks Or Comments:**  Yes  No  
**Print Course History That Has No Marks:**  Yes  No  
**Include Dropped Courses In Past Or Current Course Terms In Current Year:**  Yes  No  
**Include Dropped Courses In Future Course Terms In Current Year:**  Yes  No  
**Include Dropped Courses in Prior Years (for Credits totals):**  Yes  No  
**Show Separate Marks Subreports For Each Marking Pattern:**  Yes  No  
**Show Separate Rows in Credits Subreport for Credits from Different Schools in the Same Year:**  Yes  No  
**Require 'Update History' Flag to be True for Course to be on Report Card:**  Yes  No  
**Require 'Is High School Credit' Flag to be True for Course to be on Report Card:**  Yes  No  
**Marks Alignment in Marks Subreports:**  Align Equivalent Marks Columns in Marks Subreports for All Marking Patterns  
 Stretch Marks Columns to Fill Width of Marks Shape Within the Marks Subreport for Each Marking Pattern

---

**GPA Sets**  
 1st Quarter GPA  
 2nd Quarter GPA  
 3rd Quarter GPA  
 4th Quarter GPA

**Honor Roll GPA Sets**  
 1st Quarter GPA  
 2nd Quarter GPA  
 3rd Quarter GPA  
 4th Quarter GPA

**Refresh GPA Set and Honor Roll Results:**  Yes  No

---

**Reporting Term For Which To Show Attendance**  
 Quarter 1  
 Quarter 2  
 Quarter 3  
 Quarter 4

---

**Absence Type**  
 A - ABSENT  
 D - EARLY DIS  
 E - EXCUSED  
 S - SUSPENDED

**Show Days Present and Days Absent Totals based on Total Days or Occurrences:**  Total Days  Occurrences

**Absence Cutoff Date:**

**Use Period Attendance:**  Yes  No

**Period**  
 Period 00  
 Period 01  
 Period 02  
 Period 03

---

**Student Status**  
 A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 N - NON-RES

**Administrative Homeroom**  
 100 - AUGUST (Full Year Term)  
 101 - ROPE (Full Year Term)  
 102 - STUART (Full Year Term)  
 103 - SALYER (Full Year Term)

**Program**  
 \*\* - Not applicable  
 01 - Multihandicapped  
 02 - Deaf-blind handicapped  
 03 - Hearing handicapped

**Home School**

**Counselor**

FREEMAN, MS  
 FITZGERALD, MS  
 MONTGOMERY, MS

**Membership**

15 - Student received intervention provided during regular s  
 15 - Student received intervention provided in the summer  
 16 - Student placement by a district in a chartered non-pub  
 50 - Prev. reported as a dropout in reporting district gradua

**Special Education Services**

215001 - Adapted Physical Education Services  
 215002 - Aide Services  
 215003 - Attendant Services  
 215004 - Audiological Services

**Membership Group**

11 - Intervention  
 12 - Post-secondary Enrollment Options Program  
 15 - 15  
 16 - 16

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

**Student ID(s):**

**Homeroom Date:** 9/13/2012

**Common Text For Report Cards:**

**Grading Scale:**

**Print Blank Report Card For Student With Unpaid Fees:**  Yes  No

**Omit Unlisted Phone Numbers:**

---

**Student Graduation Eligibility Rule:**  Primary  
 Secondary

**Choose Graduation Eligibility Rule:**

**Mark Type:**

**Recalculate Graduation Eligibility:**

**Improve Performance by Separating Report Processing by Grade:**

**Grade**

PS - PS  
 KG - KG  
 01 - 01  
 02 - 02

**Sorting Options**

Grade (ASC)  
 Student Number (ASC)  
 Student Number (DESC)  
 Student Name (DESC)

Grade (DESC)  
 Student Name (ASC)

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address  
 Use custom address text

**Include Copied On Correspondence:**  Yes  No

**Delivery Method:**    
**Email Address:**   
**Description:**

**Report Layout** (required) – Select the appropriate format from the dropdown menu. These formats are created with the Custom Formatter application. However, StudentInformation does come with the following preloaded custom formats.

Format	Portrait or Landscape	Alpha or Numeric	Prints Comments	Prints GPA	Prints Honor Roll Message	Prints Grad. Eligibility	Prints Attend.	Prints Common Text	Prints Grading Scale	Prints Credits	Prints Fees	For use with window envelopes	Other
Fixed H1	Portrait	Alpha	Yes	No	No	No	Yes	Yes, "To the Parents" and building's phone # is hardcoded in the text box	Yes	Yes	No	No	-Prints attendance entered on the Teacher Menu-Report Card Attendance screen  -"Report of Student's Progress" is hardcoded at the top
Fixed N2	Portrait	Alpha	No	Yes	Yes	No	Yes	Yes	No	Yes	No	Yes	-Prints Principal's name & school phone #  -Prints individual course attempted & earned credit amounts
Fixed N4	Portrait	Alpha	No	Yes	Yes	No	Yes	Yes	No	No	No	Yes	
Fixed SP1	Portrait	Alpha	No	Yes	No	No	Yes	Yes, "Message" is hardcoded in text box	Yes	Yes	Yes	Yes*	-"Report Card" is hardcoded at the top  (*student's ID# shows in window also)
Fixed SW1	Portrait	Alpha	No	Yes	No	No	Yes	Yes	No	Yes	No	Yes	-Prints Principal's name & school phone #
Fixed L1	Landscape *	Alpha	No	No	No	No	Yes	Yes	No, grading scale is hardcoded	No	No	No	-*uses legal sized paper  -Can be used as a foldable mailer  -"Grade Report" is hardcoded at the top
Fixed L2	Landscape	Alpha	Yes	No	No	No	No	Yes	No	No	No	No	-"Interim Progress Report" hardcoded at

														the top -Prints meeting time in comments section
All Year2	Landscape *	Alpha	No	Yes	Yes	Yes	Yes	No	No	Yes	No	No		-*uses legal sized paper  -Rhino image is hardcoded  -Prints separate totals for excused and unexcused absences  -"Grade Report" is hardcoded at the top
Fixed N1	Landscape *	Alpha Numeric & Alpha equiv.	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No		*uses legal sized paper  -"Grade Report" is hardcoded at the top
Fixed N3	Landscape	Alpha	Yes	Yes	Yes	No	Yes	Yes	No	Yes	No	No		
Fixed SW2	Landscape	Numeric & Alpha equiv.	Yes	No	No	No	Yes	Yes	Yes	Yes	No	No		
Fixed SW3	Landscape	Alpha	No	Yes	Yes	No	Yes	Yes	No	No	No	No		"Report Cards" is hardcoded at the top

Format 01	Landscape	Alpha	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No		
Format 02	Landscape	Numeric	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No		
Format 03	Portrait	Numeric & Alpha equiv.	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No		
Format 04	Landscape	Numeric & Alpha equiv.	Yes	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No		
Format 11	Portrait	Alpha	Yes	No	No	No	Yes	Yes	No	No	Yes	No		Interim report card with hard-coded letter verbiage.
Format 12	Portrait	Numeric & Alpha equiv.	Yes	No	No	No	Yes	Yes	No	No	Yes	No		Interim report card with hard-coded letter verbiage.
Format 15	Portrait	Alpha	Yes	No	No	No	No	Yes	No	No	Yes	No		Interim report card with hard-coded letter verbiage.
Format 16	Portrait	Numeric & Alpha equiv.	Yes	No	No	No	No	Yes	No	No	Yes	No		Interim report card with hard-coded letter verbiage.
Format 20	Portrait	Alpha	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes	Yes		
Format 21	Portrait	Alpha	No	Yes	No	No	Yes	Yes	No	Yes	Yes	Yes		Prints Promoted, Retained, &

														Transferred checkboxes that can be manually marked
Format 30	Landscape	Numeric & Alpha equiv.	No	Yes	Yes	No	Yes	No	No	Yes	Yes	No		
Format 31	Landscape	Alpha	No	Yes	Yes	No	Yes	No	No	Yes	Yes	No		
Format 40	Portrait	Alpha	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes	Yes		
Format 41	Portrait	Alpha	No	No	Yes	No	Yes	Yes	No	Yes	Yes	Yes		
Format 50	Portrait	Alpha	No	No	No	No	Yes	Yes	No	Yes	Yes	Yes	Prints Promoted, Retained, & Transferred checkboxes that can be manually marked	

**Please see examples of formats in Appendix A.**

**Watermark Image** (optional) – Select an image to be printed on all pages from the drop-down list. This is configured by ITCs.

**Watermark Alignment** (optional) – Select the position for the watermark image from the drop-down menu. Choices are Top Left, Bottom Left, Top Right, Bottom Right and Center.

**Footer Location** (required) – Choose whether the footer information is displayed directly beneath the detail section, or at the bottom of the last page of the report card (if the report card runs onto multiple pages).

**Report Orientation** (required) – Select whether the report card prints in portrait or landscape orientation.

**Paper Kind** (required) – Select the type of paper used for the report card. Choices are Letter, Legal or Custom.

**Paper Width** (optional) – Only available if using Custom for Paper Kind. Enter the width of the paper used, in inches. If using Letter or Legal, this value is 8.5.

**Paper Height** (optional) – Only available if using Custom for Paper Kind. Enter the height of the paper used, in inches. If using Letter or Legal, this value is 11.

**Left Margin** (optional) – Enter the left-side print margin for the report card, in inches.

**Right Margin** (optional) – Enter the right-side print margin for the report card, in inches.

**Top Margin** (optional) – Enter the top margin for the report card, in inches.

**Bottom Margin** (optional) – Enter the bottom margin for the report card, in inches.

**Gutter** (optional) – Enter the width of space between columns, in inches.

**School Years For Credits** (optional) – If no School Years are selected, the report will use all School Years to calculate Credits on the report card. You can also filter by selecting specific School Years to calculate Credits on your report card.

**Interim Report Card** (optional) – Yes or No; check this box if this is an Interim Report Card.

**Reporting Term For Which To Show Comments** (optional) – If no Reporting Terms are selected, the report will use all Reporting Terms for listing Comments on the report. You can also filter Comments by selecting specific Reporting Terms for your report.

**Mark Type For Which To Show Comments** (optional) – If no Mark Types are selected, the report will use Comments of all Mark Types in creation of the report. You can also filter by selecting specific Mark Types for your report.

**Reporting Term For Which To Show Marks** (optional) – If no Reporting Terms are selected, the report will use all Reporting Terms for listing Marks on the report. You can also filter Marks by selecting specific Reporting Terms for your report.

**Mark Type For Which To Show Marks** (optional) – If no Mark Types are selected, the report will use Marks of all Mark Types in creation of the report. You can also filter by selecting specific Mark Types for your report.

**Course Types** (optional) – If no Course Types are selected, the report will use all Course Types in the creation of the report. You can also filter by selecting specific Course Types for your report.

**Mark Credit Type** (optional) – Select desired Mark Credit Types for this report card. Valid options are: All, Progress 1 or greater, Progress 2 or greater, Progress 3 or greater, Progress 4 or greater, Not Used only, Progress 1 only, Progress 2 only, Progress 3 only, Progress 4 only, or Earned only.

**Show Required Marks Only** (optional) – Yes or No; If a student has manual course history and is also taking classes that appear on the Student Mark screen, would you like only courses listed on the Student Marks screen to print on the report card? If you do, answer Yes. If you want manual course history to print also, answer No.

**Print Report Card If Student Has No Marks Or Comments** (optional) – Yes or No; If a student does not have any marks or comments entered would you like a blank report card to print for this student? If you do, answer Yes.

**Print Regular Course From Prior Course Term That Has No Marks Or Comments** (optional) – Yes or No; Allows the user to determine whether a regular course from a prior course term appears on the report card when a student has no marks or comments for the course in the Reporting Terms chose on the report submission screen for marks and comments.

**Print Regular Course From Current Course Term That Has No Marks or Comments** (optional) – Yes or No; Allows the user to determine whether a regular course from the current course term appears on the report card when a student has no marks or comments for the course in the Reporting Terms chose on the report submission screen for marks and comments.

**Print Regular Course From Future Course Term That Has No Marks or Comments** (optional) – Yes or No; Allows the user to determine whether a regular course from a future course term appears on the report card when a student has no marks or comments for the course in the Reporting Terms chose on the report submission screen for marks and comments.

**Print Course History That Has No Marks** (optional) – Yes or No; Not possible – you cannot enter course history without also entering mark. It does not matter if you answer Yes or No.

**Include Dropped Courses in Past Or Current Course Terms In Current Year** (optional) – Yes or No; If a student has dropped courses in a completed course term or the current course term, do you want the courses to print on the report card? If you do want the dropped courses to print, answer Yes.

**Include Dropped Courses in Future Course Terms In Current Year** (optional) – Yes or No; If a student drops a 2<sup>nd</sup> semester only class and you are running her report card in the middle of 1<sup>st</sup> semester, do you want the dropped 1<sup>st</sup> semester only class printing on her report card? If you do want future drops printing, answer Yes.

**Include Dropped Courses in Prior Years (for Credit totals)** (optional) - Yes or No; If a student has dropped classes in prior years, do you want the dropped courses being included in the credit amounts that print on selected report card formats? If you do want the drops included, answer Yes.

**Show Separate Marks Subreports For Each Marking Pattern** (optional) – Yes or No; If you would like the report to be broken down into separate sections for 1<sup>st</sup> semester only classes, 2<sup>nd</sup> semester only classes, and all year classes, answer Yes.

**Show Separate Rows in Credits Subreport for Credits from Different Schools in the Same Year** (optional) – Yes or No; If the student was in two different buildings and has course history from each building, do you want each school broken out into its own section? If so, answer Yes.

**Require “Update History” Flag to be True for Course to be on Report Cards** (optional) – The Update History flag on the Course determines if a course displays on the student’s course history screen. Occasionally a school will unmark a course as Update History and does not want this course to print on the report card. In 99% of the cases you will want to mark Yes for this prompt. (NOTE: You can also uncheck the flag on the course titled Print on Report Card.)

**Required “Is High School Credit” Flag to be True for Course to be on Report Cards** (optional) - If set to Yes, courses will be excluded from the report card if they are not checked as “Is High School Credit”. This would mainly be used when high school courses are taken at a middle school or junior high.

**Marks Alignment in Marks Subreports** (optional) – Select how you want Marks to display in Marks subreports. Choices are “Align Equivalent Marks Columns in Marks Subreports for All Marking Patterns”, which will keep all equivalent Marks columns aligned (such as Semester 1 Final on a full-page-width All-Year Marking Pattern lining up with Semester 1 Final on a half-page-width 1<sup>st</sup>-Semester Marking Pattern), or “Stretch Marks Columns to Fill Width of Marks Shape Within the Marks Subreport for Each Marking Pattern”, which will use the full width available in the Marks subreport, regardless of how many Marks are in the Marking Pattern (the All-Year and 1<sup>st</sup>-Semester Marking Patterns in the example above would instead each take up the full page width, without their columns being aligned together).

**GPA Sets** (required) – Select desired GPA Set(s) from the dual-select box. If no GPA Sets are selected, GPA information will not print on the report card.

**Honor Roll GPA Sets** (optional) – If no Honor Roll GPA Sets are selected, the report will use all Honor Roll GPA Sets for creation of the report. You can also filter by selecting specific Honor Roll GPA Sets for your report.

**Refresh GPA Set and Honor Roll Results** (optional) – Yes or No; Select whether GPA Set and Honor Roll Results will be refreshed.

**Reporting Term For Which To Show Attendance** (optional) – If no Reporting Terms are selected, the report will use all Reporting Terms for listing Attendance on the report. You can also filter Attendance by selecting specific Reporting Terms for your report.

**Absence Type** (optional) – If no Absence Types are selected, the report will use all Absence Types in creation of the report. You can also filter by selecting specific Absence Types for your report.

**Show Days Present and Days Absent Totals based on Total Days or Occurrences** (required) – If “Total Days” is chosen, then the Days Present will be calculated as the sum of the Actual Days value for each calendar day for the student. (Note: If the Actual Days value on any calendar day exceeds the Max Absence Level for the student’s calendar, then the Max Absence Level is used for that day in the Days Present sum.) The Days Absent will be calculated as the sum of the following: the Absence Level for each daily absence record, multiplied by the Actual Days (or Max Absence Level) for the calendar day on which the absence occurred.

If “Occurrences” is chosen, then the Days Present will be calculated as the sum of the Days Counted value for each calendar day for the student. The Days Absence will be calculated as the sum of the following: the Absence Level for each daily absence record, multiplied by the Days Counted for the calendar day on which the absence occurred. The Days Counted for a calendar day is determined from the Calendar Day Type of the calendar day. For a Calendar Day Type of “School Day”, the Days Counted is 1, for “Calamity Make-up Day”, the Days Counted is 1, and for “School Half-Day” the Days Counted is 0.5.

**Absence Cutoff Date** (optional) – Specify the date after which absences are not counted towards the attendance information listed on the report card.

**Use Period Attendance** (optional) – Yes or No; select ‘Yes’ to use Period Attendance values.

**Period** (optional) – If no Periods are selected, the report will use all Periods in creation of the report. You can also filter by selecting specific Periods for your report.

**Student Status** (optional) – If no Student Statuses are selected, the report will use all Student Statuses in creation of the report. You can also filter by selecting specific Student Statuses for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report use all Administrative Homerooms in creation of the report. You can also filter by selecting specific Administrative Homerooms for your report.

**Programs** (optional) – If no Programs are selected, the report will use all Programs in creation of the report. You can also filter by selecting specific Programs for your report.

**Home School** (optional) – If no Home Schools are selected, the report use all Home Schools in the creation of the report. You can also filter by selecting specific Home Schools for your report. This field is populated based on the values entered in the Home School field on the Student Profile – General tab.

**Counselor** (optional) – If no Counselors are selected, the report will use all Counselors in creation of the report. You can also filter by selecting specific Counselors for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Special Education Services** (optional) – Select the Special Education services to return the report cards for students who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Membership Group** (optional) – If no Membership Groups are selected, the report will use all Membership Groups for creation of the report. You can also filter by selecting specific Membership Groups for your report.

**Ad-Hoc Membership** (optional) – You can select an Ad-Hoc Membership from the drop-down list. If you select an Ad-Hoc Membership, only report cards for students from that Ad-Hoc Membership will be used in the report. Check the "Public And Private" checkbox to see Memberships created by other users in your drop-down list.

**Student ID(s)** (optional) – If report cards are needed for individual students, the student ID(s) may be input here, separated by a comma, and report cards will only be produced for those individuals.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. Defaults to today's date.

**Common Text For Report Cards** (optional) – Type in a common text message that is to appear on report cards.

**Grading Scale** (optional) – Type in a common grading scale text message that is to appear on all transcripts.

**Print Blank Report Card for Student with Unpaid Fees** (optional) – Yes or No; choose if you wish to print blank report cards (no course information or marks) for students still owing fees. A message will appear stating the amount of fees they still owe.

**Omit Unlisted Phone Numbers** (optional) – Yes or No; check if you wish to omit unlisted phone numbers on this report.

**Student Graduation Eligibility Rule** (optional) – Check the appropriate boxes if you want to view the students' primary and/or secondary Graduation/Eligibility rule status on the report.

**Choose Graduation Eligibility Rule** (optional) – Select a Graduation/Eligibility Rule from the drop-down list if you want to view the students' status for that rule on the report.

**Mark Type** (required if selecting rule) – Choose the Mark Type to use in current year's total. The Mark Type is only required if Primary, Secondary, and/or a specific Graduation Eligibility Rule are chosen.

**Recalculate Graduation Eligibility** (optional) – Check this box if you want to recalculate (slower) the student's status for the selected Graduation/Eligibility Rule(s). Otherwise, the report will use cached (faster) values if they exist.

**Improve Performance by Separating Report Processing by Grade** (optional) – Choose this option for shorter execution time and lower memory usage when running the report for multiple grade levels. A separate interim report will be generated for each selected grade, and then the interim reports for all selected grades will be combined into one final report. When choosing this option, 'Grade' will be the first sort order for the final report, in order of the grades selected in the 'Grade' dual select below.

**Grade** (optional) – If no Grades are selected, the report will use all Grades in creation of the report. You can also filter by selecting specific Grades for your report. The “Grade” dual select box is only Required if the “Improve Performance by Separating Report Processing by Grade” option is chosen above.

**Sorting Options** (optional) – Choose one or more sort options for your report. If the “Improve Performance by Separating Report Processing by Grade” option is chosen above, then the sort order of grades is determined by the order of the grades in the “Grade” dual select above. In that case the “Grade” option does not have to be selected in the Sorting Options dual select, since the grade will automatically be the first sort criteria.

**Note:** If the Zip Code is selected as the primary sort and 'Include Copied on Correspondence' is set to 'Yes', then a student may have multiple report card copies, and each of those copies may have a different zip code, since the student's zip code may differ from one or more of the contact zip codes. In this case, the report card will group all of a student's report card copies together in the final set of report cards. This is accomplished by using one zip code per student as the zip code by which all of the copies are sorted. The following rules determine which zip code is used for each student when sorting the report cards:

- If "Use Student Address" is chosen, the zip code used for each student will be the student's mailing zip code.
- If "Use Parent Address" is chosen, the zip code used for each student will be the primary contact's zip code.

**Print Report In Permanent Record Label Format** (optional) – (optional) – Yes or No; if marked Yes only courses marked as Include on Permanent Record on the Marks of Course will print.

**Output** – Select Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the dropdown list.

**Address** – Select the address to use for labels. If you check "Use custom address text," the text you enter in the field will be added at the top of each label and address field.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked "Copied on Correspondence."

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

### **Permanent Record Labels (R700)**

**Navigation: Home – SIS – Marks – Marks Reports – Report Card Formatter (R700) – Permanent Record Labels Formatter Version**

## Report Card Formatter (R700)

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

Selection Criteria    Selection Summary    Load Settings

**Formatter Version:**  Custom     Permanent Record Labels     Non-Custom (Warning: the Non-Custom formats can be used, but state support will no longer be provided.)

**Report Layout:** Report Card Format 22

### Reporting Term

Quarter 1	← →	
1st Interim	← →	
Quarter 2	← →	
2nd Interim	← →	

### Mark Type

Avg	← →	
Exam	← →	
Final	← →	
Interim	← →	

### Period

Period 00	← →	
Period 01	← →	
Period 02	← →	
Period 03	← →	

### Membership

15 - Student received intervention provi	← →	
15 - Student received intervention provi	← →	
16 - Student placement by a district in a	← →	
50 - Prev. reported as a dropout in repo	← →	

### Special Education Services

215001 - Adapted Physical Education Se	← →	
215002 - Aide Services	← →	
215003 - Attendant Services	← →	
215004 - Audiological Services	← →	

### Membership Group

11 - Intervention	← →	
12 - Post-secondary Enrollment Options	← →	
15 - 15	← →	
16 - 16	← →	

-- Select an Ad-Hoc Membership --

### Ad-Hoc Membership:

Public And Private

### Student Status

A - ACTIVE RES	← →	
ACCA - ASHLAND ACADEMY	← →	
AE - ACTIVE ELSEWHERE	← →	
D - DELETED	← →	

### Home School

	← →	
--	-----	--

### GPA Sets

1st Quarter	← →	
2nd Quarter	← →	
3rd Quarter	← →	
4th Quarter	← →	

### Honor Roll GPA Sets

1st Quarter	← →	
2nd Quarter	← →	
3rd Quarter	← →	
4th Quarter	← →	

Refresh GPA Set and Honor Roll Results:  Yes  No

Student ID(s):

Homeroom Date: 4/8/2010

Absence Date:

Common Text For Report Cards:

Print Blank Report Card For Student With Unpaid Fees:  Yes  No

Suppress Withdrawals:  Yes  No

---

Student Graduation Eligibility Rule:  Primary  Secondary  
 Select to view the student(s) primary and/or secondary Graduation Eligibility rule(s) in the report.

Choose Graduation Eligibility Rule:   
 Choose a Graduation Eligibility rule from the list to include in the report.

Mark Type:   
 Choose the mark type to use in current year's total credits calculation. The mark type is only required if Primary, Secondary, or a specific Rule are chosen.

Recalculate Graduation Eligibility:   
 Check recalculate to refresh the student's Graduation Eligibility data (slower) or Uncheck recalculate to view the student's cached Graduation Eligibility data (faster).

---

Omit Unlisted Phone Numbers:

Print Report In Permanent Record Label Format:  Yes  No

Permanent Record Label Font Size:

Permanent Record Label Height:

Top Margin:

Bottom Margin:

Left Margin:

Right Margin:

Gutter:

School Year(s) for Credits  
 2012-2013  
 2011-2012  
 2010-2011  
 2009-2010

Require 'Update History' Flag to be True for Course to be on Report Card:  Yes  No

Require 'Is High School Credit' Flag to be True for Course to be on Report Card:  Yes  No

---

Improve Performance by Separating Report Processing by Grade:   
 Choose this option for shorter execution time and lower memory usage when running the report for multiple grade levels. A separate interim report will be generated for each selected grade, and then the interim reports for all selected grades will be combined into one final report. When choosing this option, 'Grade' will be the first sort order for the final report, in order of the grades selected in the 'Grade' dual select below.

Grade  
 09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

The 'Grade' dual select is only Required if the 'Improve Performance by Separating Report Processing by Grade' option is chosen above.

Sorting Options  
 Grade (ASC)  
 Student Number (ASC)  
 Student Number (DESC)  
 Student Name (DESC)

Grade (DESC)  
 Student Name (ASC)

If the 'Improve Performance by Separating Report Processing by Grade' option is chosen above, then the sort order of grades is determined by the order of the grades in the 'Grade' dual select above. In that case the 'Grade' option does not have to be selected in the Sorting Options dual select, since the grade will automatically be the first sort criteria.

---

Output:  Report  Labels  Both Report and Labels

Label Type: Avery Label 5160 - 1" X 2 5/8" 3-columns

Address:  Use Student Address  Use Parent Address  
 Use custom address text

Include Copied On Correspondence:  Yes  No

Print Teacher Code / Last Name on Label:  Show Teacher Code  Show Teacher Last Name

Delivery Method: Pickup

Email Address: DowdR@software-answers.com

Description:

**Report Layout** (required) – Select the appropriate permanent record label format from the dropdown menu.

**Note:** All formats for this report print initially in portrait orientation (unless noted), but variations in reader and printer software, printers, printer drivers, available paper, printer settings and reporting terms may allow for different print orientations. **Please print a sample page** of your selected format before running this report for multiple students, or before using actual labels. Active permanent record label formats are as follows:

**Format 22** – 2"x4" or 3-1/3"x4"

**Format 23** – 3-1/3"x4"

**Format 24** – 3-1/3"x4"

**Format 32** – 2"x4" or 3-1/3"x4"; will include previous year credits earned and print a cumulative credit

**Format 33** – 3-1/3"x4"; will include previous year credits earned and print a cumulative credit

**Format 34** – 3-1/3"x4"; will include previous year credits earned and print a cumulative credit

**Format 42** – 2"x4" or 3-1/3"x4"; will print marks on right side and will not print student GPA or student ranking

**Format 43** – 3-1/3"x4"; will print marks below student header and will print student GPA but no student ranking

**Format 44** – 3-1/3"x4"; will print marks below student header and will not print student GPA or student ranking

**Format 54** – same as Format 34, with slight layout alterations

**Format 62** – same as Format 42 with the addition of the Home School Name field (if Home School IRN field is filled out on the Student Profile – General tab)

**Format 63** – same as Format 43 with the addition of the Home School Name field (if Home School IRN field is filled out on the Student Profile – General tab)

**Format 64** – same as Format 44 with the addition of the Home School Name field (if Home School IRN field is filled out on the Student Profile – General tab)

**Format 82** – 2"x4" or 3-1/3"x4"; will include previous year credits earned and print a cumulative credit; uses Numeric Marks

**Format 83** – 3-1/3"x4"; will print marks below student header and will print student GPA but no student ranking; uses Numeric Marks

**Format 84** – 3-1/3"x4"; uses Numeric Marks

All permanent record label formats will show external absences for a student in the attendance subreport section of the permanent record labels. If a student has both daily and external attendance in the selected school year, then two rows will be shown in the attendance subreport. A School Code column will show on all permanent record label formats except 54, due to space limitations, and that column will allow the user to more easily distinguish between the daily and external attendance rows. If the student has more than one record in the attendance subreport on the permanent record label, the Attendance subreport will sort by School Code ascending.

## Label Hints

**2"x4" Labels:** Use Avery Label #8163. The bottom right hand label will be blank (the next student prints correctly on the next page) with some margins. Recommended Font Size: 5. Label Height: 2. Recommended Top Margin: 1. Recommended Left Margin: .25.

**3-1/3"x4" Labels:** Use Avery Label #8164. For most labels of this format, Recommended Font Size: 5. Label Height: 3.33. Recommended Top Margin: 1. Recommended Left Margin: .4.

**Format 24:** (3-1/3" labels) Recommended Font Size: 5. Label Height: 3.33. Recommended Top Margin: .65. Recommended Left Margin: .3.

**Format 44:** (3-1/3" labels) Recommended Font Size: 5. Label Height: 3.33. Recommended Top Margin: .8. Recommended Left Margin: .4.

**All Label formats may require adjustment of the Margins. Make sure to print test copies first.**

**Additional formats may be listed, but they are not active at this time. Please see examples of these various formats at the end of this chapter.**

***Note:** TO HOME SCHOOLS PRINTING PERMANENT RECORD LABELS FOR THEIR VOCATIONAL STUDENTS: Since the calendar in each building is for the home school, and the vocational students follow the vocational school calendar, days present would not print correctly on your labels. Days absent and times tardy will print correctly.*

**Reporting Term** (optional) – If no Reporting Terms are selected, the report will use all Reporting Terms for creation of the report. You can also filter by selecting specific Reporting Terms for your report.

**Mark Type** (optional) – If no Mark Types are selected, the report will use all Mark Types in creation of the report. You can also filter by selecting specific Mark Types for your report.

**Period** (optional) – If no Periods are selected, the report will use all Periods in creation of the report. You can also filter by selecting specific Periods for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Special Education Services** (optional) – Select the Special Education services to return the permanent record labels for students who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Membership Group** (optional) – If no Membership Groups are selected, the report will use all Membership Groups for creation of the report. You can also filter by selecting specific Membership Groups for your report.

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from the drop-down list to only include students in that Membership in your report. Check the "Public And Private" checkbox to view Ad-Hoc Memberships created by other users in your drop-down list.

**Student Status** (optional) – If no Student Statuses are selected, the report will use all Student Statuses in creation of the report. You can also filter by selecting specific Student Statuses for your report.

**Home School** (optional) – If no Home Schools are selected, the report will use all Home Schools in creation of the report. You can also filter by selecting specific Home Schools for your report.

**GPA Sets** (required) – If no GPA Sets are selected, the report will use all GPA Sets for creation of the report. You can also filter by selecting specific GPA Sets for your report.

**Honor Roll GPA Sets** (required) – If no Honor Roll GPA Sets are selected, the report will use all Honor Roll GPA Sets for creation of the report. You can also filter by selecting specific Honor Roll GPA Sets for your report.

**Refresh GPA Set and Honor Roll Results** (required) – Select whether GPA Set and Honor Roll Results will be refreshed.

**Student ID(s)** (optional) – If report cards are needed for individual students, the student ID(s) may be input here, separated by a comma, and report cards will only be produced for those individuals.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. Defaults to today's date.

**Absence Date** (optional) – If the Absence Date is within the term, then only the days up to the Absence Date will be considered for Present, Absent, and Tardy figures. Specify an Absence Date to limit attendance to the end of the appropriate term. If you do not specify an Absence Date, all days will be considered for Present, Absent, and Tardy figures.

**Common Text For Report Cards** (optional) – Type in a common text message that is to appear on report cards.

**Print Blank Report Card for Student with Unpaid Fees** (optional) – Yes or No; choose if you wish to print blank report cards (no course information or marks) for students still owing fees. A message will appear stating the amount of fees they still owe.

**Suppress Withdrawals** (optional) – Yes or No; choose if you wish to suppress the printing of report cards for students who have withdrawn.

**Student Graduation Eligibility Rule** (optional) – Check the appropriate boxes if you want to view the students' primary and/or secondary Graduation/Eligibility rule status on the report.

**Choose Graduation Eligibility Rule** (optional) – Select a Graduation/Eligibility Rule from the drop-down list if you want to view the students' status for that rule on the report.

**Mark Type** (required if selecting rule) – Choose the Mark Type to use in current year’s total. The Mark Type is only required if Primary, Secondary, and/or a specific Graduation Eligibility Rule are chosen.

**Recalculate Graduation Eligibility** (optional) – Check this box if you want to recalculate (slower) the student’s status for the selected Graduation/Eligibility Rule(s). Otherwise, the report will use cached values if they exist (faster).

**Omit Unlisted Phone Numbers** (optional) – Yes or No; check if you wish to omit unlisted phone numbers on this report.

**Print Report In Permanent Record Label Format** (optional) – Yes or No; if marked Yes only courses marked as Include on Permanent Record on the Marks of Course will print.

**Permanent Record Label Font Size** (optional) – Enter the font size, in points, you wish to use on Permanent Record Labels, if that format is selected. Most Labels use the value 5.

**Permanent Record Label Height** (optional) – Enter the height of each Permanent Record Label, in inches. The list of formats above states which label heights work for which label formats.

**Top Margin** (optional) – Enter the value for the top margin in inches. 0.2 is a suggested starting point. The margin settings may need to be adjusted for different printers.

**Bottom Margin** (optional) – Enter the value for the bottom margin in inches. 0.2 is a suggested starting point. The margin settings may need to be adjusted for different printers.

**Left Margin** (optional) – Enter the value for the left margin in inches. 0.2 is a suggested starting point. The margin settings may need to be adjusted for different printers.

**Right Margin** (optional) – Enter the value for the right margin in inches. 0.0 is a suggested starting point. The margin settings may need to be adjusted for different printers.

**Gutter** (optional) – Enter the value for the gutter in inches. The gutter is the extra empty space to the left of the report’s left margins. 0.2 is a suggested starting point. The margin settings may need to be adjusted for different printers.

**School Year(s) for Credits** (optional) – Choose the school year(s) that determines which school years’ credits will be counted toward the total credits. Only the current year should be selected if running a label that only shows the current year’s credit.

**Require “Update History” Flag to be True for Course to be on Report Card** – The Update History flag on the Course determines if a course displays on the student’s course history screen. Occasionally a school will unmark a course as Update History and does not want this course to print on the report card. In 99% of cases you will want to mark Yes for this prompt. (NOTE: You can also uncheck the flag on the course title Print on Report Card). This can be used with Permanent Record Label formats.

**Require “Is High School Credit” Flag to be True for Course to be on Report Card –** Choose Yes to include courses only if the “Is High School Credit” flag is set to yes. This can be used with Permanent Record Label formats.

**Improve Performance by Separating Report Processing by Grade –** Choose this option for shorter execution time and lower memory usage when running the report for all multiple grade levels. A separate interim report will be generated for each selected grade, and then the interim reports for all selected grades will be combined into one final report. When choosing this option, “Grade” will be the first sort order for the final report, in order of the grades selected in the “Grade” dual select pictured below this option.

**Grade –** This dual select is only required if the “Improve Performance by Separating Report Processing by Grade” option is chosen.

**Sorting Options** (optional) – If the “Improve Performance by Separating Report Processing by Grade” option is chosen, then the sort order of grades is determined by the order of the grades in the “Grade” dual select above. In that case the “Grade” option does not have to be selected in the Sorting Options dual select, since the grade will automatically be the first sort criteria.

***Note:** If the Zip Code is selected as the primary sort and ‘Include Copied on Correspondence’ is set to ‘Yes’, then a student may have multiple report card copies, and each of those copies may have a different zip code, since the student’s zip code may differ from one or more of the contact zip codes. In this case, the report card will group all of a student’s report card copies together in the final set of report cards. This is accomplished by using one zip code per student as the zip code by which all of the copies are sorted. The following rules determine which zip code is used for each student when sorting the report cards:*

- If ‘Use Student Address’ is chosen, the zip code used for each student will be the student’s mailing zip code.
- If ‘Use Parent Address’ is chosen, the zip code used for each student will be the primary contact’s zip code.

**Output –** Select Report, Labels, or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the dropdown list.

**Address** – Select the address to use for labels. If you check "Use custom address text", the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked "Copied on Correspondence".

**Print Teacher Code/Last Name on Label** – Select Show Teacher Code to display the code of the teacher in the TEAC column on the permanent student labels. Select Show Teacher Last Name to display the first 3 characters of the teacher's last name, a comma and then the teacher's first name initial (XXX, Y).

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.



NAME EYE, MAGNUM P.		ID 4001	YEAR 2004-2005			
		GRD 12	GEND M			
PRESENT	ABSENT	TARDY	CRED 4.5			
174	4	1				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
AN GEOM	LAYM		B	A	A	0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000
GERMAN IV	LAYM	A	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND		C	A	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
SCULPTURE	HAND	F				0.000
TRIG	LAYM	A	A			0.000
MLD HIS GEN	CLAR	B	B	A		0.000
NAME FONT, ELLA JANE		ID 4002	YEAR 2004-2005			
		GRD 12	GEND F			
PRESENT	ABSENT	TARDY	CRED 4			
175	5	1				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
AN GEOM	LAYM		B	A	A	0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND		C	A	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
MLD HIS GEN	CLAR	B	B	A		0.000
NAME JOHNSON, GEORGE EVAN		ID 4003	YEAR 2004-2005			
		GRD 12	GEND M			
PRESENT	ABSENT	TARDY	CRED 4			
175	5	2				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
AN GEOM	LAYM		B	A	A	0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND		C	A	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
MLD HIS GEN	CLAR	B	B	A		0.000
NAME POTTS, JORDAN DANIEL		ID 4004	YEAR 2004-2005			
		GRD 12	GEND M			
PRESENT	ABSENT	TARDY	CRED 4			
178	0	0				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
AN GEOM	LAYM		B	A	A	0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND		C	A	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
MLD HIS GEN	CLAR	B	A	B	A	0.000
NAME POTTS, IAN MICHAEL		ID 5003	YEAR 2004-2005			
		GRD 11	GEND M			
PRESENT	ABSENT	TARDY	CRED 6.5			
178	0	0				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
ALGEBRA II	LAYM	F	F	F	A	0.000
BAS ENGLISH 11	COUS	D	F	D	A	0.000
CERAMICS	HAND					0.000
CHEM I	MEBB	D	F	F	A	0.000
DRAWING	HAND			C	A	0.000
FRENCH III	BERR	A	A	A	A	0.000
LATIN III	COUS	F	A	F	A	0.000
SPANISH II	HAND	A	A	A	A	0.000
NAME PERRY, MICHAEL JAY		ID 5002	YEAR 2004-2005			
		GRD 11	GEND M			
PRESENT	ABSENT	TARDY	CRED 6.5			
178	0	0				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
ALGEBRA II	LAYM	F	F	F	A	0.000
BAS ENGLISH 11	COUS	D	D	D	A	0.000
CHEM I	MEBB	D	F	F	A	0.000
DRAWING	HAND			C	A	0.000
FRENCH III	BERR	A	A	A	A	0.000
LATIN III	COUS	F	A	F	A	0.000
SPANISH II	HAND	A	A	A	A	0.000
NAME SPRAT, JACK JOSEPH		ID 5004	YEAR 2004-2005			
		GRD 11	GEND M			
PRESENT	ABSENT	TARDY	CRED 6.5			
174	4	0				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
ALGEBRA II	LAYM	F	F	F	A	0.000
BAS ENGLISH 11	COUS	D	F	D	A	0.000
CHEM I	MEBB	D	F	F	A	0.000
DRAWING	HAND			C	A	0.000
FRENCH III	BERR	A	A	A	A	0.000
LATIN III	COUS	F	A	F	A	0.000
SPANISH II	HAND	A	A	A	A	0.000
NAME WELLS, JOSETH		ID 4005	YEAR 2004-2005			
		GRD 12	GEND F			
PRESENT	ABSENT	TARDY	CRED 3.5			
177	1	0				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
AN GEOM	LAYM		B	A	A	0.000
ANATOMY	BERR					0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	A	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
MLD HIS GEN	CLAR	A	A	B	A	0.000
NAME WELLS, JONA RENEE		ID 5005	YEAR 2004-2005			
		GRD 11	GEND F			
PRESENT	ABSENT	TARDY	CRED 6.5			
175	3	0				
COURSE NAME	TEAC	GP 1 Qtr	GP 2 Qtr	GP 3 Qtr	GP 4 Qtr	CRED
ALGEBRA II	LAYM	F	F	F	A	0.000
BAS ENGLISH 11	COUS	D	F	D	A	0.000
CHEM I	MEBB	D	F	F	A	0.000
DRAWING	HAND			C	A	0.000
FRENCH III	BERR	A	A	A	A	0.000
LATIN III	COUS	F	A	F	A	0.000
SPANISH II	HAND	A	B	A	A	0.000

## Report Layout – Permanent Record Label Format 23

NAME	EYE, MAGNUM P.	ID	4001	YEAR	2004-2005	NAME	POTTS, JORDAN DANIEL	ID	4004	YEAR	2004-2005		
		GRD	12	GEND	M			GRD	12	GEND	M		
PRESENT	ABSENT	TARDY											
174	4	1											
CREDITS EARNED:			4.5										
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Qtr	Qtr	Qtr	Qtr				Qtr	Qtr	Qtr	Qtr	
AN GEOM	LAYM			B	A	0.000	AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000	BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	A	C	A	A	0.000	GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000	LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000	PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	A	A	0.000	PHYSICS	BERR	B	B	B	A	0.000
SCULPTURE	HAND	F	F			0.000	TRIG	LAYM	A	A			0.000
TRIG	LAYM	A	A			0.000	WLD HIS GEN	CLAR	B	A	B	A	0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000							

NAME	FONT, ELLA JANE	ID	4002	YEAR	2004-2005	NAME	MELLS, JOBETH	ID	4005	YEAR	2004-2005		
		GRD	12	GEND	F			GRD	12	GEND	F		
PRESENT	ABSENT	TARDY											
175	3	1											
CREDITS EARNED:			4										
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Qtr	Qtr	Qtr	Qtr				Qtr	Qtr	Qtr	Qtr	
AN GEOM	LAYM			B	A	0.000	AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000	ANATOMY	BERR					0.000
GERMAN IV	LAYM	C	C	A	A	0.000	BAS ENGLISH 12	COUS	B	B	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000	GERMAN IV	LAYM	C	C	A	A	0.000
PAINTING	HAND			C	A	0.000	LATIN IV	COUS	A	A	A	A	0.000
PHYSICS	BERR	B	B	A	A	0.000	PAINTING	HAND			C	A	0.000
TRIG	LAYM	A	A			0.000	PHYSICS	BERR	B	B	B	A	0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000	TRIG	LAYM	A	A			0.000
							WLD HIS GEN	CLAR	A	A	B	A	0.000

NAME	JOHNSON, GEORGE EVAN	ID	4003	YEAR	2004-2005	NAME	CONTRARY, MARY M.	ID	5001	YEAR	2004-2005		
		GRD	12	GEND	M			GRD	11	GEND	F		
PRESENT	ABSENT	TARDY											
175	3	2											
CREDITS EARNED:			4										
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Qtr	Qtr	Qtr	Qtr				Qtr	Qtr	Qtr	Qtr	
AN GEOM	LAYM			B	A	0.000	ALGEBRA II	LAYM	F	F	F	A	0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000	BAS ENGLISH 11	COUS	D	D	D	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000	CHEM I	WEBB	D	F	F	A	0.000
LATIN IV	COUS	A	A	B	A	0.000	DRAWING	HAND			C	A	0.000
PAINTING	HAND			C	A	0.000	FRENCH III	BERR	F	A	F	A	0.000
PHYSICS	BERR	B	B	A	A	0.000	LATIN III	COUS	F	F	F	A	0.000
TRIG	LAYM	A	A			0.000	SPANISH III	HAND	A	A	A	A	0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000							

**Report Layout – Permanent Record Label Format 24  
(84 is identical, but uses Numeric Marks)**

NAME EYE, MAGNUM P.		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 4001	YEAR 2004-2005	AN GEOM	LAYM		B	A	0.000	
GR 12	GEND M	BAS ENGLISH 12	COUS	A	B	A	0.000	
PRESENT ABSENT TARDY		GERMAN IV	LAYM	A	C	A	0.000	
174	4	1	LATIN IV	COUS	A	B	A	0.000
CURRENT CREDITS: 4.5		PAINTING	HAND		C	A	0.000	
TOTAL CREDITS: 21		PHYSICS	BERR	B	B	A	0.000	
		SCULPTURE	HAND	F	F		0.000	
		TRIG	LAYM	A	A		0.000	
		WLD HIS GEN	CLAR	B	B	A	0.000	
NAME FONT, ELLA JANE		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 4002	YEAR 2004-2005	AN GEOM	LAYM		B	A	0.000	
GR 12	GEND F	BAS ENGLISH 12	COUS	A	B	A	0.000	
PRESENT ABSENT TARDY		GERMAN IV	LAYM	C	C	A	0.000	
175	3	1	LATIN IV	COUS	A	B	A	0.000
CURRENT CREDITS: 4		PAINTING	HAND		C	A	0.000	
TOTAL CREDITS: 21.5		PHYSICS	BERR	B	B	A	0.000	
		TRIG	LAYM	A	A		0.000	
		WLD HIS GEN	CLAR	B	B	A	0.000	
NAME JOHNSON, GEORGE EVAN		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 4003	YEAR 2004-2005	AN GEOM	LAYM		B	A	0.000	
GR 12	GEND M	BAS ENGLISH 12	COUS	B	B	A	0.000	
PRESENT ABSENT TARDY		GERMAN IV	LAYM	C	C	A	0.000	
175	3	2	LATIN IV	COUS	A	B	A	0.000
CURRENT CREDITS: 4		PAINTING	HAND		C	A	0.000	
TOTAL CREDITS: 23.5		PHYSICS	BERR	B	B	A	0.000	
		TRIG	LAYM	A	A		0.000	
		WLD HIS GEN	CLAR	B	B	A	0.000	
NAME POTTS, IAN MICHAEL		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 5003	YEAR 2004-2005	ALGEBRA II	LAYM	F	F	A	0.000	
GR 11	GEND M	BAS ENGLISH 11	COUS	D	F	D	0.000	
PRESENT ABSENT TARDY		CHEM I	WEBB	D	F	F	0.000	
178	0	0	DRAWING	HAND		C	0.000	
CURRENT CREDITS: 6.5		FRENCH II	BERR	A	A	F	0.000	
TOTAL CREDITS: 20.5		LATIN II	COUS	F	A	F	0.000	
		SPANISH III	HAND	A	A	A	0.000	
NAME POTTS, JORDAN DANIEL		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 4004	YEAR 2004-2005	AN GEOM	LAYM		B	A	0.000	
GR 12	GEND M	BAS ENGLISH 12	COUS	B	B	A	0.000	
PRESENT ABSENT TARDY		GERMAN IV	LAYM	C	C	A	0.000	
178	0	0	LATIN IV	COUS	A	B	A	0.000
CURRENT CREDITS: 4		PAINTING	HAND		C	A	0.000	
TOTAL CREDITS: 23		PHYSICS	BERR	B	B	A	0.000	
		TRIG	LAYM	A	A		0.000	
		WLD HIS GEN	CLAR	B	A	B	0.000	
NAME SPRAT, JACK JOSEPH		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 5004	YEAR 2004-2005	ALGEBRA II	LAYM	F	F	A	0.000	
GR 11	GEND M	BAS ENGLISH 11	COUS	D	F	D	0.000	
PRESENT ABSENT TARDY		CHEM I	WEBB	D	F	F	0.000	
174	4	0	DRAWING	HAND		C	0.000	
CURRENT CREDITS: 6.5		FRENCH II	BERR	A	A	A	0.000	
TOTAL CREDITS: 21		LATIN II	COUS	F	A	F	0.000	
		SPANISH III	HAND	A	A	A	0.000	
NAME WELLS, JOSEPH		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 4005	YEAR 2004-2005	AN GEOM	LAYM		B	A	0.000	
GR 12	GEND F	ANATOMY	BERR				0.000	
PRESENT ABSENT TARDY		BAS ENGLISH 12	COUS	B	B	A	0.000	
177	1	0	GERMAN IV	LAYM	C	C	A	0.000
CURRENT CREDITS: 3.5		LATIN IV	COUS	A	A	A	0.000	
TOTAL CREDITS: 22.5		PAINTING	HAND		C	A	0.000	
		PHYSICS	BERR	B	B	A	0.000	
		TRIG	LAYM	A	A		0.000	
		WLD HIS GEN	CLAR	A	A	B	0.000	
NAME WELLS, JONA RENEE		COURSE NAME TEAC GP Qtr GP Qtr GP Qtr CRED						
ID 5005	YEAR 2004-2005	ALGEBRA II	LAYM	F	F	F	0.000	
GR 11	GEND F	BAS ENGLISH 11	COUS	D	F	D	0.000	
PRESENT ABSENT TARDY		CHEM I	WEBB	D	F	F	0.000	
175	3	0	DRAWING	HAND		C	0.000	
CURRENT CREDITS: 6.5		FRENCH II	BERR	A	A	A	0.000	
TOTAL CREDITS: 17.5		LATIN II	COUS	F	A	F	0.000	
		SPANISH III	HAND	A	B	A	0.000	

**Report Layout – Permanent Record Label Format 32  
(82 is identical, but uses Numeric Marks)**

NAME EYE, MAGNUM P.		ID 4001	YEAR 2004-2005	NAME CONTRARY, MARY M.		ID 5001	YEAR 2004-2005
GRD 12		GEND M		GRD 11		GEND F	
PRESENT	ABSENT	TARDY	PRESENT		ABSENT	TARDY	
174	4	1	174		4	0	
CURRENT CREDITS: 4.5		TOTAL CREDITS: 21		CURRENT CREDITS: 6.5		TOTAL CREDITS: 19.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Qtr	Qtr	Qtr	Qtr		
AN GEOM	LAYM			B	A	0.000	
BAS ENGLISH 12	COUS	A	B	A	A	0.000	
GERMAN IV	LAYM	A	C	A	A	0.000	
LATIN IV	COUS	A	A	B	A	0.000	
PAINTING	HAND			C	A	0.000	
PHYSICS	BERR	B	B	A	A	0.000	
SCULPTURE	HAND	F	F			0.000	
TRIG	LAYM	A	A			0.000	
NAME FCNT, ELLA JANE		ID 4002	YEAR 2004-2005	NAME FERRY, MICHAEL JAY		ID 5002	YEAR 2004-2005
GRD 12		GEND F		GRD 11		GEND M	
PRESENT	ABSENT	TARDY	PRESENT		ABSENT	TARDY	
175	3	1	175		0	0	
CURRENT CREDITS: 4		TOTAL CREDITS: 21.5		CURRENT CREDITS: 6.5		TOTAL CREDITS: 20.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Qtr	Qtr	Qtr	Qtr		
AN GEOM	LAYM			B	A	0.000	
BAS ENGLISH 12	COUS	A	B	A	A	0.000	
GERMAN IV	LAYM	C	C	A	A	0.000	
LATIN IV	COUS	A	A	B	A	0.000	
PAINTING	HAND			C	A	0.000	
PHYSICS	BERR	B	B	A	A	0.000	
TRIG	LAYM	A	A			0.000	
M.L.D.HIS GEN	CLAR	B	B	A	A	0.000	
NAME JOHNSON, GEORGE EVAN		ID 4003	YEAR 2004-2005	NAME FOTTS, IAN MICHAEL		ID 5003	YEAR 2004-2005
GRD 12		GEND M		GRD 11		GEND M	
PRESENT	ABSENT	TARDY	PRESENT		ABSENT	TARDY	
175	5	2	175		0	0	
CURRENT CREDITS: 4		TOTAL CREDITS: 23.5		CURRENT CREDITS: 6.5		TOTAL CREDITS: 20.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Qtr	Qtr	Qtr	Qtr		
AN GEOM	LAYM			B	A	0.000	
BAS ENGLISH 12	COUS	B	B	A	A	0.000	
GERMAN IV	LAYM	C	C	A	A	0.000	
LATIN IV	COUS	A	A	B	A	0.000	
PAINTING	HAND			C	A	0.000	
PHYSICS	BERR	B	B	A	A	0.000	
TRIG	LAYM	A	A			0.000	
M.L.D.HIS GEN	CLAR	B	B	A	A	0.000	
NAME POTTS, JORDAN DANIEL		ID 4004	YEAR 2004-2005	NAME SPRAT, JACK JOSEPH		ID 5004	YEAR 2004-2005
GRD 12		GEND M		GRD 11		GEND M	
PRESENT	ABSENT	TARDY	PRESENT		ABSENT	TARDY	
178	0	0	174		4	0	
CURRENT CREDITS: 4		TOTAL CREDITS: 23		CURRENT CREDITS: 6.5		TOTAL CREDITS: 21	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Qtr	Qtr	Qtr	Qtr		
AN GEOM	LAYM			B	A	0.000	
BAS ENGLISH 12	COUS	B	B	A	A	0.000	
GERMAN IV	LAYM	C	C	A	A	0.000	
LATIN IV	COUS	A	A	B	A	0.000	
PAINTING	HAND			C	A	0.000	
PHYSICS	BERR	B	B	A	A	0.000	
TRIG	LAYM	A	A			0.000	
M.L.D.HIS GEN	CLAR	B	B	A	A	0.000	
NAME WELLS, JOSEPH		ID 4005	YEAR 2004-2005	NAME WELLS, JONA RENEE		ID 5005	YEAR 2004-2005
GRD 12		GEND F		GRD 11		GEND F	
PRESENT	ABSENT	TARDY	PRESENT		ABSENT	TARDY	
177	1	0	175		3	0	
CURRENT CREDITS: 3.5		TOTAL CREDITS: 22.5		CURRENT CREDITS: 6.5		TOTAL CREDITS: 17.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Qtr	Qtr	Qtr	Qtr		
AN GEOM	LAYM			B	A	0.000	
ANATOMY	BERR					0.000	
BAS ENGLISH 12	COUS	B	B	A	A	0.000	
GERMAN IV	LAYM	C	C	A	A	0.000	
LATIN IV	COUS	A	A	B	A	0.000	
PAINTING	HAND			C	A	0.000	
PHYSICS	BERR	B	B	A	A	0.000	
TRIG	LAYM	A	A			0.000	
ALGEBRA II	LAYM	F	F	F	A	0.000	
BAS ENGLISH 11	COUS	D	F	D	A	0.000	
CHEM I	WEBB	D	F	F	A	0.000	
DRAWING	HAND			C	A	0.000	
FRENCH III	BERR	A	A	A	A	0.000	
LATIN III	COUS	F	A	F	A	0.000	
SPANISH III	HAND	A	A	A	A	0.000	

### Report Layout – Permanent Record Label Format 33

NAME EYE, MAGNUM P.	ID 4001	YEAR 2004-2005	NAME FOTTS, JORDAN DANIEL	ID 4004	YEAR 2004-2005	
GRD T2	GEND M		GRD 12	GEND M		
PRESENT 174	ABSENT 4	TARDY 1	PRESENT 178	ABSENT 0	TARDY 0	
CURRENT CREDITS: 4.5			CURRENT CREDITS: 4			
TOTAL CREDITS: 21			TOTAL CREDITS: 23			
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Gr	Gr	Gr	Gr	
AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000
GERMAN IV	LAYM	A	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
SCULPTURE	HAND	F	F			0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Gr	Gr	Gr	Gr	
AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	B	A	0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	B	A	B	A	0.000
NAME FONT, ELLA JANE	ID 4002	YEAR 2004-2005	NAME WELLS, JOBETH	ID 4005	YEAR 2004-2005	
GRD T2	GEND F		GRD T2	GEND F		
PRESENT 175	ABSENT 3	TARDY 1	PRESENT 177	ABSENT 1	TARDY 0	
CURRENT CREDITS: 4			CURRENT CREDITS: 3.5			
TOTAL CREDITS: 21.5			TOTAL CREDITS: 22.5			
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Gr	Gr	Gr	Gr	
AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Gr	Gr	Gr	Gr	
AN GEOM	LAYM			B	A	0.000
ANATOMY	BERR					0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	B	A	0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	A	A	B	A	0.000
NAME JOHNSON, GEORGE EVAN	ID 4003	YEAR 2004-2005	NAME CONTRARY, MARY M.	ID 5001	YEAR 2004-2005	
GRD T2	GEND M		GRD 11	GEND F		
PRESENT 175	ABSENT 3	TARDY 2	PRESENT 174	ABSENT 4	TARDY 0	
CURRENT CREDITS: 4			CURRENT CREDITS: 3.5			
TOTAL CREDITS: 23.5			TOTAL CREDITS: 19.5			
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Gr	Gr	Gr	Gr	
AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Gr	Gr	Gr	Gr	
ALGEBRA II	LAYM	F	F	F	A	0.000
BAS ENGLISH 11	COUS	D	D	D	A	0.000
CHEM I	WEBB	D	F	F	A	0.000
DRAWING	HAND			C	A	0.000
FRENCH III	BERR	F	A	F	A	0.000
LATIN III	COUS	F	F	F	A	0.000
SPANISH III	HAND	A	A	A	A	0.000

### Report Layout – Permanent Record Label Format 34

NAME: EYE, MAGNUM P.	COURSE NAME	TEAC	GP	GP	GP	GP	CRED	NAME: CONTRARY, MARY M.	COURSE NAME	TEAC	GP	GP	GP	GP	CRED
ID 4001 YEAR 2004-2005	AN GEOM	LAYM			B	A	0.000	ID 5001 YEAR 2004-2005	ALGEBRA I	LAYM	F	F	F	A	0.000
GR 12 GEND M	BAS ENGLISH 12	COUS	A	B	A	A	0.000	GR 11 GEND F	BAS ENGLISH 11	COUS	D	D	D	A	0.000
PRESENT ABSENT TARDY	GERMAN IV	LAYM	A	C	A	A	0.000		CHEM I	WESB	D	F	F	A	0.000
174 4 1	LATIN IV	COUS	A	A	B	A	0.000	PRESENT ABSENT TARDY	DRAWING	HAND			C	A	0.000
	PAINTING	HAND			C	A	0.000	174 4 0	FRENCH III	BERR	F	A	F	A	0.000
	PHYSICS	BERR	B	B	A	A	0.000		LATIN III	COUS	F	F	F	A	0.000
CURRENT CREDITS: 4.5	SCULPTURE	HAND	F	F			0.000	CURRENT CREDITS: 6.5	SPANISH III	HAND	A	A	A	A	0.000
TOTAL CREDITS: 21	TRIG	LAYM	A	A			0.000	TOTAL CREDITS: 19.5							
	WLD HIS GEN	CLAR	B	B	B	A	0.000								
NAME: FONT, ELLA JANE	COURSE NAME	TEAC	GP	GP	GP	GP	CRED	NAME: FERRY, MICHAEL JAY	COURSE NAME	TEAC	GP	GP	GP	GP	CRED
ID 4002 YEAR 2004-2005	AN GEOM	LAYM			B	A	0.000	ID 5002 YEAR 2004-2005	ALGEBRA I	LAYM	F	F	F	A	0.000
GR 12 GEND F	BAS ENGLISH 12	COUS	A	B	A	A	0.000	GR 11 GEND M	BAS ENGLISH 11	COUS	D	D	D	A	0.000
PRESENT ABSENT TARDY	GERMAN IV	LAYM	C	C	A	A	0.000		CHEM I	WESB	D	F	F	A	0.000
175 3 1	LATIN IV	COUS	A	A	B	A	0.000	PRESENT ABSENT TARDY	DRAWING	HAND			C	A	0.000
	PAINTING	HAND			C	A	0.000	175 0 0	FRENCH III	BERR	A	A	F	A	0.000
	PHYSICS	BERR	B	B	A	A	0.000		LATIN III	COUS	F	F	F	A	0.000
CURRENT CREDITS: 4	TRIG	LAYM	A	A			0.000	CURRENT CREDITS: 6.5	SPANISH III	HAND	A	A	A	A	0.000
TOTAL CREDITS: 21.5	WLD HIS GEN	CLAR	B	B	B	A	0.000	TOTAL CREDITS: 20.5							
NAME: JOHNSON, GEORGE EVAN	COURSE NAME	TEAC	GP	GP	GP	GP	CRED	NAME: POTTS, IAN MICHAEL	COURSE NAME	TEAC	GP	GP	GP	GP	CRED
ID 4003 YEAR 2004-2005	AN GEOM	LAYM			B	A	0.000	ID 5003 YEAR 2004-2005	ALGEBRA I	LAYM	F	F	F	A	0.000
GR 12 GEND M	BAS ENGLISH 12	COUS	B	B	A	A	0.000	GR 11 GEND M	BAS ENGLISH 11	COUS	D	F	D	A	0.000
PRESENT ABSENT TARDY	GERMAN IV	LAYM	C	C	A	A	0.000		CERAMICS	HAND			C	A	0.000
175 3 2	LATIN IV	COUS	A	A	B	A	0.000	PRESENT ABSENT TARDY	CHEM I	WESB	D	F	F	A	0.000
	PAINTING	HAND			C	A	0.000	175 0 0	DRAWING	HAND			C	A	0.000
	PHYSICS	BERR	B	B	A	A	0.000		FRENCH III	BERR	A	A	A	A	0.000
CURRENT CREDITS: 4	TRIG	LAYM	A	A			0.000	CURRENT CREDITS: 6.5	LATIN III	COUS	F	F	F	A	0.000
TOTAL CREDITS: 23.5	WLD HIS GEN	CLAR	B	B	B	A	0.000	TOTAL CREDITS: 20.5	SPANISH III	HAND	A	A	A	A	0.000
NAME: POTTS, JORDAN DANIEL	COURSE NAME	TEAC	GP	GP	GP	GP	CRED	NAME: SPRAT, JACK JOSEPH	COURSE NAME	TEAC	GP	GP	GP	GP	CRED
ID 4004 YEAR 2004-2005	AN GEOM	LAYM			B	A	0.000	ID 5004 YEAR 2004-2005	ALGEBRA I	LAYM	F	F	F	A	0.000
GR 12 GEND M	BAS ENGLISH 12	COUS	B	B	A	A	0.000	GR 11 GEND M	BAS ENGLISH 11	COUS	D	F	D	A	0.000
PRESENT ABSENT TARDY	GERMAN IV	LAYM	C	C	A	A	0.000		CHEM I	WESB	D	F	F	A	0.000
178 0 0	LATIN IV	COUS	A	A	B	A	0.000	PRESENT ABSENT TARDY	DRAWING	HAND			C	A	0.000
	PAINTING	HAND			C	A	0.000	174 4 0	FRENCH III	BERR	A	A	A	A	0.000
	PHYSICS	BERR	B	B	A	A	0.000		LATIN III	COUS	F	F	F	A	0.000
CURRENT CREDITS: 4	TRIG	LAYM	A	A			0.000	CURRENT CREDITS: 6.5	SPANISH III	HAND	A	A	A	A	0.000
TOTAL CREDITS: 23	WLD HIS GEN	CLAR	B	A	B	A	0.000	TOTAL CREDITS: 21							
NAME: WELLS, JOBETH	COURSE NAME	TEAC	GP	GP	GP	GP	CRED	NAME: WELLS, JONA RENEE	COURSE NAME	TEAC	GP	GP	GP	GP	CRED
ID 4005 YEAR 2004-2005	AN GEOM	LAYM			B	A	0.000	ID 5005 YEAR 2004-2005	ALGEBRA I	LAYM	F	F	F	A	0.000
GR 12 GEND F	ANATOMY	BERR					0.000	GR 11 GEND F	BAS ENGLISH 11	COUS	D	F	D	A	0.000
PRESENT ABSENT TARDY	BAS ENGLISH 12	COUS	B	B	A	A	0.000		CHEM I	WESB	D	F	F	A	0.000
177 1 0	GERMAN IV	LAYM	C	C	A	A	0.000	PRESENT ABSENT TARDY	DRAWING	HAND			C	A	0.000
	LATIN IV	COUS	A	A	B	A	0.000	175 3 0	FRENCH III	BERR	A	A	A	A	0.000
	PAINTING	HAND			C	A	0.000		LATIN III	COUS	F	F	F	A	0.000
CURRENT CREDITS: 3.5	PHYSICS	BERR	B	B	A	A	0.000	CURRENT CREDITS: 6.5	SPANISH III	HAND	A	B	A	A	0.000
TOTAL CREDITS: 22.5	TRIG	LAYM	A	A			0.000	TOTAL CREDITS: 17.5							
	WLD HIS GEN	CLAR	A	A	B	A	0.000								

## Report Layout – Permanent Record Label Format 42

NAME EYE, MAGNUM P.		ID 4001	YEAR 2004-2005	NAME CONTRARY, MARY M.		ID 5001	YEAR 2004-2005
		GRD 12	GEND M			GRD 11	GEND F
PRESENT	ABSENT	TARDY		PRESENT	ABSENT	TARDY	
174	4	1		174	4	0	
CURRENT CREDITS: 4.5		TOTAL CREDITS: 21		CURRENT CREDITS: 9.5		TOTAL CREDITS: 19.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Gr	Gr	Gr	Gr		
AN GEOM	LAYM			B	A	0.000/	
BAS ENGLISH 12	COUS	A	B	A	A	0.000/	
GERMAN IV	LAYM	A	C	A	A	0.000/	
LATIN IV	COUS	A	A	B	A	0.000/	
PAINTING	HAND			C	A	0.000/	
PHYSICS	BERR	B	B	A	A	0.000/	
SCULPTURE	HAND	F	F			0.000/	
TRIG	LAYM	A	A			0.000/	
NAME FONT, ELLA JANE		ID 4002	YEAR 2004-2005	NAME FERRY, MICHAEL JAY		ID 5002	YEAR 2004-2005
		GRD 12	GEND F			GRD 11	GEND M
PRESENT	ABSENT	TARDY		PRESENT	ABSENT	TARDY	
175	3	1		178	0	0	
CURRENT CREDITS: 4		TOTAL CREDITS: 21.5		CURRENT CREDITS: 9.5		TOTAL CREDITS: 20.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Gr	Gr	Gr	Gr		
AN GEOM	LAYM			B	A	0.000/	
BAS ENGLISH 12	COUS	A	B	A	A	0.000/	
GERMAN IV	LAYM	C	C	A	A	0.000/	
LATIN IV	COUS	A	A	B	A	0.000/	
PAINTING	HAND			C	A	0.000/	
PHYSICS	BERR	B	B	A	A	0.000/	
TRIG	LAYM	A	A			0.000/	
MLD HIS GEN	CLAR	B	B	A	A	0.000/	
NAME JOHNSON, GEORGE EVAN		ID 4003	YEAR 2004-2005	NAME POTTS, IAN MICHAEL		ID 5003	YEAR 2004-2005
		GRD 12	GEND M			GRD 11	GEND M
PRESENT	ABSENT	TARDY		PRESENT	ABSENT	TARDY	
175	3	2		178	0	0	
CURRENT CREDITS: 4		TOTAL CREDITS: 23.5		CURRENT CREDITS: 9.5		TOTAL CREDITS: 20.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Gr	Gr	Gr	Gr		
AN GEOM	LAYM			B	A	0.000/	
BAS ENGLISH 12	COUS	B	B	A	A	0.000/	
GERMAN IV	LAYM	C	C	A	A	0.000/	
LATIN IV	COUS	A	A	B	A	0.000/	
PAINTING	HAND			C	A	0.000/	
PHYSICS	BERR	B	B	A	A	0.000/	
TRIG	LAYM	A	A			0.000/	
MLD HIS GEN	CLAR	B	B	A	A	0.000/	
NAME POTTS, JORDAN DANIEL		ID 4004	YEAR 2004-2005	NAME SPRAT, JACK JOSEPH		ID 5004	YEAR 2004-2005
		GRD 12	GEND M			GRD 11	GEND M
PRESENT	ABSENT	TARDY		PRESENT	ABSENT	TARDY	
178	0	0		174	4	0	
CURRENT CREDITS: 4		TOTAL CREDITS: 23		CURRENT CREDITS: 9.5		TOTAL CREDITS: 21	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Gr	Gr	Gr	Gr		
AN GEOM	LAYM			B	A	0.000/	
BAS ENGLISH 12	COUS	B	B	A	A	0.000/	
GERMAN IV	LAYM	C	C	A	A	0.000/	
LATIN IV	COUS	A	A	B	A	0.000/	
PAINTING	HAND			C	A	0.000/	
PHYSICS	BERR	B	B	A	A	0.000/	
TRIG	LAYM	A	A			0.000/	
MLD HIS GEN	CLAR	B	B	A	A	0.000/	
NAME WELLS, JOSETH		ID 4005	YEAR 2004-2005	NAME WELLS, JONA RENEE		ID 5005	YEAR 2004-2005
		GRD 12	GEND F			GRD 11	GEND F
PRESENT	ABSENT	TARDY		PRESENT	ABSENT	TARDY	
177	1	0		175	3	0	
CURRENT CREDITS: 3.5		TOTAL CREDITS: 22.5		CURRENT CREDITS: 9.5		TOTAL CREDITS: 17.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Gr	Gr	Gr	Gr		
AN GEOM	LAYM			B	A	0.000/	
ANATOMY	BERR					0.000/	
BAS ENGLISH 12	COUS	B	B	A	A	0.000/	
GERMAN IV	LAYM	C	C	A	A	0.000/	
LATIN IV	COUS	A	A	B	A	0.000/	
PAINTING	HAND			C	A	0.000/	
PHYSICS	BERR	B	B	A	A	0.000/	
TRIG	LAYM	A	A			0.000/	
NAME WELLS, JONA RENEE		ID 5005	YEAR 2004-2005	NAME WELLS, JONA RENEE		ID 5005	YEAR 2004-2005
		GRD 11	GEND F			GRD 11	GEND F
PRESENT	ABSENT	TARDY		PRESENT	ABSENT	TARDY	
175	3	0		175	3	0	
CURRENT CREDITS: 9.5		TOTAL CREDITS: 17.5		CURRENT CREDITS: 9.5		TOTAL CREDITS: 17.5	
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED	
		Gr	Gr	Gr	Gr		
ALGEBRA II	LAYM	F	F	F	A	0.000/	
BAS ENGLISH 11	COUS	D	F	D	A	0.000/	
CHEM I	WEBB	D	F	F	A	0.000/	
DRAWING	HAND			C	A	0.000/	
FRENCH III	BERR	A	A	A	A	0.000/	
LATIN III	COUS	F	A	F	A	0.000/	
SPANISH III	HAND	A	B	A	A	0.000/	

**Report Layout – Permanent Record Label Format 43  
(83 is identical, but uses Numeric Marks)**

NAME EYE, MAGNUM P.	ID 4001	YEAR 2004-2005	NAME FOTTS, JORDAN DANIEL	ID 4004	YEAR 2004-2005	
GRD 12	GEND M		GRD 12	GEND M		
PRESENT 174	ABSENT 4	TARDY 1	PRESENT 175	ABSENT 0	TARDY 0	
CURRENT CREDITS: 4.5			CURRENT CREDITS: 4			
TOTAL CREDITS: 21			TOTAL CREDITS: 23			
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Qtr	Qtr	Qtr	Qtr	
AN GEOM	LAYM		B	A		0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000
GERMAN IV	LAYM	A	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND		C	A		0.000
PHYSICS	BERR	B	B	A	A	0.000
SCULPTURE	HAND	F				0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000

NAME FCNT, ELLA JANE	ID 4002	YEAR 2004-2005	NAME WELLS, JOBETH	ID 4005	YEAR 2004-2005	
GRD 12	GEND F		GRD 12	GEND F		
PRESENT 175	ABSENT 3	TARDY 1	PRESENT 177	ABSENT 1	TARDY 0	
CURRENT CREDITS: 4			CURRENT CREDITS: 3.5			
TOTAL CREDITS: 21.5			TOTAL CREDITS: 22.5			
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Qtr	Qtr	Qtr	Qtr	
AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	A	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000

NAME JOHNSON, GEORGE EVAN	ID 4003	YEAR 2004-2005	NAME CONTRARY, MARY M.	ID 5001	YEAR 2004-2005	
GRD 12	GEND M		GRD 11	GEND F		
PRESENT 175	ABSENT 3	TARDY 2	PRESENT 174	ABSENT 4	TARDY 0	
CURRENT CREDITS: 4			CURRENT CREDITS: 3.5			
TOTAL CREDITS: 23.5			TOTAL CREDITS: 19.5			
COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Qtr	Qtr	Qtr	Qtr	
AN GEOM	LAYM			B	A	0.000
BAS ENGLISH 12	COUS	B	B	A	A	0.000
GERMAN IV	LAYM	C	C	A	A	0.000
LATIN IV	COUS	A	A	B	A	0.000
PAINTING	HAND			C	A	0.000
PHYSICS	BERR	B	B	A	A	0.000
TRIG	LAYM	A	A			0.000
WLD HIS GEN	CLAR	B	B	B	A	0.000

COURSE NAME	TEAC	GP 1	GP 2	GP 3	GP 4	CRED
		Qtr	Qtr	Qtr	Qtr	
ALGEBRA II	LAYM	F	F	F	A	0.000
BAS ENGLISH 11	COUS	D	D	D	A	0.000
CHEM I	WEBB	D	F	F	A	0.000
DRAWING	HAND			C	A	0.000
FRENCH III	BERR	F	A	F	A	0.000
LATIN III	COUS	F	F	F	A	0.000
SPANISH II	HAND	A	A	A	A	0.000

### Report Layout – Permanent Record Label Format 44

NAME Student11176, DEBRA	COURSE NAME	TEAC	Sem1 Avg	CRED
ID 8667	INT ENG IV		C+	0.000
GR 12	INT MATH III		C+	0.000
YEAR 2007-2008	MET 2 LAB		B	0.000
GRD 12	OGT/EMPLOY		B-	0.000
GEND F	PHYSICS		I	0.000
HOME Findlay City SD				
PRESENT 0				
ABSENT 0				
TARDY 0				
CURRENT CREDITS: 0				
TOTAL CREDITS: 0				

### Report Layout – Permanent Record Label Format 62

NAME	Student11176, DEBRA	HM SC	Findlay City SD	ID	8667	YEAR	2007-2008
				GR	12	GEND	F
PRESENT	ABSENT	TARDY					
0	0	0					
CURRENT CREDITS: 0				TOTAL CREDITS: 0			
COURSE NAME	TEAC	Sem1					
		Avg					
INT ENG IV		C+	0.000				
INT MATH III		C+	0.000				
MET 2 LAB		B	0.000				
OGT/EMPLOY		B-	0.000				
PHYSICS		I	0.000				

### Report Layout – Permanent Record Label Format 63

NAME	Student11176, DEBRA	ID	8667	YEAR	2007-2008
		GRD	12	GEND	F
		HOME	Findlay City SD		
PRESENT	ABSENT	TARDY			
0	0	0			
CURRENT CREDITS: 0			TOTAL CREDITS: 0		
COURSE NAME	TEAC	Sem1			
		Avg			
INT ENG IV		C+	0.000		
INT MATH III		C+	0.000		
MET 2 LAB		B	0.000		
OGT/EMPLOY		B-	0.000		
PHYSICS		I	0.000		

### Report Layout – Permanent Record Label Format 64

# Appendix A. R700 Format Example

Fixed H1

## Report Of Student Progress

TO THE PARENTS
This is the school's official report card. If a conference is desired please contact the school.
(419)555-5555

ATTENDANCE			
	PRESENT	ABSENT	TARDY
Qtr1	44	0	0
Qtr2	43	1	0
TOT:	87	1	0

GRADING SCALE
A=90-100
B=80-89
C=70-79
D=60-69
F=59-0

BIRTH DATE	GENDER	GRADE	HOMEROOM
08/29/1992	F	12	IN20

1st Semester Credits Earned	2.750
2nd Semester Credits Earned	2.750
Current Year Credits Earned	2.750

Quarter 2

2010

SUBJECT		COMMENTS	Qtr1		Qtr2		CREDIT
CODE	NAME / TEACHER		Qtr	Absent	Qtr	Absent	
212 Per 4	4 AMERICAN GOVERNMENT D BRAD Teacher1244		C+	1	B+	2	
168 Per 6	6 CHORALE MR. T. Teacher1224		A		A		
125 Per 5	5 ENGLISH IV (COLLEGE) DENISE Teacher1218		C		B		
931 Per 3	3 ONU ALGEBRA/TRIGONOMETRY ANN Teacher1233		C		B		
186 Per 8, 9	98 PHYSICS ANN Teacher1331		A		A		
202 Per 1	1 STREET LAW TROY Teacher1252		B				

DASL HIGH SCHOOL  
630 GLENDALE AVENUE  
LIMA, OH 45804  
PHONE: (419)555-5555  
FAX:

To the Parents of:  
Student58519, ERICA  
645 S Main St

Lima, OH

45804-1241

**Fixed N2**

DASL HIGH SCHOOL

2010

2/22/2011

**Report Card**

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20

Mr. William Hanna  
Principal  
(419)555-5555

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	Qtr2	ATT CRED	EARN CRED
				Qtr	Qtr		
202	1	STREET LAW	Teacher1252	B		0.000	0.000
931	3	ONU ALGEBRA/TRIGONOMET	Teacher1233	C	B	0.000	0.000
212	4	AMERICAN GOVERNMENT	Teacher1244	C+	B+	0.000	0.000
125	5	ENGLISH IV (COLLEGE)	Teacher1218	C	B	0.000	0.000
168	6	CHORALE	Teacher1224	A	A	0.000	0.000
186	98	PHYSICS	Teacher1331	A	A	0.000	0.000

**Attendance**

Qtr1			Qtr2			Total		
Present	Absent	Tardy	Present	Absent	Tardy	Present	Absent	Tardy
44	0	0	43	1	0	87	1	0

**GPA**

GPA SET NAME	GPA
2nd Qtr	3.400

**Credits**

YEAR	CREDIT EARNED
2010	0.000
Total:	0.000

**Honor Message**

GPA SET NAME	HONOR MESSAGE
2nd Qtr	Congratulations! You have made the 3.0 Honor R

ERICA Student58519  
645 S Main St

Lima, OH

45804-1241

This is the school's official report card. If a conference is desired please contact the school.

# Fixed N4

DASL HIGH SCHOOL

2010

2/22/2011

## Report Card

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20

Mr. William Hanna  
Principal  
(419)555-5555

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	1Int	Qtr2	2Int	1Ex	1Avg
				Qtr	Int	Qtr	Int	Exam	Avg
202	1	STREET LAW	Teacher1252	B	B		A		
931	3	ONU ALGEBRA/TRIGONOMET	Teacher1233	C	C	B	A	C	C
212	4	AMERICAN GOVERNMENT	Teacher1244	C+	A-	B+	A-	B+	B
125	5	ENGLISH IV (COLLEGE)	Teacher1218	C	C	B	B	B	B
168	6	CHORALE	Teacher1224	A	A	A	A		A
186	98	PHYSICS	Teacher1331	A	A	A	B	A	A

### Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
44	0	0	43	1	0	25	0	0	0	0	0	112	1	0

GPA	
GPA SET NAME	GPA
2nd Qtr	3.400

Honor Message	
GPA SET NAME	HONOR MESSAGE
2nd Qtr	Congratulations! You have made the 3.0 Honor Roll

ERICA Student58519  
645 S Main St

Lima, OH

45804-1241

This is the school's official report card. If a conference is desired please contact the school.

Fixed SP1

## Report Card

DASL HIGH SCHOOL  
630 GLENDALE AVENUE  
LIMA, OH 45804

Phone: (419)555-5555 Fax: (419)555-1111

To The Parent/Guardian(s) of:  
ERICA Student58519  
645 S Main St  
Lima OH 45804-1241

Student Id	Grade	Homeroom
11802	12	IN20

School Year	2010
Marking Period	Qtr2
Run Date	2/22/2011

**Message**  
This is the school's official report card. If a conference is desired please contact the school.

**Grading Scale**

A=90-100
B=80-89
C=70-79
D=60-69
F=59-0

Period	Course Code	Sec	Course Name	Attn Cred	Qtr1	1Int	Qtr2	2Int	Earn Cred
					Qtr	Int	Qtr	Int	
1	202	1	STREET LAW	0.000	B	B		A	0.000
Teacher1252									
3	931	3	ONU ALGEBRA/TRIGONOMETRY	0.000	C	C	B	A	0.000
Teacher1233									
4	212	4	AMERICAN GOVERNMENT	0.000	C+	A-	B+	A-	0.000
Teacher1244									
5	125	5	ENGLISH IV (COLLEGE)	0.000	C	C	B	B	0.000
Teacher1218									
6	168	6	CHORALE	0.000	A	A	A	A	0.000
Teacher1224									
8, 9	186	98	PHYSICS	0.000	A	A	A	B	0.000
Teacher1331									

### Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
44	0	0	43	1	0	25	0	0	0	0	0	112	1	0

### GPA And Credits

GPA Set	GPA
2.000	3.400
1.000	2.833

Total Credits Earned:

Outstanding Fees: \$0.00

# Fixed SW1

DASL HIGH SCHOOL

2010

2/22/2011

## Report Card

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20

Mr. William Banna

(419)555-5555

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	1Int	Qtr2	2Int	CRED
				Qtr	Int	Qtr	Int	
188	6	CHORALE	MR. T. Teacher1224	A	A	A	A	
125	5	ENGLISH IV (COLLEGE)	DENISE Teacher1218	C	C	B	B	
931	3	ONU ALGEBRA/TRIGONOMETR	ANN Teacher1233	C	C	B	A	
202	1	STREET LAW	TROY Teacher1252	B	B		A	
186	98	PHYSICS	ANN Teacher1331	A	A	A	B	
212	4	AMERICAN GOVERNMENT	D BRAD Teacher1244	C+	A-	B+	A-	

GPA SET NAME	GPA	CREDITS EARNED
1st Qtr	2.833	6.000
2nd Qtr	3.400	5.000

Credits Earned
0.00

Reporting Term	Present	Absent	Tardy
Qtr1	44	0	0
Qtr2	43	1	0
Qtr3	25	0	0
Qtr4	0	0	0
Attendance Totals:	112	1	0

Student58519, ERICA  
 645 S Main St  
 Lima, OH 45804-1241

This is the school's official report card. If a conference is desired please contact the school.

Fixed L1

## GRADE REPORT

DASL HIGH SCHOOL  
630 GLENDALE AVENUE  
LIMA, OH 45804

Student Number	Student Name	H.R.	Grade	School Year
11802	Student58519, ERICA	IN20	12	2010

PERIOD	COURSE NAME	TEACHER	LEVEL	Qtr 1		1st		Qtr 2		2nd		Times Absent Total	Times Tardy Total	
				Times Absent	Times Tardy									
1	STREET LAW	Teacher1262	B	0	0	B	0	0	0	0	0	0	0	
3	ONU ALGEBRA/TRIGONOMETRY	Teacher1233	C	0	0	C	0	0	A	0	0	0	0	
4	AMERICAN GOVERNMENT	Teacher1244	C+	1	2	A-	0	0	B+	2	3	A-	0	3
5	ENGLISH IV (COLLEGE)	Teacher1218	C	0	0	C	0	0	B	0	0	B	0	0
8	CHORALE	Teacher1224	A	0	0	A	0	0	A	0	0	A	0	0
8, 9	PHYSICS	Teacher1331	A	0	0	A	0	0	A	0	0	B	0	0

This is the school's official report card. If a conference is desired please contact the school.

Achievement	Explanation of Marks	Effort
A - Superior	P - Passed in a Pass-Fail Course	E - Excellent
B - Above Average	X - Failed on Effort	S - Satisfactory
C - Average	# - Medical Excuse	U - Unsatisfactory
D - Below Average	IN - Incomplete*	
F - Failure	CO - Condition*	
* The parent should have had advance notice of these situations		

DASL HIGH SCHOOL  
630 GLENDALE AVENUE  
LIMA, OH 45804

ERICA Student58519  
Student58519, ERICA  
645 S Main St

Lima, OH 45804-1241

**GRADE REPORT**

# Fixed L2

## INTERIM PROGRESS REPORT

10/7/2011

Student Name	GIANT, RUTH	Student Number	15594
--------------	-------------	----------------	-------

Grade Level	09	Homeroom	
-------------	----	----------	--

OTTAWA HIGH SCHOOL  
630 GLENDALE AVENUE  
OTTAWA, OH 45875

Dear Parent/Guardian:

The following teachers are taking this opportunity to comment on your child's academic progress.  
**THIS IS NOT A GRADE REPORT.** If you have questions or wish additional information from a teacher, please call (419)523-██████ to arrange an appointment.

Course	Description	Teacher	Currently Receiving	Comments			
011	ART I	DENE MILLER	A	Excellent work.	1	111	
180	PEC SCIENCE	BRIAN HEEB	B-		2	112	
074	SPORTS/GAMES	STAN MYERS	B		3	114	
170	FRESHMAN CHOIR	MR. T. ELLER	A		5	116	
205	WORLD STUDIES	KIM BIRNE	C		0	119	
140	ALGEBRA I	THO WILLI	D		8	129	
120	ENGLISH I	DENI MAN	A-		9	130	

Picture Day October 15th

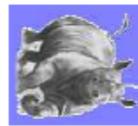
OTTAWA HIGH SCHOOL  
630 GLENDALE AVENUE  
OTTAWA, OH 45875

To the Parent/Guardian of:  
GIANT, RUTH  
30 ██████████ CROSS STREET

COLUMBUS OH 45830

**All Year<sup>2</sup>**

2010



DASL HIGH SCHOOL

ERICA Student189519  
645 S Main St  
Lima, OH

Lima, OH

45904-1241

**GRADE REPORT**

2/22/2011

STUDENT NAME	Student189519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20
GENDER	F
BIRTHDATE	08/29/1992
NEXT GRADE	GR

COURSE SEC	COURSE NAME	TEACHER	Qtr1		Qtr2		2int		CRED
			Qtr	Int	Qtr	Int			
188	CHORALE	Teacher1224	A	A	A	A			0.500
125	ENGLISH IV (COLLEGE)	Teacher1218	C	C	B	B			0.500
931	ONU ALGEBRA/TRIGONOMETRY	Teacher1233	C	C	B	A			0.500
202	STREET LAW	Teacher1252	B	B		A			0.250
186	PHYSICS	Teacher1331	A	A	A	B			0.500
212	AMERICAN GOVERNMENT	Teacher1244	C+	A-	B+	A-			0.500

GPA And Credits		
GPA SET NAME	GPA	CREDITS EARNED
1st Qtr	2.830	8.000
2nd Qtr	3.400	5.000

Honor Message		HONOR MESSAGE	
GPA SET NAME	2nd Qtr	Congratulations! You have made the 3.0 Honor Roll	

Attendance														
Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy	Present	Absent	Tardy	Present	Absent	Tardy	Present	Absent	Tardy	Present	Absent	Tardy
44	0	0	44	0	0	25	0	0	0	0	0	112	0	0

Graduation Eligibility		GRADUATION ELIGIBILITY RESULT	
GRADUATION ELIGIBILITY RULE NAME	6540 REQ.2008	Student has not met the requirements for graduation	

Fixed N1

2010

# GRADE REPORT

Quarter 2

1/14/2011

DEBOW HIGH SCHOOL

PHILIP KARHOFFER  
645 S Main St

Lima, OH  
(555)555-5555

46904-1241

STUDENT NAME	KARHOFFER, PHILIP
STUDENT NUMBER	11053
GRADE	12
HOMEROOM CODE	H4
GENDER	M
COUNSELOR NAME	DENNIS Teacher2044
HOMEROOM LOC CODE	004
STUDENT STATUS NAME	ACTIVE RES

This is the school's official report card. If a conference is desired please contact the school.

COURSE	SEC	COURSE NAME	TEACHER	Qtr1			1st			2nd			CRSE CRED EARN FULL PRO	CRED EARN FULL PRO	CRED ATT FULL PRO	CRED ATT FULL PRO
				Alpha	Number	Equi	Alpha	Number	Equi	Alpha	Number	Equi				
1057	1	AP CALCULUS	DENNIS Teacher2098		98.0	A+		92.0	A-		94.0	A	1.00	1.00	1.000	1.000
1100	1	BAND	JOHN Teacher2172		100.0	A+		100.0	A+		100.0	A+	1.00	1.00	1.000	1.000
960	1	AP ENGLISH	Katherine Teacher1923		96.5	A+		99.2	A+		107.3	A+	1.00	1.00	1.000	1.000
1390	3	AP PSYCHOLOGY	KIM Teacher2023		96.5	A		96.2	A		97.3	A+	1.00	1.00	1.000	1.000
835	1	LATIN IV	QUINN Teacher1891		99.2	A+		95.2	A		87.4	B+	1.00	1.00	1.000	1.000
1224	1	PHYSICS I	SHELBY Teacher2098		99.2	A+		98.4	A+		90.9	A-	1.00	1.00	1.000	1.000

Total Credits			
SCHOOL YEAR	SCHOOL NAME	CRSE CRED EARN FULL PRO	CRSE CRED EARN FULL PRO
2010	DEBOW HIGH SCHOOL	6.000	6.000
Credits Total:		6.00	6.00

Attendance				
Reporting Term	Present	Absent	Tardy	
Qtr1	42.0	0.0	0.0	
Qtr2	39.0	1.0	0.0	
Qtr3	22.0	1.0	0.0	
Qtr4	0.0	0.0	0.0	
Attendance Total:		103.0	2.0	0.0

# Fixed N3

DASL HIGH SCHOOL

## Report Card

ERICA Student58519  
 845 S Main St  
 Lima, OH 45804-1241

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20
GENDER	F

COURSE	SEC	COURSE NAME	TEACHER	Qtr1		Qtr2		Qtr3		Qtr4		Total		TOTAL CRED	COMMENT
				Present	Absent	1int	2int	1int	2int	1int	2int	1int	2int		
202	1	STREET LAW	Teacher1262			B	A							0.000	
831	3	ONU ALGEBRA/TRIGONOMETRY	Teacher1233			C	A							0.000	
212	4	AMERICAN GOVERNMENT	Teacher1244			C+	A-							0.000	
126	5	ENGLISH IV (COLLEGE)	Teacher1218			C	B							0.000	
188	0	CHORALE	Teacher1224			A	A							0.000	
198	98	PHYSICS	Teacher1331			A	B							0.000	

Attendance		Qtr1		Qtr2		Qtr3		Qtr4		Total	
Present	Absent	Present	Absent	Present	Absent	Present	Absent	Present	Absent	Present	Absent
44	0	43	1	25	0	0	0	0	0	112	1

This is the school's official report card. If a conference is desired please contact the school.

GPA	
GPA SET NAME	GPA
1st Qtr	2.833
2nd Qtr	3.400

Total Year Credits	
CRED ATTEMPT	0.000

**Fixed SW2**

DEBOW HIGH SCHOOL  
 101 E. NORTH ST.  
 ELIDA, OH 45807  
 (419)331-4115

Superintendent  
 Sarah Bur  
 Principal

KARHOFFER, PHILIP	08/05/1992	M	12	2010	11053	H4
STUDENT NAME	BIRTHDATE	GENDER	GRADE	SCHOOL YEAR	STUDENT ID	HOMEROOM

COURSE	SEC	COURSE NAME	TEACHER	Qtr1		1st		2nd		COMMENTS	CRED EARN FULL
				Alpha	%	Alpha	%	Alpha	%		
1057	1	AP CALCULUS	Teacher/2096	A+	98.00	A-	92.00	A	94.00		1.00
1100	1	BAND	Teacher/2172	A+	100.00	A+	100.00	A+	100.00		1.00
1224	1	PHYSICS I	Teacher/2086	A+	99.20	A+	98.38	A-	90.86		1.00
1350	3	AP PSYCHOLOGY	Teacher/2023	A	96.47	A	96.22	A+	97.29		1.00
635	1	LATIN IV	Teacher/1891	A+	99.18	A	95.17	B+	87.40		1.00
950	1	AP ENGLISH	Teacher/1923	A+	96.52	A+	99.23	A+	107.27		1.00

Attendance	Quarter 1			Quarter 2			Quarter 3			Quarter 4			Total Attendance		
	Present	Absent	Tardy	Present	Absent	Tardy									
42	0	0	39	1	0	22	1	0	0	0	0	103	2	0	

This is the school's official report card. If a conference is desired please contact the school.

- A=90-100
- B=80-89
- C=70-79
- D=60-69
- F=59-0

PHILIP KARHOFFER  
 645 S Main St  
 Lima, OH  
 45804-1241

# Fixed SW3

## Report Cards

ELIDA HIGH SCHOOL  
 101 E. NORTH ST.  
 ELIDA, OH 45807  
 (419)331-4115

10/7/2011

To the Parents/Guardian of:  
 Student 106945, SEQUOIA  
 645 S Main St

Lima, OH 45804-1241

This letter is to inform you of your son/daughter's level of performance in the following specified class(es). We recognize the importance of making you aware of your student's progress and hope that if there is a need for improvement, it will occur by the time report cards are issued. If you wish to discuss your child's progress with a particular teacher or the counselor, please call the school office to make an appointment.

COURSE SEC	COURSE NAME	QTR		COMMENTS
		QTR	QTR	
910 6	ENGLISH 9	59.29	F+	
Katherine Teacher 1979				
1000 3	PRE-ALGEBRA	71.13	C-	
DAN Teacher 2185				
712 3	GIRLS PHYSICAL EDUCATION	100.00	A+	
NICOLE Teacher 2181				
1217 3	PHYSICAL SCIENCE	88.80	D+	
LORALYNN Teacher 2213				
200 6	ART FUNDAMENTALS	79.08	C+	
MARTHA Teacher 2102				
1310 4	WORLD STUDIES 9	73.52	C	Fine student.
STEVE Teacher 2109				

Attendance		QTR 4		TOTAL	
Present	Absent	Tardy	Present	Absent	Tardy
41	3	0	41	3	0

**Format01**

**Report Card**

DASL HIGH SCHOOL  
 ERICA Student58519  
 645 S Main St  
 Lima, OH 45804-1241

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20
GENDER	F

COURSE	SEC	COURSE NAME	Qtr1		Qtr2		2Int		CRED	COMMENTS
			Qtr	Int	Qtr	Int	Qtr	Int		
212	4	AMERICAN GOVERNMENT	C+	A-	B+	A-		0.500		
Teacher1244										
168	6	CHORALE	A	A	A	A		0.500		
Teacher1224										
125	5	ENGLISH IV (COLLEGE)	C	C	B	B		0.500		
Teacher1218										
831	3	ONU ALGEBRA/TRIGONOMETRY	C	C	B	A		0.500		
Teacher1233										
186	98	PHYSICS	A	A	A	B		0.500		
Teacher1331										
202	1	STREET LAW	B	B		A		0.250		
Teacher1252										

This is the school's official report card. If a conference is desired please contact the school.

GPA And Credits	GPA SET NAME	GPA	CREDITS EARNED
1st Qtr		2.833	6.000
2nd Qtr		3.400	5.000

Total Credits	CREDITS EARNED
	2.750

Attendance	QTR1		QTR2		QTR3		QTR4		TOTAL	
	Present	Absent								
44	0	0	43	1	0	25	0	0	0	0
									112	1

Honor Message	GPA SET NAME	HONOR MESSAGE
2nd Qtr		Congratulations! You have made the 3.0 Honor Roll

Graduation Eligibility	GRADUATION ELIGIBILITY RULE NAME	GRADUATION ELIGIBILITY RULE RESULT
	GRAD REQ 2008	Student has not met the requirements for graduation

**Format02**

DEBOW HIGH SCHOOL

**Report Card**

**PHILIP KARHOFFER**  
 645 S Main St  
 Lima, OH 45804-1241

STUDENT NAME	KARHOFFER, PHILIP
STUDENT NUMBER	11053
GRADE	12
HOMEROOM	H4
GENDER	M

COURSE	SEC	COURSE NAME	Qtr 1		CRED	COMMENTS
			Qtr	Int		
1057	1	AP CALCULUS	98.00	92.00	94.00	1.000
Teacher2098						
950	1	AP ENGLISH	96.52	99.23	107.27	1.000
Teacher1923						
1350	3	AP PSYCHOLOGY	96.47	96.22	97.29	1.000
Teacher2023						
1100	1	BAND	100.00	100.00	100.00	1.000
Teacher2172						
635	1	LATIN IV	99.18	95.17	97.40	1.000
Teacher1891						
1224	1	PHYSICS I	99.20	98.38	90.96	1.000
Teacher2088						

This is the school's official report card. If a conference is desired please contact the school.

GPA And Credits	GPA SET NAME	GPA	CREDITS EARNED
1st qtr		4.000	6.000

Total Credits	CREDITS EARNED
	6.000

Attendance	QTR1		QTR2		QTR3		QTR4		Total			
	Present	Absent										
42	0	0	39	1	0	22	1	0	0	103	2	0

Honor Message	GPA SET NAME	HONOR MESSAGE
1st qtr		Congrats you made the all A honor roll
Graduation Eligibility		
GRADUATION ELIGIBILITY RULE NAME		GRADUATION ELIGIBILITY RESULT
Seniors in Progress 2007 and Beyond		

Format03

Report Card

2010

DEBOW HIGH SCHOOL

PHILIP KARHOFFER  
645 S Main St

Lima, OH

45804-1241

STUDENT NAME	KARHOFFER, PHILIP
STUDENT NUMBER	11053
GRADE	12
HOMEROOM	H4
GENDER	M

COURSE	SEC	COURSE NAME	Qtr1		1int		2int		CRED
			Alpha	%	Alpha	%	Alpha	%	
1057	1	AP CALCULUS	A+	98.00	A-	92.00	A	94.00	1.000
Teacher2096									
950	1	AP ENGLISH	A+	96.52	A+	99.23	A+	107.27	1.000
Teacher1923									
1350	3	AP PSYCHOLOGY	A	96.47	A	96.22	A+	97.29	1.000
Teacher2023									
1100	1	BAND	A+	100.00	A+	100.00	A+	100.00	1.000
Teacher2172									
835	1	LATIN IV	A+	99.18	A	95.17	B+	97.40	1.000
Teacher1891									
1224	1	PHYSICS I	A+	99.20	A+	98.38	A-	90.86	1.000
Teacher2086									

Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
42	0	0	39	1	0	22	1	0	0	0	0	103	2	0

This is the school's official report card. If a conference is desired please contact the school.

GPA And Credits		
GPA SET NAME	GPA	CREDITS EARNED
1st qtr	4.000	6.000

Total Credits
CREDITS EARNED
6.000

HONOR MESSAGE	
GPA SET NAME	HONOR MESSAGE
1st qtr	Congrats you made the all A honor roll

**Format04**

DEBOW HIGH SCHOOL

**Report Card**

PHILIP KARHOFFER  
645 S Main St  
Lima, OH 45904-1241

STUDENT NAME	KARHOFFER, PHILIP
STUDENT NUMBER	11053
GRADE	12
HOMEROOM	H4
GENDER	M

COURSE	SEC	COURSE NAME	Qtr1		2Int		CRED	COMMENTS	
			Qtr	Int	Int	Int			
1057	1	AP CALCULUS	A+	A-	A	A	94.00	1,000	
Teacher2098									
950	1	AP ENGLISH	A+	96.52	A+	99.23	A+	107.27	1,000
Teacher1923									
1350	3	AP PSYCHOLOGY	A	96.47	A	96.22	A+	97.29	1,000
Teacher2023									
1100	1	BAND	A+	100.00	A+	100.00	A+	100.00	1,000
Teacher2172									
635	1	LATIN IV	A+	99.18	A	95.17	B+	87.40	1,000
Teacher1891									
1224	1	PHYSICS I	A+	99.20	A+	98.38	A-	90.88	1,000
Teacher2088									

This is the school's official report card. If a conference is desired please contact the school.

GPA And Credits	
GPA SET NAME	GPA EARNED
1st qtr	4.000 6.000

Total Credits	CREDITS EARNED
	6.000

Attendance	Qtr1		Qtr2		Qtr3		Qtr4		TOTAL	
	Present	Absent	Tardy	Absent	Tardy	Present	Absent	Tardy	Present	Absent
+2	0	0	0	39	1	0	22	1	0	0
									103	2

Honor Message	
GPA SET NAME	HONOR MESSAGE
1st qtr	Congrats you made the all A honor roll

Graduation Eligibility	
GRADUATION ELIGIBILITY RULE NAME	GRADUATION ELIGIBILITY RESULT
Seniors in Progress 2007 and Beyond	

## Format11

### Interim Progress Report

DASL HIGH SCHOOL  
630 GLENDALE AVENUE  
LIMA, OH 45804  
(419)555-5555

2/22/2011

To the Parents/Guardian of:

Student58519, ERICA  
645 S Main St  
Lima, OH

45804-1241

This letter is to inform you of your son's/daughter's level of performance in the following specified class(es).

We recognize the importance of making you aware of your student's progress and hope that if there is a need for improvement, it will occur by the time report cards are issued.

If you wish to discuss your child's progress with a particular teacher or the counselor, please call the school office to make an appointment.

COURSE	SEC	COURSE NAME	Grades				COMMENTS
			Qtr	Int	Qtr	Int	
188	8	CHORALE	A	A	A	A	
MR. T. Teacher1224							
125	5	ENGLISH IV (COLLEGE)	C	C	B	B	
DENISE Teacher1218							
931	3	ONU ALGEBRA/TRIGONOMETRY	C	C	B	A	
ANN Teacher1233							
202	1	STREET LAW	B	B		A	
TROY Teacher1252							
186	98	PHYSICS	A	A	A	B	
ANN Teacher1331							
212	4	AMERICAN GOVERNMENT	C+	A-	B+	A-	
D BRAD Teacher1244							

#### Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
44	0	0	43	1	0	25	0	0	0	0	0	112	1	0

This is the school's official report card. If a conference is desired please contact the school.

## Format12

### Interim Progress Report

DEBOW HIGH SCHOOL  
101 E. NORTH ST.  
ELIDA, OH 45807  
(419)331-4115

To the Parents/Guardian of:

KARHOFFER, PHILIP  
645 S Main St  
Lima, OH

45804-1241

2/22/2011

This letter is to inform you of your son's/daughter's level of performance in the following specified class(es).

We recognize the importance of making you aware of your student's progress and hope that if there is a need for improvement, it will occur by the time report cards are issued.

If you wish to discuss your child's progress with a particular teacher or the counselor, please call the school office to make an appointment.

COURSE	SEC	COURSE NAME	2Int		COMMENTS
			Int		
835	1	LATIN IV	87.40	B+	
QUINN Teacher1891					
1224	1	PHYSICS I	90.86	A-	
SHELBY Teacher2086					
1350	3	AP PSYCHOLOGY	97.29	A+	
KIM Teacher2023					
950	1	AP ENGLISH	107.	A+	
Katherine Teacher1923					
1057	1	AP CALCULUS	94.00	A	
DENNIS Teacher2096					
1100	1	BAND	100.	A+	
JOHN Teacher2172					

#### Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
42	0	0	39	1	0	22	1	0	0	0	0	103	2	0

This is the school's official report card. If a conference is desired please contact the school.

## Format 15

### Interim Progress Report

DASL HIGH SCHOOL  
630 GLENDALE AVENUE  
LIMA, OH 45804  
(419)555-5555

2/22/2011

To the Parents/Guardian of:

Student 58519, ERICA  
645 S Main St  
Lima, OH

45804-1241

This letter is to inform you of your son's/daughter's level of performance in the following specified class(es).

We recognize the importance of making you aware of your student's progress and hope that if there is a need for improvement, it will occur by the time report cards are issued.

If you wish to discuss your child's progress with a particular teacher or the counselor, please call the school office to make an appointment.

\$24.00

COURSE	SEC	COURSE NAME	2010	2011	2012	2013	COMMENTS
			Qtr	int	Qtr	int	
188	8	CHORALE	A	A	A	A	
MR. T. Teacher1224							
125	5	ENGLISH IV (COLLEGE)	C	C	B	B	
DENISE Teacher1218							
931	3	ONU ALGEBRA/TRIGONOMETRY	C	C	B	A	
ANN Teacher1233							
202	1	STREET LAW	B	B		A	
TROY Teacher1252							
186	98	PHYSICS	A	A	A	B	
ANN Teacher1331							
212	4	AMERICAN GOVERNMENT	C+	A-	B+	A-	
D BRAD Teacher1244							

This is the school's official report card. If a conference is desired please contact the school.

## Format16

### Interim Progress Report

DEBOW HIGH SCHOOL  
101 E. NORTH ST.  
ELIDA, OH 45807  
(419)331-4115

2/22/2011

To the Parents/Guardian of:

KARHOFFER, PHILIP  
645 S Main St  
Lima, OH

45804-1241

This letter is to inform you of your son's/daughter's level of performance in the following specified class(es).

We recognize the importance of making you aware of your student's progress and hope that if there is a need for improvement, it will occur by the time report cards are issued.

If you wish to discuss your child's progress with a particular teacher or the counselor, please call the school office to make an appointment.

\$2.00

COURSE	SEC	COURSE NAME	2int		COMMENTS
			Int		
835	1	LATIN IV	87.40	B+	
QUINN Teacher1891					
1224	1	PHYSICS I	90.86	A-	
SHELBY Teacher2086					
1350	3	AP PSYCHOLOGY	97.29	A+	
KIM Teacher2023					
950	1	AP ENGLISH	107.	A+	
Katherine Teacher1923					
1057	1	AP CALCULUS	94.00	A	
DENNIS Teacher2096					
1100	1	BAND	100.	A+	
JOHN Teacher2172					

This is the school's official report card. If a conference is desired please contact the school.

# Format20

DASL HIGH SCHOOL

2/22/2011

## Report Card

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20

Mr. William Banna

(419)555-5555

2010

\$24.00

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	1Int	Qtr2	2Int	CRED
212	4	AMERICAN GOVERNMENT	Teacher1244	C+	A-	B+	A-	0.000
168	8	CHORALE	Teacher1224	A	A	A	A	0.000
125	5	ENGLISH IV (COLLEGE)	Teacher1218	C	C	B	B	0.000
931	3	ONU ALGEBRA/TRIGONOMETRY	Teacher1233	C	C	B	A	0.000
186	98	PHYSICS	Teacher1331	A	A	A	B	0.000
202	1	STREET LAW	Teacher1252	B	B		A	0.000

## Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
44	0	0	43	1	0	25	0	0	0	0	0	112	1	0

GPA		
GPA SET NAME	GPA	
1st Qtr	2.833	
2nd Qtr	3.400	

Total Year Credits
CRED EARNED
2.750

HONOR MESSAGE	
GPA SET NAME	HONOR MESSAGE
2nd Qtr	Congratulations! You have made the 3.0 Honor Rq

This is the school's official report card. If a conference is desired please contact the school.

Student58519, ERICA  
645 S Main St

Lima, OH

45804-1241

**Format21**

DASL HIGH SCHOOL

2/22/2011

**Report Card**

STUDENT NAME	Student58519, ERICA		
STUDENT NUMBER	11802		
GRADE	12	HOMEROOM	IN20

Mr. William Banna  
Principal

(419)555-5555      2010

\$24.00

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	1Int	Qtr2	2Int
212	4	AMERICAN GOVERNMENT	Teacher1244	C+	A-	B+	A-
168	6	CHORALE	Teacher1224	A	A	A	A
125	5	ENGLISH IV (COLLEGE)	Teacher1218	C	C	B	B
931	3	ONU ALGEBRA/TRIGONOMETRY	Teacher1233	C	C	B	A
186	98	PHYSICS	Teacher1331	A	A	A	B
202	1	STREET LAW	Teacher1252	B	B		A

**Attendance**

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
44	0	0	43	1	0	25	0	0	0	0	0	112	1	0

This is the school's official report card. If a conference is desired please contact the school.

GPA		Total Year Credits	
GPA SET NAME	GPA	CRED EARNED	
2nd Qtr	3.400	2.750	

Student58519, ERICA  
645 S Main St  
Lima, OH      45804-1241

Promoted to Grade   
Retained in Grade   
Transferred to Grade

**Format30**

**Report Card**

DEBOW HIGH SCHOOL

PHILIP KARHOFFER  
645 S Main St  
Lima, OH

2010

45804-1241

\$4.00

STUDENT NAME	KARHOFFER, PHILIP
STUDENT NUMBER	11053
GRADE	12
HOMEROOM	H4
SCHOOL ATTENDING	
HOME SCHOOL IRN	
HOME SCHOOL NAME	

COURSE	SEC	COURSE NAME	Qtr1				CRE
			Present	Absent	Tardy	Qtr	
1057	1	AP CALCULUS				98.00	1,000
Teacher2096							
950	1	AP ENGLISH				96.52	1,000
Teacher1923							
1350	3	AP PSYCHOLOGY				96.47	1,000
Teacher2023							
1100	1	BAND				100.00	1,000
Teacher2172							
635	1	LATIN IV				99.18	1,000
Teacher1891							
1224	1	PHYSICS I				99.20	1,000
Teacher2086							

Attendance	Qtr1			Qtr2			Qtr3			Qtr4			Total	
	Present	Absent	Tardy	Present	Absent									
42	0	0	0	39	1	0	22	1	0	0	0	103	2	0

GPA	GPA SET NAME	GPA
		4.000

Total Credits	CREDIT EARNED	CREDIT ATTN
	6.000	6.000

Honor Message	HONOR MESSAGE
1st qtr	Congrats you made the all A honor roll

Report Card

DASL HIGH SCHOOL

ERICA Student58519  
 645 S Main St  
 Lima, OH 45804-1241

2010  
 \$24.00

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
IRN ATTENDING	
SCHOOL ATTENDING	
HOME SCHOOL IRN	
HOME SCHOOL NAME	

COURSE	SEC	COURSE NAME	Qtr1		Qtr2		CRE
			Qtr	Qtr	Qtr	Qtr	
212	4	AMERICAN GOVERNMENT		C+		B+	0.000
Teacher1244							
168	6	CHORALE		A		A	0.000
Teacher1224							
125	5	ENGLISH IV (COLLEGE)		C		B	0.000
Teacher1218							
931	3	ONU ALGEBRA/TRIGONOMETRY		C		B	0.000
Teacher1233							
186	98	PHYSICS		A		A	0.000
Teacher1331							
202	1	STREET LAW		B			0.000
Teacher1252							

Attendance	Qtr1			Qtr2			Qtr3			Qtr4			Total		
	Present	Absent	Tardy												
44	0	0	0	43	1	0	25	0	0	0	0	112	1	0	0

GPA	GPA SET NAME	GPA
1st Qtr		2.833
2nd Qtr		3.400

Total Credits	CREDIT EARNED	CREDIT ATTM
	0.000	0.000

Honor Message	HONOR MESSAGE
2nd Qtr	Congratulations! You have made the 3.0 Honor Roll

## Format40

DASL HIGH SCHOOL

2/23/2011

### Report Card

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20

Mr. William Banna

(419)555-5555

2010

\$24.00

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	Qtr2	CRED
212	4	AMERICAN GOVERNMENT	Teacher1244	C+	B+	0.000
188	8	CHORALE	Teacher1224	A	A	0.000
125	5	ENGLISH IV (COLLEGE)	Teacher1218	C	B	0.000
931	3	ONU ALGEBRA/TRIGONOMETRY	Teacher1233	C	B	0.000
186	98	PHYSICS	Teacher1331	A	A	0.000
202	1	STREET LAW	Teacher1252	B		0.000

### Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
44	0	0	43	1	0	25	0	0	0	0	0	112	1	0

GPA	
GPA SET NAME	GPA
1st Qtr	2.833

Total Year Credits
CRED EARNED
2.750

HONOR MESSAGE	
GPA SET NAME	HONOR MESSAGE
2nd Qtr	Congratulations! You have made the 3.0 Honor Rd

ERICA Student58519  
645 S Main St

Lima, OH

45804-1241

This is the school's official report card. If a conference is desired please contact the school.

# Format41

DASL HIGH SCHOOL

2/23/2011

## Report Card

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HOMEROOM	IN20

Mr. William Banna

(419)555-5555

2010

\$24.00

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	Qtr2	CRED
212	4	AMERICAN GOVERNMENT	Teacher1244	C+	B+	0.000
168	6	CHORALE	Teacher1224	A	A	0.000
125	5	ENGLISH IV (COLLEGE)	Teacher1218	C	B	0.000
931	3	ONU ALGEBRA/TRIGONOMETRY	Teacher1233	C	B	0.000
186	98	PHYSICS	Teacher1331	A	A	0.000
202	1	STREET LAW	Teacher1252	B		0.000

### Attendance

Qtr1		Qtr2		Qtr3		Qtr4		Total	
Present	Absent								
44	0	43	1	25	0	0	0	112	1

Total Year Credits
CRED EARNED
2.750

HONOR MESSAGE	
GPA SET NAME	HONOR MESSAGE
2nd Qtr	Congratulations! You have made the 3.0 Honor Rd

ERICA Student58519  
645 S Main St

Lima, OH

45804-1241

This is the school's official report card. If a conference is desired please contact the school.

Format50

DASL HIGH SCHOOL

2/23/2011

Report Card

STUDENT NAME	Student58519, ERICA
STUDENT NUMBER	11802
GRADE	12
HR TEACHER	Teacher1278

2010

\$24.00

COURSE	SEC	COURSE NAME	TEACHER	Qtr1	Qtr2
212	4	AMERICAN GOVERNMENT	Teacher1244	C+	B+
168	8	CHORALE	Teacher1224	A	A
125	5	ENGLISH IV (COLLEGE)	Teacher1218	C	B
931	3	ONU ALGEBRA/TRIGONOMETRY	Teacher1233	C	B
186	98	PHYSICS	Teacher1331	A	A
202	1	STREET LAW	Teacher1252	B	

Attendance

Qtr1			Qtr2			Qtr3			Qtr4			Total		
Present	Absent	Tardy												
44	0	0	43	1	0	25	0	0	0	0	0	112	1	0

This is the school's official report card. If a conference is desired please contact the school.

Total Year Credits
CRED EARNED
2.750

Student58519, ERICA  
645 S Main St

Lima, OH

45804-1241

Mr. William Banna  
Principal

Superintendent

Promoted to Grade

Retained in Grade

Transferred to Grade

---

# ProgressBook StudentInformation Scheduling Guide



# **ProgressBook StudentInformation Scheduling Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Scheduling Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.6.4	<i>“Course Section – EMIS Override Tab”</i>	60	Updated image and added description of new <b>Dual Credit</b> check box.
14.6.4	<i>“Student Request Assignments”</i>	121	Changed reference to supported browser information to <i>ProgressBook End User Requirements</i> .
14.4.3	<i>“Create a List of Students Tab”</i>	111	Updated images of “Search for Students” option to reflect removal of <b>Reporting Period</b> drop-down list.
14.3.0	<i>“Course – Miscellaneous Tab”</i>	39	Added note that <b>Location Types Available</b> and <b>Location Types Selected</b> multi-select lists are currently nonfunctional.
14.3.0	<i>“Course Section Assignments”</i>	99	Added note that the screen is read-only at the district level.
14.3.0	<i>“Create a List of Students Tab”</i>	111	Updated images and added description of “Search by Ad Hoc Membership” option.
14.3.0	<i>“Course Curriculum (CRSE)”</i>	135	Updated image and added “Is College Prep” and “Is Dual Credit” to <b>Fields To Display</b> field description.
14.3.0	<i>“Add/Drop Audit Report (R209)”</i>	217	Added description of new “Add/Drop/Remove Date” and “Modified Date” options and updated image.
14.2.0	<i>“Add/Edit Course”</i>	31	Updated image of add/edit course screen to show new <b>College Prep</b> and <b>Dual Credit</b> check boxes.
14.2.0	<i>“Course – General Tab”</i>	33	Updated image of course screen <b>General</b> tab and added descriptions of new <b>College Prep</b> and <b>Dual Credit</b> check boxes.

This page intentionally left blank.

# Table of Contents

Change Log.....	i
Table of Contents.....	iii
Scheduling Overview.....	1
Understanding the Scheduling Module.....	1
Scheduling Outline and Flow.....	3
Scheduling System Maintenance .....	7
Initialization.....	7
Daily Pattern Rules.....	7
Master Calendar Period Maintenance .....	8
Periods of the Day Maintenance.....	9
Rotation Days Maintenance.....	12
Schedule Terms.....	14
Verify Reporting Terms.....	15
Course Terms Maintenance .....	15
Homeroom Term Maintenance .....	18
Master Schedule Maintenance .....	19
Course Maintenance Screens .....	22
Course Department Maintenance.....	22
Course Language Maintenance.....	24
Add/Edit Course Language.....	25
Course Difficulty Maintenance .....	25
Course Area of Study Maintenance .....	26
Add/Edit Course Area of Study.....	27
Course Subject Area Maintenance .....	27
Add/Edit Course Subject Area .....	28
Course Rank Weight Maintenance .....	28
Add/Edit Course Rank Weight .....	29
Courses .....	30
Add/Edit Course.....	31

Delete Course.....	31
Course Selection Wizard .....	32
Course – General Tab .....	33
Course – Marks Tab .....	35
Course – Miscellaneous Tab .....	39
Course – EMIS Tab .....	40
Course – Pre/Co-requisites Tab .....	43
Course Sections .....	47
Add Course Section.....	50
Delete Course Section.....	50
Course Section – General Tab .....	51
Course Section – Meeting Times Tab.....	53
Course Section – Memberships Tab.....	58
Course Section – Attendance Tab.....	58
Course Section – Teacher History Tab.....	59
Course Section – EMIS Override Tab.....	60
Course Groups .....	61
Course Group – Groups Tab .....	63
Course Group – Courses / Sections Tab .....	64
Scheduler .....	67
Job Parameter Sets (Schedule Job Wizard).....	67
Run Level Parameters Tab .....	69
Pass Level Parameters Tab .....	71
Pass Control Tab.....	72
Course Sequencing Rules Tab.....	75
Teacher Link Groups Tab .....	77
Submit Tab (Add/Edit) .....	79
Submit Tab (Execute).....	81
Study Hall Wizard .....	83
Study Hall Parameters.....	83
Execute Job.....	85

Schedule Job History.....	86
View Job Statistics.....	88
View Job Parameters.....	96
Schedule Result Sets .....	97
Add/Edit Schedule Result Set.....	98
Delete Schedule Result Set.....	98
Scheduling Screens .....	99
Course Section Assignments.....	99
Student Course Section Assignments .....	100
Course Section Assignments.....	104
Drop/Remove/Transfer Course Section Assignment .....	106
Bulk Course Section Assignment .....	111
Create a List of Students Tab .....	111
Create a List of Course Sections Tab .....	114
Assign Students Tab.....	115
Bulk Course Section Management .....	116
Choose Section Tab .....	116
Choose Action Tab .....	117
View Conflicts Tab .....	117
Summary Tab .....	118
Student Schedules .....	119
View Schedule .....	119
Student Request Assignments .....	121
CTE Management .....	132
Student Grid .....	134
Course Request Reports.....	134
Course Curriculum (CRSE) .....	135
Students With No Requests or Assignments (NORQ).....	139
Students Course Requests (REQU) .....	141
Student Request Specific Course (R404) .....	144
Students Requesting A Specific Course Pair (R405).....	147

Potential Course Conflicts (R406) .....	148
Potential Course Conflicts Matrix (R403).....	151
Scheduling Reports.....	153
Student Scheduling Analysis (R426) .....	154
Students Scheduled with Free Time (R415A).....	157
Students Scheduled with Free Time by Period (R415B).....	160
Student Scheduled In Two Assigned Courses/Sections (R425) .....	163
Student Scheduled In Course/Section and Not Another (R424) .....	165
Teacher Block Schedule (R427).....	167
Timetable Grid (R422) .....	170
Class Arena Card (R418A) – SIS .....	177
Class Arena Card (R418B).....	180
Student Arena Card (R417).....	182
Students Scheduled with Alt. Courses (R413).....	184
Section Summary by Report Period (R807).....	185
Teacher Schedule (R411).....	187
Location Schedule (R409) .....	191
Singleton List Report (R813-A).....	193
Singleton List Conflict Report (R813-B).....	195
Class Master Schedule (R407).....	197
Class Master Schedule with Disabilities (R407) Report.....	201
Schedule Card Formatter (R701) .....	203
Add/Drop Audit Report (R209).....	217
Course Section Summary Report.....	219

---

## **Scheduling Overview**

The purpose of this document is to define the initialization process necessary to begin a new scheduling year, maintenance of courses, group courses and Master Schedules, the batch and online scheduling process and reports available to help with each of these processes.

The Master calendar is a core item which scheduling is based on. The creation of the master calendar also defines scheduling terms and base reporting terms. For more information on the master calendar see the school setup and initialization documentation.

The code tables discussed in this document are all school and school year specific as they assist in defining the Master Schedule for the applicable school year.

StudentInformation allows the creation of more than one Master Schedule if desired. This might be useful if passage of a school levy might determine what type of Master Schedule will be needed for the new school year. Or it might be helpful in determining the best possible Master Schedule needed to utilize the staff and rooms, and give the students the best possible schedules for their requests.

---

## **Understanding the Scheduling Module**

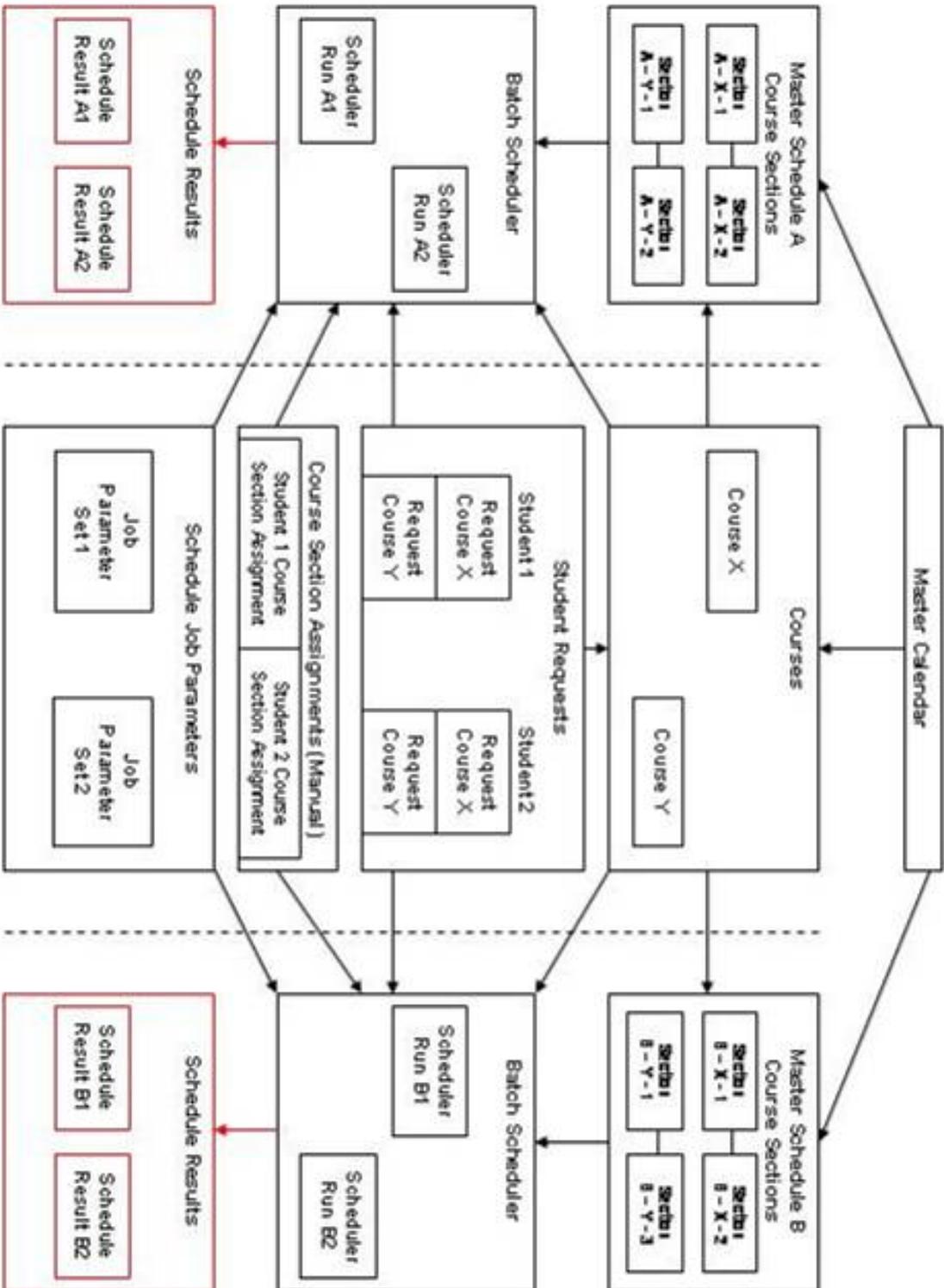
The Batch Scheduler is used to schedule one, multiple or all students at once. The Scheduler is given course requests for all students who are to be scheduled, it cycles through the student's one at a time to try to schedule as many of each student's requests as possible.

The parameters used to execute the scheduler will be saved by name as a set of scheduling parameters. The user will be able to execute the scheduler by selecting any valid Master Schedule and any valid scheduling parameter set. The results of the scheduler will be stored with a schedule job name into a user selected set of schedule results, with statistics, a reference to the Master Schedule and the scheduling parameters used to create the schedule result set.

Scheduling Reports are available in numerous formats to show Scheduling data in both detail and summary form. The data on each report can be filtered, sorted, and grouped with various date ranges and sorting options.

## DASL Scheduling Overview

Please Note – The number of Master Schedules is unlimited. The number of Schedule Results is unlimited.  
Course Section Assignments are Master Scheduler/Schedule Result specific



---

## Scheduling Outline and Flow

1. Scheduling System Maintenance
  - A. **Initialization** – Initialization consists of several code tables that must be verified and/or defined to create a course master and student schedules.
    1. **Daily Pattern Rules** – Used to define daily patterns which are to be permitted or prevented in all student schedules.
    2. **Master Calendar Periods** – A period of time that course sections can meet during a master calendar.
    3. **Periods of the Day** – Set of periods that occur during the day.
    4. **Rotation Day** – The days the courses are scheduled to meet.
    5. **Verifying Report Terms** – Two types of reporting terms exist: Standard and virtual. Standard reporting terms represent a collection of days that will be reported on. Standard reporting terms are made up of scheduling terms. Virtual reporting terms are used to create a placeholder for marks (Interims, Exam, Averages, etc.).
    6. **Schedule Terms** – Shortest amount of time that a course meets during the current master calendar schedule.
    7. **Course Terms** – Represents an individual start and end date or a group of start and end dates that a course section can be assigned to meet.
    8. **Homeroom Terms** – Terms defined for homerooms which allow students to have more than one homeroom per year.
    9. **Master Schedule** – Course Master Schedule
  2. **Course Maintenance** – Tables need to be defined for use when creating courses and courses need to be updated or added as needed for student scheduling needs.
    - A. **Course Department** – Departments help to categorize courses into more generalized areas.
    - B. **Course Language** – Used to define what language may be used to teach a course.
    - C. **Course Difficulty** – Ability to maintain difficulty levels for marks reporting.
    - D. **Course Area of Study** – Used in conjunction with Graduation Verification module.
    - E. **Course Subject Area** – Used in conjunction with Graduation Verification module.
    - F. **Course Rank Weight** – Used in conjunction with Mansfield Method custom Rank method.

- G. **Courses** – A complete course record defines all of the properties of a course.
  - 1. **Course Selection Wizard** – Tool for selecting courses
  - 2. **Course – General Tab**
  - 3. **Course – Marks Tab**
  - 4. **Course – Miscellaneous Tab**
  - 5. **Course – EMIS Tab**
  - 6. **Course – Pre/Co-requisites Tab**
- H. **Course Sections**
  - 1. **Course Sections - General Tab**
  - 2. **Course Sections – Meeting Times Tab**
  - 3. **Course Sections – Membership Tab**
  - 4. **Course Sections – Attendance Tab**
  - 5. **Course Sections – EMIS Override Tab**
- I. **Course Groups** – Provides the ability to define a grouping of courses where students can be grouped and scheduled together.
  - 1. **Course Group – Groups Tab**
  - 2. **Course Group – Courses/Sections Tab**
- 3. **Scheduler** – The scheduler consists of wizards and parameters that guide you through the batch or online scheduling process.
  - A. **Job Parameter Set (Schedule Job Wizard)** – A collection of parameters that are used to run the batch scheduler engine.
    - 1. **Run Level Parameters**
    - 2. **Pass Level Parameters**
    - 3. **Pass Control**
    - 4. **Course Sequencing Rules**
    - 5. **Teacher Link Groups**
    - 6. **Submit (Add)**
    - 7. **Submit (Execute)**
  - B. **Study Hall Wizard** – Tool to walk you through the addition of study halls to student schedules
    - 1. **Study Hall Parameters**
    - 2. **Execute Job**
  - C. **Schedule Job History** – History of all schedule jobs that have been processed
    - 1. **View Job Statistics**

- 2. **View Job Parameters**
  - D. **Schedule Result Sets** – A “container” for a set of schedule results from the run of the batch scheduler. Allows the user to save results of different runs then choose the best result to finalize schedules.
- 4. **Scheduling Screens** – Screens used to create and/or view student schedules and requests as well as information for course sections.
  - A. **Student Course Section Assignments** – Screen used to add/edit/drop student course section assignments or course section assignments
    - 1. **Student Course Section Assignments**
    - 2. **Course Section Assignments**
    - 3. **Drop/Remove/Transfer Course Section Assignments**
  - B. **Bulk Course Section Assignment** – Screen used to assign multiple students to one or more course sections at the same time.
  - C. **Bulk Course Section Transfer** – Screen used to drop, remove or transfer multiple students from a course section at the same time.
  - D. **Student Schedules**
    - 1. **View Schedule** – View-only screen displaying student’s schedule.
    - 2. **Student Requests & Assignments** – All-in-one scheduling screen to add or edit requests and/or assignments, manually assign course sections to requests, and view a schedule graph.
  - E. **CTE Management** – Screen used to update the CTE Program of Concentration field on selected students in specific course sections.
- 5. **Course Request Reports**
  - A. **Course Curriculum (CRSE)** – This report allows you to print out a customized list of all courses that have been entered.
  - B. **Students With No Requests (NORQ)** – The Students with No Requests report will display all students who do not have course requests for the selected Master Schedules.
  - C. **Student Course Requests (REQU)** – This report lists the disposition of course requests made by students for a specific schedule result set.
  - D. **Student Requested Specific Course (R404)** – Produces a report of students requesting a specific course. The list may be helpful if a course is changed or dropped from the Master Schedule.
  - E. **Students Requesting Specific Course Pair (R405)** – Generates a list of students requesting specific course pairs.
  - F. **Potential Course Conflicts (R406)** – Alternate to R403. Report produces a list of potential conflicts in table format.

G. **Potential Course Conflicts Matrix (R403)** – Alternate to R406. Lists each course against every other course in a matrix form. Used to determine the number of conflicts that would result if 2 courses were offered only one time in the same period of the day.

## 6. Scheduling Reports

A. **Student Scheduling Analysis (R426)** – Similar to R420 but more condensed. Report for latest Scheduling simulation. A=Available, S=Scheduled, F=Full

B. **Student Scheduled with Free Time (R415A)** – Report used to determine when students have free time and assist in setting up study halls.

C. **Student Scheduled with Free Time by Period (R415B)** – Report used to determine when students have free time and assist in setting up study halls; sorted by period.

D. **Students Scheduled in Two Assigned Course Sections (R425)** – Produces a report of students assigned to one course/section and any one or more of up to 7 other courses.

E. **Student Scheduled in Course Section Not Another (R424)** – Generates a list of students who are scheduled into only one of a pair of courses. Up to 7 course pairs may be specified.

F. **Teacher Block Schedule (R427)** – This report prints out the teacher's schedules in block format.

G. **Class Arena Card (R418)** – Creates class arena cards for arena scheduling.

H. **Student Arena Card (R417)** – Creates Student Arena Cards used with Arena scheduling.

I. **Students Scheduled with Alternate Courses (R413)** – Lists students who have been scheduled with an alternate course request versus a primary request.

J. **Section Summary by Report Period (R807)** – Generates a summary by section of all courses indicating the current filling counts with options to print only closed, only open or both.

K. **Teacher Schedule (R411)** – Used during the initial scheduling process will help to identify any teacher conflicts. Can later be used to provide each teacher with a copy of his/her schedule for verification.

L. **Location Schedule (R409)** – List of all locations and scheduled classes. Used to verify that the Master Schedule does not contain any room/location conflicts.

M. **Singleton List Report (R813-A)** – Provides a list of singleton courses by period and a list of students who have requested 2 or more singletons offered during the same period.

N. **Singleton List Conflict Report (R813-B)** – Provides a list of singleton courses by period and a list of students who have requested 2 or more singletons offered during the same period.

- O. **Class Master Schedule (R407)** – Lists course, sections, terms, days, period, teachers, rooms, class capacity, filling counts and demand for all courses.
- P. **Schedule Card Formatter (R701)** – Student Schedule Cards
- Q. **Add/Drop Audit Report (R209)** – Generates a list of all course assignments and requests records which have been added or dropped within a specific date range.
- R. **Course Section Summary Report** – Generates an on-line list of courses and course information.

## Scheduling System Maintenance

### Initialization

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization**

Initialization steps include items such as setting up Master calendar periods, rotation days, reporting terms, etc. Once initialization steps have been completed, course and Master Schedule information can be added and/or modified as needed to begin the scheduling process.

### Daily Pattern Rules

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Daily Pattern Rules**

Daily Pattern Rules are used to define daily patterns for courses and artificial courses which are to be permitted or prevented in all student schedules. These patterns are only enforced if a value is entered in the Scheduler for the "Maximum Number of Days with Restricted Patterns" value on the Pass Level Parameters tab.

Home » Management » School Administration » Scheduling Administration » Initialization » Daily Pattern Rules

### Daily Pattern Rules

From this screen, you are able to specify default daily pattern rules for the master calendar.

Max Consecutive Courses:

Max Consecutive Artificial Courses:

Save Cancel

**Daily Pattern Rules Screen**

**Max Consecutive Courses** – Maximum number of consecutive courses you wish for students to receive when scheduler is processed.

**Max Consecutive Artificial Courses** – Maximum number of consecutive artificial courses you wish for students to receive when scheduler is processed.

**Save** – Save the Daily Pattern Rules.

**Cancel** – Will cancel any changes made to the Daily Pattern Rules.

## Master Calendar Period Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Master Calendar Periods**

Master Calendar Periods are set up during the creation of the Master Calendar. For more details on setting up the Master Calendar see *ProgressBook StudentInformation School Setup and Configuration Guide*. Master Calendar Periods are periods of the day when classes are scheduled to meet and/or attendance is taken.

			Code	Name	Sort Order	Active
			1	1	1	
			2	2	2	
			3	3	3	
			3A	3A	4	
			4	4	5	
			5	5	6	
			6	6	7	
			7	7	8	
			8	8	9	
			9	9	11	

Show Active Only

### Master Calendar Period Maintenance

**Sorting** – Sorting on this screen is accomplished by using the and arrows to move the Master Calendar Period up or down in the grid.

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

/ – Move this Master Calendar Period up or down in the sort order listing.

**Save Changes** – Save changes to Master Calendar Period sort order.

**Cancel Changes** – Cancel changes to Master Calendar Period sort order.

## Add/Edit Master Calendar Period

Home » Management » School Administration » Scheduling Administration » Initialization » Master Calendar Periods

### Master Calendar Period Maintenance

From this screen, you can display, add, change and delete data pertaining to Master Calendar Periods.

Code:  ⚡

Name:  ⚡

Is Active:

Save Save and New Cancel

### Add/Edit Master Calendar Period Maintenance Screen

**Code** (required) – Enter up to 4 characters, alphanumeric, for the Master Calendar Period Code. If you try to use an existing inactive Master Calendar Period Code, you will be prompted to reactivate this inactive Master Calendar Period if you wish.

**Name** (required) – Enter the name of the new Master Calendar Period.

## Periods of the Day Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Periods of the Day**

Periods of the Day are either rotation day specific and will vary from day to day or fixed and will be standard from day to day. Periods of the Day are based on the Master Calendar Periods that were set up during creation of the Master Calendar. For more details on setting up the Master Calendar see *ProgressBook StudentInformation School Setup and Configuration Guide*.

Home » Management » School Administration » Scheduling Administration » Initialization » Periods of the Day

### Periods of the Day Maintenance

From this screen, you can display, add, change and delete data pertaining to periods of the day.

Filter By Rotation Day: -- Select a Rotation Day --

- Select a Rotation Day --
- Mon - Monday
- Tue - Tuesday
- Wed - Wednesday
- Thur - Thursday
- Fri - Friday

### Periods of the Day Maintenance Screen

To view/modify/delete Periods of the Day, you must first select the appropriate Rotation Day from the drop-down list of valid calendar Rotation Days.

Home » Management » School Administration » Scheduling Administration » Initialization » Periods of the Day

## Periods of the Day Maintenance

From this screen, you can display, add, change and delete data pertaining to periods of the day.

Filter By Rotation Day: Mon - Monday

Add Period Save Changes Cancel Changes

			Code	Name	Start Time	End Time	Sort Order	Active
X	✎	↓	1	1	07:35 AM	08:15 AM	1	💡
X	✎	↑ ↓	2	2	08:20 AM	09:00 AM	2	💡
X	✎	↑ ↓	3	3	09:25 AM	10:05 AM	3	💡
X	✎	↑ ↓	3A	3A	10:10 AM	10:50 AM	4	💡
X	✎	↑ ↓	4	4	10:55 AM	11:35 AM	5	💡
X	✎	↑ ↓	5	5	11:40 AM	12:20 PM	6	💡
X	✎	↑ ↓	6	6	12:25 PM	01:05 PM	7	💡
X	✎	↑ ↓	7	7	01:10 PM	01:50 PM	8	💡
X	✎	↑ ↓	8	8	01:55 PM	02:35 PM	9	💡
X	✎	↑	9	9	09:05 AM	09:20 AM	11	💡

Show Active Only

### Periods Listed on the Periods of the Day Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – Sorting on this screen is accomplished by using the ↑ and ↓ arrows to move the Rotation Days up or down in the grid.

↑ / ↓ – Move this Period of the Day up or down in the sort order listing.

**Save Changes** – Save changes to Period of the Day sort order.

**Cancel Changes** – Cancel changes to Period of the Day sort order.

### Add Period of the Day

Home » Management » School Administration » Scheduling Administration » Initialization » Periods of the Day

## Periods of the Day Maintenance

From this screen, you can display, add, change and delete data pertaining to periods of the day.

Filter By Rotation Day: Mon - Monday

Rotation Day: Mon - Monday

Master Calendar Period:  ⚡

Start Time:  ⚡

End Time:  ⚡

Save Save and New Cancel

### Adding a Period of the Day

**Rotation Day** (non-modifiable) – Description of the selected Rotation Day.

**Master Calendar Period** (required) – Master Calendar Period associated with the Period of the Day being modified. Only Master Calendar Periods which have not yet been defined for the selected Rotation Day will display in this drop-down menu.

**Start Time** (required) – Enter start time for this period.

**End Time** (required) – Enter end time for this period.

### ***Edit Period of the Day***

Home >> Management >> School Administration >> Scheduling Administration >> Initialization >> Periods of the Day

## Periods of the Day Maintenance

From this screen, you can display, add, change and delete data pertaining to periods of the day.

Filter By Rotation Day: Mon - Monday

Rotation Day: Mon - Monday

Master Calendar Period: 3A - 3A

Start Time: 10:10 AM

End Time: 10:50 AM

Is Rotation Day Active:

Is Master Calendar Period Active:

Save Cancel

### **Editing a Period of the Day**

**Is Rotation Day Active** (non-modifiable) – Yes or No; this has been designated under Rotation Days maintenance (see [“Add/Edit/Copy Rotation Day”](#)).

**Is Master Calendar Period Active** (non-modifiable) – Yes or No; this has been designated under Master Calendar Period maintenance (see [Add/Edit Master Calendar Period](#)).

## Delete Period of the Day

If there are Course Sections associated to the Rotation Day Period you are trying to delete, you will not be able to delete it. You will see a listing of associated courses and an error message.

Home » Management » School Administration » Scheduling Administration » Initialization » Periods of the Day

### Periods of the Day Maintenance

From this screen, you can display, add, change and delete data pertaining to periods of the day.

The selected Rotation Day Period cannot be deleted because there are course sections associated to the Rotation Day Period. All dependencies on the Rotation Day Period must be deleted first, before the Rotation Day Period can be deleted. You have the option of clicking on a course section to review these dependencies and take the appropriate action.

9 - 9

Course	Section	Course Term
TECH MATH 11/12	1	All Year
ART II	3	All Year
ART 10	1	All Year
AMER HISTORY CP	4	All Year
ECONOMICS CP	3	1st Semester
WORLD HISTORY GENERAL	2	All Year
TRANSITIONAL CAREER EXPERIENCE	7	All Year
TRANSITIONAL CAREER EXPERIENCE	1	All Year
TRANSITIONAL CAREER EXPERIENCE	4	All Year
TRANSITIONAL CAREER EXPERIENCE	5	All Year
TRANSITIONAL CAREER EXPERIENCE	6	All Year
DCT COOP PM	2	All Year
DCT COOP PM	1	All Year
DCT COOP PM	3	All Year
CONSTRUCTION SKILLS TECH 2 LAB	1	All Year

Deleting a Period of the Day

## Rotation Days Maintenance

Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Rotation Days

The Rotation Days Code table defines the days that classes are scheduled to meet. Each day is defined as a separate record. If a school has a normal five day school week, they would define each of those five days as shown in the following example.

Home » Management » School Administration » Scheduling Administration » Initialization » Rotation Days

### Rotation Days Maintenance

From this screen, you can display, add, change and delete data pertaining to rotation days.

Add Rotation Day   Save Changes   Cancel Changes

			Code	Name	Display Color	Rotation Day Periods	Sort Order	Active
X	✎	📄	↓	Mon	Monday	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	0	💡
X	✎	📄	↑ ↓	Tue	Tuesday	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	1	💡
X	✎	📄	↑ ↓	Wed	Wednesday	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	2	💡
X	✎	📄	↑ ↓	Thur	Thursday	1, 2, 3, 3A, 4, 5, 6, 7, 9, 8	3	💡
X	✎	📄	↑	Fri	Friday	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	4	💡

Show Active Only

Rotation Days Maintenance Screen – Standard Periods

StudentInformation allows schools to have up to 10 days defined for Rotation Days. An example of when this might be needed is when a school offers different classes each week. One week might be designated as the blue week, and the student will attend different classes on that week. An example of this type of Rotation Days is shown in the following figure.

Home » Management » School Administration » Scheduling Administration » Initialization » Rotation Days

### Rotation Days Maintenance

From this screen, you can display, add, change and delete data pertaining to rotation days.

Add Rotation Day   Save Changes   Cancel Changes

			Code	Name	Display Color	Rotation Day Periods	Sort Order	Active	
X			↓	Mon	Monday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	0	
X			↑ ↓	Tue	Tuesday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	1	
X			↑ ↓	Wed	Wednesday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	2	
X			↑ ↓	Thur	Thursday		1, 2, 3, 3A, 4, 5, 6, 7, 9, 8	3	
X			↑ ↓	Fri	Friday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	4	
X			↑ ↓	BMON	Blue Monday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	5	
X			↑ ↓	BTUE	Blue Tuesday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	6	
X			↑ ↓	BWED	Blue Wednesday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	7	
X			↑ ↓	BTHU	Blue Thursday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 9, 8	8	
X			↑	BFRI	Blue Friday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 9, 8	10	

Show Active Only

### Rotation Days Maintenance Screen – Rotation Days

If your school uses a Fixed Day calendar, you do not need to define Rotation Days. Your periods of the day are automatically created under a Standard day type.

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – Sorting on this screen is accomplished by using the ↑ and ↓ arrows to move the Rotation Days up or down in the grid.

– Copy Rotation Day

↑ / ↓ – Move this Rotation Day up or down in the sort order listing.

**Save Changes** – Save changes to Rotation Day sort order.

**Cancel Changes** – Cancel changes to Rotation Day sort order.

Clicking on the blue link listing the Rotation Day Periods for a given Rotation Day will take you to the Periods of the Day screen with that Rotation Day already selected.

Home » Management » School Administration » Scheduling Administration » Initialization » Rotation Days

### Rotation Days Maintenance

From this screen, you can display, add, change and delete data pertaining to rotation days.

Add Rotation Day   Save Changes   Cancel Changes

			Code	Name	Display Color	Rotation Day Periods	Sort Order	Active
✕	📄	↓	Mon	Monday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	0	💡
✕	📄	↑ ↓	Tue	Tuesday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	1	💡
✕	📄	↑ ↓	Wed	Wednesday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	2	💡
✕	📄	↑ ↓	Thur	Thursday		1, 2, 3, 3A, 4, 5, 6, 7, 9, 8	3	💡
✕	📄	↑ ↓	Fri	Friday		1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	4	💡
✕	📄	↑ ↓	BMON	Blue Monday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	5	💡
✕	📄	↑ ↓	BTUE	Blue Tuesday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	6	💡
✕	📄	↑ ↓	BWED	Blue Wednesday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 8, 9	7	💡
✕	📄	↑ ↓	BTHU	Blue Thursday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 9, 8	8	💡
✕	📄	↑	BFRI	Blue Friday	Blue	1, 2, 3, 3A, 4, 5, 6, 7, 9, 8	10	💡

Show Active Only

Click to navigate to the Periods of the Day screen for that period.

### Add/Edit/Copy Rotation Day

Home » Management » School Administration » Scheduling Administration » Initialization » Rotation Days

### Rotation Days Maintenance

From this screen, you can display, add, change and delete data pertaining to rotation days.

Code:

Name:

Display Color:

Is Active:

Save   Save and New   Cancel

#### Add/Edit Rotation Day Screen

**Code** (required) – Enter up to 4 characters, alphanumeric, for the new Rotation Day Code. If you try to use an existing inactive Rotation Day Code, you will be prompted to reactivate this inactive Rotation Day if you wish.

**Name** (required) – Enter Name of Rotation Day.

**Display Color** (optional) – Designate a color for the display of this rotation day (this field will be used in a future enhancement).

Copying a Rotation Day will also copy Periods of the Day for that Rotation Day. Adding a new Rotation Day leaves Periods of the Day blank, requiring you to add them on the Periods of the Day screen.

### Schedule Terms

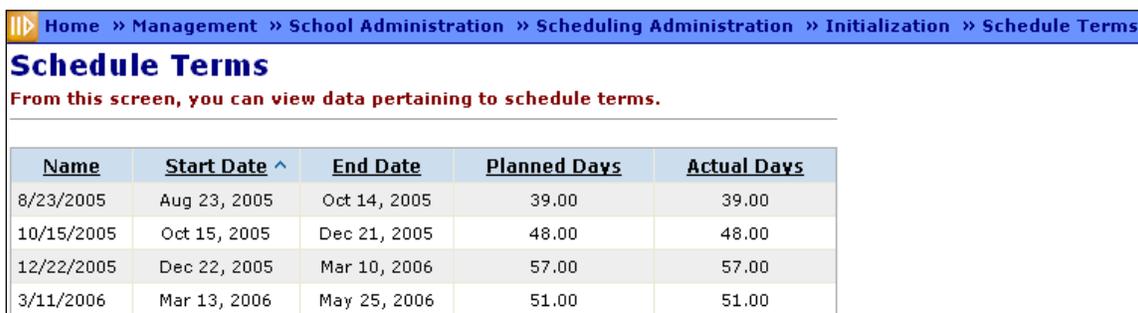
**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Schedule Terms**

A Schedule Term is created from the shortest amount of time that can combine into all amounts of time that a course meets during the current Master Calendar Schedule.

Scheduling Terms are the foundation elements that build reporting terms and course terms.

Scheduling Terms are created when the Master Calendar is created with the Calendar Wizard. For more information on the initial creation of scheduling terms see *ProgressBook StudentInformation School Year Initialization Guide* documentation.

The Schedule Terms screen is a view-only screen with a summary of information pertaining to the building's Schedule Terms. You cannot edit Schedule Term Start Dates and End Dates (though you can adjust these dates by changing Reporting Term End Dates on the Reporting Terms maintenance screen).



Name	Start Date ^	End Date	Planned Days	Actual Days
8/23/2005	Aug 23, 2005	Oct 14, 2005	39.00	39.00
10/15/2005	Oct 15, 2005	Dec 21, 2005	48.00	48.00
12/22/2005	Dec 22, 2005	Mar 10, 2006	57.00	57.00
3/11/2006	Mar 13, 2006	May 25, 2006	51.00	51.00

**Schedule Terms Screen**

Sorting – You may sort by any column (Name, Start Date, End Date, Planned Days, Actual Days) in ascending or descending order by clicking on the column header.

## Verify Reporting Terms

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Reporting Terms Maintenance**

A Non-Virtual Reporting Term is a time frame that represents a collection of days that will be reported on, and are made up of Scheduling Terms. A Virtual Reporting Term is used to create a placeholder for a mark, such as Semester 1 Average, or Exam. Standard Reporting Terms are created when the Master Calendar is created. For more information on the initial creation of reporting terms see *ProgressBook StudentInformation School Setup and Configuration Guide*.

For more information on Reporting Terms Maintenance, see *ProgressBook StudentInformation Marks Guide*.

## Course Terms Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Course Terms**

A Course Term represents an individual start and end date, or a group of start and end dates, that a course section can be assigned to meet. Examples of Course terms are 1<sup>st</sup> Semester or 1<sup>st</sup> Quarter, etc. The system will auto-generate a base set of course terms based on the reporting terms that have been configured. See [“Verify Reporting Terms.”](#)



Once students have been assigned to course sections, you cannot change course terms, even if the schedule is not yet finalized.

Home » Management » School Administration » Scheduling Administration » Initialization » Course Terms												
Course Terms Maintenance												
From this screen, you can display, add, change and delete data pertaining to course terms.												
Add Course Term		Save Changes		Cancel Changes								
Reporting Terms				Qtr1	Qtr2	1Ex	1Avg	Qtr3	Qtr4	2Ex	2Avg	F
Schedule Terms				8/23/2005	10/15/2005			12/22/2005	3/11/2006			
Term Code	Term Name	Sort Order										
				1Sem	1st Semester	1	X	X				
				2Sem	2nd Semester	2			X	X		
				Year	All Year	3	X	X		X	X	

Show Active Only

### Course Terms Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – Sorting on this screen is accomplished by using the and arrows to move the Course Terms up or down in the grid.

– Move this Course Term up or down in the sort order listing. The Sort Order of Course Terms determines the order courses will display on the student’s schedule, when a student has multiple course section assignments for a given period of the day.

– View Courses for this Course Term. This icon will take you to Course Sections Maintenance with this Course Term already selected and filtered.

**Save Changes** – Save changes to Course Terms sort order

**Cancel Changes** – Cancel changes to Course Terms sort order

## Add/Edit Course Term

Home » Management » School Administration » Scheduling Administration » Initialization » Course Terms

### Course Terms Maintenance

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

Code:

Name:

Description:

EMIS Semester Code:

Schedule Terms:

Name	Start Date	End Date	Include
8/23/2005	Aug 23, 2005	Oct 14, 2005	<input type="checkbox"/>
10/15/2005	Oct 15, 2005	Dec 21, 2005	<input type="checkbox"/>
12/22/2005	Dec 22, 2005	Mar 10, 2006	<input type="checkbox"/>
3/11/2006	Mar 13, 2006	May 25, 2006	<input type="checkbox"/>

Is Active:

Save Save and New Cancel

### Add/Edit Course Terms Maintenance Screen

**Code** (required) – Enter up to 4 characters, alphanumeric, for the Course Term Code. If you try to use an existing inactive Course Term Code, you will be prompted to reactivate this inactive Course Term if you wish.

**Name** (required) – Enter name of Course Term.

**Description** (optional) – Enter a description for the new Course Term.

**EMIS Semester Code** (required) – Select the appropriate EMIS Semester Code from the drop-down menu. For more details on the EMIS Semester Code, please see *ProgressBook StudentInformation EMIS Guide*.

**Schedule Terms** (required) – Check all applicable schedule terms (1 or more) for the new Course Term. **IMPORTANT:** All Course Terms MUST have at least one Schedule Term associated.

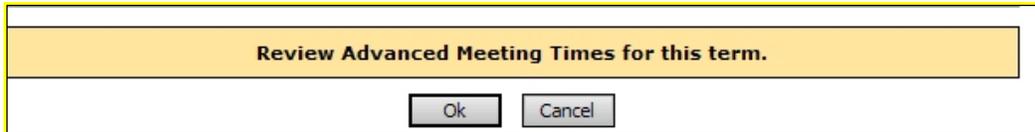
A warning message will appear when deleting schedule terms from course terms.

**Course Terms Maintenance**

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

Warning: Removing a scheduled term for this course term will result in removal of all meeting times for course sections having meeting times during the scheduled term.

Ok Cancel



### Deleting Schedule Terms from Course Terms

## Homeroom Term Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Homeroom Terms**

Homeroom Terms closely follow the Scheduling terms and allow buildings to specify homerooms assignments based on terms. This means that students may be assigned to different homerooms for different terms throughout the year. For more information on homerooms see *ProgressBook StudentInformation Student Homeroom Guide*.

Home » Management » School Administration » Scheduling Administration » Initialization » Homeroom Terms <span style="float: right;">Advanced Search</span>											
<b>Homeroom Terms Maintenance</b>											
<small>From this screen, you can display and change data pertaining to homeroom terms.</small>											
<input type="button" value="Add Homeroom Term"/> <input type="button" value="Save Changes"/> <input type="button" value="Cancel Changes"/>											
		Code	Name	Schedule Terms	Start Date	End Date	Planned Days	Actual Days	Sort Order	Active	
			FullYear	Full Year Term	8/23/2005, 10/15/2005, 12/22/2005, 3/11/2006	Aug 23, 2005	May 25, 2006	195.00	195.00	1	
			1Sem	1st Semester	8/23/2005, 10/15/2005	Aug 23, 2005	Dec 21, 2005	87.00	87.00	2	
			2Sem	2nd Semester	12/22/2005, 3/11/2006	Dec 22, 2005	May 25, 2006	108.00	108.00	3	
<input checked="" type="checkbox"/> Show Active Only											

### Homeroom Terms Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – Sorting on this screen is accomplished by using the and arrows to move the Homeroom Terms up or down in the grid.

– Remove all student homeroom assignments for this term. This button has a confirmation screen.

/ – Move this Homeroom Term up or down in the sort order listing.

**Save Changes** – Save changes to Homeroom Terms sort order.

**Cancel Changes** – Cancel changes to Homeroom Terms sort order.

## Add/Edit Homeroom Term

Home » Management » School Administration » Scheduling Administration » Initialization » Homeroom Terms

### Homeroom Terms Maintenance

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

Code:

Name:

Description:

Schedule Terms:

Name	Start Date	End Date	Include
8/23/2005	Aug 23, 2005	Oct 14, 2005	<input type="checkbox"/>
10/15/2005	Oct 15, 2005	Dec 21, 2005	<input type="checkbox"/>
12/22/2005	Dec 22, 2005	Mar 10, 2006	<input type="checkbox"/>
3/11/2006	Mar 13, 2006	May 25, 2006	<input type="checkbox"/>

Is Active:

Save Save and New Cancel

### Add/Edit Homeroom Terms Maintenance Screen

**Code** (required) – Enter up to 8 characters, alphanumeric, for the Homeroom Term Code. If you try to use an existing inactive Homeroom Term Code, you will be prompted to reactivate this inactive Homeroom Term if you wish.

**Name** (required) – Enter the name of Homeroom Term.

**Description** (optional) – Enter a description for the new Homeroom Term.

**Schedule Terms** (required) – Check all applicable schedule terms (1 or more) for the new Homeroom Term. This will indicate when this homeroom term meets.

## Master Schedule Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Master Schedule**

The Master Schedule contains all class meeting information that corresponds to each course and course group that is offered for the selected school and school year. To define courses and course groups and their associated sections see [“Course Maintenance Screens.”](#)

In StudentInformation a building may have multiple Master Schedules defined for a single school year and each of those Master Schedules will be listed in a grid like that shown in the following figure. But, only one Master Schedule will be selected as the Finalized Schedule for the school year and used in the final student schedule creation.

Home » Management » School Administration » Scheduling Administration » Initialization » Master Schedule

## Master Schedule Maintenance

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

Add Schedule

					Name ^	Description	Modified Date
			<a href="#">Course Sections</a>	<a href="#">Course Groups</a>	<a href="#">Courses</a>	Default Schedule	Nov 03, 2005
			<a href="#">Course Sections</a>	<a href="#">Course Groups</a>	<a href="#">Courses</a>	Schedule if levy fails	Schedule if levy fails
							Apr 05, 2006

### Master Schedule Maintenance Screen

This page has standard add record, edit record and delete record controls.

**Sorting** – You may sort by any column (Name, Description, Modified Date) in ascending or descending order by clicking on the column header.

– Copy this Master Schedule to a new Master Schedule.

**Course Sections** – View Course Sections for this Master Schedule. This will take you to Course Sections Maintenance.

**Course Groups** – View Course Groups and Course Group Sections for this Master Schedule. This will take you to Course Groups Maintenance.

**Courses** – View Courses for this Master Schedule. This will take you to Course Maintenance.

### Add Master Schedule

Home » Management » School Administration » Scheduling Administration » Initialization » Master Schedule

## Master Schedule Maintenance

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

Name:

Description:

Save Cancel

### Adding a Master Schedule

**Name** (required) – Enter name of the new Master Schedule.

**Description** (optional) – Enter a description for the new Master Schedule.

## Edit Master Schedule

Home » Management » School Administration » Scheduling Administration » Initialization » Master Schedule

### Master Schedule Maintenance

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

Name:  ⚡

Description:

### Editing a Master Schedule

**Study Hall Parameters** – Will take you to the Study Hall Wizard for set up of study hall parameters to be used with this Master Schedule. For details on setting up those parameters, see [“Study Hall Wizard.”](#)

## Copy Master Schedule

Home » Management » School Administration » Scheduling Administration » Initialization » Master Schedule

### Master Schedule Maintenance

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

Name:  ⚡

Description:

Copy Result Set:

Copy Options:  Course Sections  Course Group Sections

### Copying a Master Schedule

**Copy Result Set** (optional) – Designate which result set to copy, if desired. Result Sets are the container for groups of student course section assignments. A schedule may have many schedule result sets. One single result set will be chosen for the master calendar.

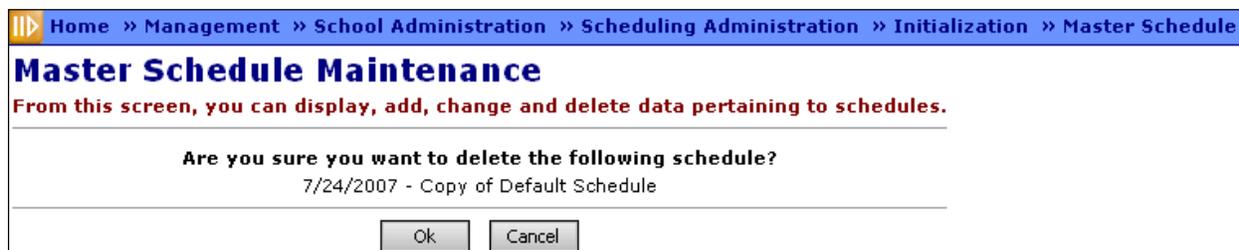
**Copy Options** (optional) – Check applicable copy options. The options are:

**Course Sections** – Check if you would like for ALL Course Sections from the selected Master Schedule to be copied to this copy of the Master Schedule.

**Course Group Sections** – Check if you would like for ALL Course Group Sections from the selected Master Schedule to be copied to this copy of the Master Schedule.

## Delete Master Schedule

 Please Note! Deleting a Master Schedule **CANNOT BE UNDONE**. Only do this if you are **absolutely** certain that you want to remove this Master Schedule and any Schedule Result Sets linked to it.



The screenshot shows a web application interface with a blue navigation bar at the top containing the path: Home » Management » School Administration » Scheduling Administration » Initialization » Master Schedule. Below the navigation bar is a section titled "Master Schedule Maintenance" with a subtitle: "From this screen, you can display, add, change and delete data pertaining to schedules." The main content area contains a confirmation message: "Are you sure you want to delete the following schedule?" followed by "7/24/2007 - Copy of Default Schedule". At the bottom of the message are two buttons: "Ok" and "Cancel".

### Master Schedule Deletion Confirmation Message

## Course Maintenance Screens

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance**

Courses are defined by many properties. Those properties are maintained by Code Tables and Maintenance Screens listed in the Course Maintenance Menu. Those tables/screens include: Course Department, Course Language, Course Difficulty, Course Area of Study, Course Subject Area, Courses, Course Groups and Course Sections.

Course maintenance is comprised of several tabs that define all aspects of the course; general information, marks related info, EMIS reporting requirements and pre/co requisites. Once the courses have been defined sections are created with the associated meeting time information detailed in course section maintenance. Group courses are handled in the same way.

Course codes may be defined globally (by the ITC), at the district level, or at the school level per the following chart.

	Visibility and Use	Editable
<b>Global Level</b>	ITC, District, School	ITC
<b>District Level</b>	ITC, District, School	ITC, District
<b>School Level</b>	ITC, District, School	ITC, District, School

## Course Department Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Department**

Course Departments are used to group courses together according to the content of the area of study and can be used for filtering in reports.

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Department

## Course Department Maintenance

From this screen, you can display, add, change and delete Course Department codes.

Add Code

	Code	Name ^	Description	Active
 	ADM	ADMINISTRATIVE	ADMINISTRATIVE	
 	ART	ART	ART	
 	ATH	ATHLETIC	ATHLETIC	
 	BUS	BUSINESS	BUSINESS	
 	COM	COMMUNICATIONS	COMMUNICATIONS	
 	CMP	COMPUTER	COMPUTER	
 	ENG	ENGLISH	ENGLISH	
 	FLA	FOREIGN LANGUAG	FOREIGN LANGUAG	
 	GUI	GUIDANCE	GUIDANCE	
 	HPE	HEALTH & PE	HEALTH & PE	
 	HIM	HEAR IMPAIRED	HEAR IMPAIRED	
 	HEC	HOME ECONOMICS	HOME ECONOMICS	
 	INT	INDUSTRIAL TECH	INDUSTRIAL TECH	
 	MAT	MATH	MATH	
 	MUS	MUSIC	MUSIC	
 	SCI	SCIENCE	SCIENCE	
 	SS	SOCIAL STUDIES	SOCIAL STUDIES	
 	SPE	SPECIAL ED	SPECIAL ED	
 	SH	STUDY HALL	STUDY HALL	
 	SUS	SUPPORT SERVICE	SUPPORT SERVICE	
 	TEC	TECHNOLOGY	TECHNOLOGY	
 	T&I	TRADES & IND	TRADES & IND	
 	VOC	VOCATIONAL	VOCATIONAL	

Show Active Only

23 Records Displayed [Back To Top](#)

### Course Department Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

 – Code defined at higher level (note these codes may only be deleted or modified at the level where they are created).

## Add/Edit Course Department

**Add/Edit Course Department Maintenance Screen**

**Code** (required) – Enter up to 4 characters – alphanumeric – for Course Department Code. If you try to use an existing inactive Course Department Code, you will be prompted to reactivate this inactive Course Department if you wish.

**Name** (required) – Enter name of Course Department Code (up to 30 characters).

**Description** (optional) – Enter description of Course Department Code (up to 200 characters).

## Course Language Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Language**

Course Language codes are used to define the languages that different courses within the school, are taught in.

	Code	Name ^	Description	Active
	ENG	English	Course is taught using English language	
	SPN	Spanish	Course is taught in Spanish	

**Course Language Maintenance Screen**

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

– Code defined at higher level (note these codes may only be deleted or modified at the level where they are created).

## Add/Edit Course Language

**Add/Edit Course Language Maintenance Screen**

**Code** (required) – Enter up to 4 characters – alphanumeric – for Course Language Code. If you try to use an existing inactive Course Language Code, you will be prompted to reactivate this inactive Course Language if you wish.

**Name** (required) – Enter name of Course Language Code (up to 30 characters).

**Description** (optional) – Enter description of Course Language Code (up to 200 characters).

## Course Difficulty Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Difficulty**

Course Difficulty codes are used to denote courses of elevated or possibly remedial stature. A school may elect to award alternate points for marks earned in specific courses based on the level of difficulty assigned for the course.

	Code	Name ^	Description	Active
	A	A	A	
	B	B	B	

**Course Difficulty Maintenance Screen**

Course Difficulty has been detailed in *ProgressBook StudentInformation Marks Guide*. Please see that document for complete details on how to add/modify/delete Course Difficulty codes.

## Course Area of Study Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Area of Study**

Course Area of Study Codes are used in conjunction with the Graduation Verification module. Areas of Study are topics for a course intended to be more specific than Course Subject Areas (see “[Course Subject Area Maintenance](#).”) For example, the FA (Fine Arts) Subject Area could contain the ART (Art) and MUS (Music) Areas of Study. Credits awarded for courses which have this field defined will be counted towards credits earned in the Course Area of Study specified to verify graduation requirements.

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Area Of Study

### Course Area Of Study Maintenance

From this screen, you can display, add, change and delete Course Area of Study codes.

Add Code

	Code	Name ^	Description	Active
	ART	ART	ART	
	BUS	BUSINESS	BUSINESS	
	COM	COMMUNICATIONS	COMMUNICATIONS	
	ENG	ENGLISH	ENGLISH	
	FLA	FOREIGN LANGUAGE	FOREIGN LANGUAGE	
	HPE	HEALTH & PE	HEALTH & PE	
	HIM	HEARING IMPAIRED	HEARING IMPAIRED	
	HEC	HOME ECONOMICS	HOME ECONOMICS	
	INT	INDUSTRIAL TECH	INDUSTRIAL TECH	
	MAT	MATH	MATH	
	MUS	MUSIC	MUSIC	
	SCI	SCIENCE	SCIENCE	
	SS	SOCIAL STUDIES	SOCIAL STUDIES	
	SPE	SPECIAL ED	SPECIAL ED	
	SUS	SUPPORT SERVICES	SUPPORT SERVICES	
	T&I	T&I		
	VOC	VOCATIONAL	VOCATIONAL	

Show Active Only

17 Records Displayed [Back To Top](#)

### Course Area Of Student Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

– Code defined at higher level (note these codes may only be deleted or modified at the level where they created).

## Add/Edit Course Area of Study

### Add/Edit Course Area of Study Screen

Code (required) – Enter up to 4 characters – alphanumeric – for Course Area of Study Code. If you try to use an existing inactive Course Area of Study Code, you will be prompted to reactivate this inactive Course Area of Study if you wish.

Name (required) – Enter Name of Course Area of Study Code (up to 30 characters)

Description (optional) – Enter description of Course Area of Study Code (up to 200 characters).

## Course Subject Area Maintenance

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Subject Area**

Course Subject Area codes are used in conjunction with the Graduation Verification module. Subject Areas are general top-level subjects (often used as course abbreviations: ENG 101 and so on). Credits awarded for courses which have this field defined will be counted towards credits earned in the Course Subject Area specified to verify graduation requirements.

	Code	Name ^	Description	Active
X	COM	COMM/SPEECH	COMM/SPEECH	Lightbulb
X	ELE	ELECTIVE	ELECTIVE	Lightbulb
X	ENG	ENGLISH	ENGLISH	Lightbulb
X	FA	FINE ARTS	FINE ARTS	Lightbulb
X	FL	FOREIGN LANGUAGE	FOREIGN LANGUAGE	Lightbulb
X	HPE	HEALTH/PE	HEALTH/PE	Lightbulb
X	MAT	MATH	MATH	Lightbulb
X	SCI	SCIENCE	SCIENCE	Lightbulb
X	SS	SOCIAL STUDIES	SOCIAL STUDIES	Lightbulb
X	TEC	TECHNOLOGY/BUSINESS	TECHNOLOGY/BUSINESS	Lightbulb

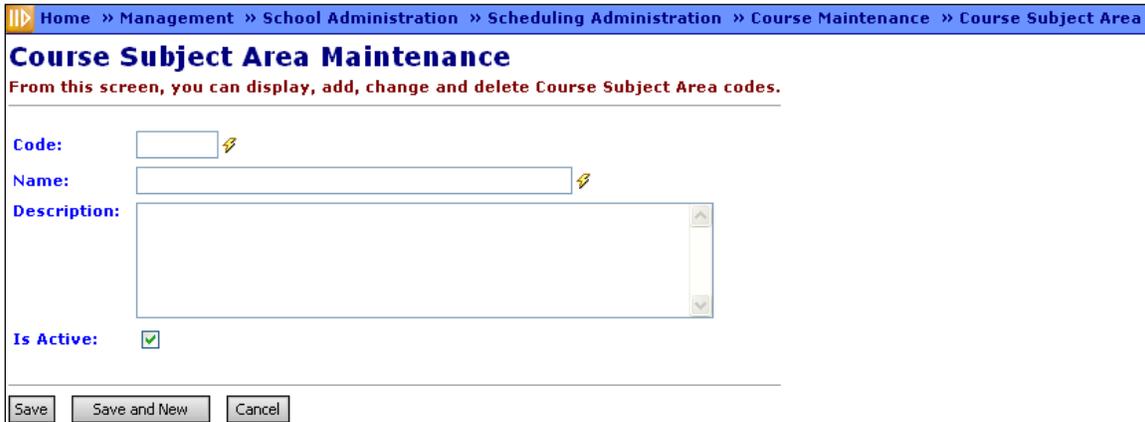
Show Active Only

### Course Subject Area Maintenance Screen

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

 – Code defined at higher level (note these codes may only be deleted or modified at the level where they are created).

### Add/Edit Course Subject Area



### Add/Edit Course Subject Area Maintenance Screen

**Code** (required) – Enter up to 4 characters – alphanumeric – for Course Subject Area Code. If you try to use an existing inactive Course Subject Area Code, you will be prompted to reactivate this inactive Course Subject Area if you wish.

**Name** (required) – Enter name of Course Subject Area Code (up to 30 characters).

**Description** (optional) – Enter description of Course Subject Area Code (up to 200 characters).

## Course Rank Weight Maintenance

### Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Rank Weight

Course Rank Weight codes are used in conjunction with the “Mansfield Method” and “Quality Points” custom GPA Rank methods. This value is multiplied to each mark gained in a course with this Course Rank Weight selected when ranking students by these methods. Any number of Course Rank Weight values may be created in a single school/school year. A Course Rank Weight value may be associated with any number of courses. Course Rank Weights will be copied forward during the School Year Initialization process.

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Rank Weight

### Course Rank Weight Maintenance

From this screen, you can display, add, change and delete Course Rank Weights.

Add Code

	Code	Name ^	Description	Multiplier	Active
 	AP	Advanced Placement	Advanced Placement Course Ranking	2.0	
 	H	Honors	Honors Course Ranking	1.5	

Show Active Only

#### Course Rank Weight Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

 – Code defined at higher level (note these codes may only be deleted or modified at the level where they are created).

#### Add/Edit Course Rank Weight

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Rank Weight

### Course Rank Weight Maintenance

From this screen, you can display, add, change and delete Course Rank Weights.

Code:

Name:

Description:

Multiplier:

Is Active:

Save Save and New Cancel

#### Add/Edit Course Rank Weight Maintenance Screen

**Code** (required) – Enter up to 4 characters – alphanumeric – for Course Rank Weight Code. If you try to use an existing inactive Course Rank Weight Code, you will be prompted to reactivate this inactive Course Rank Weight Code if you wish.

**Name** (required) – Enter name of Course Rank Weight Code (up to 30 characters).

**Description** (optional) – Enter description of Course Rank Weight Code (up to 200 characters).

**Multiplier** (required) – A decimal value indicating the value that mark point values will be multiplied by. The value will have two decimal places. Valid range is 0.00 (not counted) to 9.99.

## Courses

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Courses**

Courses are listing of all of the classes that are offered in the working school, along with all the properties of those courses. Course Groups are not included in this list. Courses are school and school year specific but may be rolled from one year to the next.

### Searching for Courses

Courses can be viewed by specifying a filter from one or more of the fields listed as shown in the following example, or by searching without any specified criteria, which would list ALL courses in the working building. Fields that may be used for search criteria include: Course Grade Level, Course Department, Course Area of Study, Course Subject Area, Course Type and EMIS Subject Code. The default sort on the Courses data grid is Course Code in ascending order.

		Code ^	Name	Area of Study	Subject Area	EMIS Subject Code	Is Active
		001	CAREER CENTER				
		003	CC HALF DAY				

### Courses Screen

Courses may also be viewed by typing the course code (if known) in the Course field and hit the <Enter> key or click Search.

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Area of Study, Subject Area, EMIS Subject Code, Is Active) in ascending or descending order.

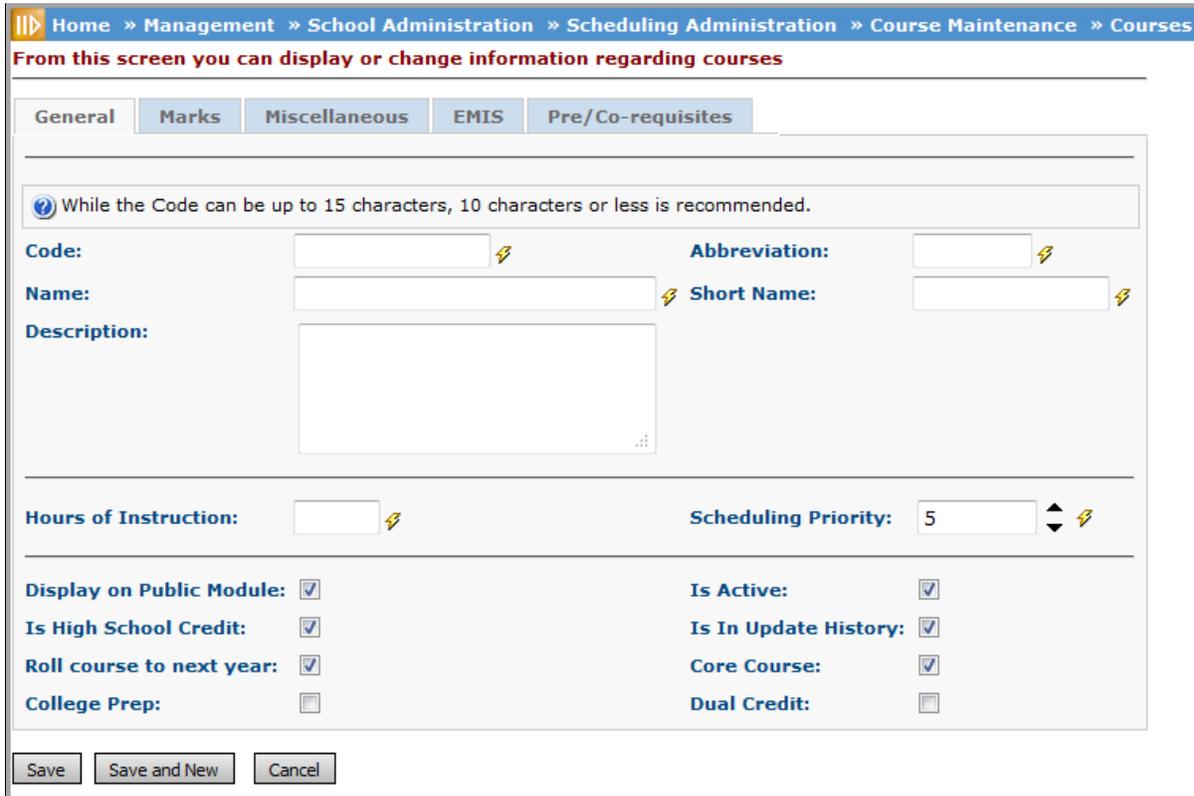
– View Course Requests.

**Search** – Search for Course using selected criterion.

 – Open Course Selection Wizard (see *“Course Selection Wizard”*) for help selecting a course.

## Add/Edit Course

The Course Maintenance screen has several tabs, which are addressed in the following sections, tab by tab. When adding or editing a course, changing tabs will **save** all information entered on the previous tab.



Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites

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: 5

Display on Public Module:  Is Active:

Is High School Credit:  Is In Update History:

Roll course to next year:  Core Course:

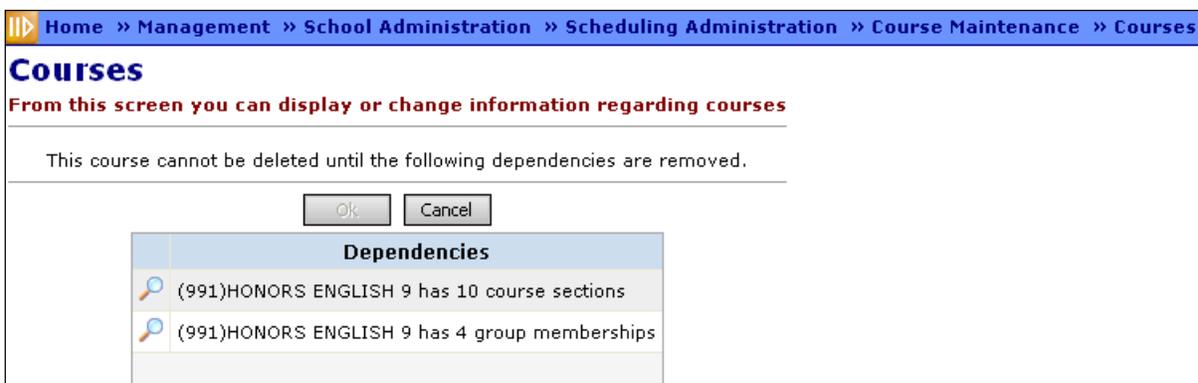
College Prep:  Dual Credit:

Save Save and New Cancel

Add/Edit Course Maintenance Screen

## Delete Course

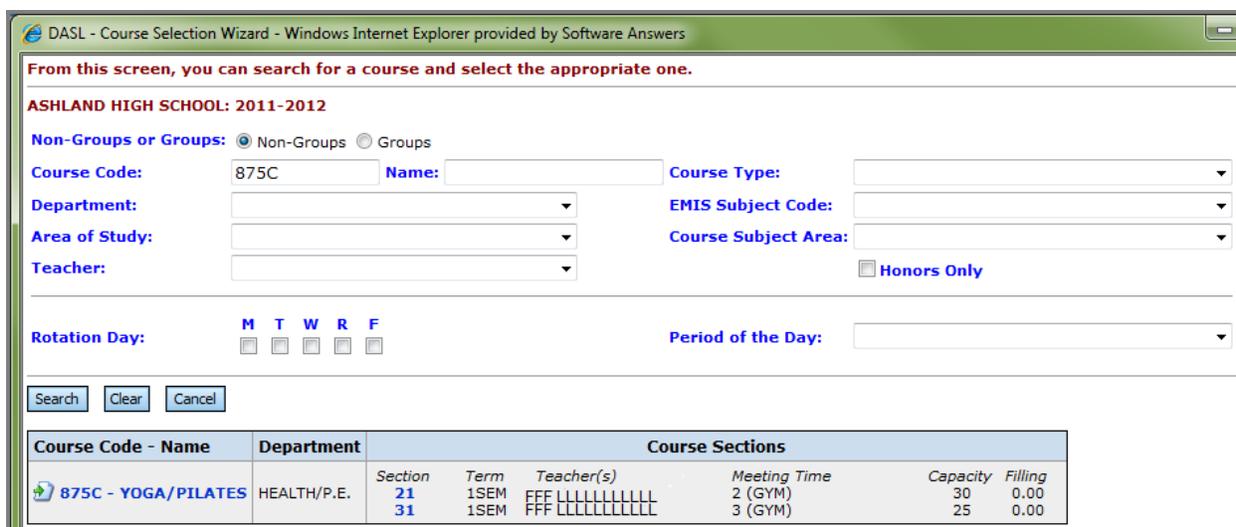
You cannot delete a Course that has Course Sections created or that is a member of any Course Groups. You will see a screen informing you of these dependencies and the Ok (Delete) button will be disabled.



**Course Deletion Confirmation Screen**

## Course Selection Wizard

On multiple screens (such as Course Maintenance and Course Section Maintenance), you can select a Course using the Course Selection Wizard (⋮ button). This invokes a separate window, which you can use to find a specific Course and populate your original screen with that Course’s information.



**Course Selection Wizard**

**Non-Groups or Groups** – Search only for individual Courses (non-groups) or search only for Course Groups.

Fields that may be used for search criteria include: Course Code (ID), Course Name, Course Type, Course Department, Course EMIS Subject Code, Course Area of Study, Course Subject Area or Teacher.

**Honors Only** – Search only for Courses marked as Honors Courses.

**Rotation Day** – Selecting one or more Rotation Days will search for those courses which meet only on the selected Rotation Days and no other days. For example: Checking Monday would display courses which meet only on Monday.

**Period of the Day** – Selecting a Period from the drop-down menu will search for those courses which meet during the selected Period (if a course meets across multiple periods, it will be included in the search as long as it also meets during the selected period).

**Search** – Search for Course using selected criteria from the Course Selection Wizard.

**Clear** – Clear all search criteria to begin a new search using the Course Selection Wizard.

**Cancel** – Cancel the Course Selection Wizard application and return to the Course Maintenance listing. (Note – you may also close the Course Selection Wizard screen at any time, without making a selection.)

After defining search criteria (Department – Art used in following example) click **Search** to perform a search for courses matching the specified criteria.

Course Code - Name	Department	Section	Term	Teacher(s)	Meeting Time	Capacity	Filling
875C - YOGA/PILATES	HEALTH/P.E.	21	1SEM	FFF LLLLLLLLLLLL	2 (GYM)	30	0.00
		31	1SEM	FFF LLLLLLLLLLLL	3 (GYM)	25	0.00

### Searching for Courses on the Course Selection Wizard Screen

– Select this course from the Course Selection Wizard and that course will be listed in the Course field of the Course Maintenance Screen, as search criteria. If you accessed the Course Selection Wizard from another screen, this icon will list the Course information in the appropriate field(s) on the appropriate screen.

### Course – General Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Courses**

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

From this screen you can display or change information regarding courses

General | Marks | Miscellaneous | EMIS | Pre/Co-requisites | < Prev: 040 | Next: 060 >

While the Code can be up to 15 characters, 10 characters or less is recommended.

Code: 050 ⚡ Abbreviation: TRIGONOM ⚡  
 Name: TRIGONOMETRY ⚡ Short Name: TRIGONOMETRY ⚡  
 Description:

Hours of Instruction: 60 ⚡ Scheduling Priority: 8 ⚡

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:

Save Cancel

**General Tab on the Add/Edit Course Maintenance Screen**

**Note:** To go to the General tab for next course, click **Next**. (The button includes the next Course Code.) To go back to the General tab for the previous course, click **Prev**. (The button includes the previous Course Code.)

**Code** (required) – Up to 15 alphanumeric characters can be entered as a new Course Code. However, 10 characters or less should be used if the CTRMEMIS process is to be run in this system. The CTRMEMIS process uses the School Code (4 characters), Course Code (truncated to 10 characters) and Course Section Code to create a Local Classroom Code. If you try to use an existing inactive Course Code, you will be prompted to reactivate this inactive Course, if you wish.

**Note:** Consider state reporting limitations when specifying course codes.

**Abbreviation** (required) – Enter up to 8 characters that define the course abbreviation.

**Name** (required) – Enter up to 30 characters to define the Course Name.

**Short Name** (required) – Enter up to 15 characters to define the Course Short Name.

**Description** (optional) – Enter up to 1,000 characters for a description of the Course.

**Hours of Instruction** (required) – Enter a number to indicate the number of hours per year, the average student spends in instruction for this course (EMIS reportable field).

**Scheduling Priority** (required) – Enter a number (1-9) to define the scheduling priority of this course in the scheduling process, 1 being the lowest and 9 being the highest. This Priority is used as the default Request Priority for all course requests for this course. A request with a higher priority will be attempted to be scheduled before a request with a lower priority.

**Note:** Once a request is entered, changing this value on the course record does not change existing request priority values. Also, request priority only affects the student's schedule when it is selected for all passes on the Job Parameter Set.

**Display on Public Module** – Determines if a course is available on the Public Course Requests Module for students to request. A course group may be requestable while all courses contained in the same course group are not requestable (locked). This can force a request for the course group only. See the **Display Courses Individually** and **Display on Public Module** check boxes on the **Course Groups – Group** tab for more information.

**Is High School Credit** – Indicates whether this course credit is earned towards total credits for graduation. Used for EMIS reporting to determine if subject area for credit is to be reported for a course that may be taken in the middle school but counts for credit towards graduation. This field does not affect whether the course displays on transcripts or not. See *ProgressBook StudentInformation EMIS Guide* for more information.

See Flag Settings in “[Course – Marks Tab](#)” to understand how Is High School Credit works with In cum Credit and In cum GPA.

**Roll course to next year** – Indicates if the course is to roll to the next year – checked by default. If unchecked, course and ALL sections of the course will NOT be copied to the next school year during the new school year initialization process.

**Is Active** – Course Code must be Active to use on new Course Records and for adding course sections to the Master schedule.

**Is In Update History** – Indicates if the information for this course is listed in course history or transcripts.

**Core Course – Please Note:** As of FY09 Period K, the **Core Course** check box on the **Courses – General** tab is no longer being used by StudentInformation. The **Core Course** on the Subject Code table (defined at the ITC level) is now used to determine HQT values. However, the **Core Course** check box on the **Courses – General** tab is still being passed to ProgressBook.

**College Prep** (optional) – Indicates if this course should be marked as college prep (for eTranscripts)

**Dual Credit** – Select this option when the course can earn credits for both high school and transcribed college credit.

## Course – Marks Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Courses**

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites < Prev: 840 Next: 842 >

841 - CONTEMPORARY CRAFTS

Course Weight:	10.0000	In Graduation Count:	<input checked="" type="checkbox"/>	Is Honors Course:	<input type="checkbox"/>
Level of Difficulty:		Include in Total Credits:	<input checked="" type="checkbox"/>	Include on Permanent Record:	<input checked="" type="checkbox"/>
GPA Add-on Level:		Include in GPA:	<input checked="" type="checkbox"/>	Print on Report Card:	<input checked="" type="checkbox"/>
Credit Units:	0.5000	In Honor Roll:	<input checked="" type="checkbox"/>		
Mark Bump:					
Rank Weight:					

Save Cancel

### Marks Tab on the Add/Edit Course Maintenance Screen

**Note:** To go to the Marks tab for the next course, click **Next** (the button includes the next Course Code). To go back to the Marks tab for the previous course, click **Prev.** (The button includes the previous Course Code.)

**Course Weight** (optional) – Enter a numeric value (up to 99) indicating the course weight to be used for scheduling purposes (not credit purposes). Default course weight is 10. This field can be used to balance the difficulty of schedules by giving more difficult courses higher weights.

**Level of Difficulty** (optional) – Indicate if course is to use a Course Difficulty level selected from drop-down menu. See *ProgressBook StudentInformation Marks Guide* for more information.

**GPA Add-on Level** (optional) – Indicate if course is to use an Add-On GPA level selected from drop-down menu. See *ProgressBook StudentInformation Marks Guide* for more information.

**Credit Units** (optional) – If the course has associated Credit, the numeric Credit amount must be entered.

**Mark Bump** (optional) – Indicate if the course uses the Mark Substitution Module. For more information, see *ProgressBook StudentInformation Marks Guide*.

**Rank Weight** (optional) – Indicate if the course uses a Rank Weight for the “Mansfield Method” or “Quality Points” GPA Ranking method.

**In Graduation Count** (optional) – This check box is not functional. See the In Graduation / Eligibility check box on the Courses – Miscellaneous tab.

**Is Honors Course** (optional) – Yes or No; Indicates that the course is to be marked as an Honors Course. Default is no.

**Include in Total Credits** (optional) – Yes or No; indicates if this course history record should be included in Cumulative Credit totals. Default value is Yes. (The Include in Total Credits check box does not affect Cumulative GPA calculations.)

See Flag Settings in “[Course – Marks Tab](#)” to understand how Is High School Credit works with Include in Total Credits and Include in GPA.

**Include on Permanent Record** (optional) – Yes or No; Indicates that the course is to be included on the student’s Permanent Record. Default is yes.

**Include in GPA** (optional) – Yes or No; Indicates that the course is to be included in the Cumulative GPA calculations. **Note:** This box must be checked for this course’s marks to be included in any GPA calculation.

See Flag Settings in “[Course – Marks Tab](#)” to understand how Is High School Credit works with Include in Total Credits and Include in GPA.

**Print on Report Card** (optional) – Yes or No. Indicates that the course is to be included on the printed report card. Default is yes.

**In Honor Roll** (optional) – Yes or No; Indicates that the course is to be included in any honor roll calculations. Default is yes.

## II. Flag Settings on Course-General Tab and Course-Marks Tab

<b>Scenario:</b>	<b>Is High School Credit:</b> Course-General tab	<b>Include in Total Credits:</b> Course-Marks tab	<b>Include in GPA:</b> Course-Marks tab	<b>Outcome:</b>
High School course marked as:	Yes	Yes	Yes	Course will be included in total HS credits and will be included in the HS GPA.
High School course marked as:	Yes	Yes	No	Course will be included in total HS credits but not the HS GPA.
High School course marked as:	Yes	No	Yes	Course will be included in HS GPA but not total HS credits.
High School course marked as:	Yes	No	No	Course will not be included in either the HS GPA or total HS credits.
High School course marked as:	No	Yes	Yes	Course will not be included in either the HS GPA or total HS credits.
High School course marked as:	No	No	No	Course will not be included in either the HS GPA or total HS credits.

<b>Scenario:</b>	<b>Is High School Credit:</b> Course-General tab	<b>Include in Total Credits:</b> Course-Marks tab	<b>Include in GPA:</b> Course-Marks tab	<b>Outcome:</b>
Middle School course marked as:	Yes	Yes	Yes	Course will be included in the student's MS total credits and HS total credits, as well as MS and HS GPA
Middle School course marked as:	Yes	Yes	No	Course will be included in the student's MS and HS total credits, but not included in either the MS or HS GPA.
Middle School course marked as:	Yes	No	Yes	Course will not be included in the student's MS or HS total credit, but the course will be included in the MS and HS GPA.
Middle School course marked as:	No	Yes	Yes	Course will only be included in the student's MS total credits and MS GPA, not the student's HS GPA or credits.
Middle School course marked as:	No	No	Yes	Course will only be included in the student's MS GPA, not in the student's MS total credit, HS total credit or HS GPA.
Middle School course marked as:	No	Yes	No	Course will only be included in the student's MS total credit, not in the student's MS GPA, HS GPA, or HS total credits.
Middle School course marked as:	No	No	No	Course will not be included in MS or HS credit nor in the MS or HS GPA.

## Course – Miscellaneous Tab

### Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Courses

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites < Prev: 840 Next: 842 >

841 - CONTEMPORARY CRAFTS

Department: ART - ART Course Type: C - Class  
Area Of Study: 02 - ART Language Code:  
Subject Area: ART In Graduation / Eligibility:

Gender Directive: None

Selecting the 'Balance...' option in the Gender Directive dropdown will only affect the batch and single student schedulers. The schedulers will attempt to balance the filling percentage in the course's sections for each gender separately.

Grade Levels Available: AG, Infant/Toddler (Ages 0-2), Kindergarten FF, GG Kindergarten, PS, KG  
Grade Levels Selected: 09, 10, 12, 11

Location Types Available: Unknown, Not Specified, Library, Gymnasium, Music room, Cafeteria  
Location Types Selected:

Save Cancel

#### Miscellaneous Tab on the Add/Edit Course Maintenance Screen

**Note:** To go to the Miscellaneous tab for the next course, click **Next**. (The button includes the next Course Code.) To go back to the Miscellaneous tab for the previous course, click **Prev**. (The button includes the previous Course Code.)

**Department** (optional) – Select applicable Course Department from drop-down menu. For more information on course department, see [“Course Department Maintenance.”](#)

**Course Type** (required) – Course Types are predefined and determines where a course appears. If Course Type = 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 = Study Hall. If a course is marked as Type = Case Management, the course will not show on the student View Schedule page.

**Area of Study** (optional) – Select applicable Course Area of Study from the drop-down list. For more information on course Area of Study, see [“Course.”](#)

**Language Code** (optional) – Select applicable Course Language Code from the drop-down list. For more information on course Language Code, see [“Course Language Maintenance.”](#)

**Subject Area** (optional) – Select applicable Course Subject Area from the drop-down list. For more information on course Subject Area, see [“Course Subject Area Maintenance.”](#)

**In Graduation / Eligibility** (optional) – Yes or No; Indicates if the course is to be included in course counts for Graduation / Eligibility purposes.

**Gender Directive** (optional) – The Gender Direct field has four options:

- None (default)
- Balance Males across Sections, and Balance Females across Sections
- Restrict to Females
- Restrict to Males

The Batch Scheduler will enforce this gender restriction. Selecting the “Balance Males across Sections, and Balance Females across Sections option in the Gender Directive drop-down 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. Please note that R401 Student Course Request Verification will correctly flag the error for a student with a request for a course restricted to the opposite gender.

**Grade Levels Available** – List of available grade levels in the building for which the course may be defined.

**Grade Levels Selected** (required) – Select the appropriate grade levels that you wish to limit the course to.

***Note:** The **Location Types Available** and **Location Types Selected** multi-select lists are currently nonfunctional.*

## **Course – EMIS Tab**

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Courses**

The information on the EMIS tab will be used for EMIS reportable fields associated with the course. The drop-down lists on this screen are all validated against the EMIS files received from ODE.

From this screen you can display or change information regarding courses

General   Marks   Miscellaneous   **EMIS**   Pre/Co-requisites   < Prev: 840   Next: 842 >

**841 - CONTEMPORARY CRAFTS**

**EMIS Location IRN:** 001081 (Only required if different from the current building, optional if same as current building)

**EMIS Location Description:** Ashland High School (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:** FAR - Fine Arts

**EMIS Language Used:** E - English (Default)

**CORE Subject Area:** FAR - Fine Arts Units

**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

#### EMIS Tab on the Add/Edit Course Maintenance Screen

**Note:** To go to the EMIS tab for the next course, click **Next**. (The button includes the next Course Code). To go back to the EMIS tab for the previous course, click **Prev**. (The button includes the previous Course Code.)

For more information about the values for the following fields, refer to *ProgressBook StudentInformation EMIS Guide*.

**EMIS Location IRN** (optional) – 6 digits indicating the IRN number of the building where the course is held. This is only required if this is an exception to the current Building IRN. For course types of PSEO, the IRN must be that of a post-secondary institution or 999999.

**Note:** This Location IRN is ONLY intended for use in EMIS reporting. This does not determine location of course for any other part of StudentInformation.

**EMIS Location Description** (optional) – This field is the description of the EMIS Location IRN. It is only enabled if the value in the EMIS Location IRN field 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 field is disabled and is populated with the name from the EMIS IRN table that is associated with the EMIS Location IRN.

**EMIS Staff Provider IRN** (required) – IRN number of the entity other than the working district, employing the staff member of this course. Valid IRNs are those for an ESC. \*\*\*\*\* must be entered if there is no EMIS Staff Provider IRN.

 – Opens the OEDS-R Search Organization screen to assist you in completing the EMIS Staff Provider IRN or Highly Qualified Teacher IRN fields.

**EMIS Course Level** (required if Report to EMIS is checked) – Select the appropriate EMIS Course Level from the drop-down list. This designates the level of the course. This provides distinctions between courses that are taken in a series or have prerequisites as French I and French II. The default will be \*.

**EMIS Subject Code** (optional) – Select the appropriate EMIS Course Subject Code from the drop-down list. This details the subject of the course being reported. There is no default for this field.

**EMIS Subject Area for Credit** (required if Report to EMIS is checked) – Select the appropriate EMIS Course Subject Area from the drop-down list. This indicates the subject for courses offered in which high school credit toward graduation is applied, whether at the middle school or high school level. If Report to EMIS is yes, the EMIS Subject code will determine the default for this field.

**EMIS Language Used** (required if Report to EMIS is checked) – Select the appropriate EMIS Language from the drop-down list. This is the language used by the teacher when presenting this course to the students. Valid options are E-English, B-Both or N-Native. The default for this field is E.

**CORE Subject Area** (optional) – Select the appropriate CORE Subject Area from the drop-down list. This is the subject area and/or CORE requirement area in which a student has earned credit/units towards graduation.

**CTE College Credit** (optional) – Choose yes or no; indicates if a career-technical course provides an opportunity for students to earn college credit.

**Curriculum** (optional) – The field of the curriculum source/model/program for a specific course.

**Delivery Method** (optional) - This field identifies the means by which instructions is provided/communicated to the student(s) in the course.

**Educational Option** (optional) – This field identifies the Educational Option status for a course per Ohio Administrative Code 3301-35-06(G).

**Student Population** (optional) - This field identifies the attributes of the group of students for which the course is intended.

**Highly Qualified Teacher IRN** (optional) – IRN used to group courses for the calculation of the percent of core courses taught by highly qualified staff and the percent of core courses taught by properly certified staff. Valid options include a 6 digit IRN, 999999 or \*\*\*\*\*.

**Credit Flex** – Indicates if the course is a Credit Flexibility Course and if it is used for credit recovery work. Available options are N (not Credit Flexibility Course, default setting), R (is Credit Flexibility Course and used for credit recovery work) and F (is Credit Flexibility Course but not used for credit recovery work). After saving, this value is part of the student’s course history and is included when the student’s course history is transferred or exported and imported. The Course Details tab on the Manually Entered Course screen displays this value. This value is also displayed on the Student Staff Classroom screen after the Course and Class list (CLISEMIS/CTRMEMIS) verify/update process is run.

**Report to EMIS** – Yes or No; Indicates if the course is reported to EMIS. This is checked (yes) by default. For example, Homerooms for Elementary Scheduling would not have Report to EMIS checked.

### Course – Pre/Co-requisites Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Courses**

Course prerequisites and corequisites records provide the school the ability to define courses to be used as pre/corequisites in the course request module. Use of prerequisites and/or corequisites is optional.

From this screen you can display or change information regarding courses

General   Marks   Miscellaneous   EMIS   Pre/Co-requisites   < Prev: 840   Next: 842 >

841 - CONTEMPORARY CRAFTS

New requisite

	Pre 1	and Pre 2	and Pre 3	and Pre 4	Operator	Co 1	and Co 2	and Co 3	and Co 4	Is Active
 	800									

Show Active Only

Save   Cancel

#### Pre-Co-requisites Tab on the Add/Edit Course Maintenance Screen

**Note:** To go to the Pre/Co-requisites tab for the next course, click **Next**. (The button includes the next Course Code.) To go back to the Pre/Co-requisites tab for the previous course, click **Prev**. (The button includes the previous Course Code.)

Individual Requisite records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

 – Delete this Course Pre/Co-Requisite.

 – Edit this Course Pre/Co-Requisite.

**New requisite** – Add a new Requisite for this course.

**Note:** Additional lines of requisites act as Or operators; a student only needs to meet one line of requisites in order to be permitted to request the course.

### Add/Edit Requisite

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

### Courses

From this screen you can display or change information regarding courses

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

222

**Pre-requisites: Operator:**      **Co-requisites:**

1:       1:

and 2:       and 2:

and 3:       and 3:

and 4:       and 4:

Is Active:

Save requisite

Save Cancel

**Add/Edit Pre/Co-requisite Screen**

**Pre-requisites** (required) – Enter Course Code defined for the first prerequisite. Must be an active Course Code from the current school/school year for which the course is being added or edited.

**Operator** (required if co-requisite if specified) – Select a valid operator from the drop-down list. This operator determines the logical relationship between the prerequisites entered and the corequisites entered, if any. Valid options are: And or Or.

**Co-requisites** (optional) – Enter Course Code defined as a Co-requisite. Must be an active Course Code from the current school/school year for which the course is being added or edited.

**Save requisite** – Save this Requisite for this course.

### Requisites Examples

- 1 Pre: A course requires one other single course (Eng 11 requires Eng 10). Enter only that course as a prerequisite, do not select an Operator or enter any corequisites. (3711: Eng 10)

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

### Courses

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites < Prev: 3713 Next: 3711 >

ENGLISH 11

Pre-requisites: Operator: Co-requisites:

1: 3711 1:

and 2:  and 2:

and 3:  and 3:

and 4:  and 4:

Is Active:

Save requisite

Save Cancel

**Example: A course that requires one prerequisite.**

- Alt Pre: A course requires any one of multiple courses (Eng 11 requires Eng 10, Eng 10 Honors or Alt Eng 10). Enter only one course in Pre-requisite box 1, do not select an Operator, and do not enter any corequisites; save and repeat with a new Requisite entry for each possible prerequisite course. (3711: Eng 10, 3611: Eng 10 Honors, 3811: Alt Eng 10)

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

### Courses

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites < Prev: 3713 Next: 3711 >

ENGLISH 11

New requisite

	Pre 1	and Pre 2	and Pre 3	and Pre 4	Operator	Co 1	and Co 2	and Co 3	and Co 4	Is Active
✗	3811									💡
✗	3611									💡
✗	3711									💡

Show Active Only

Save Cancel

**Example: A course that requires any one of multiple courses.**

- 2 Pre: A course requires all of multiple courses (Eng 11 requires both Eng 10 and Eng 9). Enter each of those courses in a Pre-requisite box in the same Requisite entry, do not select an Operator and do not enter any Co-requisites. (3711: Eng 10, 3710: Eng 9)

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

### Courses

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites < Prev: 3713 Next: 3711 >

ENGLISH 11

Pre-requisites: Operator: Co-requisites:

1: 3711 1:

and 2: 3710 and 2:

and 3:  and 3:

and 4:  and 4:

Is Active:

Save requisite

Save Cancel

**Example: A course that requires 2 prerequisites.**

- Pre + Co: A course requires both a pre-requisite course and a corequisite course (Bio I requires Phys Sci and co-requires Bio Lab). Enter the prerequisites as above, select **And** as the Operator, and enter any appropriate corequisites. (1100: Phys Sci, 1220L: Bio Lab)

The screenshot shows the 'Courses' management interface. The breadcrumb trail is: Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses. The current page is 'Courses', with a sub-header 'From this screen you can display or change information regarding courses'. There are tabs for 'General', 'Marks', 'Miscellaneous', 'EMIS', and 'Pre/Co-requisites'. The 'Pre/Co-requisites' tab is active, showing navigation buttons '< Prev: 1221' and 'Next: 1218 >'. The course name is 'BIOLOGY I'. Under 'Pre-requisites: Operator:', there are four rows: '1: 1100', 'and 2: [ ]', 'and 3: [ ]', and 'and 4: [ ]'. Under 'Co-requisites:', there are four rows: '1: 1220L', 'and 2: [ ]', 'and 3: [ ]', and 'and 4: [ ]'. The operator is set to 'And'. There is a 'Save requisite' button and an 'Is Active: ' checkbox. At the bottom are 'Save' and 'Cancel' buttons.

**Example: A course that requires one prerequisite and one corequisite.**

- Pre or Co: A course requires a single course as either a prerequisite or a corequisite (AP Calculus requires Physics be taken before or at the same time). Enter the prerequisite course, select **Or** as the Operator, and enter the same course in the corequisite box. (1400: Physics)

The screenshot shows the 'Courses' management interface. The breadcrumb trail is: Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses. The current page is 'Courses', with a sub-header 'From this screen you can display or change information regarding courses'. There are tabs for 'General', 'Marks', 'Miscellaneous', 'EMIS', and 'Pre/Co-requisites'. The 'Pre/Co-requisites' tab is active, showing navigation buttons '< Prev: 110' and 'Next: 1047 >'. The course name is 'AP CALCULUS'. Under 'Pre-requisites: Operator:', there are four rows: '1: 1400', 'and 2: [ ]', 'and 3: [ ]', and 'and 4: [ ]'. Under 'Co-requisites:', there are four rows: '1: 1400', 'and 2: [ ]', 'and 3: [ ]', and 'and 4: [ ]'. The operator is set to 'Or'. There is a 'Save requisite' button and an 'Is Active: ' checkbox. At the bottom are 'Save' and 'Cancel' buttons.

**Example: A course that requires one prerequisite or one corequisite.**

- 2 Pre or 1 Co: A course requires either prerequisite courses or a corequisite course (Anatomy requires Biology and Chemistry or co-requires AP Biology). Enter the prerequisite courses, select **Or** as the Operator, and enter the corequisite course. (1220: Biology, 1300: Chemistry, 1250: AP Biology)

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

### Courses

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites < Prev: 1231 Next: 1224 >

**ANATOMY AND PHYSIOLOGY**

Pre-requisites: Operator: Co-requisites:

1: 1220 1: 1250

and 2: 1300 Or and 2:

and 3: and 3:

and 4: and 4:

Is Active:

Save requisite

Save Cancel

Example: A course that requires 2 prerequisites or 1 corequisite.

- Complex Example: As previous example, except that any two of three courses are prerequisites, and either of two courses is an alternate corequisite (Anatomy requires any two of Biology, Chemistry and, or co-requires AP Biology or AP Chemistry). Enter the prerequisite courses, select **Or** as the Operator, and enter the corequisite course, for each possible combination of courses in this setup; each requisite line is one possible method to qualify. (1220: Biology, 1300: Chemistry, 1224: Advanced Biology, 1250: AP Biology, 1350: AP Chemistry)

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Courses

### Courses

From this screen you can display or change information regarding courses

General Marks Miscellaneous EMIS Pre/Co-requisites < Prev: 1231 Next: 1224 >

**ANATOMY AND PHYSIOLOGY**

New requisite

	Pre 1	and Pre 2	and Pre 3	and Pre 4	Operator	Co 1	and Co 2	and Co 3	and Co 4	Is Active
✕	1220	1300			o	1350				💡
✕	1220	1300			o	1250				💡
✕	1220	1224			o	1350				💡
✕	1220	1224			o	1250				💡
✕	1224	1300			o	1250				💡
✕	1224	1300			o	1350				💡

Show Active Only

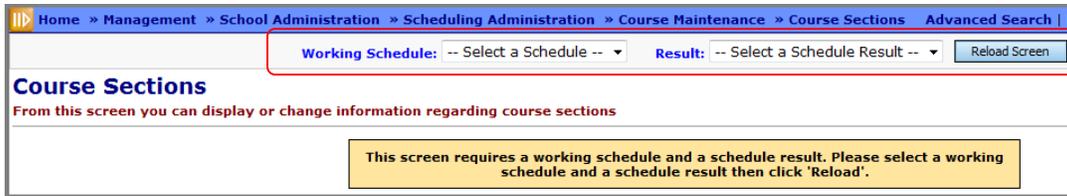
Save Cancel

Example: A course that requires any 2 of 3 prerequisites and either of two courses is an alternate corequisite.

## Course Sections

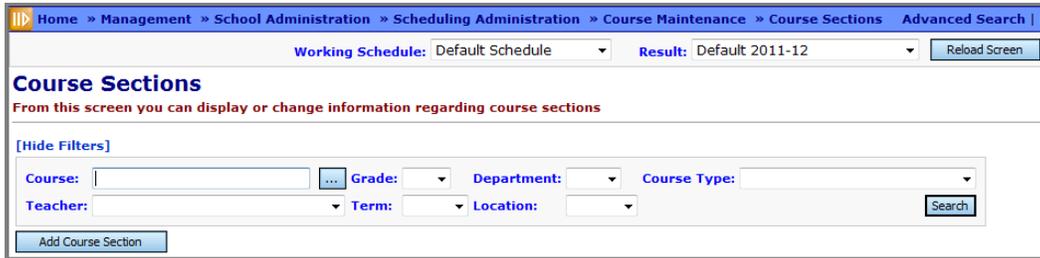
Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Sections

**Note:** When navigating to this screen before a final schedule result has been selected, you will have to select a Schedule and Schedule Result from the drop-down lists and click **Reload Screen**.



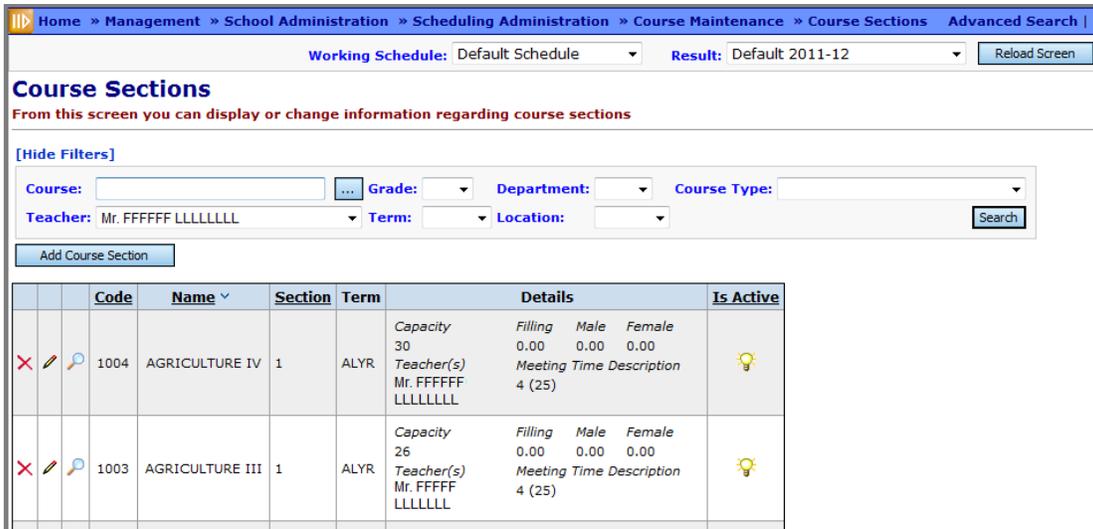
Select the Working Schedule and Result on the Course Sections screen.

A course section is the terms, periods, teachers and locations of a course meeting. A course can have several course sections and each section may contain more than one term, teacher, period and/or location.



### Searching for a Course Section

To view or edit course section information, specify a filter from one or more of the fields listed on the Course Sections Maintenance screen (as shown in the following example) or search without any specified criteria, which will list ALL sections of all courses in the working building. Course group sections are not included in this list.



### Course Sections Maintenance Screen with Search Results for Teacher

This screen has standard add record, edit record and delete record controls.

Records on this screen are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

Course sections may also be viewed by typing the course code (if known) in the Course field and hit the <Enter> key or click **Search**.

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Sections Advanced Search | F

Working Schedule: Default Schedule Result: Default 2011-12 Reload Screen

### Course Sections

From this screen you can display or change information regarding course sections

[Hide Filters]

Course: 1001 ... Grade: Department: Course Type: Teacher: Term: Location: Search

Add Course Section

		Code	Name	Section	Term	Details				Is Active	
			1001	AGRICULTURE I	1	ALYR	Capacity 26	Filling 0.00	Male 0.00	Female 0.00	
							Teacher(s) Mr. FFFFFFFF LLLLLLLLL	Meeting Time Description 3 (25)			
			1001	AGRICULTURE I	2	ALYR	Capacity 25	Filling 0.00	Male 0.00	Female 0.00	
							Teacher(s) Mr. FFFFFFFF LLLLLLLLL	Meeting Time Description 8 (25)			

### Course Sections Maintenance Screen with Search Results for Course

Fields that may be used for search criteria include: Course Code (ID), Course Grade Level, Course Department, Course Type, Teacher, Reporting Term and Room/Location.

**Search** – Search for course sections using selected criteria.

– View course section assignments for this course section (see [“Student Course Section Assignments”](#))

**Details** – The course details field contains a brief overview of the course. The details fields are Capacity, Filling, Male, Female, Teacher (s) and Meeting Time Description. Capacity lists the specified maximum of students for this course section. Filling describes the total number of students assigned to this course section and is a total of the Male and Female fields. Teacher lists the full name of the course section’s teacher. Meeting Time Description lists the Meeting Times by Period, with location in parentheses, or lists any Custom Meeting Time Description the course section has set.

**Note:** *If the rotation and meeting time of the course section is too complex to display during your initial conversion process you may see a meeting time description of “-- See Schedule --”. The actual meeting time is defined in the database but if the user needs to edit the course section, select the Custom check box and enter free form text a brief description to display the actual meeting time, location, teacher and period.*

– Open Course Selection Wizard for help selecting courses (see [Course Selection Wizard.](#))

## Add Course Section

When adding a course section, you will be presented with the General tab of the Course Sections Maintenance screen. If you had filtered by a course already, the Section Number will already be filled in with the next highest section number for that course, and the capacity will be filled in with the course's default capacity.

The screenshot shows the 'Course Sections' maintenance screen. The breadcrumb trail is: Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Sections. The 'Working Schedule' is set to 'Default Schedule' and the 'Result' is '-- Select a Schedule Result --'. The 'Course Sections' title is displayed, followed by the instruction: 'From this screen you can display or change information regarding course sections'. Below this are tabs for 'General', 'Meeting Times', 'Memberships', 'Attendance', 'Teacher History', and 'EMIS Override'. The 'General' tab is active, showing the following fields: 'Course:' (1001), 'Section Number:' (3), 'Capacity:' (25), 'Course Term:' (ALYR), 'Is Active:' (checked), 'Roll section to next year:' (checked), and 'Meeting Time Description:' (with a 'Custom' checkbox). At the bottom are buttons for 'Save Course Section', 'Save and New', and 'Cancel'.

**Add/Edit Course Section Maintenance Screen**

You can add only the general information for the course section, save the information, and add other course sections OR you can move from tab to tab, adding all relevant information for the course section on all appropriate tabs. Information is saved as you go to each Course Section tab.

**<Prev: [Course] #[Section]**– When editing, save changes made to this course section and go to the previous course section.

**Next: [Course] #[Section]>** – When editing, save changes made to this course section and go to the next course section.

## Delete Course Section

You cannot delete a course section that has course section assignments created. You will see a screen informing you of these assignments, with no **Ok** (delete) button displayed.

The screenshot shows a confirmation dialog box titled 'Course Sections - 1001 - AGRICULTURE I (3)'. The message reads: 'Are you sure you want to delete the following Course Section? Warning - all teachers, locations and periods will also be removed. This course section cannot be deleted until all assignments have been dropped or removed.' Below the message is a 'Cancel' button and a table showing the assignments for the course section.

Schedule	Result	# Assignments
Default Schedule	1st	15

**Course Section Deletion Confirmation Message**

## Course Section – General Tab

Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Sections – General Tab

The screenshot shows the 'Course Sections' interface with the 'General' tab selected. At the top, there is a breadcrumb trail: Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Sections. Below this, there are dropdown menus for 'Working Schedule' (set to 'Default Schedule') and 'Result' (set to '-- Select a Schedule Result --'), along with a 'Reload Screen' button. The main heading is 'Course Sections' with a sub-heading: 'From this screen you can display or change information regarding course sections'. Below this are several tabs: 'General', 'Meeting Times', 'Memberships', 'Attendance', 'Teacher History', and 'EMIS Override'. The 'General' tab is active and contains the following fields: 'Course:' (text input with '1001' and a lightning bolt icon, and a 'Default Section & Capacity' button), 'Section Number:' (spinners with '3' and a lightning bolt icon), 'Capacity:' (spinners with '25' and a lightning bolt icon), 'Course Term:' (dropdown with 'ALYR' and a lightning bolt icon), 'Is Active:' (checkbox checked), 'Roll section to next year:' (checkbox checked), and 'Meeting Time Description:' (text input with a 'Custom' checkbox). At the bottom are three buttons: 'Save Course Section', 'Save and New', and 'Cancel'.

### General Tab on the Add/Edit Course Section Maintenance Screen

**Course** (required) – Indicates course code of the selected course for which you are adding a section. Click  to access the Course Selection Wizard (see “[Course Selection Wizard](#)”) if you need to search for a course code.

**Default Section & Capacity** – Once you enter a course ID, click this button to auto-populate Section Number and Capacity.

**Section Number** (required or populated by the Default button) – Enter a Section number. Sections do not have to be numbered sequentially. If you click **Default Section & Capacity**, this field will automatically be set to the next higher section number than the highest existing section number. (For example, if a course already had sections 1, 2 and 3, the **Default Section & Capacity** button would make this field 4.)

**Capacity** (required or populated by the **Default Section & Capacity** button) – Indicates the maximum number of students to be scheduled into this course section. If you click **Default Section & Capacity**, this field will automatically be set to the default value of 30. Use the up and down buttons to increase or decrease increments by one or type a numeric value into the field.



**If the school uses enrollment weighting (weight flag set to true on DASL Options Scheduling tab) then the student’s program weight is used to increment the count. If school does not use enrollment weighting, each student will increment the count by 1.**

**Course Term** (required) – Indicates the term in which the course will be taught during the master calendar. Select an active course term from the drop-down list. **NOTE:** If you change a course term, you will receive a standard confirmation screen.

You can freely change course term of a course section if there are no students assigned to that course section. However, if there are any assignments to the course section, and you change course term for that course section, you will see the following screen:

The screenshot shows a web application interface with a blue header bar containing navigation links: Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Sections. Below the header, there are dropdown menus for 'Working Schedule: Default Schedule' and 'Result: Default 2011-12', along with a 'Reload Screen' button. The main content area is titled 'Course Sections - 1001 - AGRICULTURE I (2)' and includes a red warning message: 'The course term cannot be changed until all assignments have been dropped or removed. Click the Bulk Course Assignment button to drop or remove the students.' Below the message are two buttons: 'Cancel' and 'Bulk Course Assignment'. At the bottom, there is a table with the following data:

Schedule	Result	# Assignments
Default Schedule	1st	15

#### Message Users Receive When the Course Section Has Assignments

**Cancel** – Return to the course section.

**Bulk Course Assignment** – Go to the Bulk Course Section Management screen to transfer assignments from this section.

– Go to the Bulk Course Section Management screen without this course section in context.

**Is Active** (optional) – Select this box to make this course section active.

**Roll Section to Next Year** (optional) – Select this box to have this course section loaded by the school year initialization process in the next school year.

**Meeting Time Description** (non-modifiable or optional) – Lists the course section Meeting time description. If Custom is selected, you can enter your own course section Meeting time description.

**Custom** – Select this box to use the Meeting Time Description field (particularly of use with advanced meeting times).

**Note:** We recommend you **DO NOT** use a custom meeting time description for basic or intermediate meeting times. If you use a custom meeting time, and then later change the period, location or days of a Basic or Intermediate meeting time, the Custom Meeting Time description will **NOT** update with the new period, location or days.

**Course Sections - 074 - BRITISH LITERATURE (3)**  
 From this screen you can display or change information regarding course sections

General Meeting Times Memberships Attendance Teacher History EMIS Override Next: 074 #32 >

Course: 074

Section Number: 3

Capacity: 25

Course Term: ALYR

Is Active:

Roll section to next year:

Meeting Time Description: Term 1: MWF, 3 (107); Term 2: MWF, 3 (108)  Custom

**Course Sections - 074 - BRITISH LITERATURE (3)**  
 From this screen you can display or change information regarding course sections

General Meeting Times Memberships Attendance Teacher History EMIS Override Next: 074 #32 >

Course: 074

Section Number: 3

Capacity: 25

Course Term: ALYR

Is Active:

Roll section to next year:

Meeting Time Description: Term 1: MWF, 3 (107); Term 2: MWF, 3 (108)  Custom

			Code	Name	Section	Term	Details				Is Active
<input checked="" type="checkbox"/>	<input type="button" value="✎"/>	<input type="button" value="🔍"/>	074	BRITISH LITERATURE	3	ALYR	Capacity	Filling	Male	Female	<input checked="" type="checkbox"/>
							25	0.00	0.00	0.00	
							Teacher(s) Meeting Time Description				
							Term 1: MWF, 3 (107); Term 2: MWF, 3 (108)				
<input checked="" type="checkbox"/>	<input type="button" value="✎"/>	<input type="button" value="🔍"/>	074	BRITISH LITERATURE	32	2SEM	Capacity	Filling	Male	Female	<input checked="" type="checkbox"/>
							30	0.00	0.00	0.00	
							Teacher(s) Meeting Time Description				
							MS SEXTON 3 (0128)				

Show Active Only

### Using a Custom Meeting Time

## Course Section – Meeting Times Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Sections – Meeting Times Tab**

The Meeting Times tab can display in one of three ways, as explained in the help text on the right side of the tab.

- **Basic Meeting Times** – Course section must have a single teacher and a single location and have the same periods for the entire schedule.  
**Example:** Math101 meets MWF with Mrs. Smith 2<sup>nd</sup> period in room 101

- **Intermediate Meeting Times** – Course section must have the same teachers, locations, and periods for the entire schedule, but the teachers, locations, and periods may differ over rotation days.  
**Example:** Math 101 meets MWF with Mrs. Smith 2<sup>nd</sup> period in room 101 and TR with Mr. Brown 3<sup>rd</sup> period in room 34.
- **Advanced Meeting Times** - Course section may have different teachers, locations, periods and rotation days across the schedule.  
**Example:** Math101 meets MWF with Mrs. Smith 2<sup>nd</sup> period in room 101 for 1<sup>st</sup> and 2<sup>nd</sup> quarter; and then meets TR with Mr. Brown 3<sup>rd</sup> period in room 34 for 3<sup>rd</sup> and 4<sup>th</sup> quarters.

**Basic\Intermediate\Advanced** – Select meeting time type. If you enter a meeting time that cannot be represented by a lower type of meeting time, the meeting time types that cannot be used are greyed out. If you edit a meeting time so that it is more complex than it had previously been, it will automatically convert into the necessary meeting time type. If you edit a meeting time so that it is less complex than it had previously been, it will automatically convert into the least complex meeting time type.

### Basic Meeting Times

The screenshot shows a web interface for setting up course sections. At the top, there are dropdowns for 'Working Schedule' (Default Schedule) and 'Result' (-- Select a Schedule Result --), along with a 'Reload Screen' button. The main heading is 'Course Sections - 074 - BRITISH LITERATURE (3)'. Below this is a sub-heading: 'From this screen you can display or change information regarding course sections'. There are several tabs: 'General', 'Meeting Times', 'Memberships', 'Attendance', 'Teacher History', and 'EMIS Override'. The 'Meeting Times' tab is selected. Under this tab, there are three radio buttons: 'Basic' (selected), 'Intermediate', and 'Advanced'. Below these are three fields: 'Teacher:' (a dropdown menu), 'Location:' (a dropdown menu), and 'Periods (All Days):' (checkboxes for periods 1 through 8). At the bottom left are 'Save Course Section' and 'Cancel' buttons. On the right side, there is a help box with the following text: 'Basic: course section must have a single teacher and a single location and have the same periods for the entire schedule. Intermediate: course section must have the same teachers, locations, and periods for the entire schedule. Advanced: course section may have different teacher/location/periods across the schedule.'

#### Setting Up Basic Meeting Times for a Course Section

**Basic/Intermediate/Advanced** – Select Basic.

**Teacher** (required) – Indicates the teachers that will be teaching this course section. Select from the drop-down list of all available teachers.

**Note:** This teacher is automatically selected as teacher of record (for EMIS reporting).

**Location** (required) – Select the location (from the drop-down list) which will be used for this course section meeting time.

**Periods** (required) – Check the appropriate periods of the day that this course section will meet. Sections can meet any number of periods during the day (consecutive and non-consecutive). Refer to “[Course Section – Attendance Tab](#)” to determine which of those periods is used to collect period attendance.

## Intermediate Meeting Times

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

### Course Sections - 074 - BRITISH LITERATURE (3)

From this screen you can display or change information regarding course sections

General   Meeting Times   Memberships   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

Basic    Intermediate    Advanced

Add Meeting Time

	Teacher	Location	Start	End	Periods
	ABBOTT, MS	0108 - 0108	Aug 21, 2012	May 30, 2013	M: 1; T: 4; W: 1; R: 4

Basic: course section must have a single teacher and a single location and have the same periods for the entire schedule  
**Intermediate: course section must have the same teachers, locations, and periods for the entire schedule**  
 Advanced: course section may have different teacher/location/periods across the schedule

In intermediate mode, you can configure multiple teachers and/or locations for the course section. You can also select different periods for each rotation day.

Click 'Add Meeting Time' to get started, or you can edit an existing meeting time.

Save Course Section    Cancel

### Setting Up Intermediate Meeting Times for a Course Section

Basic/Intermediate/Advanced – Select Intermediate.

**Add Meeting Time** – Enter a new Intermediate meeting time entry.

– Remove this meeting time entry from the course section.

– Modify this meeting time entry.

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

### Course Sections - 074 - BRITISH LITERATURE (3)

From this screen you can display or change information regarding course sections

General   Meeting Times   Memberships   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

Add Meeting Time

	Teacher	Location	Start	End	Periods
	ABBOTT, MS	0108 - 0108	Aug 21, 2012	May 30, 2013	M: 1; T: 4; W: 1; R: 4

Teacher: MS BEASLEY    Location: 0115 - 0115    Teacher of Record:

Day	Periods							
	1	2	3	4	5	6	7	8
M	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
T	<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	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
R	<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	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

Basic: course section must have a single teacher and a single location and have the same periods for the entire schedule  
**Intermediate: course section must have the same teachers, locations, and periods for the entire schedule**  
 Advanced: course section may have different teacher/location/periods across the schedule

In intermediate mode, you can configure multiple teachers and/or locations for the course section. You can also select different periods for each rotation day.

Click 'Add Meeting Time' to get started, or you can edit an existing meeting time.

Save Meeting Time    Cancel Changes

### Adding an Intermediate Meeting Time Entry

<Prev: [Course] #[Section]/Next: [Course] #[Section]> – Click these buttons to go to the previous or next course.

**Teacher** (required) – Indicates the teachers that will be teaching this course section. Select from the drop-down list of all available teachers.

**Location** (required) – Select the location from the drop-down list, which will be used for this course section meeting time.

**Teacher of record** (optional) – Check if the selected teacher is to be listed as a teacher of record (for EMIS reporting purposes).

**Periods** (required) – Check the appropriate periods of the day that this course section will meet for each rotation day listed. Sections can meet any number of periods during the day, consecutive and non-consecutive, on any rotation days listed (see *“Course Section – Attendance Tab”* to determine which of those periods is used to collect Period Attendance).

**Save Meeting Time** – Save designated meeting time information as specified and remain in the Meeting Times entry mode for additional input if needed. You must use this button to save the meeting times before you go to another tab or return to the course section list.

**Cancel Changes** – Cancel changes, do not save meeting time information, and return to the Meeting Times tab.

### Advanced Meeting Times

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

**Course Sections - 074 - BRITISH LITERATURE (3)**  
From this screen you can display or change information regarding course sections

General   Meeting Times   Memberships   Attendance   Teacher History   EMIS Override   Next: 074 #32 >

Basic    Intermediate    Advanced

Add Meeting Time

	Teacher	Location	Start	End	Periods
	ABBOTT, MS	0108 - 0108	Aug 21, 2012	May 30, 2013	M: 1; T: 4; W: 1; R: 4
	BEASLEY, MS	0115 - 0115	Aug 21, 2012	May 30, 2013	M: 1; W: 1; F: 1

Basic: course section must have a single teacher and a single location and have the same periods for the entire schedule  
Intermediate: course section must have the same teachers, locations, and periods for the entire schedule  
**Advanced: course section may have different teacher/location/periods across the schedule**

In advanced mode, you must configure the meeting times for each schedule term within the course term. For each schedule term, you should select a teacher, a location and the periods the course section will meet on each rotation day.  
Click 'Add Meeting Time' to get started, or you can edit an exiting meeting time.

Save Course Section   Cancel

### Setting Up Advanced Meeting Times

**Basic/Intermediate/Advanced** – Select Advanced.

**Add Meeting Time** – Enter a new Advanced meeting time entry.

– Remove this meeting time entry from the course section.

– Modify this meeting time entry.

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

### Course Sections - 074 - BRITISH LITERATURE (3)

From this screen you can display or change information regarding course sections

General   Meeting Times   **Memberships**   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

Add Meeting Time

	Teacher	Location	Start	End	Periods
X	ABBOTT, MS	0108 - 0108	Aug 21, 2012	May 30, 2013	M: 1; T: 4; W: 1; R: 4
X	BEASLEY, MS	0115 - 0115	Aug 21, 2012	May 30, 2013	M: 1; W: 1; F: 1

Teacher: MS BOWERS  
 Location: 0108 - 0108  
 Schedule Term: 01/22/2013  
 Teacher of Record:

Day	Periods							
M	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
T	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
W	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
R	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Save Meeting Time    Cancel Changes

Basic: course section must have a single teacher and a single location and have the same periods for the entire schedule  
 Intermediate: course section must have the same teachers, locations, and periods for the entire schedule  
**Advanced: course section may have different teacher/location/periods across the schedule**

In advanced mode, you must configure the meeting times for each schedule term within the course term. For each schedule term, you should select a teacher, a location and the periods the course section will meet on each rotation day.

Click 'Add Meeting Time' to get started, or you can edit an exiting meeting time.

#### Adding an Advanced Meeting Time Entry

<Prev: [Course] #[Section]/Next: [Course] #[Section]> – Click these buttons to go to the previous or next course.

**Teacher** (required) – Indicates the teachers that will be teaching this course section. Select from the drop-down list of all available teachers.

**Location** (required) – Select the location from the drop-down list, which will be used for this course section meeting time.

**Schedule Term** (required) – Select the Schedule Term from the drop-down list. Advanced meeting times can have different teachers, locations, teachers of record, and periods across different schedule terms during the course term.

**Teacher of record** (optional) – Select this option if the selected teacher is to be listed as a teacher of record (for EMIS reporting purposes).

**Periods** (required) – Check the appropriate periods of the day that this course section will meet for each rotation day listed. Sections can meet any number of periods during the day, consecutive and non-consecutive, on any rotation days listed (see *“Course Section – Attendance Tab”* to determine which of those periods is used to collect Period Attendance).

**Save Meeting Time** – Save designated meeting time information as specified and remain in the meeting times entry mode for additional input if needed. You must use this button to save the meeting times before you go to another tab or return to the course section list.

**Cancel Changes** – Cancel changes, do not save meeting time information, and return to the Meeting Times tab.

## Course Section – Memberships Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Sections – Memberships Tab**

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

**Course Sections - 074 - BRITISH LITERATURE (3)**  
From this screen you can display or change information regarding course sections

General   Meeting Times   **Memberships**   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

Course Group	Group Section
There are no records to display	

Save Course Section   Cancel

### Memberships Tab on the Add/Edit Course Sections Maintenance Screen

This is a view only tab, and if the course is a member of a group, the membership will be listed as shown in the following figure.

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

**Course Sections - 074 - BRITISH LITERATURE (3)**  
From this screen you can display or change information regarding course sections

General   Meeting Times   **Memberships**   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

Course Group	Group Section
Literature and Composition	1

Save Course Section   Cancel

### Course Group on the Memberships Tab

**Course Group** (display only) – Name of the course group in which this course section is a member.

**Group Section** (display only) – Course group section number for which this course is a member.

## Course Section – Attendance Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Sections – Attendance Tab**

The Attendance tab is only used for period attendance, for course sections that meet over multiple periods each rotation day it meets. If a course section only meets in one period on each rotation day it meets, all boxes will be grayed out.

If a course section meets over multiple periods, those periods will be selectable.

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

### Course Sections - 074 - BRITISH LITERATURE (3)

From this screen you can display or change information regarding course sections

General   Meeting Times   Memberships   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

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.

Schedule Term: 10/29/2012 ⚡

Day	Periods							
M	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
W	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
F	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Save Course Section   Cancel

#### Attendance Tab on the Add/Edit Course Section Maintenance Screen

**Schedule Term** (required) – Select the schedule term from the drop-down list. Course sections can collect period attendance in different periods across different schedule terms during the course term.

**Periods** (optional) – Select the boxes for the periods in which attendance will be collected.

#### Course Section – Teacher History Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Sections – Teacher History Tab**

The Teacher History tab lists the teachers of this course section. Also listed are the dates the teacher began and ended teaching this course section and the teacher's role. The Teacher History tab is not automatically updated with the information from the Meeting Times tab. When adding a course section, users must update the information on the Teacher History tab and on the Meeting Times tab.

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

### Course Sections - 074 - BRITISH LITERATURE (3)

From this screen you can display or change information regarding course sections

General   Meeting Times   Memberships   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

Add New

	Teacher Name	Start Date	End Date	Role	Teacher Of Record
 	BEASLEY, MS	08/21/2012	05/30/2013	LT	<input checked="" type="checkbox"/>

Save Course Section   Cancel

#### Teacher History Tab on the Add/Edit Course Sections Maintenance Screen

**Add New** – Add a new teacher to this course section.

 – Remove this teacher from the course section.

 – Modify this teacher entry.

## Add Teacher

Click **Add New** to add a teacher to this course section.

Working Schedule: Default Schedule    Result: -- Select a Schedule Result --    Reload Screen

### Course Sections - 074 - BRITISH LITERATURE (3)

From this screen you can display or change information regarding course sections

General   Meeting Times   Memberships   Attendance   Teacher History   EMIS Override    Next: 074 #32 >

Teacher: MS BOWERS ⚡

Role Code: CT - Co-Teacher ⚡

Start Date: 8/21/2012 ⚡

End Date: 5/30/2013 ⚡

Teacher Of Record:

Save   Cancel

### Add Teacher History on the Add/Edit Course Sections Maintenance Screen

**Teacher** (required) – Select the teacher being added from the drop-down list.

**Role Code** (optional) – Select the teacher's role from the drop-down list. Lead teacher is used when one and only one teacher of record is assigned to this course section. When multiple teachers of record are assigned to this course section, they all must be designated as co-teachers.

**Start Date** (optional) – Select the date the teacher started teaching this course section.

**End Date** (optional) – Select the date the teacher stopped teaching this course section.

**Teacher of Record** –For EMIS reporting purposes, at least one teacher must be designated as a teacher of record for this course section. All teachers of record are reported to EMIS.

## Course Section – EMIS Override Tab

### StudentInformation – Management – School Administration – Scheduling Administration – Course Maintenance – Course Sections

The EMIS Override tab enables you to override the information reported to EMIS for courses in which an individual section varies from the information defined in the course. If a value exists in any of the fields for the course section, StudentInformation uses the values in the course section instead of those defined in the course when performing various processes.

StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Course Sections

### Course Sections - 001R - ENGLISH 9R (1)

From this screen you can display or change information regarding course sections

General Meeting Times Memberships Attendance Teacher History **EMIS Override** Next: 001R #2 >

EMIS Staff Provider IRN:  

EMIS Subject Code:

Curriculum:

Delivery Method:

Student Population:

Highly Qualified Teacher IRN:  

Dual Credit:

#### EMIS Override Tab on the Add/Edit Course Sections Maintenance Screen

You can override the following information in the course section. For more information about the codes, refer to *ProgressBook StudentInformation EMIS Guide*.

**EMIS Staff Provider IRN** – IRN number of the entity other than the working district employing the staff member of this course. Valid IRNs are those for an ESC. \*\*\*\*\* must be entered if there is no EMIS Staff Provider IRN.

**EMIS Subject Code** – Lists the valid EMIS Course Subjects.

**Curriculum** – Lists the valid curriculum source/model/program for the course.

**Delivery Method** – Identifies the means by which instruction is provided/communicated to the student(s) in the course.

**Student Population** – Identifies the attributes of the student group for which the course is intended.

**Highly Qualified Teacher IRN** – IRN used to group courses for the calculation of the percent of core courses taught by highly qualified staff and the percent of core courses taught by properly certified staff. Valid options include a 6 digit IRN, 999999 or \*\*\*\*\*.

 – Opens the OEDS-R Search Organization screen to assist you in completing the EMIS Staff Provider IRN or Highly Qualified Teacher IRN fields.

**Dual Credit** – Select this option when the course is not marked as dual credit, but the course section can earn credits for both high school and transcribed college credit.

## Course Groups

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Groups**

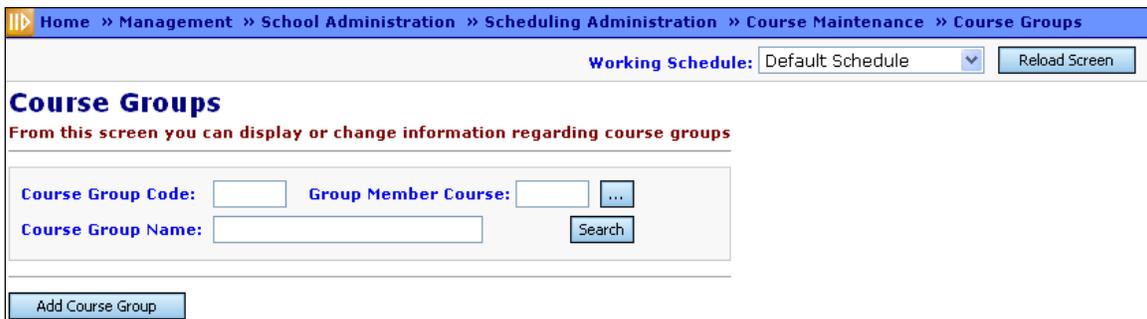
If you navigate to this page before the schedule is finalized, you will need to select a Working Schedule from the drop-down list and then click **Reload Screen**. At any time, you may select a different schedule from the drop-down and click **Reload Screen** to change which Schedule you are working with.



### Select the Working Schedule on the Course Groups Maintenance Screen

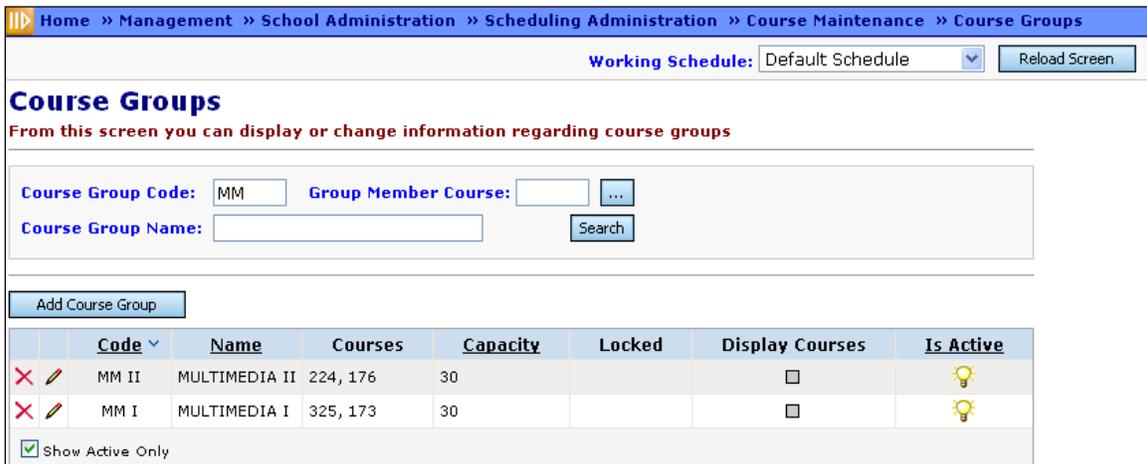
Course Groups are used as a way to mass schedule students into a group of courses, the result being that a group of students stay together for all courses that are defined in the group. Course Groups can have many courses and many sections.

From a course/schedule request point of view, students will only need a request for the course group and not all the individual courses within the course group. From a scheduling point of view the students will be assigned to the specific course sections within the course group, therefore class lists and grades can be generated for each student on the class list of each course in the group.



### Searching for Course Groups

Course Groups can be viewed by specifying a filter from one or more of the fields listed as shown in the following example, or by searching without any specified criteria, which would list ALL Course Groups in the working building. Alternately, the Course Selection Wizard may be used by clicking the ellipse button (). For more information on using the Course Selection Wizard see [“Course Selection Wizard.”](#)



### Search Results on the Course Groups Maintenance Screen



– Open the Course Selection Wizard.

**Search** – Search for Course Groups using the selection criterion.

This screen has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by most columns (Code, Name, Capacity and Is Active) in ascending or descending order by clicking on the column header.

**Courses** – This column lists the Course IDs of member Courses of this Course Group

When adding a Course Group, after entering information on the Group tab, switching to the Courses / Sections tab will save the Course Group. When editing a Course Group, switching to the Courses / Sections tab will save any changes made to information on the Group tab.

**<Prev: [Course]** – When editing, save changes made to this Course Group and go to the previous Course Group.

**Next: [Course]>** – When editing, save changes made to this Course Group and go to the next Course Group.

## Course Group – Groups Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Groups**

Home » Management » School Administration » Scheduling Administration » Course Maintenance » Course Groups

Working Schedule: Default Schedule [v] [Reload Screen]

### Course Groups

From this screen you can display or change information regarding course groups

Group [v] Courses / Sections [v]

Code: [text input] ⚡ Abbreviation: [text input]

Name: [text input] ⚡ Short Name: [text input] ⚡

Description: [text area]

Capacity: [spin box]

Scheduling Priority: 5 [spin box] ⚡

Is Locked:

Display Courses Individually:

Display on Public Module:

Is Active:

[Save] [Cancel]

### Add/Edit Course Groups Maintenance Screen

**Code** (required) – Enter up to 15 characters – alphanumeric – for the Course Group. If you try to use an existing inactive Course Group Code, you will be prompted to reactivate this inactive Group if you wish. Course Groups are defined at the building level only.

**Abbreviation** (optional) – Enter an abbreviation to be used for the Course Group (up to 8 characters).

**Name** (required) – Enter name of Course Group (up to 30 characters).

**Short Name** (optional) – Enter a short version of the Name for the Course Group (up to 15 characters).

**Description** (optional) – Enter description of the new Course Group (up to 200 characters).

**Capacity** (optional) – Enter a value to indicate the capacity to be used for this group, or adjust up and down with the arrow buttons.

**Scheduling Priority** (required) – Choose a scheduling priority from 1 to 9 (1 being the lowest and 9 being the highest) for this Course Group, with a default value of 5. Any student request created for this Course Group will have the request priority set to the Course Group's scheduling priority. A request with a higher priority will be attempted to be scheduled before a request with a lower priority. **NOTE:** Once a request is entered, changing this value on the Course Group record does not change existing request priority values. Also, request priority only affects the student's schedule when it is selected for all passes on the Job Parameter Set.

**Is Locked** (optional) – (this function is currently not functional; see the Is Locked check box for each course group section, the following topic).

**Display Courses Individually** – Yes or No. Indicates whether Courses that are members of this Course Group may be searched for and requested by students in the Public Course Requests Module. If Courses that are in this Course Group should not show individually in the Public Course Requests Module, then the Display Courses Individually check box should be unchecked. This overrides the Course – General tab – Display on Public Module check box for the Courses within this Course group.

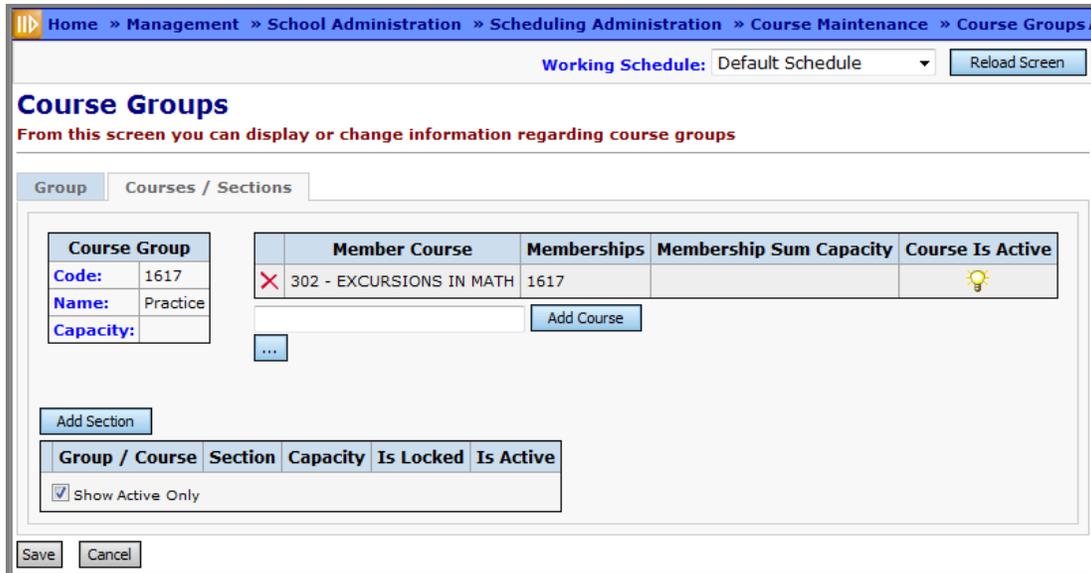
**Display on Public Module** – Yes or No. If checked, this course group is requestable by students as part of the Public Course Requests Module.

**Is Active** – Yes or No. If checked, this is an active course group that can be used in course requests and scheduling.

Clicking on the **Courses/Sections** tab saves changes made to the Course Group.

### **Course Group – Courses / Sections Tab**

**Navigation: Home – Management – School Administration – Scheduling Administration – Course Maintenance – Course Groups**



**Course/Sections Tab on the Add/Edit Course Groups Maintenance Screen**

**Course Group** – This information box lists the Course Group Code, Course Group Name, and Course Group Capacity.

– Enter a Course ID in the box, or use the Course Selection Wizard () to select a Course ID, then click **Add Course** to add that Course to the Course Group. All Courses added to the Course Group will be displayed in the grid above.

	Member Course	Memberships	Membership Sum Capacity	Course Is Active
<input type="button" value="X"/>	280 - ENGINEERING CAD TECH 2 REL	MM3, #5008	30	

**Member Course Grid on Course/Sections Tab**

– Remove this member Course from the Course Group. NOTE: This does **NOT** currently remove course sections assigned to any course group sections.

**Memberships** – This column lists all Course Groups of which this Course is a member.

**Course Is Active** – This column shows whether a Course is marked as active or not, regardless of its inclusion in the Course Group. A yellow light bulb indicates an Active Course, while a dim light bulb (and gray shading on the Course) indicates an Inactive Course.

	Member Course	Memberships	Membership Sum Capacity	Course Is Active
<input type="button" value="X"/>	280 - ENGINEERING CAD TECH 2 REL	MM3		
<input type="button" value="X"/>	405 - INTEGRATED COMP SYS TECH 2 LAB	MM3, #5008	30	

**Active and Inactive Courses in the Member Course Grid**

**Add Section** – Add a new Course Group Section to the following grid. This adds a new Course Group Section with a Section number by default one higher than the number of Course Group Sections already listed in the grid. No member Courses will have Course Sections assigned yet.

Add Section					
	Group / Course	Section	Capacity	Is Locked	Is Active
✖	MM3 - Multimedia 3	1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	280 - ENGINEERING CAD TECH 2 REL	-- Select Course Section --			
	405 - INTEGRATED COMP SYS TECH 2 LAB	-- Select Course Section --			
<input checked="" type="checkbox"/> Show Active Only					

### Adding a Course Section

Lines shaded in yellow are active Course Group Sections. Member Courses are listed below each Course Group Section.

Course Group Section records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Section (Course Group Section)** (required) – This is the Course Group Section number. You can enter a different section number (section numbers do not have to be sequential), or adjust with the arrow buttons.

**Section (Member Course Section)** (required) – For each member Course, select the Course Section that should be assigned to this Course Group Section.

**Capacity** (required) – Enter capacity to be used in filling this Course Group Section.



**Note: Course Group Section Capacity takes precedence over Course Section Capacity when using the Scheduler. Therefore, the student may not get scheduled into a Course Group Section if any one of the Course Sections has reached the Course Group Section Capacity, even if other Courses within the Course Group Section have not yet reached Capacity, or the Course Section has a higher Capacity. (For example, if a Course Section with a Capacity of 30 is assigned to a Course Group Section with a Capacity of 25, students beyond 25 will not get scheduled into the Course Group Section, even though the Course Section has not reached its own Capacity.)**

**Is Locked** (optional) – Yes or No; If a Course Group Section is Locked, a student with a request for an individual Course that is a member of this Course Group will not be scheduled into the Course Section that is a member of this Course Group Section by the Batch Scheduler (as long as “Honor Course Group Locks” was selected in the Scheduler run).

Clicking on the **Group** tab will save changes made to the Course Group.

# Scheduler

## Job Parameter Sets (Schedule Job Wizard)

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Job Parameter Sets**

A Job Parameter Set is a collection of parameters that can be used in a run of the Batch Schedule Engine or Online Scheduler. A Job Parameter Set allows the school personnel to maintain a set of parameters for reuse, rather than resetting all parameters for each Schedule Job run. As shown in the following figure, the building may have several Job Parameter Sets defined for use, with one being designated as the default set which will be used in all runs of the Batch and Online Scheduler unless otherwise specified.

			Name	Description	Revision	Default Batch	Single Student	Is Active
			Default Parameter for online scheduling		1	<input type="checkbox"/>	<input type="checkbox"/>	
			Default Parameter for online scheduling		1	<input type="checkbox"/>	<input type="checkbox"/>	
			Default Parameter for online scheduling		1	<input type="checkbox"/>	<input type="checkbox"/>	
			Default Parameter for online scheduling		1	<input type="checkbox"/>	<input type="checkbox"/>	

**Job Parameter Set Maintenance Screen**

– Delete this Job Parameter Set.

– This Job Parameter Set cannot be deleted (this Job Parameter Set has been set as Default for the Batch Scheduler or has been set to be used with the Single Student Scheduler).

– Edit this Job Parameter Set (this button opens the Schedule Job Wizard at the Run Level Parameters tab, and displays only controls to Save, set defaults, or Clear values on the Submit tab).

– Execute this Job Parameter Set and Update the existing Schedule Result (this button opens the Schedule Job Wizard at the Submit tab, and only displays controls to run and update on the Submit tab; changes made to other tabs will be saved when the job is run).

**Note:** When updating an existing Schedule Result, all previous Schedule Result records will be deleted, even those with a non-assigned status.

– Execute this Job Parameter Set and Create a new Schedule Result (this button opens the Schedule Job Wizard at the Submit tab, and only displays controls to run and create on the Submit tab; changes made to other tabs will be saved when the job is run)

**Default Batch** – This box is checked if this Job Parameter Set is used as the default Job Parameter Set for the Batch Scheduler. (This Job Parameter Set will have the Delete button locked.)

**Note:** Once a Default Batch Job Parameter Set is selected, its selections become the default values when adding a new Job Parameter Set.

**Single Student** – This box is checked if this Job Parameter Set is used for the Single Student Scheduler. (This Job Parameter Set will have the Delete button locked.)

**Add Job Parameter Set** – Add a new Job Parameter Set. There are six screens/tabs to be completed with the last one used to save the defined parameters, run the scheduler, or both save the sets and run the scheduler at the same time.



**NOTE:** If you try to use the Schedule Job Wizard or add a Job Parameter Set to the current school year, the warning message StudentInformation provides will be very large. We strongly recommend AGAINST running the Scheduler in the current school year.

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard

### Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | **Pass Level Parameters** | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit

**Grade Levels to Schedule:**

GR - GR	09 - 09
23 - 23	10 - 10
UG - UG	11 - 11
30 - 30	12 - 12

**Course Terms to Schedule:**

1st Semester
2nd Semester
All Year

**Sort Criteria for Students who are being Scheduled:**

Grade Level DESC	Grade Level ASC
Student Last Name ASC	Student Random
Student Last Name DESC	
Student Number ASC	

Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled

**Section Overfilled Percent:** 5

**Course Group Locking:** Lock No Course Groups

**Balance By Ethnicity:** No Balancing

**Time Limit Per Student:** 60

Note: The Time Limit Per Student value determines the maximum number of seconds that the scheduler will try to schedule each student.

Next > | Cancel

### Schedule Job Wizard

#### Add/Edit/Execute Job Parameter Set

On each tab, the <Back and Next> buttons have different functions depending whether you are adding/editing a Job Parameter Set, or executing a Job Parameter Set. In both cases, they will go back to the previous tab or advance to the next tab, respectively. Changes made to a Job Parameter Set will only be saved if you are **Adding or Editing** the Job Parameter Set (not Executing), and only after clicking the Save Schedule Parameters button on the Submit tab. Changes made to a Job Parameter Set while **Executing** will only be saved as part of the parameters for the current Schedule Job run. The original Job Parameter Set being executed will not change.

On all tabs, the Cancel button will cancel changes and return to the Job Parameter Sets Maintenance Screen.

## Run Level Parameters Tab

### Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job Wizard

The first tab of the Schedule Job Wizard is used to define Run Parameters. Run parameters are various selection and sort criterion to be used by the online or batch scheduler when this particular Job Parameter Set is used.

#### Run Level Parameters Tab on the Schedule Job Wizard

**Grade Levels to Schedule** (required) – Select at least one grade level to be scheduled for this Job Parameter Set. By default, all grade levels are selected.

**Course Terms to Schedule** (required) – Select at least one course term to be scheduled for this Job Parameter Set. By default, all course terms are selected.

**Sort Criteria for Students who are being Scheduled** (required) – Select the sort parameters that you wish to use and in what order those parameters are to be used in the scheduling run. If no Default Batch Job Parameter Set exists, the default sort order is “Grade Level ASC, Student Schedule Priority, Student Requesting Group, Student Random.” **Do not** select both ASC (ascending) and DESC (descending) versions of the same type of sort (such as both Student Number ASC and Student Number DESC).

Options are:

- Grade Level ASC (ascending) or DESC (descending)
- Student Last Name ASC (ascending) or DESC (descending)
- Student Number ASC (ascending) or DESC (descending)
- Student Schedule Priority – Sorts by “Student Scheduling Priority” from Profile
- Student Requesting Group – Schedules students with Requests for course groups before scheduling students without a Request for any course groups.
- Student Random – This sort option should always be the last option unless it is the only sort option being used.

At least one sort parameter must be selected. If you click on an item in the right-side box, you can move that item up or down in the Sort Order using the  and  buttons.



**NOTE: Only students with a Student Status Code with overall status of Active will be scheduled by the Scheduler.**

**Section Overfilled Percent** (optional) – If overfilling of course sections is allowed a value/percentage must be defined in this field. This value will be used as the percentage of the capacity a section may be overfilled. Please note that the scheduler will attempt to balance the number of students per section before overfilling will occur. You can enter a specific number, or increase or decrease this value by one point using the  buttons. If this value is 0% (zero) then the capacity setting will be enforced. **NOTE:** this value will only be enforced on Scheduler passes for which the Allow Section Overfilling box is checked on the Pass Control Tab.

**Course Group Locking** – Define the method to be used for Course Group Locking.

Options are:

- **Lock No Course Groups** – Students may be scheduled into course sections within a Course Group without regard to whether the Course Group Sections have been defined as locked.
- **Honor Course Group Locks** – Do not allow students to be scheduled into course sections for Course Group Sections that have been defined as locked.
- **Lock All Course Groups** – Students will NOT be scheduled into any course sections within a Course Group regardless if they have defined as locked or not.

**Balance by Ethnicity** – If ethnic balancing is to be used during the scheduling run, select the majority or primary ethnicity from the drop-down menu of all available ethnicities. All other ethnicities will be grouped together as the minority. The default value will be “no ethnic balancing.”

**Time Limit Per Student** – The Time Limit Per Student value determines the maximum number of seconds that the scheduler will try to schedule each student.

## Pass Level Parameters Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job Wizard**

Pass Level parameters define processing logic and number of passes to be completed with this run of the scheduler. Any number of passes, from 1-10 may be defined. Note that the Online Scheduler uses one pass regardless of the number listed here. Once the school year and scheduling process have been finalized, the default Job Parameter run should be designated with one pass, which will then be used by the online scheduler for new students admitted to the building.

The screenshot shows the 'Schedule Job Wizard' interface with the 'Pass Level Parameters' tab selected. The breadcrumb trail at the top reads: Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard. Below the title, a red message states: 'From this screen, you can save parameter sets for the scheduler, or run the scheduler.' The interface features six tabs: 'Run Level Parameters', 'Pass Level Parameters', 'Pass Control', 'Course Sequencing Rules', 'Teacher Link Groups', and 'Submit'. The 'Pass Level Parameters' tab is active and contains the following fields and descriptions:

- Maximum Number of Passes:** A dropdown menu set to '1' with a lightning bolt icon. Description: 'The number of passes executed by the scheduler. Note: the Single Student scheduler will only use the first pass even if multiple passes are selected.'
- Maximum Number of Periods Per Day:** A spinner box set to '10'. Description: 'The maximum number of periods that a student may be assigned to courses on a rotation day.'
- Maximum Variation of Courses Between Schedule Terms:** A spinner box. Description: 'The maximum difference, between any two schedule terms, in the number of courses to which a student is assigned.'
- Maximum Variation of Course Weights Between Schedule Terms:** A spinner box. Description: 'The maximum difference, between any two schedule terms, in the total weight of courses to which a student is assigned.'
- Maximum Number of Days Allowed with Restricted Patterns:** A spinner box. Description: 'The maximum number of days on which the courses to which a student is assigned may violate the Daily Pattern Rules.'
- Maximum Number of Days Allowed with Excessive Periods:** A spinner box. Description: 'The maximum number of days on which the courses to which a student is assigned may violate the Max Periods Per Day restriction.'

At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

**Pass Level Parameters Tab on the Schedule Job Wizard**

◆ – Adjust this value up or down by one.

**Maximum Number of Passes** (required) – Input the number of passes to be performed by the scheduler, using the various options defined for each pass (under Pass Control tab). Valid options are 1-10. This number determines the number of columns that will be available on the Pass Control Tab, and defaults to 3. Note: Regardless of the number of passes listed here, the Single Student Scheduler only uses one pass.

**Note:** *multiple passes with the exact same options selected on the Pass Control tab will not improve your final schedule. For a Pass to have any effect on your schedule, each pass should have different options selected on the Pass Control tab.*

The following three features only function for those passes for which the appropriate boxes are checked on the Pass Control Tab. For instance, if Enforce Maximum Number of Periods Per Day is checked for all passes, the number entered in the Maximum Number of Periods per Day field will be enforced for all passes.

**Maximum Number of Periods per Day** (optional) – Enter up to two digits to indicate the maximum number of periods on any given day into which a student may be scheduled. This field defaults to your total number of periods per day. (Pass Control: Enforce Maximum Number of Periods Per Day)

**Maximum Variation of Courses Between Schedule Terms** (optional) – Enter one digit to indicate the maximum difference in the number of courses a student may be scheduled into in between any two schedule terms. This field is used to ensure that each student’s course load is spread evenly across all schedule terms. By default, this field is blank. (Pass Control: Enforce Number of Courses Between Schedule Terms)

**Maximum Variation In Course Weights Between Schedule Terms** (optional) – Enter up to two digits to indicate the maximum variation in course weights between any two schedule terms. This field is used to ensure that each student’s course load is spread evenly across all schedule terms. By default, this field is blank. (Pass Control: Enforce Course Weights Between Schedule Terms)

**Maximum Number of Days Allowed With Restricted Patterns** (optional) – Enter a number from 0 to 10 to indicate the max number of cycle/rotation days a student’s schedule may be in conflict with the daily pattern rules in a schedule term. By default, this field is blank. (See [“Daily Pattern Rules.”](#))

Example: If the max number of days allowed with restricted patterns is 2, and the student has a schedule that violates a daily pattern rule on only Monday, then the student’s schedule is accepted. But if the student’s schedule violates a pattern on Monday, Tuesday, and Wednesday, then the schedule is rejected.

**Maximum Number of Days Allowed With Excessive Periods** (optional) – Enter a number from 0 to 10 to indicate the max number of cycle days a student’s schedule may be in conflict with the Maximum number of Periods Per Day rule. By default, this field is blank.

## Pass Control Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job Wizard**

The Pass Control Tab defines properties to be used by each pass during the batch schedule run. The number of columns listed will be determined by the number of passes defined on the previous tab. The following example is for one (1) pass of the scheduler. This might be an example of how this screen would be defined for the online scheduler to process. (Allow Partial Schedules should only ever be checked for **ONE** pass.)

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard

### Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | Pass Level Parameters | **Pass Control** | Course Sequencing Rules | Teacher Link Groups | Submit

#	Description	1	2	3
1.	Enforce Course Sequencing Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Enforce Daily Pattern Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Enforce Teacher Link Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Enforce Maximum Number of Periods Per Day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Enforce Number of Courses Between Schedule Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Enforce Course Weights Between Schedule Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	Allow Section Overfilling	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8.	Try Alternates	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9.	Allow Partial Schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10.	Order Requests By Priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.	Enforce Requests with Assigned Teacher or Period	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

< Back    Next >

**Pass Control Tab on the Schedule Job Wizard**

Run Level Parameters | Pass Level Parameters | **Pass Control** | Course Sequencing Rules | Teacher Link Groups | Submit

**Maximum Number of Passes:**  ⚡

The number of passes executed by the scheduler. Note: the Single Student scheduler will only use the first pass even if multiple passes are selected

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard

### Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | Pass Level Parameters | **Pass Control** | Course Sequencing Rules | Teacher Link Groups | Submit

#	Description	1	2	3
1.	Enforce Course Sequencing Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Enforce Daily Pattern Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Enforce Teacher Link Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Enforce Maximum Number of Periods Per Day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Enforce Number of Courses Between Schedule Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Enforce Course Weights Between Schedule Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	Allow Section Overfilling	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8.	Try Alternates	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9.	Allow Partial Schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10.	Order Requests By Priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.	Enforce Requests with Assigned Teacher or Period	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

< Back    Next >

**Example: Using 4 Pass Levels**

When more than one pass has been designated, you should make the first pass the most restrictive and with each consecutive pass, remove various constraints, with the final pass being the least restrictive (Allow Partial Schedules should only ever be checked for the **FINAL** pass). This will enable students to possibly be at least partially scheduled during the final pass of the Batch Scheduler. Multiple passes with the exact same options selected will not improve your final schedule. For a Pass to have any effect on your schedule, each pass should have different options selected.

**Enforce Course Sequencing Rules** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce Course Sequencing Rule if defined on the Course Sequencing Rules tab.

**Enforce Daily Pattern Rules** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce Daily Pattern Rules. To use Daily Pattern Rules, they must have been defined in StudentInformation (see [“Daily Pattern Rules”](#)).

**Enforce Teacher Link Groups** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce Teacher Link Groups that have been defined on the Teacher Link Groups Tab.

**Enforce Maximum Number of Periods per Day** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce the Maximum Number of Periods per Day value defined on the Pass Level Parameters Tab.

**Enforce Number of Courses Between Schedule Terms** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce the Maximum Variation of Courses Between Schedule Terms value defined on the Pass Level Parameters Tab.

**Enforce Course Weights Between Schedule Terms** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce the Maximum Variation in Course Weights Between Schedule Terms value defined on the Pass Level Parameters Tab.

**Allow Section Overfilling** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce Section Capacity. If Yes is entered, capacities will be incremented by the percentage defined on the Run Level Parameters Tab.

**Try Alternates** (optional) – Set each subsequent pass to Yes or No to determine whether to allow alternates to be attempted in the corresponding pass, if one or more of the primary requests cannot be scheduled. Note that this should not be checked in the first pass of the scheduler if more than one pass has been defined.

**Allow Partial Schedules** (optional) – Set each subsequent pass to Yes or No to determine whether to allow partial schedules if a student cannot be fully scheduled. Partial schedules are allowed in any pass. The student’s best partial schedule from all passes, with allowed partial schedules, will be the student’s final schedule if a full schedule cannot be found. NOTE: This should only be checked for the FINAL pass.

**Order Requests by Priority** (optional) – Set each subsequent pass to Yes or No to determine whether to enforce the scheduling of High priority course requests before Low priority course requests. **IMPORTANT:** If you do not check this box for each run, course requests will be assigned during the unchecked run without regard to request priority, which may result in electives being scheduled before core classes. **NOTE:** This refers to request priority (which defaults to course Scheduling Priority when a request is entered), not to student Schedule Priority (See the Run Level Parameters tab above).

If you choose to schedule by Course Priority when running the StudentInformation Batch Scheduler it will only order courses by Course Priority - it does not guarantee a student will receive higher priority courses over lower priority courses. If StudentInformation can give a student a fuller schedule by scheduling a lower priority course instead of a higher priority course, the Batch Scheduler will assign the lower priority course. The SIS Batch Scheduler had the same functionality.

**Enforce Requests With Assigned Teacher or Period** (optional) – Set each subsequent pass to Yes or No to determine whether a base request with an assigned teacher or period must receive a section with the chosen teacher or period. If not enforced, a student may be assigned another section if none for the chosen teacher or period are available.

### Course Sequencing Rules Tab

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job Wizard**

Course Sequencing Rules are used to define the order course sections can be assigned in a student’s schedule by the online or batch scheduler engine. Course sequencing rules function by placing one course against another course with a preset rule that specifies when the first course must be taken in relation to the second course.



**NOTE: These are not pre-requisites or co-requisites. These only determine course ordering in the year being scheduled, and only if a student has requested both courses.**

The screenshot shows the 'Schedule Job Wizard' interface. At the top, there is a breadcrumb trail: Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard. Below this is the title 'Schedule Job Wizard' and a sub-header: 'From this screen, you can save Job Parameter Sets for the Scheduler'. A navigation bar contains tabs for 'Run Level Parameters', 'Pass Level Parameters', 'Pass Control', 'Course Sequencing Rules' (which is active), 'Teacher Link Groups', and 'Submit'. Below the navigation bar is a table with the following data:

Primary Course	Rule	Secondary Course	Is Rigid
✗ TE_1A1 - Technology 1A	In Earlier Schedule Term	TE_1B1 - Technology 1B	<input type="checkbox"/>

Below the table are form fields for adding a new rule:
   
Primary Course: [text input] [dropdown]
   
Rule: [dropdown]
   
Secondary Course: [text input] [dropdown]
   
Is Rigid: 
  
[Add] button
   
At the bottom right are buttons for '< Back', 'Next >', and 'Cancel'.

Course Sequencing Rules Tab on the Schedule Job Wizard

✖ – Delete this Course Sequencing Rule.

✎ – Edit this Course Sequencing Rule.

**Note:** Course Sequencing Rules now copy up to the new school year when running School Year Initialization.

### Add/Edit Course Sequencing Rule

The screenshot shows the 'Schedule Job Wizard' interface. At the top, there is a breadcrumb trail: Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard. Below this is the title 'Schedule Job Wizard' and a sub-header: 'From this screen, you can save Job Parameter Sets for the Scheduler'. A navigation bar contains tabs for 'Run Level Parameters', 'Pass Level Parameters', 'Pass Control', 'Course Sequencing Rules', 'Teacher Link Groups', and 'Submit'. Below the navigation bar is a table with columns: 'Primary Course', 'Rule', 'Secondary Course', and 'Is Rigid'. The table contains one row: 'TE\_1A1 - Technology 1A', 'In Earlier Schedule Term', 'TE\_1B1 - Technology 1B', and a checkbox. Below the table is a form for adding a new rule. The form has fields for 'Primary Course' (ART1A), 'Rule' (In Earlier Schedule Term), 'Secondary Course' (ART1B), and 'Is Rigid' (checkbox). There is an 'Add' button and a '< Back' button.

#### Add Course Sequencing Rule

The screenshot shows the 'Schedule Job Wizard' interface. At the top, there is a breadcrumb trail: Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard. Below this is the title 'Schedule Job Wizard' and a sub-header: 'From this screen, you can save parameter sets for the scheduler, or run the scheduler.'. A navigation bar contains tabs for 'Run Level Parameters', 'Pass Level Parameters', 'Pass Control', 'Course Sequencing Rules', 'Teacher Link Groups', and 'Submit'. Below the navigation bar is a table with columns: 'Primary Course', 'Rule', 'Secondary Course', and 'Is Rigid'. The table contains one row: '946 - SKILLS FOR LIFE I', 'In Earlier Schedule Term', '947 - SKILLS FOR LIFE II', and a checkbox. Below the table is a form for editing a rule. The form has fields for 'Primary Course' (946), 'Rule' (In Earlier Schedule Term), 'Secondary Course' (947), and 'Is Rigid' (checkbox). There are 'Save' and 'Cancel' buttons and a '< Back' button.

#### Edit Course Sequencing Rule

**Note:** Unlike most screens, to add a Course Sequencing Rule, you need to enter the necessary fields before clicking Add.

**Primary Course** – Type in a course ID or use the Course Selection Wizard (⋮) to designate the first/primary course, for this Course Sequencing Rule.

**Rule** – Select the applicable rule from the drop-down menu. Valid options are: In Earlier Schedule Term, Not in Earlier Schedule Term, In Same Schedule Term, and Not in Same Schedule Term.

**Secondary Course** – Type in the course ID or use the Course Selection Wizard (⋮) to designate the secondary course, for this Course Sequencing Rule.

**Is Rigid** – Yes or No; check if this rule is to be enforced throughout the schedule run process, regardless of pass Control parameters.

**Add** – After entering values on the tab, click this button to create a new Course Sequencing Rule.

**Save** – Save changes to this Course Sequencing Rule.

**Cancel** – Discard changes to this Course Sequencing Rule.

### Teacher Link Groups Tab

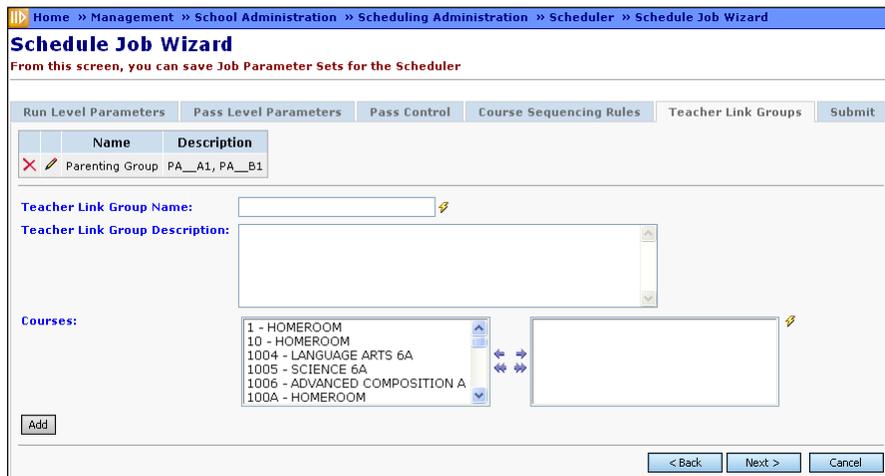
**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job Wizard**

The batch schedule process includes a mechanism to link a teacher and a group of courses that the teacher will instruct in progression, so students will be scheduled with the same instructor. Most often this is handled through Course Groups but can also be accomplished using the Teacher Link Group. By setting up courses as a Teacher Linked Group, the batch scheduler will ensure that students are assigned a course section with the same teacher for all courses that are defined in that Teacher Link Group.

**IMPORTANT NOTE:** The maximum number of Teacher Link Group Sections for a Teacher Link Group with two courses is defaulted to 100. This will allow a maximum of ten course sections in each course in the Teacher Link Group to have the same teacher. If this limit is exceeded, the batch scheduler will not process correctly.

There is an ITC-level parameter that can be used to increase the maximum number of course sections in each course in a Teacher Link Group that have the same teacher. The parameter is called

BatchScheduler.TeacherLinkGroup.MaxSectionsPerCourseWithSameTeacher, and must be a whole number. The desired setting must be added to the appSettings section of the MCOECN.DASL.Windows.BatchScheduler.exe.config file in the folder where the StudentInformation binaries are located on the ITC's app server.



**Teacher Link Groups Tab on the Schedule Job Wizard**

- ✖ – Delete this Teacher Link Group.
- ✎ – Edit this Teacher Link Group.

### ***Edit Teacher Link Group***

#### **Editing a Teacher Link Group**

**Teacher Link Group Name** (required) – Define a Teacher Link Group name of up to 30 characters. All courses to be linked together must have the same teacher link group name.

**Teacher Link Group Description** (optional) – Enter up to 200 characters to describe the group.

**Courses** (required) – Select courses from the left list box that are to be included in this Teacher Link Group, and move to the right list box.

**Save** – Save changes to this Teacher Link Group.

**Cancel** – Discard changes to this Teacher Link Group.

### ***Add Teacher Link Group***

Unlike most screens, to add a Teacher Link Group, you need to enter the necessary fields before clicking Add.

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard

### Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | **Teacher Link Groups** | Submit

Name	Description
Parenting Group PA__A1, PA__B1	

Teacher Link Group Name: PE Group

Teacher Link Group Description: PEHSA1, PEHSB1

Courses:

PA__B1 - Parenting B	PEHSA1 - Physical Education HS A
PE_7B1 - Physical Education MS B	PEHSB1 - Physical Education HS B
PR - PRIN. OFFICE	
SA - SPEC ASSIGNMENT	
SA00 - SPEC ASSIGN	
SA1 - SPEC ASSIGN	

Add

< Back | Next > | Cancel

### Adding a Teacher Link Group

**Add** – After entering values on the tab, click this button to create a new Teacher Link Group.

### Submit Tab (Add/Edit)

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job Wizard**

When Adding or Editing a Job Parameter Set, the Submit tab allows you to set the properties of the Schedule Job and then save the Job Parameter Set (without running the Scheduler).

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard

## Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | **Teacher Link Groups** | Submit

**Is Active:**

**Job Parameter Set Name:**

**Job Parameter Set Description:**

Set this Parameter Set as the Default Batch Parameter Set

Set this Parameter Set as the Single Student Parameter Set

Clear Schedule Results Created By Scheduler  
If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created Manually  
If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

Save Schedule Parameters < Back

### Submit Tab on the Schedule Job Wizard

**Is Active** (optional) – Check if this Scheduling Job Parameter is active and can be used for scheduling purposes.

**Job Parameter Set Name** (required) – Enter a name for the Job Parameter Set (up to 20 characters).

**Job Parameter Set Description** (optional) – Enter a Description for this Job Parameter Set (up to 200 characters).

**Set this Parameter Set as the Default Batch Parameter Set** – Yes or No; check this box if this Parameter Set is to be designated as the default parameter set to be used by the Batch Scheduler. (If you are adding a first Job Parameter Set, this will be checked by default and not be editable.)

**Set this Parameter Set as the Single Student Parameter Set** – Yes or No; check this box if this Parameter Set is to be designated for use by the Single Student Scheduler.

**Clear Schedule Results Created By Scheduler** – Yes or No; check if student schedule result with a status of Assigned and a type of Batch or Online should be changed to a status of UnAssigned (initial request) at the beginning of the scheduling run. Selecting this option will un-schedule all previously scheduled course requests for a student that were scheduled using the scheduler (batch or online).

**Clear Schedule Results Created Manually** – Yes or No; check if schedule result with a status of Assigned and a type of Manual should be changed to a status of UnAssigned (initial request) at the beginning of the scheduling run. Selecting this option will un-schedule any course requests which were previously scheduled manually for the student.

Schedule Results with a non-Assigned status are always cleared.

**Save Schedule Parameters** – Will save the current Job Parameter Set and return to the Job Parameter Sets listing.

### Submit Tab (Execute)

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job Wizard**

When Executing a Job Parameter Set (using either the  or  buttons from the Job Parameter Set listing page), the Submit tab allows you to set the properties of the Schedule Job and then run the Scheduler (note that this will not affect the original Job Parameter Set).

### Execute Job and Update Existing Schedule Result

Home > Management > School Administration > Scheduling Administration > Scheduler > Schedule Job Wizard

### Schedule Job Wizard

From this screen, you can save parameter sets for the scheduler, or run the scheduler.

Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit

Master Schedule: Default Schedule ⚡ Schedule Result: Default Schedule Result ⚡

Schedule Job Name: Job Queue:

Clear Schedule Results Created By Scheduler  
If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created Manually  
If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

Execute Schedule Job < Back Cancel

### Executing Job and Updating an Existing Schedule Result

**Master Schedule** (required) – Select the applicable Master Schedule from the drop-down. This Master Schedule will be used in this run of the Scheduler. Note: The building may have several Master Schedules listed when working on the schedule for the upcoming school year, so be sure to select the appropriate Master Schedule.

**Schedule Result** (required) – Select the applicable Schedule Result to update from the drop-down. This Schedule Result will be updated in this run of the Scheduler. Note: The building is likely to have several Schedule Results for each Master Schedule listed when working on the schedule for the upcoming school year, so be sure to select the appropriate Schedule Result.

**Schedule Job Name** (required) – Enter a name for this Schedule Job (up to 30 characters). This name will be displayed on the Schedule Job History screen, so you should make it descriptive of what this Schedule Job Run represents ("third run" might not be useful, while something like "09-11, OF 10%, partials" might be more useful).

**Job Queue** (required) – Select a predefined Job Queue from the drop-down list. Job queues may be set up to run at specific times of the day or night.

**Clear Schedule Results Created By Scheduler** – Yes or No; check if student schedule result with a status of Assigned and a type of Batch or Online should be changed to a status of UnAssigned (initial request) at the beginning of the scheduling run. Selecting this option will un-schedule all previously scheduled course requests for a student that were scheduled using the scheduler (batch or online).

**Clear Schedule Results Created Manually** – Yes or No; check if schedule result with a status of Assigned and a type of Manual should be changed to a status of UnAssigned (initial request) at the beginning of the scheduling run. Selecting this option will un-schedule any course requests which were previously scheduled manually for the student.

Schedule Results with a non-Assigned status are always cleared.

**Execute Schedule Job** – Will run the Scheduler (saving these parameters to the Schedule Job History only) and go to the Schedule Job History screen.

### Execute Job and Create New Schedule Result

#### Executing Job and Creating a New Schedule Result

For fields not listed here, see [“Execute Job and Update Existing Schedule Result.”](#)

**New Schedule Result Name** (required) – Enter a name for the Schedule Results that will be obtained when this job has processed (up to 30 characters)

**New Schedule Result Description** (optional) – Enter a description to more clearly define these Schedule Results obtained when this job has processed (up to 200 characters).

**Copy from existing Schedule Result set** (optional) – Select a different Schedule Result set in the drop-down menu to copy assignments from that Schedule Result. Check the boxes below the drop-down to determine which assignments are copied. If you are creating a brand new schedule result with this Scheduler run, you can leave this drop-down (and all three Copy Schedule Results check boxes below) blank.

**Copy Schedule Results Created Manually** – Yes or No; check if any manual results are to be copied from an existing Schedule Result (selected in the drop-down above these check boxes).

**Copy Schedule Results Created by the Batch Scheduler** – Yes or No; check if any batch results are to be copied from an existing Schedule Result (selected in the drop-down above these check boxes).

**Copy Schedule Results Created by the Online Scheduler** – Yes or No; check if any Single Student results (formerly called Online Scheduler results) are to be copied from an existing Schedule Result (selected in the drop-down above these check boxes).

**Execute Schedule Job** – Will run the Scheduler (saving these parameters to the Schedule Job History only) and go to the Schedule Job History screen.

## Study Hall Wizard

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Study Hall Wizard**

The Study Hall Wizard is used to define parameters used when scheduling study halls for students via the batch or online schedule engines.



**NOTE: If you try to use the Study Hall Wizard in the current school year, the warning message StudentInformation provides will be very large. We strongly recommend AGAINST running the Study Hall Wizard in the current school year.**

Home » Management » School Administration » Scheduling Administration » Scheduler » Study Hall Wizard Advanced Search | Feedback | Mgmt | Help | Print

**WARNING: You are working with the Current School Year, and not a Future School Year as expected**

### Study Hall Wizard

From this screen, you can define the rules used by the study hall scheduler when assigning students to study halls.

Study Hall Parameters Execute Job

**Max Consecutive Study Halls:**  ⚙

**Section Overfill Percent:**

---

**Sort Params Sort Order:**

Grade Level DESC	↔	Grade Level ASC	⚙
Student Last Name ASC	↔		
Student Last Name DESC	↔		
Student Number ASC	↔		⚙

Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled

---

**Enforce Study Hall Grade Levels:**

**Grade Levels to Schedule:**  ⚙

	↔	09 - 09	⚙
	↔	11 - 11	
	↔	12 - 12	

---

Permit First Period Study Hall     Permit Study Hall Before Lunch

Permit Last Period Study Hall     Permit Study Hall After Lunch

## Student Hall Wizard

### Study Hall Parameters

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Study Hall Wizard**

### Student Hall Parameters Tab on the Study Hall Wizard Screen

**Max Consecutive Study Halls** (required) – Enter up to two digits to indicate the maximum consecutive study halls on any given day into which a student may be scheduled. Value of 0 (zero) means that no study halls can be scheduled.

**Section Overfill Percent** (optional) – If overfilling of course sections is allowed, this value represents a percentage of the capacity a study hall may be overfilled.

**Sort Params Sort Order** (required) – Select the sort parameters that you wish to use and in what order those parameters are to be used in the study hall assignment run. By default, none are selected, so you must select at least one. **Do not** select both ASC (ascending) and DESC (descending) versions of the same type of sort (such as both Student Number ASC and Student Number DESC). Options are:

- Grade Level ASC (ascending) or DESC (descending)
- Student Last Name ASC (ascending) or DESC (descending)
- Student Number ASC (ascending) or DESC (descending)
- Student Schedule Priority – Sorts by Student Scheduling Priority from Profile.
- Student Random – This sort option should always be the last option unless it is the only sort option being used.

If you click on an item in the right-side box, you can move that item up or down in the Sort Order using the ↑ and ↓ buttons.

**Note:** Only students with a Student Status Code with overall status of Active will be scheduled by the Study Hall Wizard.

**Enforce Study Hall Grade Levels** (optional) – Indicates whether the study hall assignment will be performed only for the grade levels that are set up on the course master for each study hall. The grade level for a study hall must also be selected in the set of Grades Levels to Schedule list box.

**Grade Levels to Schedule** (optional) – Select the grades from the available list box (left) that are to be included in the assignment of study halls when batch or online schedule engine is run. By default all grade levels will be selected (right list box).

**Permit First Period Study Hall** (optional) – Yes or No; check this box if you wish to allow study halls to be added first period to student schedules on any rotation day, if an opening exists.

**Permit Last Period Study Hall** (optional) – Yes or No; check this box if you wish to allow study halls to be added last period to student schedules on any rotation day, if an opening exists.

**Permit Study Hall Before Lunch** (optional) – Yes or No; check this box if you wish to allow study halls to be added to student schedules on any rotation day, before a scheduled lunch, if an opening exists.

**Permit Study Hall After Lunch** (optional) – Yes or No; check this box if you wish to allow study halls to be added to student schedules after a scheduled lunch on any rotation day, if an opening exists.

**Save** – Save current Study Hall Scheduling parameters without executing the Study Hall scheduling job.

**Cancel**– Clear out any data entered.

**Next>** – Save Study Hall Scheduling parameters and go to the Execute Job tab.

***Note:** The Study Hall Wizard tries to balance study hall sections, first by trying to schedule a study hall with the greatest number of meeting times per rotation period (e.g. if a student has period 3 open all week, the Study Hall Scheduler will first try to schedule a MTWRF study hall before it tries a MWF study hall), and after that, it schedules study halls in ascending order by filling percentage. This means that, if you have three study hall sections with Capacity 30, and have 61 students to schedule into this study hall, the StudentInformation Study Hall Wizard will eventually try to schedule these study halls to 21, 20 and 20 Filling, respectively. (SIS/POISE would have scheduled these study halls to 30, 30 and 1, respectively.)*

## **Execute Job**

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Study Hall Wizard**

### Execute Job Tab on the Study Hall Wizard Screen

**Schedule** (optional) – Select a schedule from the drop-down list that is to be used during this submission of the Study Hall schedule job. The schedule marked as the default, will auto populate this field. If the schedule has been finalized, this field will not be selectable.

**Schedule Result** (required) – Select the schedule result to be used during this submission of the study hall schedule job. If the schedule has been finalized, this field will not be selectable.

**Schedule Job Name** (required) – Enter a name for this Schedule Job (up to 30 characters).

**Job Queue** (required) – Select a predefined Job Queue from the drop-down list of available queues.

**Submit** – Submit the Schedule Job with the job specifications as defined.

**<Back** – Save changes to this tab and go to the Study Hall Parameters tab.

## Schedule Job History

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History**

A Schedule Job contains data regarding a single run of the batch schedule engine including the Scheduling Job Parameters used, date and time of execution and statistics related to the schedule job run. Schedule job records are not restricted to batch schedule jobs but may also include Online (single student) jobs and special runs such as study hall jobs.

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job History								Advanced Search	
<b>Schedule Job History</b>									
From this screen, you can view all previously run schedule jobs for the current school and school year.									
Result Set:	-- All --	Job Type:	Regular Batch	Job Status:	-- All --	Refresh Display			
Add Schedule Job									
	Job Name	Schedule Result Set	Run Time	Duration (min)	Job Type	Status	Username		
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	3rd att add math	Default Schedule Result	03/27/2007 01:06 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	2nd attempt	Default Schedule Result	03/27/2007 01:02 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	3rd	3rd try	03/27/2007 12:58 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	2nd try	2nd run new result	03/27/2007 12:54 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	1st try	Default Schedule Result	03/27/2007 12:09 PM	2	Batch	Complete	Melissa

### Schedule Job History

**Result Set** – Specify Result Set from the drop-down menu. All is the default.

**Job Types** – Specify from the drop-down menu options, which result sets are to be selected. Batch is the default. Valid options are All, Batch, Online, Study Hall Batch and Study Hall Online.

**Job Status** – Specify from the drop-down menu options, which result sets are to be used. All is the default. Valid options are All, Job Schedule Error, Error, Submitted, Pending, Active and Complete.

**Refresh Display** – Click this button to refresh results.

**Sorting** – You may sort by any column (Job Name, Schedule Result Set, Run Time, Duration (min), Job Type, Status, Username or ReferenceId) in ascending or descending order by clicking on the column header.

**Stats** – View job statistics.

**Job Params** – View and/or Save Job Parameters used for the Schedule Job (invokes the Schedule Job Wizard, see [“Add/Edit/Execute Job Parameter Set”](#) or [“Study Hall Wizard”](#)).

**Rerun Job** – Execute Job and Update Existing Schedule Result (invokes the Schedule Job Wizard, see [“Submit Tab \(Execute\)”](#) or the [“Study Hall Wizard”](#)).

**Add Schedule Job** – Add a new Schedule Job (invokes the Schedule Job Wizard, see [“Job Parameter Sets \(Schedule Job Wizard\).”](#))

**Note:** *If your Schedule Job ends in an error, and you wish to troubleshoot the error, ITC personnel will need to submit a Help Desk ticket to StudentInformation State Support. If the ITC personnel working on troubleshooting have the Batch Scheduler Utility, they can use the Batch Scheduler Troubleshooter Action within the Batch Scheduler Utility to acquire Schedule Job Data and Schedule Job Details to attach to the Help Desk ticket. For more information on the Batch Scheduler Utility and the latest version of the Utility, ITC personnel may contact StudentInformation State Support.*

**Note:** If you view the Schedule Job Statistics page in the current school year, the warning message StudentInformation provides will be very large. We strongly recommend AGAINST running the Scheduler in the current school year using any links on this page.

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job History Advanced Search | Feedback | Mgmt | Help | Print

**WARNING: You are working with the Current School Year, and not a Future School Year as expected**

**Schedule Job History**  
From this screen, you can view all previously run schedule jobs for the current school and school year.

Result Set:  Job Type:  Job Status:

			Job Name	Schedule Result Set	Run Time	Duration (min)	Job Type	Status	Username
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	Master Schedule	Master Schedule	07/02/2007 09:06 AM	1	Batch	Complete	noacsc.christine
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	Master Schedule	Master Schedule	07/02/2007 08:49 AM	1	Batch	Complete	noacsc.christine
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	Master Schedule	Master Schedule	06/27/2007 04:10 PM	1	Batch	Complete	noacsc.christine

### Schedule Job History

### View Job Statistics

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History**

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job History Advanced Search

**Schedule Job History**  
From this screen, you can view all previously run schedule jobs for the current school and school year.

Result Set:  Job Type:  Job Status:

			Job Name	Schedule Result Set	Run Time	Duration (min)	Job Type	Status	Username
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	3rd att add math	Default Schedule Result	03/27/2007 01:06 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	2nd attempt	Default Schedule Result	03/27/2007 01:02 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	3rd	3rd try	03/27/2007 12:58 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	2nd try	2nd run new result	03/27/2007 12:54 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a>	<a href="#">Job Params</a>	<a href="#">Rerun Job</a>	1st try	Default Schedule Result	03/27/2007 12:09 PM	2	Batch	Complete	Melissa

### View Job Statistics

Click **Stats** to view Job Statistics (if available).

You can also reach this screen from the Schedule Result Set Maintenance screen:

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Result Sets**

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Result Sets

## Schedule Result Set Maintenance

From this screen, you can display, change and delete data pertaining to Schedule Result Sets.

Filter By Schedule:  ⚡

	Name	Description
✕  	2nd run new result	
✕  	3rd try	
✕  	Default Schedule Result	

### Schedule Result Set Maintenance Screen

Click  to View Job Statistics (if available).



There are two possible formats for Schedule Result Statistics Sets. Statistics saved prior to DASL version 1.33 (released early March, 2006) will display with different tab titles and a few slightly different tab functions.

Home » Management » School Administration » Scheduling Administration » Schedule Result Statistics Advance

## Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary		Students Scheduled Detail			Course Status Messages		Request Status Messages		Requests Exceeding Course	
Stat Type	Scheduled Status	Grade IN	Grade 31	Grade 23	Grade GR	Grade 12	Grade 11	Grade 10	Grade 09	Pass Total
Total Scheduled For Pass 1	Fully Scheduled	0	0	0	0	4	1	0	1	6
	Partially Scheduled	0	0	0	0	0	0	0	0	0
	Not Scheduled	0	0	0	0	0	0	0	0	0
Total Scheduled For Pass 2	Fully Scheduled	0	0	0	0	0	0	0	0	0
	Partially Scheduled	0	0	0	0	0	0	0	0	0
	Not Scheduled	0	0	0	0	0	0	0	0	0
Total Scheduled For Pass 3	Fully Scheduled	0	0	0	0	1	0	0	0	1
	Partially Scheduled	0	0	0	0	81	0	0	0	81
	Not Scheduled	0	0	0	0	46	0	0	0	46
Total Scheduled For All Passes	Fully Scheduled	0	0	0	0	5	1	0	1	7
	Partially Scheduled	0	0	0	0	81	0	0	0	81
	Not Scheduled	0	0	0	0	46	0	0	0	46
Percent Scheduled For All Passes	% Fully Scheduled	NaN	NaN	NaN	NaN	3.79	100	NaN	100	5.22
	% Partially Scheduled	NaN	NaN	NaN	NaN	61.36	0	NaN	0	60.45
	% Not Scheduled	NaN	NaN	NaN	NaN	34.85	0	NaN	0	34.33

### Schedule Result Statistics Screen



Note that there is no Back, Next or Cancel buttons. You must click on a tab to navigate to that tab, and you must click your web browser's Back button to return to a previous page (or select another page from the [Go To] search box, the breadcrumb trail, the side navigation menu or the main menu).

### Students Scheduled Summary Tab

Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History

### Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary		Students Scheduled Detail		Course Status Messages		Request Status Messages		Requests Exceeding Course Capacity	Constraint Test Failures
Stat Type	Scheduled Status	Grade UG	Grade GR	Grade 12	Grade 11	Grade 10	Grade 09	Pass Total	
Total Scheduled For Pass 1	Fully Scheduled	0	0	28	21	40	51	140	
	Fully Scheduled With Request Error	0	0	0	0	0	0	0	
	Partially Scheduled	0	0	0	0	0	0	0	
	Not Scheduled	0	0	0	0	0	0	0	
	Not Scheduled Due To Time Limit	0	0	0	0	0	0	0	
Total Scheduled For Pass 2	Fully Scheduled	0	0	0	0	0	0	0	
	Fully Scheduled With Request Error	0	0	0	0	0	0	0	
	Partially Scheduled	0	0	0	0	0	0	0	
	Not Scheduled	0	0	0	0	0	0	0	
	Not Scheduled Due To Time Limit	0	0	0	0	0	0	0	
Total Scheduled For Pass 3	Fully Scheduled	0	0	0	0	0	0	0	
	Fully Scheduled With Request Error	0	0	0	1	11	10	22	
	Partially Scheduled	0	0	25	36	1	2	64	
	Not Scheduled	0	0	0	0	0	0	0	
	Not Scheduled Due To Time Limit	0	0	0	0	0	0	0	
Total Scheduled For All Passes	Fully Scheduled	0	0	28	21	40	51	140	
	Fully Scheduled With Request Error	0	0	0	1	11	10	22	
	Partially Scheduled	0	0	25	36	1	2	64	
	Not Scheduled	0	0	0	0	0	0	0	
	Not Scheduled Due To Time Limit	0	0	0	0	0	0	0	
Percent Scheduled For All Passes	% Fully Scheduled	NaN	NaN	52.83	36.21	76.92	80.95	61.95	
	% Fully Scheduled With Request Error	NaN	NaN	0	1.72	21.15	15.87	9.73	
	% Partially Scheduled	NaN	NaN	47.17	62.07	1.92	3.17	28.32	
	% Not Scheduled	NaN	NaN	0	0	0	0	0	
	% Not Scheduled Due To Time Limit	NaN	NaN	0	0	0	0	0	

25 Records Displayed

[Back To Top](#)

### Statistics prior to 10.4.0

WARNING: You are working with a Future School Year

## Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary		Students Scheduled Detail		Course Status Messages		Request Status Messages	
Stat Type	Scheduled Status	Grade 12	Grade 11	Grade 10	Grade 09	Pass Total	
Total Scheduled For Pass 1	Fully Scheduled	17	34	40	55	146	
	Fully Scheduled With Request Error	0	0	0	0	0	
	Partially Scheduled	0	0	0	0	0	
Total Scheduled For Pass 2	Fully Scheduled	0	0	0	0	0	
	Fully Scheduled With Request Error	0	0	0	0	0	
	Partially Scheduled	0	0	0	0	0	
Total Scheduled For Pass 3	Fully Scheduled	0	0	0	0	0	
	Fully Scheduled With Request Error	18	10	6	1	35	
	Partially Scheduled	26	38	34	6	104	
Total Scheduled For All Passes	Fully Scheduled	17	34	40	55	146	
	Fully Scheduled With Request Error	18	10	6	1	35	
	Partially Scheduled	26	38	34	6	104	
	Not Scheduled	3	3	1	2	9	
	Not Scheduled Due To Time Limit	0	0	0	0	0	
Percent Scheduled For All Passes	% Fully Scheduled	26.56	40	49.38	85.94	49.66	
	% Fully Scheduled With Request Error	28.12	11.76	7.41	1.56	11.9	
	% Partially Scheduled	40.62	44.71	41.98	9.38	35.37	
	% Not Scheduled	4.69	3.53	1.23	3.12	3.06	
	% Not Scheduled Due To Time Limit	0	0	0	0	0	

19 Records Displayed

[Back To Top](#)

### Statistics 10.4.0 and After

**Note:** These statistics ONLY include those students processed by the scheduler. For instance, if a student is already fully scheduled and Clear Results Created by Scheduler was not selected, they will NOT be included in these statistics.

Number of Students Scheduled By Pass and Grade:	
Number of Students fully scheduled (For Each Pass and Grade)	<p>The number of students for whom a course section was assigned for all of their base request courses (i.e. those with an I status) by the scheduler engine</p> <p>A separate value is stored for each Grade being scheduled, in each Pass being scheduled</p>
Number of Students fully scheduled with request errors (For Each Pass and Grade)	<p>The number of students for whom a course section was assigned for all of their base request courses by the scheduler engine, except for any requests for courses with course status errors (e.g. if a student had all their requests filled except for a request for a course which has no course sections, that student would be considered fully scheduled with request errors)</p> <p>A separate value is stored for each Grade being scheduled, in each Pass being scheduled</p>

<b>Number of Students Scheduled By Pass and Grade:</b>	
<b>Number of Students partially scheduled (For Each Pass and Grade)</b>	<p>The number of students for whom a course section was assigned for at least one but not all of their base request courses by the scheduler engine</p> <p>A separate value is stored for each Grade being scheduled, in each Pass being scheduled</p>
<b>Number of Students not scheduled (For Each Pass and Grade)</b>	<p>The number of students for whom no course section was assigned for any of their base request courses by the scheduler engine</p> <p>A separate value is stored for each Grade being scheduled, in each Pass being scheduled</p>
<b>Number of Students not scheduled due to time limit (For Each Pass and Grade)</b>	<p>The number of students who were not scheduled because the scheduler reached the specified limit on single-student processing (some students drastically increase the amount of time taken while scheduling due to the number and combination of their requests).</p> <p>A separate value is stored for each Grade being scheduled, in each Pass being scheduled</p>
<b>Total Students (For Each Grade, for all passes, for each resolution type)</b>	<p>The total number of students processed by the scheduler engine for the run (fully, partially or not scheduled).</p> <p>A separate value is stored for each Grade being scheduled, which is a total for all passes being scheduled, and for each of the types of scheduling resolutions above.</p>
<b>Percent of Students fully scheduled (For Each Grade, for all passes)</b>	<p>The percentages of students, of those processed by the scheduler engine, which were fully scheduled as listed above.</p> <p>A separate value is stored for each Grade being scheduled, which is a total for all passes being scheduled</p>
<b>Percent of Students fully scheduled with request errors (For Each Grade, for all passes)</b>	<p>The percentages of students, of those processed by the scheduler engine, which were fully scheduled except for request errors as listed above.</p> <p>A separate value is stored for each Grade being scheduled, which is a total for all passes being scheduled</p>
<b>Percent of Students partially scheduled (For Each Grade, for all passes)</b>	<p>The percentages of students, of those processed by the scheduler engine, which were partially scheduled as listed above.</p> <p>A separate value is stored for each Grade being scheduled, which is a total for all passes being scheduled</p>
<b>Percent of Students not scheduled (For Each Grade, for all passes)</b>	<p>The percentages of students, of those processed by the scheduler engine, which were not scheduled as listed above.</p> <p>A separate value is stored for each Grade being scheduled, which is a total for all passes being scheduled</p>

<b>Number of Students Scheduled By Pass and Grade:</b>	
<b>Percent of Students not scheduled due to time limit (For Each Grade, for all passes)</b>	<p>The percentage of students, of those processed by the scheduler engine, who were not scheduled due to the scheduler reaching the time limit for single-student processing as listed above.</p> <p>A separate value is stored for each Grade being scheduled, which is a total for all passes being scheduled</p>

### Students Scheduled Detail Tab

Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History

Home » Management » School Administration » Scheduling Administration » Schedule Result Statistics

## Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request
----------------------------	---------------------------	------------------------	---------

Scheduled Level	Student Number	Last Name	First Name	Grade Level Code
Fully Scheduled	48652258	Banana	Hannah	09
	6001	EYE	CORY ROBERT	09
	5001	CONTRARY	MARY M.	09
	122445	EYE	PRIVA	09
	48652281	Contrary	Jesse	09
Partially Scheduled	6004	LINE	TROY AARON	12

28 Records Displayed [Back To Top](#)

### Student Scheduled Detail Tab on the Schedule Result Statistics Screen

Student Number, Name and Grade are listed for all categories.

**Fully Scheduled** – This section lists those students who were processed by the Scheduler engine and for whom a course section was assigned for all of their base request courses.

**Fully Scheduled with Request Error** – This section lists those students who were processed by the Scheduler engine and for whom a course section was assigned for all of their base request courses except those requests for courses with course status errors (such as a request for a course with no course sections on the master schedule).

**Partially Scheduled** – This section lists those students who were processed by the Scheduler engine and for whom a course section was assigned for at least one but not all of their base request courses.

**Not Scheduled** – This section lists those students who were processed by the Scheduler engine and for whom no course section was assigned for any of their base request courses.

**Not Scheduled Due To Time Limit** – This section lists those students who were processed by the Scheduler engine and whose number and combination of requests caused the scheduler to reach the single-student processing time limit for them.

### Course Status Messages Tab

Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History

Course	Course Section	Group	Group Section	Message	Requested
1211				Course has no Course Sections on the master schedule	No
1235				Course has no Course Sections on the master schedule	No
1311				Course has no Course Sections on the master schedule	No
1321				Course has no Course Sections on the master schedule	No
H114				Course Has No Course Sections with Meeting Times on the Master Schedule	No
H12				Course has no Course Sections on the master schedule	No
H14				Course has no Course Sections on the master schedule	No

Course Status Messages Tab on the Schedule Result Statistics Screen

### Possible Course Status Messages:

- Course has no Course Sections on the master schedule
- Course Has No Course Sections with Meeting Times on the Master Schedule
- Group has no Group Sections on the Master Schedule
- Course Has No Sections In Selected Course Terms
- Group Section is missing at least one Course Section
- Course is not Active for the master calendar

### Request Status Messages Tab

Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History

Student	Course	Message
There are no records to display		

Request Status Messages Tab on the Schedule Result Statistics Screen

## Possible Request Status Messages:

- Student has multiple requests for the same course
- Student has one or more requests that are not Approved

## Requests Exceeding Course Capacity Tab

Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History

The screenshot shows the 'Schedule Result Statistics' page with the 'Requests Exceeding Course Capacity' tab selected. The page title is 'Schedule Result Statistics' and it includes a sub-header 'This page displays the result statistics from a scheduling job'. The navigation breadcrumb is 'Home » Management » School Administration » Scheduling Administration » Schedule Result Statistics'. The main content area has a tabbed interface with the following tabs: 'Students Scheduled Summary', 'Students Scheduled Detail', 'Course Status Messages', 'Request Status Messages', and 'Requests Exceeding Course Capacity'. The selected tab displays a table with the following data:

Course	Requests Count	Capacity
1025	132	72
AS948	133	5

### Requests Exceeding Course Capacity Tab on the Schedule Result Statistics Screen

**Course** – Displays the course number for any course for which the number of requests exceeds course capacity.

**Requests Count** – Displays the total number of requests for the course (this number will be greater than the Capacity field).

**Capacity** – Displays the capacity value for the corresponding course.

If section capacities are being enforced for the scheduler run, then these stats will be accumulated before the scheduler run, showing those courses for which the total number of student requests was in excess of the total capacity of all sections for the course. For a course group, this statistic will show any group where the total capacity of the group sections for the group is exceeded by the number of total requests for the group. The total capacity of course sections and group sections will be incremented by the Section Overfilled Percent from the scheduling parameters for the schedule job. The fields stored for each qualifying course will be: Course, Requests Count and Capacity.

## Constraint Test Failures Tab

Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History

The screenshot shows the 'Schedule Result Statistics' page with the 'Constraint Test Failures' tab selected. The page title is 'Schedule Result Statistics' and it includes a sub-header 'This page displays the result statistics from a scheduling job'. The navigation breadcrumb is 'Home » Management » School Administration » Scheduling Administration » Schedule Result Statistics'. The main content area has a tabbed interface with the following tabs: 'Students Scheduled Summary', 'Students Scheduled Detail', 'Course Status Messages', 'Request Status Messages', 'Requests Exceeding Course Capacity', and 'Constraint Test Failures'. The selected tab displays a table with the following data:

Course Sequencing Rule:	0
Daily Pattern Rule:	0
Max Course Deviation:	0
Max Course Weight Deviation:	0
Max Periods Per Day:	0

### Constraint Test Failures Tab on the Schedule Result Statistics Screen

The following are the violations that are stored for Pass Control rules that can be enforced/allowed on the Schedule Job Wizard's Pass Control tab for the passes being scheduled. The flags are set on an individual student basis, i.e. each time a candidate schedule for a student is rejected due to one of these Pass Control rules, the student ID is stored with the rule that was violated.

The flag is only set for a student if the rule violation prevents the student from receiving a full schedule for the run. For example, if a student received a candidate full schedule in an earlier pass but violated a Course Sequencing Rule in that pass, and then received a full schedule in a later pass, the rule violation is not stored with the final run statistics. However, if a student received a candidate full schedule in an earlier pass but violated a Course Sequencing Rule, and then received no full schedule in any subsequent pass, then the rule violation for the student is stored with the final run statistics.

**Course Sequencing Rule** – Flag is set for a student if a full schedule violates one of the course sequencing rules for the master schedule Daily Pattern Rules Flag

**Daily Pattern Rule** – Flag is set for a student if a full schedule violates one of the daily pattern rules for the master schedule Daily Pattern Rules Flag

**Max Periods Per Day** – Flag is set for a student if a full schedule has been setup with course sections that meet in more periods per day in any schedule term than the max number allowed by the Max Periods Per Day value in the scheduling parameters

**Max Course Weight Deviation** – Flag is set for a student if a full schedule has been setup with course sections such that the total course weight of courses that meet one schedule term exceeds the total course weight of courses that meet in any other schedule term by the Course Weights between Schedule Terms value in the scheduling parameters.

**Max Course Deviation** – Flag is set for a student if a full schedule has been setup with course sections such that the number of courses that meet one schedule term exceeds the number that meet in any other schedule term by the Number of Courses between Schedule Terms value in the scheduling parameters.

## View Job Parameters

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Job History**

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job History Advanced Search

### Schedule Job History

From this screen, you can view all previously run schedule jobs for the current school and school year.

Result Set:  Job Type:  Job Status:

	Job Name	Schedule Result Set	Run Time	Duration (min)	Job Type	Status	Username
<a href="#">Stats</a> <a href="#">Job Params</a> <a href="#">Rerun Job</a>	3rd att add math	Default Schedule Result	03/27/2007 01:06 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a> <a href="#">Job Params</a> <a href="#">Rerun Job</a>	2nd attempt	Default Schedule Result	03/27/2007 01:02 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a> <a href="#">Job Params</a> <a href="#">Rerun Job</a>	3rd	3rd try	03/27/2007 12:58 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a> <a href="#">Job Params</a> <a href="#">Rerun Job</a>	2nd try	2nd run new result	03/27/2007 12:54 PM	1	Batch	Complete	Melissa
<a href="#">Stats</a> <a href="#">Job Params</a> <a href="#">Rerun Job</a>	1st try	Default Schedule Result	03/27/2007 12:09 PM	2	Batch	Complete	Melissa

### Viewing Job Parameters from the Schedule Job History Screen

Click **Job Params** to view Job Parameters that were used for the selected batch/online Job. This will open up the Schedule Job Wizard Parameters or Study Hall Wizard Parameters used for the selected job. See *“Job Parameter Sets (Schedule Job Wizard)”* for more details on the Schedule Job Wizard.

Home » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job Wizard

### Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | **Pass Level Parameters** | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit

**Grade Levels to Schedule:**

GR - GR	09 - 09
23 - 23	10 - 10
UG - UG	11 - 11
30 - 30	12 - 12

**Course Terms to Schedule:**

1st Semester
2nd Semester
All Year

**Sort Criteria for Students who are being Scheduled:**

Grade Level DESC	Grade Level ASC
Student Last Name ASC	Student Random
Student Last Name DESC	
Student Number ASC	

Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled

**Section Overfilled Percent:**

**Course Group Locking:**

**Balance By Ethnicity:**

**Time Limit Per Student:**

Note: The Time Limit Per Student value determines the maximum number of seconds that the scheduler will try to schedule each student.

### Job Parameters Used in the Selected Job

## Schedule Result Sets

**Navigation: Home – Management – School Administration – Scheduling Administration – Scheduler – Schedule Result Sets**

A Schedule Result Set is a container for a set of schedule results (student course section assignments). A schedule result set allows the user to create distinct sets of student course section assignments for a specified Master Schedule. The user can then choose the best schedule result set to use when finalizing the master calendar schedule (class lists).

**Schedule Result Set Maintenance Screen**

This screen has standard add record, edit record and delete record controls.

**Filter By Schedule** – Select a Schedule for which to view Schedule Result Sets.

– View Statistics for the most recent Schedule Job which saved or updated this Schedule Result. See [“View Job Statistics.”](#) If you try to view statistics for a Schedule Result Set that has no associated Schedule Jobs (such as one created by the Add Schedule Result button), you will see an error message.

**No statistics are available, since the chosen Schedule Result Set has no Schedule Jobs**

### Add/Edit Schedule Result Set

**Add/Edit Schedule Result Set Maintenance Screen**

**Name** (required) – Enter the name of this Schedule Result Set.

**Description** (optional) – Enter a description for this Schedule Result Set.

### Delete Schedule Result Set

Please note that deleting a Schedule Result set deletes **ALL** schedule results associated with that Schedule Result Set. Only do this if you are certain you no longer need any of those schedule results. You will see a confirmation message stating that the Schedule Result Set and all associated schedule results were deleted.

**The selected Schedule Result Set and the associated schedule results were successfully deleted**

**Successful Deletion Message**

## Scheduling Screens

### Navigation: Home – SIS – Scheduling

There are three major screens for defining individual student schedules or for viewing course requests and assignments. The Request and Course Section Assignment screens serve dual purposes. When a student is selected the screens are applicable to that student's information (student requests or student course section assignments). If no student is selected the screens are for specific course information (requests and course section assignments). For more information about the Course Request screen, see *ProgressBook StudentInformation Course Request Guide*. In addition, there is a Bulk Course Section Assignment screen, and a Bulk Course Section Transfer screen.

Once students have been assigned specific course sections, their schedules can be viewed from a link provided on the selected student's profile.

## Course Section Assignments

### Navigation: Home – SIS – Scheduling – Course Section Assignments

The **Course Section Assignments** screen serves a dual purpose in StudentInformation. When you select a student, the information that you can add or view is for the selected student – the courses that you have assigned to the student for the school year. From this screen, you can add or drop course section assignments and process the online Study Hall scheduler.

**Note:** If you access this screen at the district level, the information is read-only. To make changes, you must first switch to the building level.

Course	Course Name	Section	Meeting	Teacher	Term	Type	Status	Start Date	End Date
330	CHEMISTRY I	1	- See Schedule -	RONALD CASTLE	All Year	Manual	Assigned	Aug 24, 2004	
245	PRACTICAL GEOMETRY	2	5 (109)	DONALD BERRY	All Year	Manual	Assigned	Aug 24, 2004	
211	HONORS ENGLISH 10	1	6 (210)	MICHAEL WEBBER	All Year	Manual	Assigned	Aug 24, 2004	

### Course Section Assignments Screen with Student in Context

If you don't select a student, the information on the **Course Section Assignment** screen is pertinent to a specific course.

DASL		No Student is Currently Selected				DASL HIGH SCHOOL				
DASL User						[Find Students] Find [Navigation Icons]				
Home » SIS » Scheduling » Course Section Assignments										
<b>Course Section Assignments</b>										
From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.										
Schedule: Default Schedule		Schedule Result:		Dropped						
Course:		Course Term:		Removed		Search				
Date:		Teacher:								
5 Records Displayed (Maximum: 500)										
Course Code	Section	Teacher	Meeting	Student Number	Student	Filling Count	Type	Status	Start Date	End Date
037	2	MICHAEL WEBBER	8 (226)	00006001	EYE, CORY ROBERT	0	Manual	Assigned	Aug 24, 2004	
037	2	MICHAEL WEBBER	8 (226)	00006002	FONT, MICHELLE LYNN	0	Manual	Assigned	Aug 24, 2004	
037	2	MICHAEL WEBBER	8 (226)	00006003	JONES, WHITNEY ANN	0	Manual	Assigned	Aug 24, 2004	
037	2	MICHAEL WEBBER	8 (226)	00006004	LINE, TROY AARON	0	Manual	Assigned	Aug 24, 2004	
037	2	MICHAEL WEBBER	8 (226)	00006005	MAY, DAISY LEE	0	Manual	Assigned	Aug 24, 2004	

### Course Section Assignments Screen without a Student in Context

For information on these two functions, see *“Student Course Section Assignments”* and *“Course Section Assignments.”*

### Student Course Section Assignments

#### Navigation: Home – SIS – Scheduling – Course Section Assignments

In addition to the Menu or the Go To search, you can access this screen by selecting View/Edit Full schedule from the I want to... drop-down menu on the Student Profile screen.

DASL		CONTRARY, MARY M.		ID: 00005001	Counselor:
DASL User		DASL HIGH SCHOOL		Gender: F	Homeroom: A107
		2004-2005 (8/24/2004 - 6/1/2005)		Grade: 11	Status: A
Home » SIS » Student » View Profile					
<b>CONTRARY, MARY M.</b>					
From this screen, you can view the s					
Address:		90 ELM STREET LIMA, OH 45801		I want to... I want to... - Edit this student's profile - View/Edit Full schedule - View/apply fees - View the medical health log - View this student's memberships - View Today's Schedule - View Contacts - View Lockers	
Phone Number:		(419) 228-7417			
Email Address:					
Parent/Guardian:		CONTRARY, MARI H: (419) 228-7417			
Student Status:		ACTIVE RES			
Birthdate:		11/17/1987			
Ethnicity:		WHITE			
Program:					
Academic Locker:					
Admission History:		8/1/1992 - Enrolled			
EMIS Situation:		Resident attending full time			
Percent of Time:		100%			
Report to EMIS:		<input type="checkbox"/>			

### Student Course Section Assignments from the I want to... Menu

To use the Course Section Assignments screen for a specific student's course listing for the working school year, you must select a student.

<b>DASL</b>		Contrary, Jesse		ID: 48652281	Counselor:
DASL User		DASL HIGH SCHOOL		Gender: M	Homeroom:
		2004-2005 (8/24/2004 - 6/1/2005)		Grade: 10	Status: A

Home » SIS » Scheduling » Course Section Assignments

### Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule: Default Schedule    Schedule Result:    Status:  Assigned  Dropped  
 Removed

Course:    Course Term:    Date:    Teacher:    Search

Add Course Assignment    Drop All Assignments    Schedule Study Halls    Save Changes    Cancel Changes

Course	Course Name	Section	Meeting ^	Teacher	Term	Type	Status	Start Date	End Date
X	330 CHEMISTRY I	1	- See Schedule -	RONALD CASTLE	All Year	Manual	Assigned	Aug 24, 2004	
X	245 PRACTICAL GEOMETRY	2	5 (109)	DONALD BERRY	All Year	Manual	Assigned	Aug 24, 2004	
X	211 HONORS ENGLISH 10	1	6 (210)	MICHAEL WEBBER	All Year	Manual	Assigned	Aug 24, 2004	

### Course Section Assignments for a Student

This screen has standard add record, edit record and delete record controls. The drop controls are described in [“Drop/Remove/Transfer Course Section Assignment.”](#)

**Schedule** (required) – Select from the drop-down list if available, the Schedule to be used when viewing the Course Section Assignment information. (Note: if the school year has been finalized then this will not be available for selection – the final schedule must be used as shown in the previous figure.)

**Schedule Result** (required) – Select from the drop-down menu if available, the Schedule Results to be used when viewing the Course Section Assignment information.

*Note: if the school year has been finalized then this will not be available for selection – the final schedule result must be used as shown in the previous figure.*

**Status** (required) – Display Student Course Section assignments that have been assigned, dropped and/or removed. Only Assigned is checked by default. After checking the applicable options, click **Search** to refresh the screen and list results.

**Course** (optional) – Type in a Course ID and/or section number (second box) for viewing or modifying Course Section Assignments or use the Course Selection Wizard to identify the course

 – Open Course Selection Wizard for help selecting courses (refer to [“Course Selection Wizard”](#)).

**Course Term** (optional) – Select a Course Term from drop-down list to view only courses offered for a specific Course Term. If none is selected, all will be shown by default.

**Date** (optional) – Indicate a date for which you wish to view Course Section Assignments and/or Dropped Assignments. By default the current date will populate this field. If you wish to view the information for the entire year, remove a date from this field

**Teacher** (optional) – Select a Teacher from drop-down list of all available teachers in the building, as course search criteria.

**Search** – Search for Student Course Section Assignments using selected criteria.

**Sorting** – You may sort by any column (Course, Course Name, Section, Meeting, Teacher, Term, Type, Status, Start Date, End Date) in ascending or descending order by clicking on the column header

**Drop All Assignments** – Drop All Student Course Assignments (see [“Drop/Remove/Transfer Course Section Assignment”](#)).🔒 – This Course Section Assignment cannot be modified.

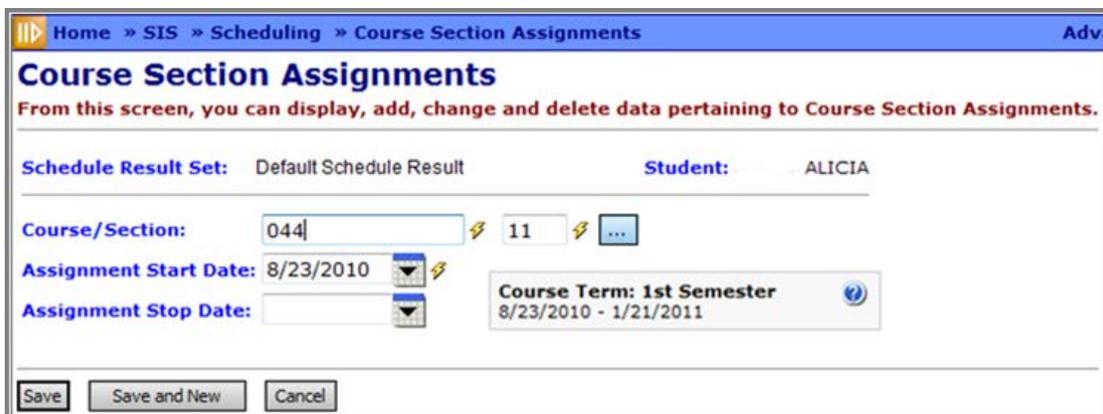
**Schedule Study Halls** – Run Online Study Hall Scheduler to assign study hall sections to the student’s schedule where openings occur. Note: Study Hall Scheduler only works from the Course Section Assignment page when a student is selected.

**IMPORTANT:** If you make any changes on this screen (including adding, editing or deleting course section assignments), you must click the **Save Changes** button in order to save those changes.

**Save Changes**– Save changes made to the Student’s Course Section Assignments.

**Cancel Changes**– Cancel all changes made to the Student’s Course Section Assignments.

### Add/Edit Student Course Section Assignment



Add/Edit Student Course Section Assignments Screen

**Schedule Result Set** – Auto populated with the Schedule Result Set that was used for the Course Section Assignment.

**Student** – Displayed name of the student for which the course section assignment is being modified.

**Course/Section** (required) – Input the Course ID and Section number (second box) for the course that is to be assigned to the student or use the Course Selection Wizard.

 – Open Course Selection Wizard for help selecting a course(s) (see [“Course Selection Wizard”](#)).

**Assignment Start Date** (required) – Indicates the date that the student began/was assigned this course/section. Defaults to current date but may be changed. Note that, if this date is after the first day of school, the student will not be included in filling counts or attendance lists prior to the start of the school year.

**Assignment Stop Date** (optional) – Indicates the last day the student was in or will be in this course/section. If this date is in the future, you can enter data for the student and this course/section normally until the day after this date.

The Course Section Assignment was marked to be saved. Click the save changes button to commit to the database.

Schedule: Default Schedule | Schedule Result: Default Schedule Result | Status:  Assigned  Dropped  Removed

Course: [ ] | Course Term: [ ] | Date: [ ] | Teacher: [ ] | Search

Buttons: Add Course Assignment | Drop All Assignments | Schedule Study Halls | Save Changes | Cancel Changes

Course	Course Name	Section	Meeting ^	Teacher	Term	Type	Status	Start Date	End Date
330	CHEMISTRY I	1	- See Schedule -	RONALD CASTLE	All Year	Manual	Assigned	Aug 24, 2004	
245	PRACTICAL GEOMETRY	2	5 (109)	DONALD BERRY	All Year	Manual	Assigned	Aug 24, 2004	
211	HONORS ENGLISH 10	1	6 (210)	MICHAEL WEBBER	All Year	Manual	Assigned	Aug 24, 2004	
426	PROGRAM/WEB DEV TECH II	1	7,8 (310S)	LAURA LAYMAN	All Year	Manual	Assigned	Aug 30, 2004	
177	TECH ENGLISH CP 12	2	9 (301S)	MARK HANDLEY	All Year	Manual	Assigned	Aug 30, 2004	

**Courses Marked To Be Saved on the Course Section Assignments Screen**



**Important: Be sure to click the Save Changes button to commit your changes to the database or all changes will be lost!**

### ***Student Assignments Created from Course Groups***

Student assignments created from course groups have 2 additional columns display, Group and Group Section. With the addition of these 2 columns, it is easy to distinguish regular course assignments and course group assignments. If a student has a combination of assignments from courses and course groups, the Group and Group Section columns will only be populated for assignments from course groups. For regular course assignments, these columns will be blank.

Home SIS Teacher Menu EZ Query Management EMIS My Account ITC Local

**SCRAMBLED** Student77476, EMILY ID: 00017101 Counselor: Elementary School  
 Elementary School 2009-2010 Gender: F Homeroom: 5C  
 Calendar: DFLT Grade: 05 Status: A [Find Students] Find

Home » SIS » Scheduling » Course Section Assignments Advanced Search | Feedb

### Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

The Course Section Assignments have been successfully saved

Schedule: Default Schedule Schedule Result: Default Schedule Result Status:  Assigned  Dropped  
 Removed

Course: Course Term: Date: Teacher: Search

Add Course Assignment Drop All Assignments Schedule Study Halls Save Changes Cancel Changes

	Group	Group Section	Course	Course Name	Section	Meeting ^	Teacher	Term	Type	Status	Start Date	End Date
X			571	BAND 5	1	1 (81)	MR. P. Teacher1208	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	530	MATH 5	3	2 (42)	MRS. S. Teacher1165	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	505	READING 5	3	2 (44)	MRS. D. Teacher1251	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	510	SCIENCE 5	3	3 (45)	MRS. D. Teacher1251	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	560	ART 5	3	M: 5 (51)	MRS. J. Teacher1219	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	570	MUSIC 5	3	T,F:5 (23)	MRS. A. Teacher1116	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	550	PHYSICAL EDUCATION 5	3	R: 5 (GYM)	MRS. L. Teacher1206	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	590	SPELLING 5	3	6 (44)	MRS. D. Teacher1251	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	500	LANGUAGE 5	3	6 (44)	MRS. D. Teacher1251	All Year	Manual	Assigned	Aug 24, 2009	
X	5C	1	520	SOCIAL STUDIES 5	3	7 (45)	MRS. S. Teacher1233	All Year	Manual	Assigned	Aug 24, 2009	

### Course Sections Successfully Saved Message

## Course Section Assignments

### Navigation: Home – SIS – Scheduling – Course Section Assignments

When no student is selected on this screen, course section assignments for all students in the selected course section will be displayed and the Add Course Assignment, Drop Course Assignment, Schedule Study Hall, Save Changes and Cancel Changes buttons are not available.

Home » SIS » Scheduling » Course Section Assignments Advanced Search | Feedback | Mgmt | Help | Version |

### Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule: Default Schedule Schedule Result: Run 8 Status:  Assigned  Dropped  
 Removed

Course: 330 Course Term: Date: Teacher: Search

54 Records Displayed (Maximum: 500)

	Course Code ^	Section	Teacher	Meeting	Student Number	Student	Filling Count	Type	Status	Start Date	End Date
X	330	1	MICHAEL WEBBER	1 (0206)	00006001	EYE, CORY ROBERT	22.00	Manual	Assigned	Aug 24, 2010	
X	330	1	MICHAEL WEBBER	1 (0206)	00006002	FONT, MICHELLE LYNN	22.00	Manual	Assigned	Aug 24, 2010	
X	330	1	MICHAEL WEBBER	1 (0206)	00006003	JONES, WHITNEY ANN	22.00	Manual	Assigned	Aug 24, 2010	
X	330	1	MICHAEL WEBBER	1 (0206)	00006004	LINES, TROY AARON	22.00	Manual	Assigned	Aug 24, 2010	
X	330	1	MICHAEL WEBBER	1 (0206)	00006005	MAY, DAISEY LEE	22.00	Manual	Assigned	Aug 24, 2010	

### Course Section Assignments Screen

This screen has standard edit record controls. This page has no add record control. The “drop” controls are described in [“Drop/Remove/Transfer Course Section Assignment.”](#)

**Schedule** (required) – Select from the drop-down menu if available, the Schedule to be used when viewing the Course Section Assignment information. (Note: if the school year has been finalized then this will not be available for selection – the default must be used as shown above.)

**Schedule Result** (required) – Select from the drop-down menu if available, the Schedule Results to be used when viewing the Course Section Assignment information. (Note: If the school year has been finalized then this will not be available for selection – the default must be used as shown in the previous figure.)

**Status** (required) – Display Student Course Section assignments that have been assigned, dropped and/or removed. Only Assigned is checked by default. After checking the applicable options, click **Search** to refresh the screen and list results.

**Course** (optional) – Enter a Course ID and/or section number (second box) for viewing or modifying Course Section Assignments, or use the Course Selection Wizard to select a Course. If only the course ID (and not section) is input, all sections of the requested course will be displayed. If section number is entered, only information for that section of the specified course will be listed.

 – Open Course Selection Wizard for help selecting a course(s) (see “[Course Selection Wizard](#)”).

**Course Term** (optional) – Select a Course Term from drop-down list to view only courses offered for a specific Course Term. If none is selected, all will be shown by default.

**Date** (optional) – Indicate a date for which you wish to view Course Section Assignments and/or Dropped Assignments. By default the current date will populate this field. If you wish to view the information for the entire year, remove a date from this field.

**Teacher** (optional) – Select a Teacher from drop-down list of all available teachers in the building, as course search criteria.

**Search** – Search for Student Course Section Assignments using selected criteria.

**Sorting** – You may sort by any column (Course Code, Section, Teacher, Meeting, Student Number, Student, Filling Count, Type, Status, Start Date, End Date) in ascending or descending order by clicking on the column header. The screen will preserve your previous sorting choice within your new sorting choice (for instance, selecting Student, then selecting Course Code, would result in a list sorted first by Course Code, then within each Course Code by Student Name.)

 – This Course Section Assignment cannot be modified.

**Font, Michelle Lynn** – Clicking on a student’s name will put that student in context and convert this screen to the Student Course Section Assignment screen detailed in section 4A-1. Student Course Section Assignment above.

## Edit Course Section Assignment

Home » SIS » Scheduling » Course Section Assignments

### Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule Result Set: Run 8 Student: ELIZABETH

Course/Section: 330 2

Assignment Start Date: 6/7/2011

Assignment Stop Date:

Save Save and New Cancel

### Editing Course Section Assignments

**Schedule Result Set** – Auto populated with the Schedule Result Set that was used for the Course Section Assignment.

**Student** – Displayed name of the student for which the course section assignment is being modified.

The header includes Request information when an assignment is linked to a request.

**Course/Section** – Auto-populated with the Course ID and Section number for the assigned course.

**Assignment Start Date** (required) – Indicates the date that the student began/was assigned this course/section. Defaults to current date but may be changed. Note that, if this date is after the first day of school, the student will not be included in filling counts or attendance lists prior to the start of the school year.

**Assignment Stop Date** (optional) – Indicates the last day the student was in or will be in this course/section. If this date is in the future, you can enter data for the student and this course/section normally until the day after this date.

**Course Term** – This box displays which Course Term this Course Section is assigned to, and lists the date range of that Course Term.

Unlike Student Course Section Assignments, **all** changes made on this screen (edit, delete) take effect immediately after you click Save (you do not have to click Save Changes on the Course Section Assignments listing).

The Course Section Assignment was saved successfully.

## Drop/Remove/Transfer Course Section Assignment

On the **Course Section Assignments** screen, you can drop, remove and transfer course sections.

## Drop Course Section

You can only drop a course section after the start of the school year. Choose this option only if the student has attended the class.

The screenshot shows a web interface for 'Course Section Assignments'. At the top, there is a breadcrumb trail: Home > SIS > Scheduling > Course Section Assignments. Below this is the title 'Course Section Assignments' and a sub-header: 'From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.' The main content area is divided into two columns. The left column is titled 'Student: WHEELER, EVELYN' and contains 'Course Info' with fields for Course: 000, Section: 24, and Start Date: 8/22/2011. The right column is titled 'Term Info' and contains fields for Term: All Year, Start Date: 8/22/2011, and Stop Date: 5/29/2012. Below these columns is a 'Drop' section with a radio button selected. It contains the text: 'Student will appear on class lists for this assignment until the stop date has passed.' and a 'Stop Date' field with the value 5/29/2012 and a calendar icon. At the bottom of the 'Drop' section are two radio buttons: 'Remove / Delete' and 'Transfer'. At the very bottom of the form are 'Save' and 'Cancel' buttons.

### Drop Course Section

1. On the **Course Section Assignments** screen, in the row of the course section assignment you want to drop, click **X**.
2. Verify that the **Drop** radio button is selected.
3. In the **Stop Date** field, enter the last date the student was in or will be in this course section, which must be between the course's scheduled start date and stop date.
4. Click **Save**.

The course section assignment no longer displays on the **Course Section Assignments** screen.

5. Click **Save Changes**.

All marks, mark comments, exception credits and period attendance for this student and this class are retained. The student appears on class and attendance lists until the stop date.

## Delete Course Section

Before the schedule is finalized, you can delete a course section assignment.

The screenshot shows a web interface for 'Course Section Assignments'. At the top, there is a breadcrumb trail: Home » SIS » Scheduling » Course Section Assignments. Below this is the title 'Course Section Assignments' and a red instruction: 'From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.' The main content area is for student 'WHEELER, EVELYN'. It is divided into two columns: 'Course Info' and 'Term Info'. 'Course Info' includes: Course: 015, Sec: 26, Course Name: FV PSYCHOLOGY, and Start Date: 1/14/2013. 'Term Info' includes: Term: 2nd Semester Only, Start Date: 1/14/2013, and Stop Date: 5/29/2013. Below this is a radio button menu with three options: 'Drop', 'Remove / Delete' (which is selected), and 'Transfer'. The 'Remove / Delete' section contains the following text: 'Remove (Schedule Finalized). Delete (Schedule not Finalized). Student will no longer appear on class lists for this assignment. Delete marks, exception credits, mark comments and report card absences. Removing a previously dropped assignment will set status to removed.' At the bottom of the form are 'Save' and 'Cancel' buttons.

### Delete Course Section

1. On the **Course Section Assignments** screen, in the row of the course section assignment you want to delete, click **X**.
2. Select the **Remove / Delete** radio button.
3. Click **Save**.
4. On the **Course Section Assignments** screen, click **Save Changes**.

The course section assignment is deleted, and no record of the course remains on the student's schedule or on the **Course Section Assignments** screen.

**Note:** Any fees associated with dropped course section assignments follow the fee proration tables.

## Remove Course Section

After the schedule is finalized, you can remove a course section assignment if the student either did not attend the class or should not have attended the class.

**Note:** You cannot remove vocational courses after they are reported in period K.

Home » SIS » Scheduling » Course Section Assignments

## Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

**Student: WHEELER, EVELYN**

<p><b>Course Info:</b></p> <p><b>Course:</b> 015    <b>Sec:</b> 26</p> <p><b>Course Name:</b> FV PSYCHOLOGY</p> <p><b>Start Date:</b> 1/14/2013</p>	<p><b>Term Info:</b></p> <p><b>Term:</b> 2nd Semester Only</p> <p><b>Start Date:</b> 1/14/2013</p> <p><b>Stop Date:</b> 5/29/2013</p>
---	---

Drop  
 **Remove / Delete**  
 Transfer

Remove (Schedule Finalized). Delete (Schedule not Finalized). Student will no longer appear on class lists for this assignment.

Delete marks, exception credits, mark comments and report card absences. Removing a previously dropped assignment will set status to removed.

### Remove Course Section

1. On the **Course Section Assignments** screen, in the row of the course section assignment you want to remove, click **X**.
2. Select the **Remove / Delete** radio button.
3. Click **Save**.
4. On the **Course Section Assignments** screen, click **Save Changes**.

The course section assignment is removed. The student is removed from class and attendance lists, but a locked record of the assignment remains on the student's **Course Section Assignments** screen.

**Note:** For removed course section assignments, the associated fees are also removed.

### Transfer Course Section

You can transfer a course section assignment if a student has attended one class but should have been in another.

Home » SIS » Scheduling » Course Section Assignments

## Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

**Student: WHEELER, EVELYN**

<p><b>Course Info:</b></p> <p><b>Course:</b> 015   <b>Sec:</b> 26</p> <p><b>Course Name:</b> FV PSYCHOLOGY</p> <p><b>Start Date:</b> 1/14/2013</p>	<p><b>Term Info:</b></p> <p><b>Term:</b> 2nd Semester Only</p> <p><b>Start Date:</b> 1/14/2013</p> <p><b>Stop Date:</b> 5/29/2013</p>
--	---

Drop  
 Remove / Delete  
 **Transfer**

Transfer marks to the new assignment when both have the same course term and course type. New assignment will retain the assignment start date of the removed assignment.

**Drop**    Remove

The original assigned course will be marked as dropped with the stop date entered. The new assignment will begin with a start date of the next attending day.

**Stop Date:** 4/9/2013

### Transfer Course Section

1. On the **Course Section Assignments** screen, in the row of the course section assignment you want to transfer, click .
2. Select the **Transfer** radio button.
3. Click .

The **Course Selection Wizard** opens.

4. Search for and select the course and course section to which to transfer the student.

**Note:** The new assignment must have the same course type and course term as the original assignment.

The course and course section information populate the fields in the **Transfer** section of the **Course Section Assignments** screen.

5. Choose one of the following options:
  - **Drop** – Allows you to set the stop date of the original course. The start date of the new course is set to the next available school day following the stop date. The original (dropped) course is still reported on the Student Subject Record.

- **Remove** – Sets the stop date of the original course and start date of the new course to the first day of the term. The original (removed) course is not reported on the Student Subject Record.

**Note:** *You cannot remove vocational courses after they are reported in period K.*

6. If you selected **Drop** in [step 5](#), in the **Stop Date** field, enter the last date the student was in or will be in this course section.
7. Click **Save**.

The **Course Section Assignments** screen displays the new course section assignment.

8. Click **Save Changes**.

**Note:** *Any fees associated with dropped course section assignments follow the fee proration tables. For removed course section assignments, the associated fees are also removed.*

## Bulk Course Section Assignment

**Navigation: Home – SIS – Scheduling – Bulk Assign**

This process is sometimes called “Arena Scheduling,” and is used to assign many students to a single course section or list of course sections. Elementary Scheduling procedures also use Bulk Assignment, usually to homeroom-based course groups.

**Working Schedule/Result** – Select a Schedule and/or Schedule Result to which to apply changes. This drop-down only appears if the Schedule has not yet been finalized.

**Reload Screen**– Reload the screen using data from the selected Schedule and Result.

**<Back Next>** – Navigate between tabs on this screen.

### Create a List of Students Tab

This tab determines which students will have the course section or sections added. Select students using the **Search Mode** of your choice – either “Search for Students,” “Enter Student Ids” or “Search by Ad Hoc Membership.”

- “Search for Students” option – Enter information in as many fields as you wish, and click **Create New List** or **Add to List**. Only students who fit all search criteria you enter are included in the list.

**Note:** *To perform a wildcard search on a name field, select the check box beside the field.*

Home >> SIS >> Scheduling >> Bulk Assign

## Bulk Course Section Assignment

Use the bulk course section assignment wizard to schedule a list of students into a list of course sections

Create a list of students | **Create a list of course sections** | Assign students

Next >

**Create a list of students.**

Search Mode:  Search for Students  Enter Student Ids  Search by Ad Hoc Membership

Name:   Middle Name:

First Name:   Called Name:

Student Status:   Gender:

Grade:   Homeroom:

Effective Date:

District of Residence IRN:

How Received IRN:   Sent To IRN:

### Search for Students Option on the Create a List of Students Tab

- “Enter Student Ids” option – Enter a list of student IDs, separated by commas, and click **Create New List** or **Add to List**. If you select the same student ID number multiple times, this bulk course section assignment process only processes the student once and removes all duplicate student IDs.

### Enter Student IDs Option on the Create a List of Students Tab

- “Search by Ad Hoc Membership” option – Select a membership in the **Ad Hoc Membership** drop-down list, and click **Create New List** or **Add to List**. You can repeat this process to add additional memberships to the list.

Home >> SIS >> Scheduling >> Bulk Assign

## Bulk Course Section Assignment

Use the bulk course section assignment wizard to schedule a list of students into a list of course sections

Create a list of students    Create a list of course sections    Assign students

Next >

**Create a list of students.**

Search Mode:  Search for Students    Enter Student Ids    Search by Ad Hoc Membership

Ad Hoc Membership:

Create New List   Add to List   Clear List

### Search by Ad Hoc Membership Option on the Create a List of Students Tab

For all search methods, the students matching your criteria appear in a list at the bottom of the screen. To remove a student from the list, click **X**.

Home >> SIS >> Scheduling >> Bulk Assign

## Bulk Course Section Assignment

Use the bulk course section assignment wizard to schedule a list of students into a list of course sections

Create a list of students    Create a list of course sections    Assign students

Next >

**Create a list of students.**

Search Mode:  Search for Students    Enter Student Ids    Search by Ad Hoc Membership

Name:      Middle Name:

First Name:      Called Name:

Student Status:     Gender:

Grade:     Homeroom:

Effective Date:

District of Residence IRN:

How Received IRN:      Sent To IRN:

Create New List   Add to List   Clear List

**Students to be assigned.**

	Number	Student	Gender
X	00140580	ACEVEDO, VANESSA	F
X	00150215	AGUILAR, NELLIE	F
X	00160178	ALEXANDER, SHELLY	F
X	00140129	ANDERSON, BENJAMIN	M
X	00150037	ATKINS, CARMEN	F
X	00170047	ATKINS, ROSA	F
Male: 1 Female: 5 Total: 6			

### List of Students on the Create a List of Students Tab

## Create a List of Course Sections Tab

Home » SIS » Scheduling » Bulk Assign

Working Schedule: Default Schedule Result: 11/12 Sched

### Bulk Course Section Assignment

Use the bulk course section assignment wizard to schedule a list of students into a list of course sections

Create a list of students   Create a list of course sections   Assign students

< Back   Next >

Create a list of course sections to assign to each student in the list.

Group / course section:

... Add Section   Clear Sections

### Create a List of Course Sections Tab

**Group/course section** – Enter a Course or Course Group ID in the first box and a Course Section or Course Group Section number in the second box. Once you enter these, you will need to use the Add Section button to add the section to the list.

 – Open Course Selection Wizard for help selecting a course(s). See “[Course Selection Wizard.](#)”

**Add Section** – Add the entered section to the list of sections to assign.

**Clear Selections** – Clear the list of sections to assign.

Home » SIS » Scheduling » Bulk Assign   Advanced

Working Schedule: Default Schedule Result: 11/12 Scheduling Results

### Bulk Course Section Assignment

Use the bulk course section assignment wizard to schedule a list of students into a list of course sections

Create a list of students   Create a list of course sections   Assign students

< Back   Next >

Create a list of course sections to assign to each student in the list.

Group / course section:

... Add Section   Clear Sections

Course sections to be assigned.

	Group / Course	Section	Capacity	Meeting Times
✗	164 - ECONOMICS	11	30	1 (0102)
✗	330 - PRACTICAL ALGEBRA I	10	20	-- Not Defined --
	<b>Total Course Sections:</b>	2		

### Course Sections List on the Create a List of Course Sections Tab

✗ – Remove this section from the list.

## Assign Students Tab

### Assign Students Tab on the Bulk Course Section Assignment Screen

**Assignment date** (required) – Enter the date you wish the assignment to start. Defaults to today’s date. The assignment’s Start Date will default to the first day of the course term if the Assignment Date is before the first day of class.

**Assign** – Assign the selected course sections to the selected students.

The following message is displayed when bulk course section assignment is successful (no conflicts found).

**Assignments were successfully saved.**

If scheduling conflicts are detected the following table is displayed. Select the students you wish to schedule (conflicts are saved) and click **OK**. Click **Return** to resolve the conflicts.

<input type="checkbox"/>	Number	Student	Course Code	Course Name	Section
<b>110 - Rocketry 1</b>					
<input type="checkbox"/>	123456	SMITH, Fxxxxxx	999	READING	62
<input type="checkbox"/>	456789	SMITH, Zxxxxxx	999	READING	62

### Scheduling Conflicts

## Bulk Course Section Management

Navigation: Home – SIS – Scheduling – Bulk Course Section Management

**Working Schedule/Result** – Select a Schedule and/or Schedule Result to which to apply changes. This drop-down only appears if the Schedule has not yet been finalized.

**Reload Screen** – Reload the screen using data from the selected Schedule and Result.

**<Back / Next>** – Navigate between tabs on this screen.

### Choose Section Tab

On the first tab, select a course section to manage. Students in this section will be dropped, removed or transferred as selected on the next tab. You can remove students from the list to be affected, if those students should be left in the selected section.

The screenshot shows the 'Bulk Course Section Management' interface. At the top, there is a breadcrumb trail: Home » SIS » Scheduling » Bulk Course Section Management. Below this is the title 'Bulk Course Section Management' and a subtitle: 'The course section transfer screen allows users to transfer students from one course section to another course section.' There are four tabs: 'Choose Section' (selected), 'Choose Action', 'View conflicts', and 'Summary'. A red instruction box says: 'Select the source course section and click view to build the list of students to transfer. Remove students that will not be transferred to the target course section.' Below this is a form with two input fields, each with a lightning bolt icon, followed by a '...' icon and a 'View' button.

Choose Section Tab on the Bulk Course Section Management Screen

**Course/Section** – Enter a Course ID and Section number from which to transfer students (click the  icon to open the Course Selection Wizard to help select a course section).

**View** – See a list of students currently assigned to the entered Course Section.

The screenshot shows the 'Bulk Course Section Management' interface with the 'View' tab selected. The breadcrumb trail is the same. The subtitle is the same. The 'Choose Section' tab is selected. The red instruction box is the same. Below it, the form shows '961' in the first input field and '1' in the second, with a 'View' button. Below the form, there is a section titled 'Students to be transferred.' containing a table of student data and a summary box.

Number	Student	Gender
48652304	Frog, Kermit	M
48652327	James, Steven	M

Male: 2 Female: 0 Total: 2

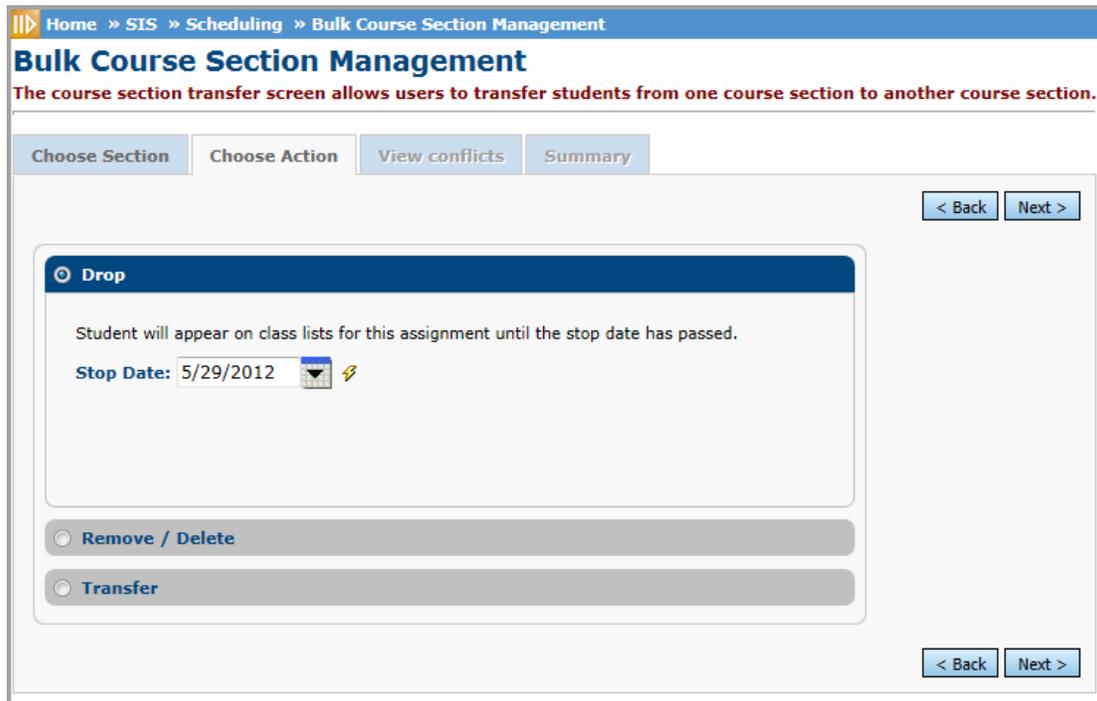
Term	All Year
Course	961 - GOVERNMENT
Section	1
Capacity	30
Meeting Times	9 (106)
Start	8/22/2006

List of Students on the Choose Section Tab

✗ – Remove this student from the list.

## Choose Action Tab

On the **Choose Action** tab, select what action to perform for the students and course section selected on the **Choose Section** tab. The **Choose Action** tab functions just like the Drop/Remove/Transfer screen described in section “[Drop/Remove/Transfer Course Section Assignment](#)”.



The screenshot shows the 'Bulk Course Section Management' interface. At the top, there is a breadcrumb trail: Home » SIS » Scheduling » Bulk Course Section Management. Below this is the title 'Bulk Course Section Management' and a subtitle: 'The course section transfer screen allows users to transfer students from one course section to another course section.' There are four tabs: 'Choose Section', 'Choose Action' (which is selected), 'View conflicts', and 'Summary'. On the right side of the 'Choose Action' tab, there are '< Back' and 'Next >' buttons. The main content area has a 'Drop' section with a radio button selected. Below it, there is a text box stating 'Student will appear on class lists for this assignment until the stop date has passed.' and a 'Stop Date' field with the value '5/29/2012' and a calendar icon. At the bottom of the 'Drop' section, there are two radio buttons: 'Remove / Delete' and 'Transfer', both of which are currently unselected. Another set of '< Back' and 'Next >' buttons is located at the bottom right of the main content area.

Choose Action Tab on the Bulk Course Section Management Screen

## View Conflicts Tab

The **View Conflicts** tab is only used with the Transfer option from the **Choose Action** tab, and it displays any conflicts students would have after the transfer with a 🚫 icon. It also shows any students currently assigned to the target course section, and if any of those students are in the list to be transferred, their names will be highlighted. If the target course section will be overfilled, a message displays listing the new total number of students.

Home » SIS » Scheduling » Bulk Course Section Management

### Bulk Course Section Management

The course section transfer screen allows users to transfer students from one course section to another course section.

Choose Section | Choose Action | View conflicts | Summary

< Back | Next >

Course section will be overfilled. Number of students after transfer will be 3.

Students currently assigned to target course section.

Number	Student	Gender	Course	Section	Capacity	Meeting Times
48652304	Frog, Kermit	M	232 - BIOLOGY I	3	1	6,7 (110)

Male: 1 Female: 0 Total: 1

▼ This list shows any conflicts with the student's current assignments. Click the delete icon to remove the student from the current transfer.

Number	Student	Course Code	Course Name	Section
✗ 48652304	Frog, Kermit	232	BIOLOGY I	3
✗ 48652327	James, Steven	573	ENGLISH	2

Students in both the source and target course section are highlighted. Students that already in the target course section will not be transferred.

< Back | Next >

#### View Conflicts Tab on the Bulk Course Section Management Screen

✗ – Remove this student from the transfer list.

#### Summary Tab

The fourth tab shows the list of students you selected on the first tab, for final confirmation.

Home » SIS » Scheduling » Bulk Course Section Management

### Bulk Course Section Management

The course section transfer screen allows users to transfer students from one course section to another course section.

Choose Section | Choose Action | View conflicts | Summary

< Back

Here are the students you have selected. You may go back and edit the students.

Number	Student	Gender
48652304	Frog, Kermit	M
48652327	James, Steven	M

Male: 2 Female: 0 Total: 2

Submit

< Back

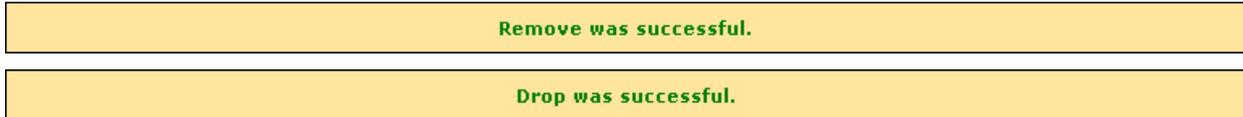
#### Summary Tab on the Bulk Course Section Management Screen

**Submit** – Process the bulk drop, remove or transfer as selected on the second tab. A confirmation message will display and the screen will return to the first tab.



### Transfer was Successful Message

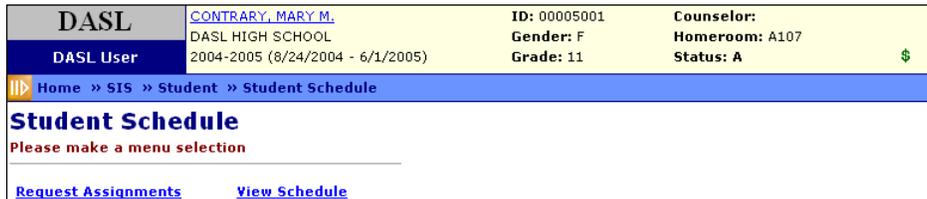
The confirmation message includes the chosen Action:



## Student Schedules

### Navigation: Home – SIS – Student – Student Schedule

After the Master Schedule and student schedules have been finalized, the student's schedule can be viewed from the SIS – Student – Student Schedule menu.



### Student Schedule Menu

The Student Request Assignments screen is a convenient, all-inclusive screen for managing a student's schedule, requests and assignments on a single screen. This screen duplicates (but does not replace) the functions covered by other screens. See *ProgressBook StudentInformation Getting Started Guide* for more information about browsers supported by this screen and similar screens.

## View Schedule

### Navigation: Home – SIS – Student – Student Schedule – View Schedule

You can also access this read-only page by selecting **View Today's Schedule** from the I want to... drop-down menu on the Student profile page.

<b>DASL</b>	<a href="#">CONTRARY, MARY M.</a>	<b>ID:</b> 00005001	<b>Counselor:</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	<b>Gender:</b> F	<b>Homeroom:</b> A107
		<b>Grade:</b> 11	<b>Status:</b> A

Home » SIS » Student » View Profile

**SIS**

Grad Verification

Registration

Student

- Lockers
- » **View Profile**
- Edit Profile
- Student Schedule
- Student Transfer
- Homeroom Assignment
- Admission History
- Withdraw Student
- Locker Assignment
- Contacts
- Student Memberships
- Edit Memberships
- Custody Alert
- Miscellaneous Alerts
- Handicap Alert
- Assessment

**CONTRARY, MARY M.**

From this screen, you can view the

**Address:** 90 ELM STREET  
LIMA, OH 45801

**Phone Number:** (419) 228-7417

**Email Address:**

**Parent/Guardian:** CONTRARY, MARI  
H: (419) 228-7417

**Student Status:** ACTIVE RES

**Birthdate:** 11/17/1987

**Ethnicity:** WHITE

**Program:**

**Academic Locker:**

**Admission History:** 8/1/1992 - Enrolled



**EMIS Situation:** Resident attending full time

**Percent of Time:** 100%

**Report to EMIS:**

### Viewing a Student's Schedule

Home » SIS » Student » Student Schedule » View Schedule

## View Schedule

From this screen, you can view a student's schedule for a particular day of the week.

Date:

Period	Course Code	Course Name	Section	Teacher	Location	Rotation Days	Term
1	0132	ENGLISH 11 CP	1	MRS. J. Teacher1646	221 - MRS. RECKER	M, T, W, R, F	A-Y
2	0912	ECONOMICS	21	MR. N. Teacher1579	215 - MR. DUMBAUGH	M, T, W, R, F	1st Semester
3	0632	ADVANCED BIOLOGY	3	MRS. C. Teacher1553	220 - MRS. BOWDEN	M, T, W, R, F	A-Y
4	0422	SPANISH II	4	MS. S. Teacher1591	230 - MISS BUCHER	M, T, W, R, F	A-Y
5	SH	STUDY HALL	51	MR. N. Teacher1579	206 - MR. FAINE	M, T, W, R, F	1st Semester
6	0532	ALGEBRA II	6	MRS. J. Teacher1616	227 - MRS. LUDANYI	M, T, W, R, F	A-Y
7	0731	AMERICAN GOVERNMENT	7	MR. K. Teacher1575	228 - MR. JOCHIMS	M, T, W, R, F	A-Y
8	SH	STUDY HALL	81	MRS. R. Teacher1541	CAF - CAFETERIA	M, T, W, R, F	1st Semester

### View Schedule Screen

**Date** – Indicates the date for which the schedule is to be viewed. The schedule information will only display classes that are active on the specified date. (Defaults to current date). If the Date selected is before the first day of the calendar master, then the first day of the calendar master is used. If the Date selected is after the last day of the calendar master, then the last day of the calendar master is used. If the Date selected is not an attending day, then the next attending day is used.

**Sorting** - The View Schedule screen sorts by Meeting Time, Period, Course Name and Section Number.

**Course Code, Course Name, Course Section** - The View Schedule screen does not show courses that have a Course Type (Courses – Miscellaneous tab) equal to Case Management.”

**Teacher, Location** - Only Teachers and Locations that are assigned to the course section on the rotation day in the schedule term that’s active on the Date selected will display. For a particular course section, if there is more than one teacher assigned in the same period in the schedule term that is active on the selected Date, then for that period those Teachers and/or Locations are shown in alphabetical order, comma delimited.

**Rotation Days** – The screen shows all Rotation Days in which a course section meets in the period associated with the row in the data grid, for the schedule term that’s active on the selected Date. If a course section is assigned to more than one teacher or location in a period for the schedule term that’s active on the selected date, and the course section meets with one teacher or location for a certain set of rotation days and another teacher or location for another set of rotation days, the rotation days shown will be the union of all rotations days on which the course section meets for those teachers or locations in that period. For example if the course section meets in period 3 with Teacher A on Monday and Wednesday, and with Teacher B on Tuesday and Thursday, then the Rotation Days column for period 3 will be M, T, W, R.

Click **Go** after changing the date to view the student’s schedule for the newly selected date.

**View Student Profile** – Return to the Student Profile screen.

## Student Request Assignments

**Navigation: Home – SIS – Student – Student Schedule – Request Assignments**

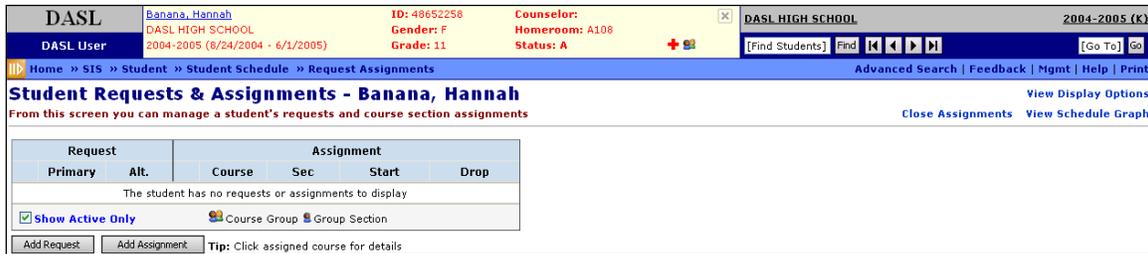
*Note: When navigating to this page before a final schedule result has been selected, you will have to select a Schedule and Schedule Result from the drop-down menus and click **Reload Screen**.*



The screenshot shows a web browser interface for the 'Request Assignments' page. The breadcrumb trail is 'Home > SIS > Student > Student Schedule > Request Assignments'. The page title is 'Student Requests & Assignments - Banana, Hannah'. Below the title, there is a sub-header: 'From this screen you can manage a student's requests and course section assignments'. The main content area has two dropdown menus: 'Working Schedule: -- Select a Schedule --' and 'Result: -- Select a Schedule Result --'. To the right of these dropdowns is a 'Reload Screen' button. In the top right corner, there are links for 'Advanced Search | Feedback | Mgmt | Help | Print'. In the bottom right corner, there are links for 'View Display Options', 'Close Assignments', and 'View Schedule Graph'.

### Select a Working Schedule and Result on the Student Requests & Assignments Screen

The Request Assignments screen has multiple sections, which can change dynamically through use of a set of web techniques called Ajax. If your web browser does not support Ajax, you should use the standard Course Requests, Course Section Assignment and Student Schedule pages to perform the tasks you can perform on this page. For more information on supported browsers, see *ProgressBook End User Requirements*.



### Student Requests & Assignments Screen

You must have a student in context to use this page, and the student's name displays in the page's title. The options at the upper right determine how the page displays.

**Close Assignments/View Assignments** – Close or display the Requests/Assignments pane (upper left) of the screen. The Requests/Assignments pane can be used to add course requests, directly add course section assignments, delete course requests, drop course section assignments or assign a course section to a request. Each of these actions will open a control pane to the right of this pane.

**View Schedule Graph/Close Schedule Graph** – Display or close the Schedule Graph display pane (bottom) of the screen. The Schedule Graph display pane is a view-only graphical representation of the student's schedule.

**View Display Options/Close Display Options** – Display or close the Display Options pane (upper right) of the screen. The Display Options pane will be replaced by any Add Request, Delete Request, Add Assignment, Assign Request or Drop Assignment pane (all performed in the Requests/Assignments pane).

**NOTE:** There might be a slight delay when displaying or saving a pane. In this case, a Loading or Saving message will display in that pane.



Loading Schedule Message

### Common Controls

**Save**– Save changes made to this pane and close it.

**Cancel**– Cancel changes made to this pane and close it.

– Close confirmation message.

### Display Options

The Display Options pane will be replaced by any Add Request, Delete Request, Add Assignment, Assign Request or Drop Assignment control pane (displayed by actions performed in the Requests/Assignments pane).

### Display Options on the Student Requests & Assignments Screen

**Display Requests** – Check this box to show the Requests columns on the Requests/Assignments pane.

**Display Inactive Requests/Assignments** – Check this box to display Inactive Course Requests and Section Assignments in the Requests/Assignments pane. This is the same as unchecking the Show Active Only check box in the Requests/Assignments pane.

**Course Terms** – A check box displays for each Course Term (defined elsewhere in StudentInformation). Check the boxes for any Course Terms for which you want to display Course Requests, Course Section Assignments and Courses on the Student Schedule.

**Rotation Days** – A check box displays for each Rotation Day (defined elsewhere in StudentInformation). Check the boxes for any Rotation Days you want to display on the Student Schedule.

### Requests/Assignments Pane

#### Navigation: Home – SIS – Student – Student Schedule – Request Assignments

You must have a student in context to use this page. If this pane is not visible, click **View Assignments** to display the pane in the upper left of the screen. The Requests/Assignments pane can be used to add course requests, directly add course section assignments, delete course requests, drop course section assignments or assign a course section to a request. Each of these actions will open a control pane to the right of this pane.

Home SIS Teacher Menu EZ Query Management EMIS My Account ITC Local Develop Sitemap

DASL Banana, Hannah ID: 00390110 Counselor: XXXXXXXX HIGH SCHOOL 2010-2011 (N)

First Last XXXXXXXX HIGH SCHOOL 2010-2011 Gender: F Homeroom: 2-131  
Calendar: DFLT Grade: 11 Status: A [Find Students] Find [Go To] Go

Home » SIS » Student » Student Schedule » Request Assignments Advanced Search | Feedback | Mgmt | Help | Version | Print

### Student Requests & Assignments - Banana, Hannah

From this screen you can manage a student's requests and course section assignments Close Assignments View Schedule Graph

Request		Assignment				
Primary	Alt.		Course	Sec	Start	Drop
			180	11	11/18/2010	
			048	12	1/18/2011	
			038	2	8/24/2010	
			299	2	11/18/2010	
			9003	31	11/18/2010	
			640	32	1/18/2011	
			345	4	11/18/2010	
			066	51	11/18/2010	
			070	52	1/19/2011	
			9006	67	11/18/2010	
			875B	62	1/18/2011	
			160	71	11/18/2010	
			164	72	1/18/2011	

Course Group Group Section

Show Active Only

Add Request Add Assignment Tip: Click assigned course for details

#### Requests/Assignments Pane on the Student Requests & Assignments Screen

(request) – Click to edit the Course Request.

(assignment) – Click to edit the Course Section Assignment.

– Click to drop, remove or transfer the Course Section Assignment.

**414** – Click on a Course ID or Course Section Number to view details for that Course Section in the right-hand pane.

**Show Active Only** – If checked, will show only active Course Requests and Course Section Assignments; if not checked, will show both active and inactive Course Requests and Course Section Assignments.

**Add Request**– Click to display the Add Course Request pane.

**Add Assignment** – Click to display the Add Course Section Assignment pane.

When changing a Request or Assignment, or adjusting Display Options, the pane will display an animated Loading icon at the lower-right. This icon will no longer display once the pane is finished reloading.



In addition, when adding or changing a Request or Assignment, the Request or Assignment added or changed will be highlighted.

573	573	2	1/22/2008
655	655	2	8/27/2007
	<b>Comp</b>	<b>1</b>	8/27/2007
233	233	2	1/22/2008

### Highlighted Change

**Note:** On this page, hitting the <Enter> key while any add or edit pane is open will save the data on that pane. Hitting the <Tab> key moves to the next field in the pane.

## Add/Edit Request

The screenshot shows the 'Student Requests & Assignments' page for Hannah Banana. The main table lists requests and assignments with columns for Request (Primary, Alt.), Assignment (Course, Sec, Start, Drop), and a 'Drop' column. The 'Edit Request' form on the right allows for editing the request details. The 'Primary Course' field is set to 160, and the 'Priority' is set to 9. The 'Request Status' is 'DASL'. There are also checkboxes for 'Locked', 'Approved', 'Guardian Created', 'Student Created', 'Guardian Pending', 'Student Pending', 'Guardian Locked', 'Guardian Approved', and 'Student Committed'. Buttons for 'Delete Request', 'Save', and 'Cancel' are visible at the bottom of the form.

### Editing a Request

**Primary Course** (required) – Type in the Primary Course ID that the student is requesting (use the button to open the Course Selection Wizard).

**Alternate Course** (optional) – Type in the Alternate Course ID that the student is requesting. If an alternate course is specified, the scheduler will use it if unable to add the Primary Course to the student’s schedule due to conflicts (use the button to open the Course Selection Wizard).

**Priority** (optional) – Indicate the Student Request priority that you wish to be used for this request. Default priority is one (1) which is the lowest and 9 is the highest priority. You can also use the buttons to increase or decrease priority. If you leave Priority blank, the Primary Course’s Priority will be used.

**Teacher** (optional) – Select a teacher from the drop-down list of available teachers. If a teacher is specified then the scheduler will try to schedule this request with the specified teacher, if available. Check **Exclude** if you wish to request the student be assigned to a course that does not have the specified teacher.

**Period** (optional) – Select a period from the drop-down list of available periods. If a period is specified then the scheduler will try to schedule this request with the specific period, if available. Check **Exclude** if you wish to request the student be assigned to a course that does not meet in the specified period.

**Request Status** – These check boxes display the request status. Most status types are display only, but three are selectable: If the StudentInformation user checks the Locked check box, the request status cannot be changed by Public Application users. If the Public DASL Guardian account user checks the Guardian Locked check box, the request status cannot be changed by the student account user. If the Approved check box is checked, the request’s status becomes Approved, and the request will be included in the next Scheduler run.

**Is Active** (optional) – Yes or No; Student Course Request must be Active to use with online or batch scheduler, or for any assignments linked to the request to be shown on student schedules. Active by default.

**Delete Request** (only available when editing) – Remove this Course Request. If no Course Section has been Assigned to this Request, this button will completely remove the Request. If a Course Section has been Assigned to this Request, this button will make the Request Inactive, and highlight the Request in red. Removing the Course Section Assignment, then Deleting the Course Request, will also retain the Request as Inactive.

The screenshot shows a web application interface for managing student requests and assignments. The breadcrumb trail is: Home » SIS » Student » Student Schedule » Request Assignments. The page title is "Student Requests & Assignments - Banana, Hannah". Below the title, there are links for "View Display Options", "Close Assignments", and "View Schedule Graph". A message states: "From this screen you can manage a student's requests and course section assignments".

Request		Assignment					
Primary	Alt.	Course	Sec	Start	Drop		
	180			180	11	11/18/2010	
	048			048	12	1/18/2011	
	038			038	2	8/24/2010	
	299			299	2	11/18/2010	
	9003			9003	31	11/18/2010	

A yellow notification box on the right side of the table contains the text "Assignment Deleted" with a close button (X).

**Deleting a Request**

## Add Assignment

Home » SIS » Student » Student Schedule » Request Assignments

### Student Requests & Assignments - Banana, Hannah

From this screen you can manage a student's requests and course section assignments

Request			Assignment				
Primary	Alt.		Course	Sec	Start	Drop	
048		X	048	12	1/18/2011		
038		X	038	2	8/24/2010		
299		X	299	2	11/18/2010		
9003		X	9003	31	11/18/2010		
640		X	640	32	1/18/2011		
wwwwwwwwwwwwwwww		X	wwwwwwwwwwwwwwww	4	11/18/2010		
066		X	066	51	11/18/2010		
		X	070	52	1/19/2011		
160		X	160	71	11/18/2010		
164		X	164	72	1/18/2011		

Course Group Group Section

Show Active Only

Add Request Add Assignment Tip: Click assigned course for details

### Adding an Assignment

**Note:** The Add Assignment button creates a manual assignment with no associated request.

**Choose Course or Course Section (required)** – Enter a Course ID or a Course ID and Course Section ID to assign to this student. Leaving Section ID blank allows you to view a list of Course Sections for the Course ID entered. Entering a Course ID and hitting the Tab key will display all Course Sections in this pane, below the entry fields (use the button to open the Course Selection Wizard).

Home » SIS » Student » Student Schedule » Request Assignments Advanced Search | Feedback | Mgmt | Help | Version | Print

### Student Requests & Assignments - Banana, Hannah

From this screen you can manage a student's requests and course section assignments View Display Options  
Close Assignments View Schedule Graph

Request			Assignment				
Primary	Alt.		Course	Sec	Start	Drop	
048		X	048	12	1/18/2011		
038		X	038	2	8/24/2010		
299		X	299	2	11/18/2010		
9003		X	9003	31	11/18/2010		
640		X	640	32	1/18/2011		
wwwwwwwwwwwwwwww		X	wwwwwwwwwwwwwwww	4	11/18/2010		
066		X	066	51	11/18/2010		
		X	070	52	1/19/2011		
160		X	160	71	11/18/2010		
164		X	164	72	1/18/2011		

Course Group Group Section

Show Active Only

Add Request Add Assignment Tip: Click assigned course for details

**Add Assignment**

Choose Course/Group (required) and section (optional):

Action	Course/Group	Sec	Meeting Times	Term	Filling		
Assign	164	11	1 (0102)	1st Sem Only	29.00 / 30		
Assign	164	12	1 (0104)	2nd Sem Only	13.00 / 30		
Assign	164	21	2 (0104)	1st Sem Only	29.00 / 30		
Assign	164	31	3 (0104)	1st Sem Only	26.00 / 30		
Assign	164	52	5 (0101)	2nd Sem Only	28.00 / 30		
Assign	164	62	6 (0104)	2nd Sem Only	23.00 / 30		
Assign	164	72	7 (0104)	2nd Sem Only	25.00 / 30		

Edit Assignment Course Section Details Scheduling Conflict Filled

### Searching for an Assignment to Add

**Assign**– Assign this Course Section and proceed to Course Section Assignment details.

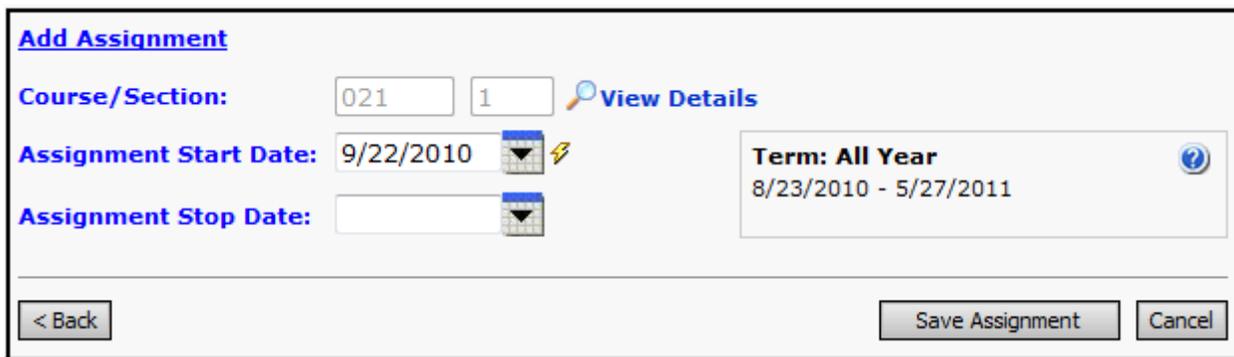
 – Clicking on this icon displays the Course Section Details (see the following figure).

 – This icon indicates that assigning this course section would create a scheduling conflict with an existing Course Section Assignment.

 – This icon indicates that this course section has already been filled. You can only assign a Course Section Assignment to a filled course section if you have the appropriate permissions.

If you are attempting to add a Course Section Assignment for a Course ID that the student already has an assignment for, the **Assign** button for the Course Section already been assigned will be replaced by a  icon. Click this to edit the Course Section Assignment details (see “[Edit Assignment](#)”).

Once you select a Course Section to assign, you will need to enter Course Section Assignment details.



#### Entering the Course Section Assignment Details

**Course/Section** (view-only) – Displays the Course ID and Course Section ID for this Assignment. Click the  icon to view Course Section Details (see the following figure) for this Course Section.

**Assignment Start Date** (required) – Indicates the date that the student began/was assigned this course/section. This date defaults to the 1<sup>st</sup> day of the Course Term of the selected Course Section.

**Assignment Stop Date** (optional) – Indicates the last day the student was in or will be in this course/section. If this date is in the future, you can enter data for the student and this course/section normally until the day after this date.

**Term** – This box displays the Course Term for the Course Section being assigned, as well as that Course Term’s start and stop dates. Entering dates outside this range will result in those dates being changed to the closest date possible inside the Course Term (For example, entering a start date of 8/10, when the Course Term starts 8/30, will result in a start date of 8/30).

**Save Assignment**– Will save the Course Section Assignment.

**Note:** If you attempt to save an Assignment that would create a conflict, you will see a warning message similar to the following. You can override the warning and create the conflict by clicking **Save Assignment** again.

**Please correct the following errors:**  
- An assignment to course 333 section 1 would create a scheduling conflict  
- If you click to save again, the can override this warning

**<Back**– Return to the list of Course Sections.

**Note:** When a user chooses to assign a group section, the user can view the details of the group section. The course/group section selection wizard does show the constituent course sections of a group section as of 10.2.0. Users that would like to see constituent course section information may click the course/group section selection wizard that is already on the Request Assignment screen to see the desired information.

### Edit Assignment

**Edit Assignment**

**Course/Section:** 182 2 [View Details](#)

**Assignment Start Date:** 8/23/2010  

**Assignment Stop Date:** 

**Term: All Year**   
8/23/2010 - 5/27/2011

#### Editing an Assignment

(for all field values, see [“Add Assignment”](#) above)

**Advanced Drop** – Drop, remove or transfer this course section assignment (this is the same action that the  icon on the assignments pane performs).

## Drop/Remove/Transfer Assignment

Home » SIS » Student » Student Schedule » Request Assignments Advanced Search | Feedback | Mgmt | Help | Version | Print

### Student Requests & Assignments - ALVARADO, ALICIA

From this screen you can manage a student's requests and course section assignments View Display Options

[Close Assignments](#) [View Schedule Graph](#)

Request		Assignment				
Primary	Alt.		Course	Sec	Start	Drop
	903	<input checked="" type="checkbox"/>	903	12	8/20/2012	
	200	<input checked="" type="checkbox"/>	200	3	8/20/2012	
	302G	<input checked="" type="checkbox"/>	302G	13	8/20/2012	
	304G	<input checked="" type="checkbox"/>	304G	23	1/14/2013	
	020	<input checked="" type="checkbox"/>	020	4	8/20/2012	
	601	<input checked="" type="checkbox"/>	601	16	8/20/2012	
	0001	<input checked="" type="checkbox"/>	0001	4	8/20/2012	
	0002	<input checked="" type="checkbox"/>	0002	8	1/14/2013	
	202	<input checked="" type="checkbox"/>	202	7	8/20/2012	
	012	<input checked="" type="checkbox"/>	012	8	8/20/2012	
	700	<input checked="" type="checkbox"/>	700	9	8/20/2012	
	002					

Course Group Group Section

Show Active Only

**Tip:** Click assigned course for details

**Drop / Remove**

**Course Info:**

Course: 0002 Sec: 8

Course Name: Lunch

Start Date: 1/14/2013

**Term Info:**

Term: 2nd Semester Only

Start Date: 1/14/2013

Stop Date: 5/29/2013

**Drop**

Student will appear on class lists for this assignment until the stop date has passed.

Stop Date: 4/11/2013

Remove / Delete

Transfer

**Delete Request**

Delete the request associated with this assignment.

### Dropping, Removing, or Transferring an Assignment

Refer to [“Drop/Remove/Transfer Course Section Assignment”](#) for more information on the options on this screen.

**Delete Request** (optional) – Yes or No. Check this box if you would like to remove the Course Request in addition to dropping the Course Section Assignment. This check box only appears if you are dropping a Course Section Assignment that has a related Course Request.

**Save** – Process the drop, remove or transfer.

### View Course Section Details

Click on a Course ID or Course Section ID. This opens the Course Section details pane to the right. You can also access this screen by clicking on the icon when adding a Course Section Assignment.

Home » SIS » Student » Student Schedule » Request Assignments Advanced Search | Feedback | Mgmt | Help | Version | Print

### Student Requests & Assignments - Banana, Hannah

From this screen you can manage a student's requests and course section assignments View Display Options  
Close Assignments View Schedule Graph

Request		Assignment				
Primary	Alt.	Course	Sec	Start	Drop	
048	<input checked="" type="checkbox"/>	048	12	1/18/2011		
038	<input checked="" type="checkbox"/>	038	2	8/24/2010		
299	<input checked="" type="checkbox"/>	299	2	11/18/2010		
9003	<input checked="" type="checkbox"/>	9003	31	11/18/2010		
640	<input checked="" type="checkbox"/>	640	32	1/18/2011		
wwwwww	<input checked="" type="checkbox"/>	wwwwww	4	11/18/2010		
066	<input checked="" type="checkbox"/>	066	51	11/18/2010		
	<input checked="" type="checkbox"/>	070	52	1/19/2011		
160	<input checked="" type="checkbox"/>	160	71	11/18/2010		
164	<input checked="" type="checkbox"/>	164	72	1/18/2011		

Course Group  Group Section

Show Active Only

Tip: Click assigned course for details

**Section Details**

Section:   Term: 1st Sem Only  
8/24/2010 - 1/14/2011

Name: CLASSICAL MYTHOLOGY

Capacity: 28

Filling Counts: Female: 10; Male: 15; Total: 25; Weighted: 25.00

Program Builder Code:  Special Population:

Meeting Time Desc: 5 (0126)

Teacher	Location	Start	End
BRACKEN, KIM	0126 - 0126	Aug 24, 2010	Jan 14, 2011

M	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
T	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
W	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
R	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F	1	2	3	4	5	6	7	8
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### View Course Section Details

This pane displays Course ID, Course Section ID, Course Term, Course Capacity, Course Name, Course Filling Counts, Course Program Builder Code, Course Special Population Code, Course Meeting Time Description and a detailed Course Meeting Time display.

**Close** – Closes the Course Section details pane. If this pane was accessed from a Course Section Assignment add or edit pane, that pane is restored.

#### Schedule Graph Pane

#### Navigation: Home – SIS – Student – Student Schedule – Request Assignments

You must have a student in context to use this page. If this pane is not visible, click

**View Schedule Graph** to display the pane at the bottom of the screen.

The Schedule Graph display pane is a view-only graphical representation of the student's schedule. If a student's schedule is different on different Rotation Days, a separate schedule graph will display for each different set of Rotation Days. You can also uncheck some Rotation Days in the Display Options pane, and those days will not display on the Schedule Graph.

Each Graph is laid out with Schedule Terms across the top, and Periods of the Day down the side. This should graphically show the student's schedule over the entire year. Course conflicts will be highlighted in red, and display both courses.

Home » SIS » Student » Student Schedule » Request Assignments					Advanced Search   Feedback   Mgmt   Help   Print					
<b>Student Requests &amp; Assignments - Banana, Hannah</b>										
From this screen you can manage a student's requests and course section assignments										
View Display Options										
View Assignments Close Schedule Graph										
<b>Mon - Monday, Wed - Wednesday</b>										
	8/24	11/01	1/19	3/16						
1	182 #1: FRENCH I - CLARK (281)									1
2	414 #1: BASIC ENGLISH 12 - COUSINS (208)			CONFLICT 193 #2: TECH CAREER II - WEBBER (7) 414 #1: BASIC ENGLISH 12 - COUSINS (208)						2
3	343 #7: ALGEBRA II - LAYMAN (165)									3
3A										3A
4	232 #2: BIOLOGY I - WEBBER (149)									4
5										5
6	420 #1: AMERICAN GOVERNMENT BASIC - LAYMAN (267)			022 #17: COMMUNICATIONS I - BERRY (269)						6
7	300 #1: YEARBOOK III - LAYMAN (215)									7
8	840 #1: SOCIAL STUDIES - BERRY (MSS)									8
9	076 #1: BAND - LAYMAN (22)									9
<b>Tue - Tuesday, Thur - Thursday, Fri - Friday</b>										
	8/24	11/01	1/19	3/16						
1	182 #1: FRENCH I - CLARK (281)									1
2	414 #1: BASIC ENGLISH 12 - COUSINS (208)			CONFLICT 193 #2: TECH CAREER II - WEBBER (7) 414 #1: BASIC ENGLISH 12 - COUSINS (208)						2
3	343 #7: ALGEBRA II - LAYMAN (165)									3
3A										3A
4	232 #2: BIOLOGY I - WEBBER (149)									4
5										5
6	420 #1: AMERICAN GOVERNMENT BASIC - LAYMAN (267)			022 #17: COMMUNICATIONS I - BERRY (269)						6
7	300 #1: YEARBOOK III - LAYMAN (215)									7
8	840 #1: SOCIAL STUDIES - BERRY (MSS)									8
9	076 #1: BAND - LAYMAN (22)									9

**Schedule Graph Pane**

## CTE Management

### Navigation: Home – SIS – Scheduling – CTE Management

The CTE Program of Concentration field can be mass updated for vocational students. The CTE Management screen will allow users to view student vocational course section assignments based on the teacher of the vocational course and update the CTE Program of Concentration field for selected students in that course section assignment.

Home » SIS » Scheduling » CTE Management Advan

### CTE Management

From this screen, you can view student vocation course section assignments based on the teacher of the vocational course.

Teacher: [ ] , ANN ⚡ Section: (922) PRIN OF ENGINEERING - PLTW - 1 ⚡

CTE Program Area: [ ]

CTE Program Of Concentration: \*\* - Student is not a concentrator in any CTE Program

[Update]

<input type="checkbox"/> Check All	Student Number	First Name ^	Last Name	CTE Program Of Concentration
<input type="checkbox"/>	13135	ADAM	Student76252	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	11102	ELI	Student77892	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13823	EMILY	Student76092	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13577	JACOB	Student76184	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13152	JACOB	Student76237	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13137	JACOB	Student76250	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13820	JONATHON	Student76095	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13157	MICHAEL	Student76233	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13824	MITCHELL	Student76091	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13850	NATHAN	Student76065	** - Student is not a concentrator in any CTE Program

### CTE Management Screen

**Sorting** – You may sort by any column (Student Number, First Name, Last Name, CTE Program of Concentration) in ascending or descending order by clicking on the column header.

**Teacher** (required) – Choose a teacher from the drop-down list. The drop-down list displays only those teachers assigned to a course or course section in the current school year where the value in the Curriculum field begins with a “V.”

**Section** (required) – Choose a course section from the drop-down list. The drop-down list displays only those course sections assigned to the selected teacher where the value in the Curriculum field for the course section or course begins with a “V.” The student grid will populate with actively enrolled students (as of today’s date) in the selected course section.

**CTE Program Area** (required) – Choose a Program area for the CTE Program of Concentration element.

**CTE Program of Concentration** (required) – Choose an element that designates the program of concentration for a CTE concentrator. The list of available values in the CTE Program of Concentration drop-down is dependent on the value selected for the CTE Program Area.

## Student Grid

Update				
<input type="checkbox"/> Check All	Student Number	First Name ^	Last Name	CTE Program Of Concentration
<input type="checkbox"/>	13135	ADAM	Student76252	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	11102	ELI	Student77892	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13823	EMILY	Student76092	** - Student is not a concentrator in any CTE Program
<input type="checkbox"/>	13577	JACOB	Student76184	** - Student is not a concentrator in any CTE Program

### Student Grid

Clicking **Check All** will check/uncheck all students in the student grid.

Individual students can be checked or unchecked by clicking on the  next to their student number.

**Student Number, First Name, Last Name** – The identifying information for each student in the selected course section.

**CTE Program of Concentration** – The current value of the CTE Program of Concentration for the student in the selected course section assignment.

**Update** – Click Update to apply the value in the CTE drop-down list to all students that are checked in the student grid.

The following banner message will display:

The CTE records were saved

The student grid will display the updated CTE Program of Concentration values for each student.

CTE Program Area: <input type="text" value="1 - Agricultural and Environmental Systems"/>				
CTE Program Of Concentration: <input type="text" value="A0 - Agribusiness and Production Systems"/>				
Update				
<input type="checkbox"/> Check All	Student Number	First Name ^	Last Name	CTE Program Of Concentration
<input type="checkbox"/>	13135	ADAM	Student76252	A0 - Agribusiness and Production Systems

### Search Results on the CTE Management Screen

## Course Request Reports

### Navigation: Home – SIS – Scheduling – Scheduling Reports

See the Batch/Report Management documentation for more detailed information about running and viewing reports.

Home » SIS » Scheduling » Scheduling Reports

## Scheduling Reports

Please make a menu selection

<a href="#">Add/Drop Audit Report (R209)</a>	<a href="#">Stud Sched In Cor/Sec Not Another (R424)</a>
<a href="#">Class Arena Card (R418A)- SIS</a>	<a href="#">Student Arena Card (R417)</a>
<a href="#">Class Arena Card (R418B)</a>	<a href="#">Student Course Request Verify (R401)</a>
<a href="#">Class Master Schedule (R407)</a>	<a href="#">Student Request Specific Course (R404)</a>
<a href="#">Course Curriculum (CRSE)</a>	<a href="#">Student Sched In Two Assg Cor/Sec (R425)</a>
<a href="#">Course Request Labels (R206)</a>	<a href="#">Student Scheduled w/FT by Period (R415B)</a>
<a href="#">Course Request Verification Slip (R416)</a>	<a href="#">Student Scheduled With Free Time (R415A)</a>
<a href="#">Location Schedule (R409)</a>	<a href="#">Student Scheduling Analysis (R426)</a>
<a href="#">No Requests/Assignments (NORQ)</a>	<a href="#">Students Course Requests (REQU)</a>
<a href="#">Potential Course Conflicts (R406)</a>	<a href="#">Students Req. Specific Course Pair(R405)</a>
<a href="#">Potential Course Conflicts Matrix (R403)</a>	<a href="#">Students Sched with Alt Courses (R413)</a>
<a href="#">Schedule Card Formatter (R701)</a>	<a href="#">Tally Of Student Course Requests (R402)</a>
<a href="#">Section Summary by Report Period (R807)</a>	<a href="#">Teacher Block Schedule (R427)</a>
<a href="#">Singleton List Conflict Report (R813-B)</a>	<a href="#">Teacher Schedule (R411)</a>
<a href="#">Singleton List Report (R813-A)</a>	<a href="#">Timetable Grid (R422)</a>

### Scheduling Reports Menu

## Course Curriculum (CRSE)

### Navigation: Home – SIS – Scheduling – Scheduling Reports – Course Curriculum

This report lets you print out a customized list of all entered courses. You can organize courses by any combination of Course Type, Grade, Department, Subject Area, Course Area of Study, EMIS Subject Area, Difficulty Level and Add On Level. You can also select customized fields to include on the report (Course Name, Code, Description, Credits, etc.).

Courses are printed once (not once per grade) with the grades displayed as a comma delimited list showing all grades in which the course is offered.

Home » SIS » Scheduling » Scheduling Reports » Course Curriculum (CRSE)

## Course Curriculum (CRSE)

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

Selection Criteria   Selection Summary   Load Settings

**Course Type**

C - Class  
L - Lunch  
Z - Study hall  
ESC - ESC course

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Department**

000 - NO DEPARTMENT  
ART - ART  
BUS - BUSINESS  
CAR - CAREER TECH

**Subject Area**

AL1 - ALGEBRA 1  
AL2 - ALGEBRA 2/TRIG  
APL - APPRECIATION OF LITERATUR  
ART - ART

**Course Area Of Study**

01 - AGRICULTURE  
02 - ART  
03 - BUSINESS  
05 - ENGLISH

**EMIS Subject Area**

\*\*\* - Not Applicable (Does not qualify for  
BUS - BUS - Business  
CTA - Career/Technical  
ELE - Elective

**Difficulty Level**

1 - 1

**Add On Level**

**Fields To Display**

Abbreviation  
Area Of Study  
Course Add On Level  
Course Type

Only include courses with requests:

**Sorting Options**

Course Code (DESC)  
Course Name (ASC)  
Course Name (DESC)  
Abbreviation (ASC)

Course Code (ASC)

**Delivery Method:** Pickup

**Email Address:**

**Report Format:** Adobe PDF

**Description:**

Course Curriculum Report Parameters Screen

**Course Type** (optional) – Select one or more Course Types to filter report results by. If no Course Types are selected, the report will select all Course Types. Selecting a Course Type will filter report results by the specified item but the field will only be displayed on the report output if the Course Type field is selected in the Fields to Display box.

**Grade** (optional) – Select one or more Grades to filter report results by. If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Department** (optional) – If no Departments are selected, the report will select all Departments. Selecting a Department will filter report results by the specified item but the field will only be displayed on the report output if the Department field is selected in the Fields to Display box.

**Subject Area** (optional) – If no Subject Areas are selected, the report will select all Subject Areas. Selecting a Subject Area will filter report results by the specified item but the field will only be displayed on the report output if the Subject Area field is selected in the Fields to Display box.

**Course Area of Study** (optional) – If no Course Area of Study fields are selected, the report will select all Course Area of Study fields. Selecting a Course Area of Study will filter report results by the specified item but the field will only be displayed on the report output if the Area of Study field is selected in the Fields to Display box.

**EMIS Subject Area** (optional) – If no EMIS Subject Area fields are selected, the report will select all EMIS Subject Area fields. Selecting an EMIS Subject Area will filter report results by the specified item but the field will only be displayed on the report output if the EMIS Subject Area field is selected in the Fields to Display box.

**Difficulty Level** (optional) – If no Difficulty Levels are selected, the report will select all Difficulty Levels. Selecting a Difficulty Level will filter report results by the specified item but the field will not be displayed on the report output.

**Add On Level** (optional) – If no Add On Levels are selected, the report will select all Add On Levels. Selecting an Add On Level will filter report results by the specified item but the field will not be displayed on the report output.

**Fields to Display** (optional) – Select up to ten fields to display as columns on the report output. These fields do not filter report results. Depending on the year in context, the available options can include:

- Abbreviation
- Area of Study
- CORE Subject Area
- Course Add On Level
- Course Type
- Course Weight
- Credit Flex
- Credit Units
- CTE College Credit
- Curriculum
- Delivery Method
- Demand Count
- Department
- Description
- Educational Option
- EMIS Course Level
- EMIS Course Type
- EMIS Language Used
- EMIS Location IRN
- EMIS Subject Area for Credit
- EMIS Subject Code
- Gender Directive
- Highly Qualified Teacher IRN
- Hours of Instruction
- Include in Total Credits
- Include in GPA
- In Graduation Count (use “Include in Grad. Verification”)
- In Honor Roll
- Include in Grad. Verification (now titled “In Graduation/Eligibility” on the Course – Misc tab)
- Include on Permanent Record
- Is Active
- Is College Prep
- Is Dual Credit
- Is High School Credit
- Is Honors Course
- Is In Update History
- Is Requestable (please note that this is the same as “Display on Public Module”)
- Language Code
- Level of Difficulty
- Print on Report Card
- Report to EMIS
- Rank Weight
- Roll Course to Next Year
- Scheduling Priority
- Short Name
- Student Population
- Subject Area

**Only include courses with requests** (optional) – Check this option to only show courses that have at least one course request. If unchecked, all courses will show even if they have no course requests.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

REPORT: DASL - REPO CRSE		HIGH SCHOOL		COURSE CURRICULUM		
SCHOOLYEAR: 2010-2011				PAGE 1 OF 1		
RUN AT 12:07 PM 8/2/2010						
COURSE CODE	COURSE NAME	GR	Course Short Name	Rank Weight	Incld GPA	Hon Roll
030	GENERAL BUSINESS	09;10;11;12	GEN BUS		Y	Y
033	ACCOUNTING I	10;11;12	ACCT I		Y	Y
034	ACCOUNTING II	11;12	ACCT II		Y	Y
035	PERSONAL MONEY MATTERS	11;12	MONEY MATTERS		Y	Y
230	YEARBOOK	10;11;12	YEARBOOK		Y	Y

### Course Curriculum Report

## Students With No Requests or Assignments (NORQ)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Students With No Requests/Assignments (NORQ)**

The Students with No Requests report will display all students who do not have course requests for the selected Master Schedule(s). This screen expects you to be working in a Future School Year – you will be warned if you are working in the Current School Year.

**Note:** As of 8.3.0, this report has been renamed from “Students with No Request” to “Students with No Request or Assignments” and includes additional options. This report can now be used to find students with no schedule.

Home » SIS » Scheduling » Scheduling Reports » No Requests/Assignments (NORQ) Adva

WARNING: You are working with the Current School Year, and not a Future School Year as expected

## Students with No Requests or Assignments (NORQ)

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

---

Selection Criteria   **Selection Summary**   Load Settings

**Homeroom Date:** 11/29/2010

---

**Schedule:** Default Schedule

**Schedule Result:** Default Schedule Result

---

**Run Type:**  No Requests    No Assignments    Neither Requests nor Assignments

---

**Grade**

07 - 07	▲		↔		
08 - 08	☰		↔		
09 - 09	▼		↔		
10 - 10			↔		

---

**Student Status**

A - ACTIVE RES	▲		↔		
D - DELETED	☰		↔		
I - INACTIVE	▼		↔		
N - NON-RES			↔		

---

**Administrative Homeroom**

AUT - Teacher1357 (Full Year Term)	▲		↔		
IN01 - Teacher1275 (Full Year Term)	☰		↔		
IN02 - Teacher1347 (Full Year Term)	▼		↔		
IN03 - Teacher1237 (Full Year Term)			↔		

---

**Sorting Options**

StudentName (DESC)	▲		↔		
StudentNumber (ASC)	☰		↔		
StudentNumber (DESC)	▼		↔		
Homeroom (ASC)			↔		

**Delivery Method:** Pickup

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

**Description:**

### Students with No Requests or Assignments Parameters Screen

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. The date will default to the current date, or the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Schedule** (required) – Select the appropriate schedule from the list of existing schedules. Defaults to the Default Schedule.

**Schedule Result** (required) – Select the appropriate Schedule Result from the available list, which you wish to base the report results on.

**Run Type** (required) – Choose from three options.

**No Requests** - Show students with no requests regardless of whether they have assignments or not.

- No Assignments - show students with no assignments regardless of whether they have requests or not
- Neither Requests nor Assignments – show students only if they have no requests and no assignments

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Student Status** (optional) – If no Student Status is selected, the report will select all Student Status codes. You can also filter by selecting specific Student Status codes for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homeroom for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: BASL - REPO NORQ		HIGH SCHOOL		RUN AT 10:19 AM 11/29/2010		
SCHOOLYEAR: 2010-2011		STUDENTS WITH NO REQUESTS OR ASSIGNMENTS REPORT		PAGE 1 OF 1		
ID	STUDENT NAME	GN	GR	COUNSELOR	HMRM	HMRM TEACHER
136692	Student51658, LINDA	F	09			
136574	Student51664, KYLE	M	11			
77569	Student52100, BRET	M	12			
33369	Student54564, ALEXIS	F	11			
136704	Student55002, Evan	M	09			
14626	Student56940, VICTORIA	F	09			
14579	Student56976, ZACHARY	M	09			
14565	Student56984, KAITLYN	F	09			
14532	Student57005, JONELLE	F	09			

**Students With No Requests or Assignments Report**

## Students Course Requests (REQU)

**Navigation: Home – SIS – Scheduling – Scheduling Report – Students Course Requests (REQU)**

The Student Course Requests (REQU) report lists the disposition of course requests made by students for a specific scheduled result set. The user may select any course request disposition to view in order to view just requests successfully scheduled, to view only conflicts, etc.

Home » SIS » Scheduling » Scheduling Reports » Students Course Requests (REQU) Ac

## Students Course Requests (REQU)

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

---

Selection Criteria   **Selection Summary**   Load Settings

**Schedule:**   Default Schedule ▾

**Schedule Result:**   12-13 Result Set ▾ ⚡

---

**Homeroom Date:**   9/27/2012 📅 ⚡

---

**Grade**

09 - 09	↕	↔	↕
10 - 10	↕	↔	↕
11 - 11	↕	↔	↕
12 - 12	↕	↔	↕

**Student Status**

A - ACTIVE RES	↕	↔	↕
ACCA - ASHLAND ACADEMY	↕	↔	↕
AE - ACTIVE ELSEWHERE	↕	↔	↕
D - DELETED	↕	↔	↕

**Administrative Homeroom**

2-108 - MAYNARD (Full Year Term)	↕	↔	↕
2-124A - WELCH (Full Year Term)	↕	↔	↕
2-124B - BRAY (Full Year Term)	↕	↔	↕
2-125 - GILL (Full Year Term)	↕	↔	↕

**Counselor**

FREEMAN, MS	↕	↔	↕
FITZGERALD, MS	↕	↔	↕
MONTGOMERY, MS	↕	↔	↕

**Membership Group**

11 - Intervention	↕	↔	↕
12 - Post-secondary Enrollment Options Program	↕	↔	↕
15 - 15	↕	↔	↕
16 - 16	↕	↔	↕

**Membership**

15 - Student received intervention provided during regular s	↕	↔	↕
15 - Student received intervention provided in the summer	↕	↔	↕
16 - Student placement by a district in a chartered non-pub	↕	↔	↕
50 - Prev. reported as a dropout in reporting district gradua	↕	↔	↕

**Special Education Services**

215001 - Adapted Physical Education Services	↕	↔	↕
215002 - Aide Services	↕	↔	↕
215003 - Attendant Services	↕	↔	↕
215004 - Audiological Services	↕	↔	↕

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

---

**Sorting Options**

StudentName (DESC)	↕	↔	StudentName (ASC)	↕
StudentNumber (ASC)	↕	↔		↕
StudentNumber (DESC)	↕	↔		↕
Homeroom (ASC)	↕	↔		↕

---

**Delivery Method:**   Pickup ▾  

**Email Address:**   EmhoffH@software-answers.com

**Report Format:**   Adobe PDF ▾

---

**Description:**  

### Student Course Requests Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the Default Schedule.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list, which you wish to base the report results on.

**Homeroom Date** (required) – Specify the date to use to retrieve student’s homeroom. Will default to the current date or the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Student Status** (optional) – If no Student Status is selected, the report will select all Student Status codes. You can also filter by selecting specific Student Status codes for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homeroom for your report.

**Counselor** (optional) – If no Counselor is selected, the report will select all Counselors. You can also filter by selecting specific Counselors for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Membership** (optional) – If no Membership Codes are selected, the report will select all Membership Codes. You can also filter by selecting specific Membership Codes for your report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: REQU Printed Fri, Feb 16, 2007, 1:42 PM						DASL HIGH SCHOOL 2006-2007 Students Course Requests				
Student Number	Student Name	Gd Gr	Counselor	Hmrm Code	Homeroom Teacher	Course Code	Course Name	Sec	Teacher Name	
4865225 8	Banana, Hannah	F 12				171	ART II			
						182	FRENCH I			
						2012	ENGLISH 7			
						2013	READING 7			
						076	BAND			
						232	BIOLOGY I			
						233	ANATOMY			
						275	PAINTING			
						425	COMPUTER PROG 2			
						431	PHYSICS			
						825	PSYCHOLOGY			
						423	SOCIOLOGY			
						052	LANGUAGE ARTS	2	LAURA LAYMAN	
						2007	ART	2	JOHN BAER	
						232	BIOLOGY I	2	SAM BAUM	
						233	ANATOMY	2	BILLY BELL	
						240	PRAC GEOMETRY	2	DONALD BERRY	
						255	AP AM HISTORY	2	JEFF BOYER	
						423	SOCIOLOGY	1	DEBRA BRIGGS	
						573	ENGLISH	1	SUSAN CLARK	
						655	MATH	2	DAVID COUSINS	
						962	ECON	3	LAURA CROFT	
						183	SPANISH I			
						2014	MATH 7			
7001	CONTRARY, JASON	M 10				235	ENV. SCIENCE			
						076	BAND			
						171	ART II			
						182	FRENCH I			

### Student Course Requests Report

## Student Request Specific Course (R404)

### Navigation: Home – SIS – Scheduling – Scheduling Reports – Student Request Specific Course (R404)

This report allows the user to get a list of all of the students that have requested a specific course. The report lists alternate course, students ID, name, grade, gender, homeroom, previous school, program, counselor, team and telephone number. The user can also have the report list the courses that have less than a specified number of students requesting the course.

Course groups are included on this report and treated the same as any other course request. Students who select the course group will be shown under the course group. Students who request the course (only) will show up under the course.

Home » SIS » Scheduling » Scheduling Reports » Student Request Specific Co

## Student Who Requested A Specific Course (R404)

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

Selection Criteria   Selection Summary   Load Settings

Homeroom Date: 6/6/2011  

Courses:  

Less Than Students:

**Sorting Options**

Grade Level (DESC)	← →	Grade Level (ASC)	↑ ↓
Student Name (DESC)	← →	Student Name (ASC)	
Team (ASC)	← →		
Team (DESC)			

Delivery Method: Pickup

Email Address:

Report Format: Adobe PDF

Description:

### Students Who Requested A Specific Course Report Parameters Screen

**Homeroom Date** (required) – Specify the date to use to retrieve student’s homeroom.

**Courses** (optional) – Indicate course ID/IDs to be used to produce a list of requests made for the specified course/courses. Type in the Course ID or use the Course Selection Wizard () to assist and then click **Add** to add the course ID for inclusion in the report. The Course Selection Wizard will return both courses and course groups.

Home » SIS » Scheduling » Scheduling Reports » Student Request Specific Co

## Student Who Requested A Specific Course (R404)

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

Selection Criteria | Selection Summary | Load Settings

Homeroom Date: 6/6/2011

Courses:  ... Add

Selected Courses	
X	396
X	050

Less Than Students:

**Sorting Options**

Grade Level (DESC)	↔	Grade Level (ASC)	↕
Student Name (DESC)	↔	Student Name (ASC)	↕
Team (ASC)	↔		
Team (DESC)			

Delivery Method: Pickup

Email Address:

Report Format: Adobe PDF

Description:

### Selected Courses

**Less Than Students** (optional) – Enter a maximum number to be used in creating the report. Only requests that have fewer than this number will be included in the report

**Sorting Options** (optional) – Choose one or more sort options for your report. All sorts are secondary to the course sort. All sorts are secondary to the course sort.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: DASL - R404		DASL HIGH SCHOOL				RUN AT 10:51 AM 3/18/2008					
SCHOOLYEAR: 2007-2008		STUDENT WHO REQUESTED A SPECIFIC COURSE				PAGE 1 OF 12					
COURSE 052		LANGUAGE ARTS									
ALTERNATE	ID	STUDENT NAME	COUNSELOR	TEAM	GN	ST	GR	HMRM	HOME DISTRICT	HDCP	TELEPHONE
	48652258	Banana, Hannah	MARK ALLEN		F	A	09	A109	044222	06	
	48652281	Contrary, Jesse	MARK ALLEN		M	A	09	A109	043877	**	
	5001	CONTRARY, MARY M.	MARK ALLEN		F	A	09		043877	03	(419) 228-7417
	6001	EYE, CORY ROBERT	MARK ALLEN		M	A	09	A109	043877	**	
	122445	EYE, PRIVA	MARK ALLEN		F	A	09	A109	043877	**	(419) 222-8888
	4001	EYE, MAGNUM P.			M	A	10	A105	043877	**	(555) 111-2222
	4002	FONT, ELLA JANE			F	A	10	A105	043877	**	

### Students Who Requested a Specific Course Report

## Students Requesting A Specific Course Pair (R405)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Students Requesting Specific Course Pair (R405)**

This report produces a list of all of the students that have a pair of requested courses. A student must have requested both courses in the pair in order for the student to show up on the report. The report will list the Alternate course pair, student's ID, name, grade, gender, homeroom, previous school, program and telephone number.

Home » SIS » Scheduling » Scheduling Reports » Students Req. Specific Course

### Students Requesting A Specific Course Pair (R405)

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

**Selection Criteria** | Selection Summary | Load Settings

**Homeroom Date:** 6/6/2011

**Course 1:**

**Course 2:**

**Delivery Method:** Pickup

**Email Address:**

**Report Format:** Adobe PDF

**Description:**

### Students Requesting A Specific Course Pair Report Parameters Screen

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom.

**Course 1** (required) – Indicate course ID for the first course that must be requested. Type in the Course ID or use the Course Selection Wizard (...) to assist and then click **Add** to add the course ID for inclusion in the report.

**Course 2** (required) – Indicate course ID for the second course that must be requested. Type in the Course ID or use the Course Selection Wizard (...) to assist and then click **Add** to add the course ID for inclusion in the report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

ALTERNATE		ID	STUDENT NAME	GR	GN	MHRM	PREV SCHOOL	PR	TELEPHONE
1	2								
		6002	FONT, MICHELLE LYNN	10	F	A105			
		6003	JONES, WHITNEY ANN	10	F	A105			
		6004	LINE, TROY AARON	10	M	A105			
		6005	MAY, DAISY LEE	10	F	A105			
		6002	FONT, MICHELLE LYNN	10	F	A105			
		6003	JONES, WHITNEY ANN	10	F	A105			
		6004	LINE, TROY AARON	10	M	A105			
		6005	MAY, DAISY LEE	10	F	A105			

**Students Requesting A Specific Course Pair Report**

## Potential Course Conflicts (R406)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Potential Course Conflicts (R406)**

This Report is used to generate a table listing each course ID against all other course IDs that have been jointly requested by one or more students, in order to determine the number of conflicts that would result if two courses were offered only one time (singleton) within the same block/period. Optionally, this report can be based on only those courses where the number of students requesting the course is less than or equal to the number specified on the requesting screen.

Course groups will be show on this report and will display Course Group number and number of requests.

Home » SIS » Scheduling » Scheduling Reports » Potential Course Conflicts (R406)

## Potential Course Conflicts (R406)

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

Selection Criteria   Selection Summary   Load Settings

Include Courses:  ... Add

Excluded Courses:  ... Add

---

**Course Types**

C - Class		
L - Lunch	← →	
Z - Study hall	⇐ ⇐	
ESC - ESC course		

**Course Groups**

1		
2	← →	
4	⇐ ⇐	
5		

**Course Grades**

09 - 09		
10 - 10	← →	
11 - 11	⇐ ⇐	
12 - 12		

**Course Department**

000 - NO DEPARTMENT		
ART - ART	← →	
BUS - BUSINESS	⇐ ⇐	
CAR - CAREER TECH		

**Sorting Options**

Department (ASC)		
Department (DESC)	← →	
Course Grade Level (ASC)	⇐ ⇐	
Course Grade Level (DESC)		

Only show courses / groups with fewer than  requests.

Exclude course groups from the report

Delivery Method: Pickup

Email Address:

Report Format: Adobe PDF

Description:

**Potential Course Conflicts Report Parameters Screen**

**Include Courses** (optional) – Indicate course ID/IDs to be included in the list of requests. Type in the Course ID or use the Course Selection Wizard (...) to assist and then click **Add** to add the course ID for inclusion in the report.

Include Courses:  ... Add

Selected Courses	
✗	301

**Including Courses**

✗ – Remove this course from the list of included courses.

**Excluded Courses** (optional) – Indicate course ID/IDs to be used to exclude from the list of requests made for the specified course/courses. Type in the Course ID or use the Course Selection Wizard (☰) to assist and then click **Add** to add the course ID for exclusion from the report.

Selected Courses	
✗	396

Excluding Courses

✗ – Remove this course from the list of excluded courses.

**Course Types** (optional) – If no Course Types are selected, the report will select all Course Types. You can also filter by selecting specific Course Type(s) for your report. Courses and artificial courses without a department will be shown on the report if their course type is selected to be shown.

**Course Groups** (optional) – If no Course Groups are selected, the report will select all Course Groups. You can also filter by selecting specific Course Group(s) for your report.

**Course Grades** (optional) – If no Course Grades are selected, the report will select all Grades. You can also filter by selecting specific Course Grades for your report.

*Note: If you filter by Course Grade Level, course groups will not be included on the report (since they have no Course Grade).*

**Course Department** (optional) – If no Course Departments are selected, the report will select all Course Departments. You can also filter by selecting specific Course Departments for your report.

*Note: If you filter by Course Department, course groups will not be included on the report (since they have no Course Department).*

**Sorting Options** (optional) – Choose one or more sort options for your report. If sort by Course Grade Level ASC is selected, the sort will use the lowest grade level for the course (since courses can have multiple grade levels). If sort by Course Grade level DESC is selected, the sort will use the highest grade level for the course.

**Only show courses / groups with fewer than**  **requests** (optional) – enter a number if you wish to select only courses where the number of students requesting the course is less than the number indicated. Leave this field blank to select all courses regardless of the number of corresponding requests.

**Exclude course groups from the report** (optional) – If checked, course groups will be excluded from the report. If unchecked, course groups will be included in the report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R406 Printed Mon, Aug 03, 2009, 10:43 AM		<b>DASL HIGH SCHOOL</b> 2009-2010									
<b>Potential Course Conflicts</b>											
<b>Course:</b> 0110 - YEARBOOK		<b>Requests:</b> 6	<b>Dept:</b> ENG	<b>Grd Lvl:</b> 09,10,11,12							
<b>No</b>	<b>Id</b>	<b>Course Name</b>	<b>No</b>	<b>Id</b>	<b>Course Name</b>	<b>No</b>	<b>Id</b>	<b>Course Name</b>	<b>No</b>	<b>Id</b>	<b>Course Name</b>
1	0111	ENG 9	2	0121	ENG 10	2	0132	ENG 11CP	1	0142	ENG 12CP
1	0148	COMMUNICATIONS	1	0209	ART Ia	1	0220	CERAMICS I	1	0323	PHYS ED II
1	0411	FRENCH I	2	0421	FRENCH II	1	0422	SPANISH II	1	0513	ALG I
1	0522	GEOM	3	0532	ALG II	1	0612	CHEMISTRY	1	0630	PHYSICAL SCI
1	0631	ADV CHEM	3	0632	ADV BIO	1	0711	WORLD STUDIES	2	0731	AM GOVT
2	0732	US STUDIES II	1	0811	AG SCI I	1	0851	AG MECH & CONST	1	0900	PERS FINANCE
1	0909	COMP OP 1	1	0910	COMP OP 2						
<b>Course:</b> 0111 - ENG 9		<b>Requests:</b> 69	<b>Dept:</b> ENG	<b>Grd Lvl:</b> 09							
<b>No</b>	<b>Id</b>	<b>Course Name</b>	<b>No</b>	<b>Id</b>	<b>Course Name</b>	<b>No</b>	<b>Id</b>	<b>Course Name</b>	<b>No</b>	<b>Id</b>	<b>Course Name</b>
1	0110	YEARBOOK	19	0209	ART Ia	9	0210	ART Ib	7	0212	CHOIR
12	0214	CHORUS-S	17	0215	BAND	17	0220	CERAMICS I	65	0323	PHYS ED II
8	0343	ISOT	27	0411	FRENCH I	34	0412	SPANISH I	22	0511	INTEGR MATH I
23	0513	ALG I	23	0522	GEOM	51	0613	CP BIO	17	0622	GEN BIO
69	0711	WORLD STUDIES	20	0811	AG SCI I	13	0909	COMP OP 1	7	1121	COMPUTER TECH I
9	1131	AV PRODUCTION									

**Potential Course Conflicts Report**

**Potential Course Conflicts Matrix (R403)**

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Potential Course Conflicts Matrix (R403)**

This report is used to generate a matrix listing each course ID against all other course ID's, in order to determine the number of conflicts that would result if two courses were offered only 1 time (singleton) within the same block/period of the day. The forecasted number of conflicts will be printed at the intersection point on the matrix corresponding to each pair of courses.

**Potential Course Conflicts Matrix Report Parameters Screen**

**Department** (optional) – If no Departments are selected, the report will select all Departments. You can also filter by selecting specific Departments for your report. NOTE: If you filter by Department, course groups will not be included on the report (since they have no Department).

**Courses** (optional) – Indicate course ID/IDs to be used to produce a list of requests made for the specified course/courses. Type in the Course ID or use the Course Selection Wizard (...) to assist and then click **Add** to add the course ID for inclusion in the report.

**Only Return Courses with Conflicts** (optional) – Allows you to display only those courses that have conflicts pertaining to prerequisites, scheduling times, etc.

**Display courses that have requests** – Allows you to select whether to display courses that have requests that are “greater than or equal to ( $\geq$ )” or “less than or equal to ( $\leq$ )” or “a particular number of your choice. The default selection is “not selected.”

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit**– Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Note:** The page numbers of this report allow the report to be used in a grid shape. The first number is the row where the page should be placed, and the second number is the column where the page should be placed. For instance, for a four-page report consisting of pages “Page 1.1 of 2,” “Page 1.2 of 2,” “Page 2.1 of 2,” and “Page 2.2 of 2,” Page 1.1 is in the upper left. Page 1.2 is to the right of Page 1.1. Page 2.1 is below Page 1.1, and Page 2.2 is to the lower right.

REPORT: DASL - R403			HIGH SCHOOL																				RUN AT 3:40 PM 4/25/2007							
SCHOOLYEAR: 2007-2008			POTENTIAL COURSE CONFLICTS MATRIX																				PAGE	1.1	OF	2				
COURSE CODE	COURSE NAME	DEPARTMENT CODE	114	120A	120B	121	128	129	140	150	154	156	159	160	168	170	182	183	184	190	190A	191	194	196	197	198	199	240	249	250
114	AMER. HISTORY	SS	44	21	1b	4	16	2/	21	21	b	6	9	3	3	3	13	14	31	6	6	3	/	2	22	1b	/	2	3	14
120A	ALGEBRA 1A	MAT	21	23	1/	b	1/	8	12	3	4	b	1	1	1	8	/	15	3	3	1	4	1	6	10	6				
120B	ALGEBRA 1B	MAT	1b	1/	1/	1	1b	b	9	1	4	b	1			6	3	10	2	2	1	3			10	6				
121	ADV. ALG. 2	MAT	4		b	4	3	3					1	1		1	1	4								4	1			
128	INTE SCI 1	SCI	16	b	1	1/		8	6	2	1	3	1	3	3	3	5	9	15	3	3		2	1	1b	1		2	2	8
129	ADV SCIENC	SCI	2/	1/	1b	4		28	13	15	3	b	/	2		10	4	18	3	3	3	3	6	1	6	1b	/		1	5
140	COMP APPLI 1	BUS	21	8	5	3	8	13	26	10	3	3	7	1		1	12	6	19	2	2	3	7	3	12	6	3	2	3	7
150	SPANISH 1	FLG	21	12	9	3	6	1b	10	22			4	3	1		8	/	18	4	4	1	1		9	11	2	1	6	
154	FRENCH 1	FLG	b	3	1	2	3	3			b		1	1		2	1	3				1	2		3	1	1	2		
156	GERMAN I	FLG	6	4	4	1	b	3			/	2				3		1				3	2	2	2	2		3		
159	TREB ENSEMB	MUS	9	5	5	1	3	7	7	4	1	2	11			5		8				4		3	3	3		3		
160	MEN'S CHORALE	MUS	3	1	1	1	1	2	1	3				3	1				1					1	2				1	

Potential Course Conflicts Matrix Screen

## Scheduling Reports

Navigation: Home – SIS – Scheduling – Scheduling Reports

Please see the Batch/Report Management documentation for more detailed information about running and viewing reports.

Home » SIS » Scheduling » Scheduling Reports

### Scheduling Reports

Please make a menu selection

<a href="#">Add/Drop Audit Report (R209)</a>	<a href="#">Stud Sched In Cor/Sec Not Another (R424)</a>
<a href="#">Class Arena Card (R418A)- SIS</a>	<a href="#">Student Arena Card (R417)</a>
<a href="#">Class Arena Card (R418B)</a>	<a href="#">Student Course Request Verify (R401)</a>
<a href="#">Class Master Schedule (R407)</a>	<a href="#">Student Request Specific Course (R404)</a>
<a href="#">Course Curriculum (CRSE)</a>	<a href="#">Student Sched In Two Assg Cor/Sec (R425)</a>
<a href="#">Course Request Labels (R206)</a>	<a href="#">Student Scheduled With Free Time (R415)</a>
<a href="#">Course Request Verification Slip (R416)</a>	<a href="#">Student Scheduling Analysis (R426)</a>
<a href="#">Location Schedule (R409)</a>	<a href="#">Students Course Requests (REQU)</a>
<a href="#">No Requests/Assignments (NORO)</a>	<a href="#">Students Req. Specific Course Pair(R405)</a>
<a href="#">Potential Course Conflicts (R406)</a>	<a href="#">Students Sched with Alt Courses (R413)</a>
<a href="#">Potential Course Conflicts Matrix (R403)</a>	<a href="#">Tally Of Student Course Requests (R402)</a>
<a href="#">Schedule Card Formatter (R701)</a>	<a href="#">Teacher Block Schedule (R427)</a>
<a href="#">Section Summary by Report Period (R807)</a>	<a href="#">Teacher Schedule (R411)</a>
<a href="#">Singleton List Conflict Report (R813-B)</a>	<a href="#">Timetable Grid (R422)</a>
<a href="#">Singleton List Report (R813-A)</a>	

Scheduling Reports Menu

## Student Scheduling Analysis (R426)

Navigation: Home – SIS – Scheduling – Scheduling Reports – Student Scheduling Analysis (R426)

The Student Scheduling Analysis is a condensed report with student scheduling results listed. The report will only display each course once, with the status from the last attempt to schedule the course.

Home » SIS » Scheduling » Scheduling Reports » Student Scheduling Analysis (R426)

### Student Scheduling Analysis (R426)

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

Selection Criteria | Selection Summary | Load Settings

Schedule: Default Schedule

Schedule Result: Default Schedule Result

Homeroom Date: 6/3/2010

**Grade**

07 - 07  
08 - 08  
09 - 09  
10 - 10

**Course Type**

C - Class  
L - Lunch  
Z - Study hall  
ESC - ESC course

**Administrative Homeroom**

AUT - RADLER (Full Year Term)  
IN01 - MILLER (Full Year Term)  
IN02 - SCHRINER (Full Year Term)  
IN03 - MOORE (Full Year Term)

**Course Term**

1st Semester  
All Year  
2nd Semester

**Counselor**

**Team**

Student Scheduling Analysis Parameters Screen (First Half of Screen)

**Membership Group**

10 - 10  
 11 - Intervention  
 12 - Post-secondary Enrollment Options  
 13 - 13

**Membership**

15 - Student received intervention provi  
 15 - Student received intervention provi  
 16 - Student placement by a district in a  
 50 - Prev. reported as a dropout in repc

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

**Only Show Students with Number of Non-Assigned Requests >=**

**Print Phone Number:**

**Compress Assigned Course Information:**

**Sorting Options**

Grade (ASC)  
 Grade (DESC)  
 Number Of Non-Assigned Requests (ASC)  
 Number Of Non-Assigned Requests (DESC)

**Delivery Method:** Pickup

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

**Description:**

**Student Scheduling Analysis Parameters Screen (Second Half of Screen)**

**Schedule** (optional/required) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this field is not selectable.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list on which you wish to base the report results. You must select a Schedule to see possible Schedule Results in this drop-down menu. If the schedule has been finalized, this field is not selectable.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Course Type**, (optional) – If no Course Types are selected, the report will select all Course Types. You can also filter by selecting specific Course Types for your report.

**Administrative Homeroom** (optional) – If no Administrative Homerooms are selected, the report will select all Administrative Homerooms. You can also filter by selecting specific Administrative Homeroom for your report.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Counselor** (optional) – If no Counselors are selected, the report will select all Counselors. You can also filter by selecting specific Counselors for your report.

**Team** (optional) – If no Teams are selected, the report will select all Teams. You can also filter by selecting specific Teams for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Membership** (optional) – If no Membership Codes are selected, the report will select all Membership Codes. You can also filter by selecting specific Membership Codes for your report.

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list.

**Only Show Students with Number of Non-Assigned Requests >=** (optional) – Indicate the minimum number of non-assigned requests to be used in creation of this report. If a number is specified then only students with at least that number of non-assigned requests will be included on the report. If none is specified then all students with non-assigned requests will be included.

**Print Phone Number** (optional) – Yes or No; Indicates if you wish for student phone numbers to be printed on the report.

**Compress Assigned Course Information** (optional) – If this box is checked, the specific non-assigned requests for each student will not be show. Instead one line for each student will be shown with the number of non-assigned requests. This gives more of a summary affect for each student.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: DASL - R426		HIGH SCHOOL			RUN AT 10:55 AM 6/3/2010		
SCHOOLYEAR: 2010-2011		STUDENT SCHEDULING ANALYSIS REPORT			PAGE 1 OF 29		
, KATHERINE		NON-ASSIGNED : 0		NUMBER : 1210	GRADE : 11	GENDER : F	HMRM:
TERM	COURSE	SEC	DESCRIPTION	DAYS	PERIOD	STATUS	
Year	931	1	ONU ALGEBRA/TRIGONOMETRY	MTWRF	1	Assigned	
Year	923	3	DIGITAL ELECTRONICS-PLTW	MTWRF	3	Assigned	
1Sem	058	41	VIDEO PRODUCTION	MTWRF	4	Assigned	
2Sem	035	42	PERSONAL MONEY MATTERS	MTWRF	4	Assigned	
Year	123	5	ENGLISH III (COLLEGE)	MTWRF	5	Assigned	
Year	202	6	STREET LAW	MTWRF	6	Assigned	
Year	184	78	COLLEGE PREP CHEMISTRY	MTWRF	7,8	Assigned	
Year	070	9	SPANISH III	MTWRF	9	Assigned	
, BRANDON		NON-ASSIGNED : 0		NUMBER : 1259	GRADE : 11	GENDER : M	HMRM:
TERM	COURSE	SEC	DESCRIPTION	DAYS	PERIOD	STATUS	
Year	133	1	MATH III	MTWRF	1	Assigned	
1Sem	219	21	CURRENT EVENTS	MTWRF	2	Assigned	
2Sem	213	22	WORLD GEOGRAPHY	MTWRF	2	Assigned	
Year	183	3	ANATOMY/PHYSIOLOGY	MTWRF	3	Assigned	
Year	066	4	GERMAN III	MTWRF	4	Assigned	
1Sem	035	51	PERSONAL MONEY MATTERS	MTWRF	5	Assigned	
2Sem	058	52	VIDEO PRODUCTION	MTWRF	5	Assigned	
Year	202	6	STREET LAW	MTWRF	6	Assigned	
Year	LUNCH	7	LUNCH	MTWRF	7	Assigned	
Year	123	8	ENGLISH III (COLLEGE)	MTWRF	8	Assigned	

### Student Scheduling Analysis Report

**Note:** The Non-Assigned column in the student section will count any record that has a status other than Assigned or Removed. Course section assignments for each student are printed in period order using the Sort Order for the Period.

## Students Scheduled with Free Time (R415A)

### Navigation: Home – SIS – Scheduling – Scheduling Reports – Students Scheduled With Free Time (R415A)

This report generates a list of students or only totals of students with free time available. This enables the school to determine how many study halls may be needed to accommodate student's free time.

Home » SIS » Scheduling » Scheduling Reports » Student Scheduled With Free Time (R415A)

## Student Scheduled With Free Time (R415-A)

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

Selection Criteria   Selection Summary   Load Settings

Schedule: -- Select a Schedule --

Schedule Result:  ⚡

Homeroom Date: 2/13/2009  ⚡

---

**Grade**

07 - 07	⬆	⬅	➡	
08 - 08	⬆	⬅	➡	
09 - 09	⬆	⬅	➡	
10 - 10	⬆	⬅	➡	

**Student Status**

A - ACTIVE RES	⬆	⬅	➡	
D - DELETED	⬆	⬅	➡	
I - INACTIVE	⬆	⬅	➡	
N - NON-RES	⬆	⬅	➡	

**Schedule Term**

08/26/2009	⬆	⬅	➡	
11/02/2009	⬆	⬅	➡	
01/25/2010	⬆	⬅	➡	
03/29/2010	⬆	⬅	➡	

**Period**

Period 1	⬆	⬅	➡	
Period 2	⬆	⬅	➡	
Period 3	⬆	⬅	➡	
Period 4	⬆	⬅	➡	

**Membership**

15 - Student received intervention provide	⬆	⬅	➡	
15 - Student received intervention provide	⬆	⬅	➡	
16 - Student placement by a district in a c	⬆	⬅	➡	
50 - Prev. reported as a dropout in report	⬆	⬅	➡	

**Membership Group**

12 - Post-secondary Enrollment Options F	⬆	⬅	➡	
13 - Other Regular Programs	⬆	⬅	➡	
20 - Specialized Instructions	⬆	⬅	➡	
21 - Placement Options	⬆	⬅	➡	

Ad-Hoc Membership: -- Select an Ad-Hoc Membership --

Public And Private

Minimum Free Periods in a Schedule Term for Student to Appear On Report:

Print Only Totals:

---

**Sorting Options**

Grade (ASC)	⬆	⬅	➡	
Grade (DESC)	⬆	⬅	➡	
Student Name (ASC)	⬆	⬅	➡	
Student Name (DESC)	⬆	⬅	➡	

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Student Scheduled With Free Time Report Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this field is not selectable.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list which you wish to base the report results on. If the schedule has been finalized, this field is not selectable.

**Homeroom Date** (required) – Specify the date to use to retrieve student’s homeroom

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Student Status** (optional) – If no Student Status is selected, the report will select all Student Status codes. You can also filter by selecting specific Student Status codes for your report.

**Schedule Term** (optional) – If no Schedule Terms are selected, the report will select all Schedule Terms. You can also filter by selecting specific Schedule Terms for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Membership Groups** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list.

**Minimum Free Periods in a Schedule Term for Student to Appear on Report** (optional) – If a number of Minimum Free Periods is not entered, the report will select all students with a free period. You can also filter by entering a minimum number of free periods for your report.

**Print Only totals** (optional) – Yes or No; indicates if you wish to print only total number of students with free time during the various periods of the day, versus printing detailed summary info.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R415 Printed Mon, Feb 16, 2009, 3:37 PM										HIGH SCHOOL 2008-2009					
										Student Scheduled With Free Time					
Student Number	Student Name	St	Gr	Gd	HmRm	Disability Condition	Dist of Res	Period	Rotation Days	Schedule Terms					
										08/27/2008	11/10/2008	01/27/2009	03/30/2009		
2624	Student67819, SPENCER	A	07	M	204	**	AV								
								2	MTWRF	X					
								6	MTWRF	X					
								E	MTWRF	X	X	X	X		
3061	Student67813, ANTHONY	R	11	M		01	AV								
								1	MTWRF	X	X	X	X		
								2	MTWRF	X	X	X	X		
								3	MTWRF	X	X	X	X		
								4	MTWRF	X	X	X	X		
								5	MTWRF	X	X	X	X		
								6	MTWRF	X	X	X	X		
								7	MTWRF	X	X	X	X		
								8	MTWRF	X	X	X	X		
								E	MTWRF	X	X	X	X		

**Students Scheduled With Free Time Report**

## Students Scheduled with Free Time by Period (R415B)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Students Scheduled With Free Time by Period (R415B)**

This report generates a list of students or only totals of students with free time available, sorted by period. This enables the school to determine how many study halls may be needed to accommodate student's free time.

Home » SIS » Scheduling » Scheduling Reports » Student Scheduled w/FT by Period (R415B)

## Student Scheduled With Free Time by Period (R415-B)

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

Selection Criteria   Selection Summary   Load Settings

**Schedule:** -- Select a Schedule --

**Schedule Result:** [v] ⚡

**Homeroom Date:** 2/16/2009 [v] ⚡

---

**Grade**

07 - 07	[^]	
08 - 08	[v]	
09 - 09	[v]	
10 - 10	[v]	

**Student Status**

A - ACTIVE RES	[^]	
D - DELETED	[v]	
I - INACTIVE	[v]	
N - NON-RES	[v]	

**Schedule Term**

08/25/2009	[^]	
09/29/2009	[v]	
11/02/2009	[v]	
12/07/2009	[v]	

**Period**

Period 1	[^]	
Period 2	[v]	
Period 3	[v]	
Period 4	[v]	

**Membership**

15 - Student received intervention provide	[^]	
15 - Student received intervention provide	[v]	
16 - Student placement by a district in a c	[v]	
50 - Prev. reported as a dropout in report	[v]	

**Membership Group**

12 - Post-secondary Enrollment Options F	[^]	
13 - Other Regular Programs	[v]	
20 - Specialized Instructions	[v]	
21 - Placement Options	[v]	

---

**Ad-Hoc Membership:** -- Select an Ad-Hoc Membership --

Public And Private

---

**Minimum Free Periods in a Schedule Term for Student to Appear On Report:** [ ]

**Print Only Totals:**

---

**Sorting Options**

Grade (ASC)	[^]	
Grade (DESC)	[v]	
Student Name (ASC)	[v]	
Student Name (DESC)	[v]	

---

**Delivery Method:** Pickup [v]

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF [v]

---

**Description:** [ ]

Students Schedule With Free Time by Period Report Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this field is not selectable.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list which you wish to base the report results on. If the schedule has been finalized, this field is not selectable.

**Homeroom Date** (required) – Specify the date to use to retrieve student’s homeroom.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Student Status** (optional) – If no Student Status is selected, the report will select all Student Status codes. You can also filter by selecting specific Student Status codes for your report.

**Schedule Term** (optional) – If no Schedule Terms are selected, the report will select all Schedule Terms. You can also filter by selecting specific Schedule Terms for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Membership** (optional) – If no Memberships are selected, the report will select all Memberships. You can also filter by selecting specific Memberships for your report.

**Membership Groups** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Ad-Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check the Public And Private check box to see Memberships created by other users in your drop-down list.

**Minimum Free Periods in a Schedule Term for Student to Appear on Report** (optional) – If a number of Minimum Free Periods is not entered, the report will select all students with a free period. You can also filter by entering a minimum number of free periods for your report.

**Print Only totals** (optional) – Yes or No; indicates if you wish to print only total number of students with free time during the various periods of the day, versus printing detailed summary info.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R415B		HIGH SCHOOL											
Printed Mon, Feb 16, 2009, 3:40 PM		2008-2009											
Student Scheduled With Free Time by Period													
Period	Student Number	Student Name	St	Gr	Gd	HmRm	Disability Condition	Dist of Res	Rotation Days	Schedule Terms			
										08/27/2008	11/10/2008	01/27/2009	03/30/2009
6	2597	Student67847, BILLIE	I	09	F	**	AV	MTWRF	X	X	X	X	
	2608	Student67836, GENE	A	07	M	202B	**	AV	MTWRF	X	X		
	2613	Student67830, MICHAELA	R	08	F	**	AV	MTWRF	X	X	X	X	
	2616	Student67827, FELIX	A	07	M	204	**	AV	MTWRF	X	X		
	2619	Student67824, JESSICA	A	07	F	208	**	AV	MTWRF		X	X	
	2623	Student67820, ROXANNA	A	07	F	208	**	AV	MTWRF	X			
	2624	Student67819, SPENCER	A	07	M	204	**	AV	MTWRF	X			
	3061	Student67813, ANTHONY	R	11	M	01	AV	MTWRF	X	X	X	X	
	3222	Student67732, EMILY	A	12	F	CAFE	**	AV	MTWRF		X	X	
	3226	Student67728, NATASHA	I	13	F	**		MTWRF	X	X	X	X	
	3252	Student67708, BRANDON	I	13	M	**	AV	MTWRF	X	X	X	X	
	3265	Student67698, JUSTIN	R	11	M	**	AV	MTWRF	X	X	X	X	
	3324	Student67683, CORY	R	09	M	03	AV	MTWRF	X	X	X	X	
	3330	Student67679, PHILLIP	R	11	M	**	AV	MTWRF	X	X	X	X	
	3338	Student67673, AMANDA	A	12	F	CAFE	**	AV	MTWRF		X	X	

**Students Scheduled With Free Time by Period Report**

## Student Scheduled In Two Assigned Courses/Sections (R425)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Student Scheduled In Two Assigned Course/Sec (R425)**

This report generates a list of students who are assigned to a specific course and then also have been assigned to any one or more of additional selected courses.

Home » SIS » Scheduling » Scheduling Reports  
 » Student Sched In Two Assg Cor/Sec (R425) Advanced Search | Feedback | Mgmt

### Students Scheduled Into Two Assigned Course/Section (R425)

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

Selection Criteria   Selection Summary   Load Settings

**Schedule:** -- Select a Schedule --

**Schedule Result:** [v] ⚡

**Homeroom Date:** 8/11/2008 [v] ⚡

**Primary Course:** 052 - LANGUAGE ARTS [v]

**Secondary Course**

052 - LANGUAGE ARTS	↕	↔	
182 - FRENCH I	↕	↔	
200 - YEARBOOK II	↕	↔	
2007 - ART	↕	↔	

**Print Only Totals:**

**Sorting Options**

Student Name (ASC)	↕	↔		↕
Student Name (DESC)	↕	↔		
Grade (ASC)	↕	↔		
Grade (DESC)	↕	↔		

**Delivery Method:** Pickup [v]

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF [v]

**Description:** [text box]

#### Students Scheduled Into Two Assigned Course/Section Report Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this field is not selectable.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list which you wish to base the report results on. If the schedule has been finalized, this field is not selectable.

**Primary Course** (required) – Select the primary course that students are assigned a section for comparison to the secondary course.

**Secondary Course** (optional) – Select the secondary course(s) to be used in conjunction with the primary course, to find students assigned both courses

**Print only totals** (optional) – Yes or No; Indicates if you wish to print only total number of students scheduled into the specified courses.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)



**Schedule** (optional) – Select the schedule from the drop-down for which you wish to run this report. This is only modifiable until the schedule is finalized.

**Schedule Result** (required) – Select the Schedule Result from the drop-down for which you wish to run this report. This is only modifiable until the schedule is finalized.

**Homeroom Date** (required) – Specify the date to use to retrieve student’s homeroom. Defaults to today’s date.

**Course Scheduled** (optional) – Indicate the course into which the students have been scheduled. May type in Course and section or use Course Selection Wizard to find the course.

**Course Not Scheduled** (optional) – Indicate the course into which the students have NOT been scheduled. May type in Course and section or use Course Selection Wizard to find the course.

Click **Add Course Pair** to add the selected course pairs to the report. Continue to add as many course pairs as needed for this run of the report.

Course Scheduled:	933	2	...	Course Not Scheduled:	936	6	...	Add Course Pair
Course Scheduled	Course Section	Course Not Scheduled	Course Section					
✗ 933	2	936	6					

**Add a Course Pair**

**Print Student Phone Number** (optional) – Yes or No; Indicates if you wish for student phone numbers to be printed on the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

REPORT: DASL - R424		DASL HIGH SCHOOL				RUN AT 1:36 PM 3/9/2005	
STUDENTS SCHEDULED INTO ONE COURSE/SECTION AND NOT ANOTHER						PAGE 1 OF 1	
SCHOOLYEAR: 2004-2005		COURSE 1: 182		SECT NO: 3		AND NOT COURSE 2: 181	
						SECT NO: 1	
ID	STUDENT NAME	GR	GN	HHRM	PR	COUNSELLOR	
7009	RING, NICOLE SUZANNE	09	F	A103			
7001	CONTRARY, JASON WILLIAM	09	M	A103			
7002	FERRY, RICHARD MATTHE (RICH)	09	M	A103			
7004	SARGENT, LEANN JEAN	09	F	A103			
7005	WILLIAMSON, RYAN SETH	09	M	A103			

**Students Scheduled Into One Course/Section and Not Another Report**

## Teacher Block Schedule (R427)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Teacher Block Schedule (R427)**

This report is used to generate a block schedule for a single teacher, or all teachers. It indicates the courses that they are scheduled to teach within a specified time period. Teacher block schedules are formatted so that a copy could be mailed to each teacher showing his/her schedule before school starts.

Home » SIS » Scheduling » Scheduling Reports » Teacher Block Schedule (R427)

## Teacher Block Schedule (R427)

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

Selection Criteria   Selection Summary   Load Settings

Schedule:  ⚡

Schedule Result:  ⚡

Only Display Free Teacher Meeting Times:

Print One Teacher Per Page:

**Staff**

ROBERT MR. KIMBERLY HOPE	← →	
-----------------------------------	-----	--

**Course Term**

1st Semester All Year 2nd Semester	← →	
--	-----	--

**Period**

0 1 2 IN	← →	
-------------------	-----	--

**Sorting Options**

Teacher Name (DESC) Teacher Code (ASC) Teacher Code (DESC)	← →	Teacher Name (ASC)	↑ ↓
--	-----	--------------------	-----

Output:  Report  Labels  Both Report and Labels

Label Type:

Delivery Method:

Email Address:

Report Format:

Description:

### Teacher Block Schedule Report Parameters Screen

**Schedule** (required) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule.

**Schedule Result** (required) – Select a Schedule Result to which to limit the results.

**Only Display Free Teacher Meeting Times** (optional) – Yes or No; indicates whether to only include teachers with free time on the report. Those with full schedules would not be included if checked.

**Print One Teacher Per Page** (optional) – Yes or No; indicates whether schedules are to be printed on separate pages for distribution to each teacher.

**Staff** (optional) – If no Staff members are selected, the report will select all Staff. You can also filter by selecting specific Staff members for your report.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** (optional) – Select one option for the intended output for this run of the report. Options are Report, Labels or both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Note:** *Since this report is used for teachers, to print labels for mailing purposes, the teacher's address information must be available on the teacher's maintenance screen.*

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Teacher Code: BOYE Name: JEFF BOYER

Rotation Days										
Monday 1	Tuesday 1	Wednesday 1	Thursday 1	Friday 1	Monday 2	Tuesday 2	Wednesday 2	Thursday 2	Friday 2	
AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:	AP AM HISTORY Code: 255 Sec: 3 113 M: F: T:
5										
6										
7										
8 Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	Comp Code: Comp Sec: 2 111 M: F: T:	
9 Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	Comp Code: Comp Sec: 1 144 M: F: T:	

**Teacher Block Schedule Report**

**Timetable Grid (R422)**

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Timetable Grid (R422)**

The R422 will show a grid (similar to R427 Teacher Block Schedule) of courses and when they meet by period. The R422 can be run by Teacher or Course (the filters change depending on the option chosen).

The R422 handles all possible course section meeting time scenarios including the following:

**Basic Meeting Times:** Course section meeting times must have the same teacher and location on all rotation days defined for the school. R422 handles the following basic meeting time scenarios:

- One period
- Multiple periods contiguous
- Multiple periods non-contiguous

**Intermediate Meeting Times:** Course section meeting times must be the same for all schedule terms, but the course section can have multiple teachers and/or locations, different periods for different rotation days. R422 handles the following intermediate meeting time scenarios:

- One period on all rotation days
- One period on each rotation day but not the same period on all days
- Multiple periods contiguous and the same set of periods on all days
- Multiple periods contiguous but not the same contiguous periods on all days

- Multiple periods non-contiguous and the same set of periods on all days
- Multiple periods non-contiguous but not the same non-contiguous periods on all days
- Same teacher and location in all periods on all days
- Same teacher in all periods on all days but not the same location in all periods on all days
- Same location in all periods on all days but not the same teacher in all periods on all days
- Not the same location in all periods on all days and not the same teacher in all periods on all days

**Advanced meeting times:** Meeting times can be different for each schedule term; otherwise, the same variations are possible as with intermediate meeting time. R422 handles the following advanced meeting time scenarios:

- Multiple periods but not the same periods in all schedule terms
- Same teacher in all periods in all schedule terms, but not the same location in all periods in all schedule terms
- Same location in all periods in all schedule terms, but not the same teacher in all periods in all schedule terms

Home » SIS » Scheduling » Scheduling Reports » Timetable Grid (R422)

## Timetable Grid (R422)

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

Selection Criteria   Selection Summary   Load Settings

Schedule: -- Select a Schedule --

Schedule Result: [v]

Show Grid by Teachers or Courses:  Teachers  Courses

Show Grid by Course Terms or Schedule Terms:  Course Terms  Schedule Terms

Course Section Start and Stop Dates:  Show Dates only for Course Sections with Advanced Meeting Times  
 Show Dates for all Course Sections  
 Don't Show Dates for any Course Sections

**Staff**

MARCIA ALLEN MARK ALLEN RYAN ALLSS CINDY AMON	← →	
--	-----	--

**Course Term**

1st Semester All Year 2nd Semester	← →	
--	-----	--

**Period**

1 2 3 3A	← →	
-------------------	-----	--

**Additional Fields To Display**

Department Subject Area Area Of Study Course Grade Level	← →	
---	-----	--

Print One Teacher/Course Per Page:

Paper Kind: Letter

**Sorting Options**

Teacher Name (DESC) Teacher Code (ASC) Teacher Code (DESC)	← →	Teacher Name (ASC)	↑ ↓
--	-----	--------------------	-----

Delivery Method: Pickup

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description: [ ]

**Timetable Grid (By Teachers) Report Parameters Screen**

Home » SIS » Scheduling » Scheduling Reports » Timetable Grid (R422)

## Timetable Grid (R422)

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

Selection Criteria | Selection Summary | Load Settings

Schedule: -- Select a Schedule --

Schedule Result: [v]

Show Grid by Teachers or Courses:  Teachers  Courses

Show Grid by Course Terms or Schedule Terms:  Course Terms  Schedule Terms

Course Section Start and Stop Dates:  Show Dates only for Course Sections with Advanced Meeting Times  
 Show Dates for all Course Sections  
 Don't Show Dates for any Course Sections

**Course**

052 - LANGUAGE ARTS  
182 - FRENCH I  
200 - YEARBOOK II  
2007 - ART

**Course Term**

1st Semester  
All Year  
2nd Semester

**Period**

1  
2  
3  
3A

**Department**

ADM - ADMINISTRATIVE  
ART - ART  
ATH - ATHLETIC  
BUS - BUSINESS

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Subject Area**

COM - COMM/SPEECH  
ELE - ELECTIVE  
ENG - ENGLISH  
FA - FINE ARTS

**Course Area Of Study**

ART - ART  
BUS - BUSINESS  
COM - COMMUNICATIONS  
ENG - ENGLISH

**Course Type**

Class  
Lunch  
Study hall  
ESC course

**Additional Fields To Display**

Department  
Subject Area  
Area Of Study  
Course Grade Level

Print One Course Per Page:

Paper Kind: Letter

**Sorting Options**

Course Short Name (ASC)  
Course Short Name (DESC)  
Course Code (DESC)  
Department (ASC)

Course Code (ASC)

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:** [text box]

Timetable Grid (By Courses) Report Parameters Screen

**Schedule** (required) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule.

**Schedule Result** (optional) – Select a Schedule Result to which to limit the results.

**Show Grid by Teachers or Courses** (required)

If Teachers is chosen, then a separate grid is shown for each selected teacher with a column for each period for the school. The report filter criteria available in Teacher mode are Staff, Course Terms and Periods.

If Courses is chosen, then a separate grid is shown for each selected course with a column for each period for the school. The report filter criteria available in Courses mode are Courses, Course Terms or Schedule Terms, Periods, Departments, Course Grades, Subject Areas, Areas of Study, Course Types.

**Show Grid by Course Terms or Schedule Terms** (required) – If Course Terms is chose, then a separate row is shown for each course term in which the teacher/course has course sections. If the Schedule Terms option is chosen, then a separate row is shown for each schedule term in which a teacher/course has course sections.

**Course Section Start and Stop Dates** (required if Course Terms is selected) – If the Course Term option is selected above, then an additional set of Course Section Start and Stop Dates options is displayed. Most course sections last for the entire duration of the course term to which they belong, so the start and stop date information for the course section would be redundant. However, for course sections that only meet for part of the course term, the start and top date information is useful. The user can choose from the following options regarding Course Section Start and Stop Dates:

- Show Dates only for Course Sections with Advanced Meeting Times
- Show Dates for all Course Sections
- Don't Show Dates for any Course Sections

**Staff** (optional – Teacher option only) – If no Staff members are selected, the report will select all Staff. You can also filter by selecting specific Staff members for your report.

**Course** (optional – Courses option only) – If no Courses are selected, the report will select all Courses. You can also filter by selecting specific Courses for your report.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Department** (optional – Courses option only) – If no Departments are selected, the report will select all Departments. You can also filter by selecting specific Departments for your report.

**Grade** (optional – Courses option only) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report. This refers to the Grade on the Course Master.

**Subject Area** (optional – Courses option only) – If no Subject Areas are selected, the report will select all Subject Areas. You can also filter by selecting specific Subject Areas for your report. This refers to the Subject Area on the Course Master.

**Course Area of Study** (optional – Courses option only) – If no Course Area of Study are selected, the report will select all Course Area of Studies. You can also filter by selecting specific Course Area of Studies for your report. This refers to the Course Area of Study on the Course Master.

**Course Type** (optional – Courses option only) – If no Course Type are selected, the report will select all Course Type. You can also filter by selecting specific Course Types for your report.

**Additional Fields to Display** (optional) – Choose to display Departments, Course Grades, Subject Areas, Areas of Study and/or Course Types.

**Print One Teacher/Course Per Page** (optional) – If this option is selected, then each teacher/course starts on a new page. If the option is not selected, then as many teachers/courses as possible are put onto each report page.

**Paper Kind** (required) – Choose whether the report width is formatted for Letter or Legal size paper. This option is mainly for those schools that have a large number of periods, such that the width of the column for each period would not be wide enough when shown on Letter size paper. The default is Letter.

**Sorting Options** (optional) – Choose one or more sort options for your report. The sort options in Teacher mode are Teacher Name and Teacher Code. The sort options in Courses mode are Course Code, Course Short Name, Department, Course Grade, Subject Area, Areas of Study and Course Type.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Term	Periods											
	1	2	3	4	5	6	7	8	9	10	11	A
Teacher Code Teac Name Test Teacher												
Semester 1	MTWRF MONEY MGMT. Code: 0511 Sec: 1 Room: 302 15 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 5 Room: 302 13 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 1 Room: 302 15 Students			MTWRF INTRO. TO BUS. Code: 0505 Sec: 6 Room: 302 22 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 6 Room: 302 22 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 7 Room: 302 12 Students		MTWRF INTRO. TO BUS. Code: 0505 Sec: 7 Room: 302 12 Students		
All Year											MTWRF ACCT 1 Code: 0501 Sec: 2 Room: 301 21 Students	
Semester 2	MTWRF INTRO. TO BUS. Code: 0505 Sec: 2 Room: 302 12 Students	MTWRF MONEY MGMT. Code: 0511 Sec: 5 Room: 302 23 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 3 Room: 302 21 Students			MTWRF INTRO. TO BUS. Code: 0505 Sec: 4 Room: 302 17 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 4 Room: 302 17 Students		MTWRF INTRO. TO BUS. Code: 0505 Sec: 8 Room: 302 29 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 8 Room: 302 29 Students		

### Teacher Mode - Course Term Mode

Term	Periods											
	1	2	3	4	5	6	7	8	9	10	11	A
Teacher Code Teac Name Test Teacher												
8/23/2007	MTWRF MONEY MGMT. Code: 0511 Sec: 1 Room: 302 15 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 5 Room: 302 13 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 1 Room: 302 15 Students			MTWRF INTRO. TO BUS. Code: 0505 Sec: 6 Room: 302 22 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 6 Room: 302 22 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 7 Room: 302 12 Students		MTWRF INTRO. TO BUS. Code: 0505 Sec: 7 Room: 302 12 Students	MTWRF ACCT 1 Code: 0501 Sec: 2 Room: 301 21 Students	
10/27/2007	MTWRF MONEY MGMT. Code: 0511 Sec: 1 Room: 302 15 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 5 Room: 302 13 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 1 Room: 302 15 Students			MTWRF INTRO. TO BUS. Code: 0505 Sec: 6 Room: 302 22 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 6 Room: 302 22 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 7 Room: 302 12 Students		MTWRF INTRO. TO BUS. Code: 0505 Sec: 7 Room: 302 12 Students	MTWRF ACCT 1 Code: 0501 Sec: 2 Room: 301 21 Students	
1/19/2008	MTWRF INTRO. TO BUS. Code: 0505 Sec: 2 Room: 302 12 Students	MTWRF MONEY MGMT. Code: 0511 Sec: 5 Room: 302 23 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 3 Room: 302 21 Students			MTWRF INTRO. TO BUS. Code: 0505 Sec: 4 Room: 302 17 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 4 Room: 302 17 Students		MTWRF INTRO. TO BUS. Code: 0505 Sec: 8 Room: 302 29 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 8 Room: 302 29 Students	MTWRF ACCT 1 Code: 0501 Sec: 2 Room: 301 21 Students	
4/5/2008	MTWRF INTRO. TO BUS. Code: 0505 Sec: 2 Room: 302 12 Students	MTWRF MONEY MGMT. Code: 0511 Sec: 5 Room: 302 23 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 3 Room: 302 21 Students			MTWRF INTRO. TO BUS. Code: 0505 Sec: 4 Room: 302 17 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 4 Room: 302 17 Students		MTWRF INTRO. TO BUS. Code: 0505 Sec: 8 Room: 302 29 Students	MTWRF INTRO. TO BUS. Code: 0505 Sec: 8 Room: 302 29 Students	MTWRF ACCT 1 Code: 0501 Sec: 2 Room: 301 21 Students	

### Teacher Mode - Schedule Term Mode

Term	Periods											
	1	2	3	4	5	6	7	8	9	10	11	A
Course Code 0505 Name INTRO. TO BUS.												
Semester 1		MTWRF Teacher Code: Teac Sec: 5 Room: 302 13 Students	MTWRF Teacher Code: Teac Sec: 1 Room: 302 15 Students			MTWRF Teacher Code: Teac Sec: 6 Room: 302 22 Students	MTWRF Teacher Code: Teac Sec: 6 Room: 302 22 Students	MTWRF Teacher Code: Teac Sec: 7 Room: 302 12 Students		MTWRF Teacher Code: Teac Sec: 7 Room: 302 12 Students		
Semester 2	MTWRF Teacher Code: Teac Sec: 2 Room: 302 12 Students		MTWRF Teacher Code: Teac Sec: 3 Room: 302 21 Students			MTWRF Teacher Code: Teac Sec: 4 Room: 302 17 Students	MTWRF Teacher Code: Teac Sec: 4 Room: 302 17 Students		MTWRF Teacher Code: Teac Sec: 8 Room: 302 29 Students	MTWRF Teacher Code: Teac Sec: 8 Room: 302 29 Students		

### Course Mode - Course Term Mode

**Course Mode - Schedule Term Mode**

Term	Periods											
	1	2	3	4	5	6	7	8	9	10	11	A
Course Code 0505      Name INTRO. TO BUS.												
8/23/2007		MTWRF Teacher Code: Teac Sec: 5 Room: 302 13 Students	MTWRF Teacher Code: Teac Sec: 1 Room: 302 15 Students			MTWRF Teacher Code: Teac Sec: 6 Room: 302 22 Students	MTWRF Teacher Code: Teac Sec: 6 Room: 302 22 Students	MTWRF Teacher Code: Teac Sec: 7 Room: 302 12 Students		MTWRF Teacher Code: Teac Sec: 7 Room: 302 12 Students		
10/27/2007		MTWRF Teacher Code: Teac Sec: 5 Room: 302 13 Students	MTWRF Teacher Code: Teac Sec: 1 Room: 302 15 Students			MTWRF Teacher Code: Teac Sec: 6 Room: 302 22 Students	MTWRF Teacher Code: Teac Sec: 6 Room: 302 22 Students	MTWRF Teacher Code: Teac Sec: 7 Room: 302 12 Students		MTWRF Teacher Code: Teac Sec: 7 Room: 302 12 Students		
1/19/2008	MTWRF Teacher Code: Teac Sec: 2 Room: 302 12 Students		MTWRF Teacher Code: Teac Sec: 3 Room: 302 21 Students			MTWRF Teacher Code: Teac Sec: 4 Room: 302 17 Students	MTWRF Teacher Code: Teac Sec: 4 Room: 302 17 Students		MTWRF Teacher Code: Teac Sec: 8 Room: 302 29 Students	MTWRF Teacher Code: Teac Sec: 8 Room: 302 29 Students		
4/5/2008	MTWRF Teacher Code: Teac Sec: 2 Room: 302 12 Students		MTWRF Teacher Code: Teac Sec: 3 Room: 302 21 Students			MTWRF Teacher Code: Teac Sec: 4 Room: 302 17 Students	MTWRF Teacher Code: Teac Sec: 4 Room: 302 17 Students		MTWRF Teacher Code: Teac Sec: 8 Room: 302 29 Students	MTWRF Teacher Code: Teac Sec: 8 Room: 302 29 Students		

**Course Mode - Schedule Term Mode**

**Class Arena Card (R418A) – SIS**

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Class Arena Card (R418A) - SIS**

This report is used to create Class Arena Cards used in Arena Scheduling.

Home » SIS » Scheduling » Scheduling Reports » Class Arena Card (R418A)- SIS

## Class Arena Card (R418A)- SIS

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

Selection Criteria   Selection Summary   Load Settings

Schedule: -- Select a Schedule --

**Course Type**

D00 - Interactive Distance Learning - Spec  
D01 - Special Education (Not to be used f  
D02 - Home Instruction (Special Educat  
D08 - Center-Based Class for Preschool S

**Course**

052 - LANGUAGE ARTS  
182 - FRENCH I  
200 - YEARBOOK II  
2007 - ART

**Course Section**

1  
2  
3  
4

**Course Term**

1st Semester  
All Year  
2nd Semester

Print Number Of Cards Per Remaining Capacity Plus Extra Cards Percent Of Total Capacity:

Include Artificial Courses:

**Sorting Options**

Teacher Name (ASC)  
Teacher Name (DESC)  
Course Code (DESC)  
Course Section (DESC)

Course Code (ASC)  
Course Section (ASC)

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

### Class Arena Card Report Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule.

**Course Type** (optional) – If no Course Types are selected, the report will select all Course Types. You can also filter by selecting specific Course Types for your report.

**Course** (optional) – If no Courses are selected, the report will select all Courses. You can also filter by selecting specific Courses for your report.

**Course Section** (optional) – If no Course Sections are selected, the report will select all Course Sections. You can also filter by selecting specific Course Sections for your report.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Print Number of Cards Per Remaining Capacity Plus Extra Cards Percent Of Total Capacity** (optional) – Indicate a percentage of cards OVER the available seating capacity of courses that you wish to be created by the report. If left blank no additional cards will be created, only enough for the specified capacity.

**Include Artificial Courses** (optional) – Yes or No; Indicates if you wish include artificial course types in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

CLASS	CRSE:	052	RUN AT 3:05 PM 2/14/2008		
ARENA	SECT:	3	Term:	Days:	PRD:
CARD	TEAC:	LAURA LAYMAN	Year	M1, T1, W1, R1, 1	
				F1, M2, T2, W2,	
				R2, F2	
			Year	M1, T1, W1, R1, 2	
				F1, M2, T2, W2,	
				R2, F2	
R418A	SEAT:	1			
	OF:	30			
CLASS	CRSE:	052	RUN AT 3:05 PM 2/14/2008		
ARENA	SECT:	3	Term:	Days:	PRD:
CARD	TEAC:	LAURA LAYMAN	Year	M1, T1, W1, R1, 1	
				F1, M2, T2, W2,	
				R2, F2	
			Year	M1, T1, W1, R1, 2	
				F1, M2, T2, W2,	
				R2, F2	
R418A	SEAT:	2			
	OF:	30			
CLASS	CRSE:	052	RUN AT 3:05 PM 2/14/2008		
ARENA	SECT:	3	Term:	Days:	PRD:
CARD	TEAC:	LAURA LAYMAN	Year	M1, T1, W1, R1, 1	
				F1, M2, T2, W2,	
				R2, F2	
			Year	M1, T1, W1, R1, 2	
				F1, M2, T2, W2,	
				R2, F2	

**Class Arena Report**

## Class Arena Card (R418B)

Navigation: Home – SIS – Scheduling – Scheduling Reports – Class Arena Card (R418B)

This report is used to create Class Arena Cards used in Arena Scheduling.

Home > SIS > Scheduling > Scheduling Reports > Class Arena Card (R418B)

### Class Arena Card (R418B)

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

Selection Criteria | Selection Summary | Load Settings

Schedule: -- Select a Schedule --

**Course Type**

D00 - Interactive Distance Learning - Spec  
D01 - Special Education (Not to be used f  
D02 - Home Instruction (Special Educatior  
D08 - Center-Based Class for Preschool S

**Course**

052 - LANGUAGE ARTS  
182 - FRENCH I  
200 - YEARBOOK II  
2007 - ART

**Course Section**

1  
2  
3  
4

**Course Term**

1st Semester  
All Year  
2nd Semester

Print Number Of Cards Per Remaining Capacity Plus Extra Cards Percent Of Total Capacity:

Include Artificial Courses:

**Sorting Options**

Teacher Name (ASC)  
Teacher Name (DESC)  
Course Code (DESC)  
Course Section (DESC)

Course Code (ASC)  
Course Section (ASC)

Delivery Method: Pickup Set As Default

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

Submit

### Class Arena Card Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule.

**Course Type** (optional) – If no Course Types are selected, the report will select all Course Types. You can also filter by selecting specific Course Types for your report.

**Course** (optional) – If no Courses are selected, the report will select all Courses. You can also filter by selecting specific Courses for your report.

**Course Section** (optional) – If no Course Sections are selected, the report will select all Course Sections. You can also filter by selecting specific Course Sections for your report.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Print Number of Cards Per Remaining Capacity Plus Extra Cards Percent Of Total Capacity** (optional) – Indicate a percentage of cards OVER the available seating capacity of courses that you wish to be created by the report. If left blank no additional cards will be created, only enough for the specified capacity.

**Include Artificial Courses** (optional) – Yes or No; Indicates if you wish include artificial course types in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: DASL - R418	DASL HIGH SCHOOL		RUN AT 3:06 PM 2/14/2008	
SCHOOLYEAR: 2007-2008	CLASS ARENA CARD		PAGE 1	OF 104
CRSE: 052	TEACHER: LAURA LAYMAN	Term:	Days:	PRD:
SECT: 1	SEATS: 30	OF: 30	1Sem	1
			M1, T1, W1, R1, F1, M2, T2, W2, R2, F2	
Place Label Here	Place Label Here	Place Label Here		
Place Label Here	Place Label Here	Place Label Here		

**Class Arena Card**

## Student Arena Card (R417)

Navigation: Home – SIS – Scheduling – Scheduling Reports – Student Arena Card (R417)

This Report will create course request cards for students for use in Arena Scheduling.

Home » SIS » Scheduling » Scheduling Reports » Student Arena Card (R417)

### Student Arena Card (R417)

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

Selection Criteria | Selection Summary | Load Settings

Homeroom Date: 8/11/2008

Calendar Date:

Grade

09 - 09  
10 - 10  
11 - 11  
12 - 12

Select Only Students Who Have Any Requests:

Number Of Cards Printed For Selected Students:

- OR -

Print The Requested Course On Each Card:

Number Of Cards Printed In Addition To The Above Cards:

Sorting Options

Homeroom (ASC)  
Homeroom (DESC)  
Grade (ASC)  
Grade (DESC)

Delivery Method: Pickup

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

### Student Arena Card Parameters Screen

**Homeroom Date** (required) – Specify the date to use to retrieve student’s homeroom. Defaults to today’s date.

**Calendar Date** (optional) – Specify the date to use to retrieve student’s calendar.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Select Only Students Who Have Any Requests** (optional) – Yes or No; Indicates if you want only students with at least one request to be included in the report.

**Number of Cards Printed for Selected Students** (optional) – Indicate the number of cards to be printed for each student, included in the report. If left blank no additional cards will be created

**Print the Requested Course on Each Card** (optional) – Yes or No. Indicates if you wish to include the name of the requested course on each card printed.

**Number of Cards Printed in Addition to Above Cards** (optional) – Indicate the number of additional cards to be printed ABOVE the amount specified earlier if left blank no additional cards will be created.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

```
STUDENT: 48652258 Banana, Hannah
GRADE: 9 SEX: F HOMEROOM: A109 PREV: PROG:
COURSE CODE: 255 COURSE NAME: AMER HISTORY AP

STUDENT: 48652258 Banana, Hannah
GRADE: 9 SEX: F HOMEROOM: A109 PREV: PROG:
COURSE CODE: 052 COURSE NAME: LANGUAGE ARTS

STUDENT: 48652258 Banana, Hannah
GRADE: 9 SEX: F HOMEROOM: A109 PREV: PROG:
COURSE CODE: 076 COURSE NAME: BAND

STUDENT: 48652258 Banana, Hannah
GRADE: 9 SEX: F HOMEROOM: A109 PREV: PROG:
COURSE CODE: 171 COURSE NAME: ART II
```

**Student Arena Card**

## Students Scheduled with Alt. Courses (R413)

Navigation: Home – SIS – Scheduling – Scheduling Reports – Students Scheduled with Alternate Courses (R413)

This report creates a list of students who have been scheduled with an alternate course request versus a primary request.

Home >> SIS >> Scheduling >> Scheduling Reports >> Students Sched with ALT Courses (R413)

### Students Scheduled with Alternate Courses (R413)

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

Selection Criteria | Selection Summary | Load Settings

**Schedule:** -- Select a Schedule --

**Schedule Result:** [v] ⚡

**Homeroom Date:** 10/6/2008 📅 ⚡

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Sorting Options**

Homeroom (ASC)  
Homeroom (DESC)  
Student Name (ASC)  
Student Name (DESC)

**Delivery Method:** Pickup [v] [Set As Default]

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF [v]

**Description:**

[Submit]

### Students Scheduled with Alternate Courses Report Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this field is not selectable.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list which you wish to base the report results on. If the schedule has been finalized, this field is not selectable.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

## Section Summary by Report Period (R807)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Section Summary by Report Period (R807)**

This report lists out the courses along with the count of students in the course. It also has a count of the student capacity for each course. If the total number of students meets or exceeds the capacity count then the message **\*\*CLOSED\*\*** will print out at the end of the record. Course section, title, term, periods, teacher and room are also printed. The user has the choice of listing out only the closed classes, open classes, or both on the report.

Home » SIS » Scheduling » Scheduling Reports » Section Summary by Report Period (R807)

### Section Summary by Report Period (R807)

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

Selection Criteria   Selection Summary   Load Settings

**Schedule:** Default Schedule

**Schedule Result:** 12-13 Result Set

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Course**

001 - CAREER CENTER  
002 - COLLEGE NOW  
003 - CC HALF DAY  
004 - MOVING

**Course Section**

1  
2  
3  
4

**Course Term**

1st Sem Only  
All Year  
2nd Sem Only

**Period**

1  
2  
3  
4

**Print Only Open Courses:**

**Print Only Closed Courses:**

**Print All Courses:**

**Section Summary by Report Period Report Parameters Screen (First Half)**

### Section Summary by Report Period Report Parameters Screen (Second Half)

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this field is not selectable.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list which you wish to base the report results on. If the schedule has been finalized, this field is not selectable.

**Grade** (optional) – If no Grade Levels are selected, the report will select all Grade Levels. You can also filter by selecting specific Grade Levels for your report.

**Course** (optional) – If no Courses are selected, the report will select all Courses. You can also filter by selecting specific Courses for your report.

**Course Section** (optional) – If no Course Sections are selected, the report will select all Course Sections. You can also filter by selecting specific Course Sections for your report.

**Reporting Term** (optional) – If no Reporting Terms are selected, the report will select all Reporting Terms. You can also filter by selecting specific Reporting Terms for your report.

**Print Courses Options** (required) – Choose one of the following:

- **Print Only Open Courses** – Indicates if you wish for the report to only include those courses which still have openings (not filled to capacity).
- **Print Only Closed Courses** – Indicates if you wish for the report to only include those courses which have NO openings (filled to capacity).
- **Print All Courses** – Indicates if you wish for the report to include all courses regardless of the availability of seats.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

REPORT: DASL - R807		DASL HIGH SCHOOL			RUN AT 3:09 PM 2/14/2008					
SCHOOLYEAR: 2007-2008		SECTION SUMMARY BY REPORT PERIOD					PAGE	1	OF	2
COURSE ID	COURSE DESCRIPTION	TERM	SECTION ID	TEACHER NAME	PERIODS	ROOM ID	SECTION CAPACITY	STUDENTS ENROLLED	CLASS STATUS	
052	LANGUAGE ARTS	1Sem	1	LAURA LAYMAN	1	103	30	1	Open	
052	LANGUAGE ARTS	2Sem	2	LAURA LAYMAN	2	103	30	28	Open	
052	LANGUAGE ARTS	Year	3	LAURA LAYMAN	1	103	30		Closed	
					2	103				
182	FRENCH I	1Sem	1	LINDA WALTERS	3	109	30	9	Open	
182	FRENCH I	2Sem	2	LINDA WALTERS	3A	109	30	11	Open	
182	FRENCH I	Year	3	LINDA WALTERS	3	109	30	8	Open	
					3A	109				
2007	ART	1Sem	1	JOHN BAER	4	105	30	15	Open	
2007	ART	2Sem	2	JOHN BAER	5	104	30	13	Open	
2007	ART	Year	3	JOHN BAER	4	104	30		Closed	
					5	104				
232	BIOLOGY I	1Sem	1	SAM BAUM	6	110	30	15	Open	
232	BIOLOGY I	2Sem	2	SAM BAUM	7	110	30	13	Open	
232	BIOLOGY I	Year	3	SAM BAUM	6	110	30		Closed	
					7	110				

### Section Summary by Report Period Report

## Teacher Schedule (R411)

### Navigation: Home – SIS – Scheduling – Scheduling Reports – Teacher Schedule (R411)

This report is used to generate a schedule for one or all teachers, indicating the courses which they are scheduled to teach within a specified time period. Additionally, it is used to confirm that the master schedule does not contain any teacher conflicts.

Course group information is not printed on this report.

Home » SIS » Scheduling » Scheduling Reports » Teacher Schedule (R411)

## Teacher Schedule (R411)

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

Selection Criteria   Selection Summary   Load Settings

**Schedule:** Default Schedule ⚡

**Schedule Result:** 12-13 Result Set

---

**Course Type**

C - Class  
L - Lunch  
Z - Study hall  
ESC - ESC course

**Staff Member**

MS ANTHONY  
MS AYERS  
MS BARBER  
MS BEASLEY

**Schedule Term**

08/21/2012  
10/29/2012  
01/22/2013  
03/25/2013

**Period**

1 - 1  
2 - 2  
3 - 3  
4 - 4

---

**Only Display Free Teacher Meeting Times:**

**Suppress Number Of Students Assigned To Courses:**

**Print One Teacher Per Page:**

**Include Conflict Messages:**

**Only Display Schedules For Teachers With Conflicts:**

---

**Common Text:**

---

**Sorting Options**

Teacher Name (ASC)  
Teacher Name (DESC)  
Teacher Code (ASC)  
Teacher Code (DESC)

---

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

---

**Delivery Method:** Pickup

**Email Address:** EmhoffH@software-answers.com

**Report Format:** Adobe PDF

---

**Description:**

### Teacher Schedule Report Parameters Screen

**Schedule** (required) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule.

**Schedule Result** (optional) – Select a Schedule Result to which to limit the results.

**Course Type** (optional) – If no Course Types are selected, the report will select all Course Types. You can also filter by selecting specific Course Types for your report.

**Staff Member** (optional) – If no Staff Members are selected, the report will select all Staff Members. You can also filter by selecting specific Staff Members for your report.

**Schedule Term** (optional) – If no Schedule Terms are selected, the report will select all Schedule Terms. You can also filter by selecting specific Schedule Terms for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Only Display Free Teacher Meeting Times** (optional) – Yes or No; indicates whether to only include teachers with free time on the report. Those with full schedules would not be included if checked.

**Suppress Number Of Students Assigned To Courses** (optional) – Yes or No; this will indicate whether the number of students enrolled in each course is to be suppressed from printing.

**Print One Teacher Per Page** (optional) – Yes or No; indicates whether schedules are to be printed on separate pages for distribution to each teacher.

**Include Conflict Messages** (optional) – Yes or No; indicates whether conflict messages are included in the report or not.

**Only Display Schedules For Teachers With Conflicts** (optional) – Yes or No; if checked, only those teachers who have conflict messages will be included.

**Common Text** (optional) – This common text will appear at the bottom of each teacher's schedule.

**Sorting Options** (optional) – Choose one or more sort options for your report. If no Sorting Option is selected, the sort will default to Teacher Name in ascending order. If only Teacher Zip Code is selected as a Sorting Option, the secondary sort will default to Teacher Name in ascending order.

**Output** (optional) – Select one option for the intended output for this run of the report. Options are Report, Labels or both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).

**Note:** Since this report is used for teachers, to print labels for mailing purposes, the teacher's address information must be available on the teacher's maintenance screen.

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection. Please note that there is a Zip Code sort that can be used when printing labels.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: R411										DASL MIDDLE SCHOOL			
Printed Tue, Mar 18, 2008, 12:14 PM										2007-2008			
										Teacher Schedule			
										Schedule Terms			
Period	Rotation Days	Course Code	Course Short Name	Sec Num	Location	Filling Male	Filling Female	Filling Total	08/27/2007	11/05/2007	01/22/2008	03/31/2008	
Teacher Code: COWE		Name: ELIZABETH COWEN											
1	MTWRF	900	ADAPT. P.E.	1	PHYSICAL EDUCATION	15	9	24	X	X	X	X	
2	MTWRF	900	ADAPT. P.E.	2	PHYSICAL EDUCATION	13	12	25	X	X	X	X	
3	MTWRF	900	ADAPT. P.E.	3	COMPUTER TECH	16	11	27	X	X	X	X	
4	MTWRF								Open	Open	Open	Open	
5	MTWRF								Open	Open	Open	Open	
6	MTWRF	SH	Study Hall	6	6TH GRADE				X	X	X	X	
7	MTWRF								Open	Open	Open	Open	
8	MTWRF	SH	Study Hall	8	PHYSICAL EDUCATION				X	X	X	X	
9	MTWRF								Open	Open	Open	Open	

### Teacher Schedule Report

## Location Schedule (R409)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Location Schedule (R409)**

This report is used to generate a schedule for one or all Locations/Rooms, indicating the courses which are scheduled within a specified time period in that location (each location will print on a separate page). Additionally, it is used to confirm that the master schedule does not contain any location/room conflicts. The report can be filtered to show results for free only, conflicts only, or all. If all results are chose, the conflicts will appear in red.

Home » SIS » Scheduling » Scheduling Reports » Location Schedule (R409) Advanced Se

### Location Schedule (R409)

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

Selection Criteria | Selection Summary | Load Settings

Schedule: -- Select a Schedule --  
Schedule Result: -- Select a Schedule --

**Location**

MRS. SPERLING  
MRS. KOONTZ  
MRS. VOGT  
MRS. SCHROCK

**Schedule Term**

08/26/2009  
11/02/2009  
01/25/2010  
03/29/2010

**Period**

Period 1  
Period 2  
Period 3  
Period 4

Print One Location/Period Per Page:

Display: Conflict Only  
Group By: Location

**Sorting Options**

Location Code (DESC) | Location Code (ASC)  
Location Name (ASC)  
Location Name (DESC)  
Period Code (ASC)

Delivery Method: Pickup   
Email Address: chris@noacsc.org  
Report Format: Adobe PDF  
Description:

**Location Schedule Report Parameters Screen**

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this option will not be available.

**Schedule Result** (required) – Select the appropriate Scheduler Result from the available list for which you wish to base the report results on. If the schedule has been finalized, this option will not be available.

**Location** (optional) – If no Locations are selected, the report will select all Locations. You can also filter by selecting specific Locations for your report.

**Schedule Term** (optional) – If no Schedule Terms are selected, the report will select all Schedule Terms. You can also filter by selecting specific Schedule Terms for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Only Display Free Locations** (optional) – Yes or No; indicates whether to only include free (empty) rooms/locations on the report.

**Print One Location Per Page** (optional) – Yes or No; indicates whether to print each location on a separate page.

**Display** (required) – Choose from All, Free Only or Conflict Only. If All is chosen, the conflicts will display on the report in red.

**Group By** (required) – Choose to group the report by Location (default) or Period. The chosen Group By will also be the primary sort.

**Sorting Options** (optional) – Choose one or more sort options for your report. The chosen Group By will be the primary sort. Secondary sort(s) can be specified by choosing one or more Sorting Options.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Period	Rotation Days	Course Code	Course Short Name	Sec Num	Staff Code	Staff Name	Conflict	Schedule Terms				
								08/27/2008	11/10/2008	01/26/2009	03/30/2009	
Location Code 121		Name: MRS. J. Teacher1479										
1	MTWRF							Open	Open	Open	Open	
2	MTWRF							Open	Open	Open	Open	
3	MTWRF							Open	Open	Open	Open	
4	MTWRF							Open	Open	Open	Open	
5	MTWRF	ART800	ART 8	51	SPER	MRS. J. Teacher1479	Conflict	C				
5	MTWRF	ART999	ART	5	SPER	MRS. J. Teacher1479	Conflict	C	C	C	C	
5	MTWRF	ART800	ART 8	52	SPER	MRS. J. Teacher1479	Conflict		C			
5	MTWRF	ART800	ART 8	53	SPER	MRS. J. Teacher1479	Conflict			C		
5	MTWRF	ART800	ART 8	54	SPER	MRS. J. Teacher1479	Conflict				C	
6	MTWRF							Open	Open	Open	Open	
7	MTWRF							Open	Open	Open	Open	
8	MTWRF	0233	PHOTO	81	SPER	MRS. J. Teacher1479		X	X			
8	MTWRF	0250	CRAFT SP PROJ	82	SPER	MRS. J. Teacher1479				X	X	
E	MTWRF							Open	Open	Open	Open	

**Location Schedule Report**

**Singleton List Report (R813-A)**

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Singleton List Report (R813-A)**

This report lists out courses that only exist in one period during the day. This allows the user to see what course will be in conflict with each other. The periods are listed as column headings across the top of the page and the course ID's are listed under the period column that corresponds to the period the course is offered.

Home » SIS » Scheduling » Scheduling Reports » Singleton List Report (R813-A)

## Singleton List Report (R813-A)

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

Selection Criteria   Selection Summary   Load Settings

**Schedule:** -- Select a Schedule -- 

**Course Term**

1st Semester	←	→	
All Year	←	→	
2nd Semester	←	→	

**Delivery Method:** Pickup 

**Email Address:**

**Report Format:** Adobe PDF 

**Description:**

### Singleton List Report Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

SCHOOLYEAR: 2004-2005

COUNSELOR

GRADE: 12

COURSE TERM: 2Sem

STUDENT ID	STUDENT NAME	CALENDAR PERIOD CODE	COURSE CODE	COURSE NAME	SCHEDULE ID	START TIME	STOP TIME
4001	EYE, MAGNUM P.	4	444	ANALYTICAL GEOMETRY	Default Schedule	10:55 AM	11:35 AM
4002	FONT, ELLA JANE	4	444	ANALYTICAL GEOMETRY	Default Schedule	10:55 AM	11:35 AM
4003	JOHNSON, GEORGE EVAN	4	444	ANALYTICAL GEOMETRY	Default Schedule	10:55 AM	11:35 AM
4004	POTTS, JORDAN DANIEL	4	444	ANALYTICAL GEOMETRY	Default Schedule	10:55 AM	11:35 AM
4005	WELLS, JOBETH	4	444	ANALYTICAL GEOMETRY	Default Schedule	10:55 AM	11:35 AM
4001	EYE, MAGNUM P.	2	414	BASIC ENGLISH 12	Default Schedule	8:20 AM	9:00 AM
4002	FONT, ELLA JANE	2	414	BASIC ENGLISH 12	Default Schedule	8:20 AM	9:00 AM
4003	JOHNSON, GEORGE EVAN	2	414	BASIC ENGLISH 12	Default Schedule	8:20 AM	9:00 AM
4004	POTTS, JORDAN DANIEL	2	414	BASIC ENGLISH 12	Default Schedule	8:20 AM	9:00 AM
4005	WELLS, JOBETH	2	414	BASIC ENGLISH 12	Default Schedule	8:20 AM	9:00 AM
4001	EYE, MAGNUM P.	2	403	SPANISH IV	Default Schedule	8:20 AM	9:00 AM
6001	EYE, CORY ROBERT	3	240	PRACTICAL GEOMETRY	Default Schedule	9:25 AM	10:05 AM
6002	FONT, MICHELLE LYNN	3	240	PRACTICAL GEOMETRY	Default Schedule	9:25 AM	10:05 AM
6003	JONES, WHITNEY ANN	3	240	PRACTICAL GEOMETRY	Default Schedule	9:25 AM	10:05 AM
6004	LINE, TROY AARON	3	240	PRACTICAL GEOMETRY	Default Schedule	9:25 AM	10:05 AM
6005	MAY, DAISY LEE	3	240	PRACTICAL GEOMETRY	Default Schedule	9:25 AM	10:05 AM
5003	POTTS, IAN MICHAEL	3	316	JOURNALISM II	Default Schedule	9:25 AM	10:05 AM
4001	EYE, MAGNUM P.	3	416	JOURNALISM III	Default Schedule	9:25 AM	10:05 AM
6001	EYE, CORY ROBERT	2A	240	PRACTICAL GEOMETRY	Default Schedule	10:10 AM	10:50 AM
6002	FONT, MICHELLE LYNN	2A	240	PRACTICAL GEOMETRY	Default Schedule	10:10 AM	10:50 AM
6003	JONES, WHITNEY ANN	2A	240	PRACTICAL GEOMETRY	Default Schedule	10:10 AM	10:50 AM
6004	LINE, TROY AARON	2A	240	PRACTICAL GEOMETRY	Default Schedule	10:10 AM	10:50 AM
6005	MAY, DAISY LEE	2A	240	PRACTICAL GEOMETRY	Default Schedule	10:10 AM	10:50 AM
5003	POTTS, IAN MICHAEL	2A	316	JOURNALISM II	Default Schedule	10:10 AM	10:50 AM
4001	EYE, MAGNUM P.	2A	416	JOURNALISM III	Default Schedule	10:10 AM	10:50 AM
6002	FONT, MICHELLE LYNN	4	216	JOURNALISM I	Default Schedule	10:55 AM	11:35 AM
6003	JONES, WHITNEY ANN	4	216	JOURNALISM I	Default Schedule	10:55 AM	11:35 AM
6004	LINE, TROY AARON	4	216	JOURNALISM I	Default Schedule	10:55 AM	11:35 AM
6005	MAY, DAISY LEE	4	216	JOURNALISM I	Default Schedule	10:55 AM	11:35 AM

**Singleton List Report**

**Singleton List Conflict Report (R813-B)**

Navigation: Home – SIS – Scheduling – Scheduling Reports – Singleton List Report (R813-B)

This report lists out courses that a student has in conflict. Any student that has two or more courses that are scheduled for the same time will be listed on this report along with the course and period information. The report orders the information by class and term.

### Singleton List Conflict Report Parameters Screen

**Schedule** (optional) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

STUDENT ID	STUDENT NAME	CALENDAR PERIOD CODE	COURSE CODE	COURSE NAME	SCHEDULE ID	START TIME	STOP TIME
6005	MAY, DAISY LEE	4	-- 414 - BASIC ENGLISH 12 : 482 - SPANISH IV	Default Schedule	1/1/1900 10:55:00 AM	1/1/1900 11:35:00 AM	
			-- 481 - LATIN IV : 482 - FRENCH IV				
			-- 214 - BASIC ENGLISH 11 : 284 - GERMAN III				
			-- 216 - JOURNALISM I : 281 - LATIN II				
			-- 216 - JOURNALISM I : 281 - LATIN II				
			-- 216 - JOURNALISM I : 281 - LATIN II				
			-- 216 - JOURNALISM I : 281 - LATIN II				

### Singleton List Conflict Report

## Class Master Schedule (R407)

### Navigation: Home – SIS – Scheduling – Scheduling Reports – Master Schedule (R407)

This report generates a complete listing of the master schedule for a given school year. In addition, schedule balancing information is printed for each term at the end of the report.

This report is divided into various sections:

- Course Groups (displaying all course sections within the course group with course section capacity and course group capacity)
- Courses
- Class Master Scheduling Balancing
- Demand Detail (Course and Group)

Filling counts will only include students who are enrolled in the course section on the date that the report is run. The report will check the course section assignment start/stop dates.

Home » SIS » Scheduling » Scheduling Reports » Class Master Schedule (R407)

## Class Master Schedule (R407)

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

Selection Criteria   Selection Summary   Load Settings

**Schedule:** -- Select a Schedule -- ⚡

**Schedule Result:** -- Select a Schedule --

**Filling Count Date:** 8/3/2009 ⚡

---

**Course Term**

1st 9 wks  
A-Y  
1st Semester  
234

**Course Grade Level**

07 - 07  
08 - 08  
09 - 09  
10 - 10

**Department**

ART - ART  
BUS - BUSINESS  
COM - COMMERCIAL  
EDP - EDUCATIONAL OPT

**Period**

Period 1  
Period 2  
Period 3  
Period 4

---

**Print Only Totals:**    **Print Course Groups Only:**

**Show Active Only:**    **Display Demand Detail:**

**Show only courses/groups with demand greater than 0:**

---

**Sorting Options**

Department (ASC)  
Department (DESC)  
Course Grade Level (ASC)  
Course Grade Level (DESC)

Course Code (ASC)

---

**Delivery Method:** Pickup  

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

---

**Description:**

### Class Master Schedule Report Parameters Screen

**Schedule** (required) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. If the schedule has been finalized, this field is not selectable.

**Schedule Result** (optional) – Select the appropriate Schedule Results from the available list, on which you wish to base the report results. If the schedule has been finalized, this field is not selectable.

**Filling Count Date** (required) – Enter the date to use for the filling count calculation and for Period filtering.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Course Grade Level** (optional) – If no Course Grade Levels are selected, the report will select all Course Grade Levels. You can also filter by selecting specific Course Grade Levels for your report.

**Department** (optional) – If no Departments are selected, the report will select all Departments. You can also filter by selecting specific Departments for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report. The Period filtering will be based on the date entered for the Filling Count Date.

**Print Only Totals** (optional) – Check to print only totals on the report; Uncheck to print class meetings details on the report.

**Print Course Groups Only** (optional) – Check to print only course groups. Uncheck to print courses and course groups.

**Show Active Only** (optional) – Check to show only active course sections and course group sections. Uncheck to include inactive course sections and course group sections.

**Display Demand Detail** (optional) – Check to show the Demand Detail section of the report. The demand for each course will be listed.

**Show only courses/groups with demand greater than 0** (optional) – Check to show only courses and course groups with demand greater than 0; Uncheck to show courses and course groups even if their demand is zero.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Group:	(none)	(none)	Gr Cap:	Demand:	Gr Section:	Sec Cap:
Course: 0110	YEARBOOK		Credits: 1.000	Dpt: ENG	Demand: 1	
Sec Term	Day/Period/Location/Staff	Cap	M	F	Tot	Open
8 A-Y	MTWRF / 8 / 224	MRS. R. Teacher1548	20	1	7	8 12
Course: 0111	ENGLISH 9		Credits: 1.000	Dpt: ENG	Demand: 1	
Sec Term	Day/Period/Location/Staff	Cap	M	F	Tot	Open
3 A-Y	MTWRF / 3 / 221	MRS. J. Teacher1558	20	15	9	24 -4
6 A-Y	MTWRF / 6 / 221	MRS. J. Teacher1558	20	11	8	19 1
8 A-Y	MTWRF / 8 / 221	MRS. J. Teacher1558	20	10	10	20 0
Totals:		60	36	27	63	-3

**Class Master Schedule Report**

Class Master Schedule Balancing - TERM: 9wk1						
Rotation	Period	Total Classes	Total	Total Filling	Total Open	
MTWRF	2	3	73	36	37	
MTWRF	5	2	38	36	2	
MTWRF	6	4	73	66	7	
Total		9	184	138	46	
Class Master Schedule Balancing - TERM: 9wk2						
Rotation	Period	Total Classes	Total	Total Filling	Total Open	
MTWRF	2	3	66	38	28	
MTWRF	5	2	38	34	4	
MTWRF	6	4	75	65	10	
MTWRF	8	1	5	0	5	
Total		10	184	137	47	
Class Master Schedule Balancing - TERM: 9wk3						
Rotation	Period	Total Classes	Total	Total Filling	Total Open	
MTWRF	2	2	46	28	18	
MTWRF	5	2	38	35	3	
MTWRF	6	4	74	67	7	
Total		8	158	130	28	
Class Master Schedule Balancing - TERM: 9wk4						
Rotation	Period	Total Classes	Total	Total Filling	Total Open	
MTWRF	2	2	46	29	17	
MTWRF	5	2	38	34	4	
MTWRF	6	4	73	66	7	
Total		8	157	129	28	

**Balancing on the Class Master Schedule Report**

Demand Detail: Course

Course		Demand
0110	YEARBOOK	0
0111	ENGLISH 9	0
0121	ENGLISH 10	2
0130	ENGLISH 11	0
0132	ENGLISH 11 CP	3
0140	ENGLISH 12	0
0142	ENGLISH 12CP	0
0143	AP ENGLISH 12	0
0148	COMMUNICATIONS	2

Course Master Schedule - Demand Detail

## Class Master Schedule with Disabilities (R407) Report

The Class Master Schedule with Disabilities (R407) report lists the master schedule for the selected school year, staff and term with a count of the number of male, female and students with disabilities enrolled in each course.

The Class Master Schedule with Disabilities Report is located in the following path:  
 Home > Local > Report Builder Links > Report Builder Reports.

Run Icon

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	Test Help Text	
	Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.
	Period G Student Core Summary Report	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	Period K NonGraduate Core Summary Report	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	Student Location Report	
	Course Fee Analysis	
	Locker Combination Report	
	Payments Posted by User Report	
	Discipline Report	
	Student Location1	

### Class Master Schedule Report on the Report Builder Reports Screen

1. With the school for which you want to run the report in context, on the Report Builder screen, click the **run icon** in the View Report column for the Class Master Schedule with Disabilities (R407) report.

The StudentInformation Report Viewer screen displays.

**Update Report Headers**  
No headings are available to set.

**Select Required Parameters**  
 School Year: 2011 - 2012  
 Course Term: 1SEM, 2SEM, ALYR  
 Staff Name: BOWERS , MS, DOTSON , MS, DUKE , MS, FRENCH , MS

**Set Optional Filters**

Field Name	Operation	Value
CourseName	Contains	geo

**Add & Remove Columns**  
No columns are available to add or remove.

View Report

### Class Master Schedule with Disabilities Report on the Report Viewer Screen

2. In the **School Year** drop-down list in the Select Required Parameters area, select the school year for which you want to view the master schedule.
3. In the **Course Term** drop-down list, select the course term(s) for which you want to view the master schedule.
4. In the **Staff Name** drop-down list, select the name of the staff member(s) for whom you want to view the master schedule..
5. If you would like to apply an additional filter to the report results, in the Set Optional Filters area, perform the following steps:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the Field Name list. For more information about the filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.
  - c. Enter or select the appropriate value in the **Value** field, if applicable.

**Note:** The available options and acceptable values vary depending on the option you selected in the Field Name drop-down list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name drop-down list. If you selected an option in the Field Name drop-down list that requires a date, a calendar becomes available in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation drop-down list, then the Value field is unavailable.

- d. To add an additional filter, repeat [step 5\(a\)](#) through [step 5\(c\)](#) in the line below the previous filter.

6. Click **View Report**.

The report displays at the bottom of the window.

**Class Master Schedule with Disabilities (R407)**  
**School Year: 2011**  
**School: ASHS**

Course	344	PRACTICAL GEOMETRY	Credits	1.000	Dpt	MTH	Dem	26.00		
Sec	Term	Period/Location	Staff	Cap	M	F	Dis	**	Tot	Open
1	ALYR	1 (0202)	DOTSON, MS	25	13	6	5	14	19	6
2	ALYR	2 (0202)	DOTSON, MS	25	5	2	1	6	7	18
Totals				50	18	8	6	20	26	24

Course	346	HONORS GEOMETRY	Credits	1.000	Dpt	MTH	Dem	13.00		
Sec	Term	Period/Location	Staff	Cap	M	F	Dis	**	Tot	Open
3	ALYR	3 (0202)	DOTSON, MS	30	6	7	0	13	13	17
Totals				30	6	7	0	13	13	17

7/2/2012  
4:34:06 PM

**Class Master Schedule with Disabilities (R407) Report**

7. To save the report with your selected parameters and filters, perform the following steps:

- a. Click **Save Setup As**.
- b. Enter a unique report name in the **New report name** field.
- c. Enter a description of the report in the **New description** field.
- d. Click **Save**.

The following message displays at the bottom of the screen: “Report setup saved successfully.”

The report is saved. You can now run it directly from the User Reports area on the Report Builder Reports screen.

8. Click the **close** button to close the StudentInformation Report Viewer screen and return to the Report Builder Reports screen.

## Schedule Card Formatter (R701)

**Navigation: Home – SIS – Scheduling – Scheduling Reports – Schedule Card Formatter (R701)**

The schedule card formatter determines the information to be included on student’s schedule cards and the layout of the schedule cards.

Several versions of schedule cards have been set up for use at each school. The report headings, demographic info, class sequence and selection controls, student selection and sequence controls, and totaling information are set up with the formatters.

These changes have taken place as of DASL v8.3.0:

- Course section assignments that are associated with an inactive request previously did not appear on the report. Those assignments now appear on the report, as long as they qualify to appear on the report based on the other chosen report criteria.
- Requests that have not been scheduled yet by the scheduler now show the request status, for example Approved or Pending. Course section assignments will continue to show the course section assignment status, for example Assigned or Conflict. The Request or Course Section Assignment status is only shown on formats 1, 11 and 21.

**Schedule Card Formatter Report Parameters Screen (First Part of Screen)**

**Home School**

**Counselor**

FREEMAN, MS  
FITZGERALD, MS  
MONTGOMERY, MS

**Membership**

15 - Student received intervention provi  
15 - Student received intervention provi  
16 - Student placement by a district in a  
50 - Prev. reported as a dropout in repo

**Membership Group**

11 - Intervention  
12 - Post-secondary Enrollment Options  
15 - 15  
16 - 16

**Special Education Services**

215001 - Adapted Physical Education Se  
215002 - Aide Services  
215003 - Attendant Services  
215004 - Audiological Services

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

**Student Status**

A - ACTIVE RES  
ACCA - ASHLAND ACADEMY  
AE - ACTIVE ELSEWHERE  
D - DELETED

---

**Student Numbers (comma separated):**

**Homeroom Date:** 9/27/2012

**Common Text For Schedule Cards:**

**Common Text For Schedules With Results That Have No Assignment:**

**Suppress Requests That Have No Matching Assignment:**  Yes  No

**Position For Requests That Have No Matching Assignment:** Before

---

**Suppress Results That Have No Assignment:**  Yes  No

**Position Of Results That Have No Assignment:** Before

**Print Only Schedules With Results That Have No Assignment:**  Yes  No

**Print Schedules Changed After Date:**

**Print Blank Schedule Card For Student With Unpaid Fees:**  Yes  No

**Show Meeting Time By Description or Periods/Days/Locations:**  Meeting Time Description  Periods, Days, and Locations

---

**Omit Unlisted Phone Numbers:**  **Omit All Phone Information:**  **Omit Counselor Information:**  **Omit Course And Section Info:**

**Omit Locker Information:**  **Omit Social Security Number:**  **Omit Team Information:**  **Omit Home School Information:**

**Omit Credit Information:**  **Print Two Students Per Page:**  **Omit Homeroom Info:**  **Omit Program Info:**

**Omit Credit Total Information:**  **Omit Teacher Information:**

---

**Student Sorting Options**

Student Number (ASC) Grade (DESC)  
Student Number (DESC) Student Name (ASC)  
Student Name (DESC)  
Grade (ASC)

---

**Course Sorting Options**

Period (ASC)  
Period (DESC)  
Course Term (ASC)  
Course Term (DESC)

---

**Sort Students by Course Section they're in during Period:**

**Rotation Day:** None **Calendar Periods:** None

---

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address  
 Use custom address text

**Include Copied On Correspondence:**  Yes  No

---

**Delivery Method:** Pickup

**Email Address:** EmhoffH@software-answers.com

---

**Description:**

Schedule Card Formatter Report Parameters Screen (Second Part of Screen)

**Report Layout** (required) – Select the appropriate format from the drop-down menu. All formats for this report include Grade, Birthdate, Gender, Homeroom, Locker and Phone unless otherwise noted. Formats are as follows:

	Orientation	Print Request Status?	Print Locker or Combo?	Print Fees?	Notes
1	Landscape	Yes	Yes –no combo	No	- Only format to print request status - When printing, choose Page Scaling = Fit to Printable Area
2	Portrait	No	Yes –no combo	No	
3	Portrait	No	Yes (both)	No	- Very similar to format 2; smaller print - Prints student number
4	Landscape	No	Yes –no combo	No	- 2 schedule cards for the same student per page - Prints student SSN
5	Landscape	No	Yes –no combo	No	- 2 schedule cards for the same student per page - Very similar to format 4 except for placement of several small items
6	Landscape	No	Yes (both)	Yes	- Can project fees if fees have not been assigned - Prints program
11					Same as format 1
12	Portrait	No	Yes (both)	No	- Similar to format 2 - Prints program - Does not print gender or homeroom
13					Same as format 3
14					Same as format 4
15					Same as format 5
16	Landscape	No	Yes (both)	Yes	- Can project fees if fees have not been assigned - Very similar to format 6 - Prints student SSN
21					Same as format 1
22					Same as format 2
23					Same as format 3
24					Same as format 4
25					Same as format 5
26					Same as format 6
27					Similar to format 13 - Footer contains school's return address and parent's mailing address for use with self-sealing paper (mailer).

**\*Note on Format 6:** Font size is 8.5 and will accommodate 17 assignments on a single page with default margins of 0.4. For students with 17 assignments (or more), the common text will print on the 2<sup>nd</sup> page. A single page can accommodate more assignments by reducing the top and bottom margins or using the Adobe Page Scaling setting of Fit to Printable Area or Shrink to Printable Area.

**Schedule** (required) – Select the appropriate schedule from the list of existing schedules. Defaults to the default schedule. This field is not selectable once a final schedule result has been selected.

**Schedule Result** (required) – Select the appropriate Schedule Results from the available list which you wish to base the report results on. This field is not selectable once a final schedule result has been selected.

**Left, Right, Top, Bottom Margin** (optional) –The user can set the appropriate margins (in inches) for the report output. The default margin for all R701 formats is 0.4 inches if no value is specified in the options on the screen. Note that if the margins are too large for a particular format, parts of the report output may get cut off.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Course Types** (optional) – If no Course Types are selected, the report will select all Course Types. You can also filter by selecting specific Course Types for your report.

**Period** (optional) – If no Periods are selected, the report will select all Periods. You can also filter by selecting specific Periods for your report.

**Grade** (optional) – If no Grades are selected, the report will select all Grades. You can also filter by selecting specific Grades for your report.

**Program** (optional) – If no Programs are selected, the report will select all Programs. You can also filter by selecting specific Programs for your report.

**Homeroom** (optional) – If no Homerooms are selected, the report will select all Homerooms. You can also filter by selecting specific Homerooms for your report.

**Home School** (optional) – If no Home Schools are selected, the report will select all Home Schools. You can also filter by selecting specific Home Schools for your report. The Home School filter is controlled by the Home School on the Student Profile – General tab.

**Counselor** – If no Counselors are selected, the report will select all Counselors. You can also filter by selecting specific Counselors for your report.

**Membership** (optional) – If no Membership Codes are selected, the report will select all Membership Codes. You can also filter by selecting specific Membership Codes for your report.

**Membership Group** (optional) – If no Membership Groups are selected, the report will select all Membership Groups. You can also filter by selecting specific Membership Groups for your report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services.

This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

**Note:** *The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Ad-Hoc Membership** (optional) – You can select an Ad-Hoc Membership from the drop-down list. If you select an Ad-Hoc Membership, only schedules for students from that Ad-Hoc Membership will be used in the report. Check the Public and Private check box to see Memberships created by other users in your drop-down list.

**Student Status** (optional) – If no Student Status Codes are selected, the report will select all Student Status Codes. You can also filter by selecting specific Student Status Codes for your report.

**Student Numbers** (optional) – If you wish to run the report for individual students (versus entire group/grade) indicate the students for which the report is to be processed by typing in their student ID numbers separated by commas.

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. Defaults to today's date.

**Common Text for Schedule Cards** (optional) – Multi-line text box in which to enter a comment that will appear on all students' schedule cards.

**Common Text for Schedules with Results that have No Assignment** (optional) – Multi-line text box in which to enter a comment that appears on all students' schedule cards which have at least one course with an Unassigned Course Section Student Status.

**Suppress Requests That Have No Matching Assignment** (optional) – Yes or No; Indicates if printing of courses with a request that has no matching Course Section assignment should be suppressed on the schedules.

**Position For Requests That Have No Matching Assignment** (optional) – Indicate by selection from the drop-down menu if course requests that have not been assigned a section be displayed before, after or in any location in proximity to the assigned courses.

**Suppress Results That Have No Assignment** (optional) – Yes or No; Indicates if printing of unassigned courses should be suppressed on the schedules.

**Position For Results That Have No Assignment** (optional) – Indicate by selection from the drop-down menu if unassigned courses should be displayed before, after or in any location in proximity to the assigned courses.

**Print Only Schedules With Results That Have No Assignment** (optional) – Yes or No; Indicates if printing of courses with a request that has no matching Course Section assignment should be suppressed on the schedules.

The above three settings can be confusing. Here are a few examples of their use:

<b>Suppress Requests That Have No Matching Assignment:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Position For Requests That Have No Matching Assignment:</b>	Before ▾
<b>Suppress Results That Have No Assignment:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Position Of Results That Have No Assignment:</b>	Before ▾
<b>Print Only Schedules With Results That Have No Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Print Schedules Changed After Date:</b>	<input type="text"/> 

These settings could be used to print Schedule Cards to hand out to students. They will include only requests that were assigned, and will include schedule cards for all students that meet the selection criteria.

<b>Suppress Requests That Have No Matching Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Position For Requests That Have No Matching Assignment:</b>	Before ▾
<b>Suppress Results That Have No Assignment:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Position Of Results That Have No Assignment:</b>	Before ▾
<b>Print Only Schedules With Results That Have No Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Print Schedules Changed After Date:</b>	<input type="text"/> 

These settings could be used to print Schedule Cards that include both requests that were assigned and requests the scheduler attempted to schedule, but could not find a valid assignment (for instance, due to conflicts or all sections filled), for all students that meet the selection criteria.

<b>Suppress Requests That Have No Matching Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Position For Requests That Have No Matching Assignment:</b>	Before ▾
<b>Suppress Results That Have No Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Position Of Results That Have No Assignment:</b>	Before ▾
<b>Print Only Schedules With Results That Have No Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Print Schedules Changed After Date:</b>	<input type="text"/> 

These settings could be used to print Schedule Cards for all students that meet the selection criteria, to see students with unapproved requests.

<b>Suppress Requests That Have No Matching Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Position For Requests That Have No Matching Assignment:</b>	Before ▾
<b>Suppress Results That Have No Assignment:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Position Of Results That Have No Assignment:</b>	Before ▾
<b>Print Only Schedules With Results That Have No Assignment:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Print Schedules Changed After Date:</b>	<input type="text"/> 

These settings could be used to print Schedule Cards only for those students who meet the selection criteria and still have unfilled requests (whether the scheduler has been run or not).

**Print Schedules Changed After Date** – Will only print schedules printed after the date you indicate with the date picker.

**Print Blank Schedule Card for Student With Unpaid Fees** (optional) – If checked, students who have not paid their fees will get a blank schedule card. If unchecked, students who have not paid their fees will get a normal schedule card like all other students.

**Show Meeting Time By Description or Periods/Days/Locations** (required) – Choose one of the following:

- **Meeting Time Description** – Show the meeting time description.
- **Periods, Days, and Locations** – Show the period(s), day(s) and location(s) in separate columns on the report, instead of showing the meeting time description. If a course section meets in multiple periods, they are shown in a comma delimited list, and likewise for the days and locations. However, if a course section has advanced meeting times, this option will not always give the complete meeting time info for a course section – for example, if it meets in different periods on different days and/or schedule terms, with different teachers and/or in different locations.

**Omit Unlisted Phone Numbers** (optional) – If checked, the student unlisted Phone Numbers will not print on the schedule cards. If unchecked, the student unlisted Phone Numbers will print on the schedule cards.

**Omit Locker Information** (optional) – If checked, the student Locker Information will not print on the schedule cards. If unchecked, the student Locker information will print on the schedule cards.

**Omit Credit Information** (optional) – If checked, the Credit information will not print on the schedule cards. If unchecked, the Credit information will print on the schedule cards.

**Omit Credit Total Information** (optional) - For formats 6, 16 and 26, the credits total displays beneath the list of courses for the student. If the user checks the Omit Credit Total Information box on the report submission screen, the credits total does not appear. The Omit Credit Total Information box only appears on the report submission screen if formats 6, 16 or 26 are selected in the Report Layout drop-down. The Omit Credit Total Information check box is checked by default on formats 6, 16 and 26.

**Omit All Phone Information** (optional) – If checked, the student Phone information will not print on the schedule cards. If unchecked, the student Phone information will print on the schedule cards.

**Omit Social Security Number** (optional) – If checked, the student SSN will not print on the schedule cards. If unchecked, the student SSN will print on the schedule cards.

**Print Two Students Per Page** (optional) – This option is only available for formats that are set up in Portrait orientation – formats 2, 3, 12, 13, 22 and 23. The report output pdf file will have dimensions of 8.5 by 5.5 inches per page instead of the usual 8.5 by 11 inches. The report footer will be hidden if there is no Common Text entered by the user – to allow more students to fit on a single 8.5 by 5.5 pdf page. The user can then use Adobe print settings to print two pages of the pdf per 8.5 by 11 inch sheet of paper.

**Omit Teacher Information** (optional) – If checked, the Teacher information will not print on the schedule cards. If unchecked, the Teacher information will print on the schedule cards.

**Omit Counselor Information** (optional) – If checked, the Counselor information will not print on the schedule cards. If unchecked, the Counselor information will print on the schedule cards.

**Omit Team Information** (optional) – If checked, the Team information will not print on the schedule cards. If unchecked, the Team information will print on the schedule cards.

**Omit Homeroom Info** (optional) – If checked, the Homeroom information will not print on the schedule cards. If unchecked, the Homeroom information will print on the schedule cards.

**Omit Course And Section Info** (optional) – If checked, the course code, course name, and section number will not display for the requests / assignments. If unchecked, the course code, course name and section number will display for the requests / assignments.

**Omit Home School Information** (optional) – If checked, the Home School information will not print on the schedule cards. If unchecked, the Home School information will print on the schedule cards.

**Omit Program Info** (optional) – If checked, the Program information will not print on the schedule cards. If unchecked, the Program information will print on the schedule cards.

**Student Sorting Options** (optional) – Choose one or more student sort options for your report.

**Course Sorting Options** (optional) – Choose one or more course sort options (within student sort) for the courses included in your report.

**Sort Students by Course Section they're in during Period:** (optional) – You can select by Rotation Day or Calendar Periods from the corresponding drop-down list.

**Output** (optional) – Select one option for the intended output for this run of the report. Options are Report, Labels or both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection.

**Address** (optional) – Indicate which address should be used if labels are created in the output. Options are: Use Student Address or Use Parent Address.

**Use Custom Address Text** (optional) – If you check this box, the custom text entered in the text field will print at the top of each address field on the report.

**Include Copied on Correspondence** – Yes or No; Selecting Yes will include address labels for contacts marked as Copied on Correspondence when creating labels.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. See the Batch/Report Management documentation for further details.

**Note:** R701 Schedule Card sorts by period first. Then it looks at all periods that a course section may meet in. Of two course sections start in the same period but one lasts for a single period and the other for two periods, then the single period course will be sorted first.

COURSE		SEC	COURSE NAME	TERM	MEETING TIME	TEACHER	CREDIT	STATUS
962	3		ECON	All Year	1 (125)	LAURA CROFT	0.500	Assigned
052	2		LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000	Assigned
182	1		FRENCH I	1st Semester	3 (109)	LINDA WALTERS	1.000	Assigned
240	2		PRAC GEOMETRY	2nd Semester	3 (112)	DONALD BERRY	1.000	Assigned
423	1		SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500	Assigned
255	2		AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000	Assigned
431	1		PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000	Assigned
2007	2		ART	2nd Semester	5 (104)	JOHN BAER	1.000	Assigned
573	1		ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000	Assigned
232	2		BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000	Assigned
655	2		MATH	All Year	8 (150)	DAVID COUSINS	1.000	Assigned
233	2		ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000	Assigned

**Schedule Format 1**

STUDENT SCHEDULE		DASL HIGH SCHOOL		2007-2008		
CONTRARY, JASON WILLIAM 90 ELM STREET LIMA, OH 45801 TEAM NAME : HOME SCHL: PROGRAM:				NUMBER 7001 GRADE 11 BIRTHDATE 02/14/1990 GENDER M HOMEROOM LOCKER 023 PHONE (740)493-5555 COUNSELOR		
COURSE	SEC	COURSE NAME	TERM	MEETING TIME	TEACHER	CREDIT
962	3	ECON	All Year	1 (125)	LAURA CROFT	0.500
052	2	LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000
182	1	FRENCH I	1st Semester	3 (109)	LINDA WALTERS	1.000
240	2	PRAC GEOMETRY	2nd Semester	3 (112)	DONALD BERRY	1.000
423	1	SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500
255	2	AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000
431	1	PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000
2007	2	ART	2nd Semester	5 (104)	JOHN BAER	1.000
573	1	ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000
232	2	BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000
655	2	MATH	All Year	8 (150)	DAVID COUSINS	1.000
233	2	ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000

### Schedule Format 2

STUDENT SCHEDULE		DASL HIGH SCHOOL		2007-2008		
COUNSELOR : CONTRARY, JASON WILLIAM STUDENT #: 7001 90 ELM STREET LIMA, OH 45801				GRADE 11 BIRTHDATE 02/14/1990 HOMEROOM LOCKER 023 COMBINATION 01-20-10 PHONE (740)493-5555 Home School Program	GENDER	M
COURSE	SEC	COURSE NAME	COURSE TERM	MEETING TIME	TEACHER	CREDIT
962	3	ECON	All Year	1 (125)	LAURA CROFT	0.500
052	2	LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000
182	1	FRENCH I	1st Semester	3 (109)	LINDA WALTERS	1.000
240	2	PRAC GEOMETRY	2nd Semester	3 (112)	DONALD BERRY	1.000
423	1	SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500
255	2	AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000
431	1	PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000
2007	2	ART	2nd Semester	5 (104)	JOHN BAER	1.000
573	1	ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000
232	2	BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000
655	2	MATH	All Year	8 (150)	DAVID COUSINS	1.000
233	2	ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000

### Schedule Format 3

SSN: 369-85-2369		2007-2008		SSN: 369-85-2369		2007-2008	
<b>STUDENT SCHEDULE</b>				<b>STUDENT SCHEDULE</b>			
DASL HIGH SCHOOL				DASL HIGH SCHOOL			
CONTRARY, JASON WILLIAM		NUMBER	7001	CONTRARY, JASON WILLIAM		NUMBER	7001
90 ELM STREET		GRADE	11 GEND M	90 ELM STREET		GRADE	11 GEND M
LIMA, OH 45801		BIRTHDATE	02/14/1990	LIMA, OH 45801		BIRTHDATE	02/14/1990
		HOMEROOM				HOMEROOM	
		LOCKER	023			LOCKER	023
		PHONE	(740)493-5555			PHONE	(740)493-5555
		HOME SCHL				HOME SCHL	
		PROGRAM				PROGRAM	
CRSE	SEC	COURSE NAME	TERM	MEETING TIME	TEACHER	CRED	
962	3	ECON	All Year	1 (125)	LAURA CROFT	0.500	
052	2	LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000	
182	1	FRENCH I	1st Semester	3 (109)	LINDA WALTERS	1.000	
240	2	PRAC GEOMETRY	2nd Semester	3 (112)	DONALD BERRY	1.000	
423	1	SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500	
255	2	AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000	
431	1	PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000	
2007	2	ART	2nd Semester	5 (104)	JOHN BAER	1.000	
573	1	ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000	
232	2	BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000	
655	2	MATH	All Year	8 (150)	DAVID COUSINS	1.000	
233	2	ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000	

### Schedule Format 4

<b>STUDENT SCHEDULE</b>		DASL HIGH SCHOOL		<b>STUDENT SCHEDULE</b>		DASL HIGH SCHOOL	
COUNSELOR :		2007-2008		COUNSELOR :		2007-2008	
CONTRARY, JASON WILLIAM		NUMBER	7001	CONTRARY, JASON WILLIAM		NUMBER	7001
90 ELM STREET		HOMEROOM		90 ELM STREET		HOMEROOM	
LIMA, OH 45801		LOCKER	023 GEND M	LIMA, OH 45801		LOCKER	023 GEND M
		SSN	369-85-2369			SSN	369-85-2369
		BIRTHDATE	02/14/1990			BIRTHDATE	02/14/1990
		PHONE	(740)493-5555			PHONE	(740)493-5555
		HOME SCHL				HOME SCHL	
		PROGRAM				PROGRAM	
CRSE	SEC	COURSE NAME	TERM	MEETING TIME	TEACHER	CRED	
962	3	ECON	All Year	1 (125)	LAURA CROFT	0.500	
052	2	LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000	
182	1	FRENCH I	1st Semester	3 (109)	LINDA WALTERS	1.000	
240	2	PRAC GEOMETR	2nd Semester	3 (112)	DONALD BERRY	1.000	
423	1	SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500	
255	2	AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000	
431	1	PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000	
2007	2	ART	2nd Semester	5 (104)	JOHN BAER	1.000	
573	1	ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000	
232	2	BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000	
655	2	MATH	All Year	8 (150)	DAVID COUSINS	1.000	
233	2	ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000	

### Schedule Format 5

STUDENT SCHEDULE		DASL HIGH SCHOOL		2007-2008		STUDENT FEES		
CONTRARY, JASON WILLIAM 90 ELM STREET LIMA, OH 46801				NUMBER 7001 HOMEROOM _____ GRADE 11 LOCKER 023 GENDER M BIRTHDATE 02/14/1990 PHONE (740)493-5555 COUNSELOR _____ HOME SCHL _____		NAME CONTRARY, JASON WILLIAM NUMBER 7001 GRADE 11		
TEAM NAME : _____ PROGRAM : _____								
COURSE	SEC	COURSE NAME	TERM	MEETING TIME	TEACHER	CREDIT	COURSE FEE	AMOUNT
962	3	ECON	All Year	1 (125)	LAURA CROFT	0.500	Economics	\$15.00
052	2	LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000	Language Arts	\$15.00
182	1	FRENCH I	1st Semester	3 (109)	LINDA WALTERS	1.000	French	\$20.00
240	2	PRAC GEOMETRY	2nd Semester	3 (112)	DONALD BERRY	1.000	Practical Geometry	\$10.00
423	1	SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500	Sociology, Sociology Workbook	\$25.00, \$15.00
255	2	AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000	American History	\$20.00
431	1	PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000	PHYSICS	\$12.00
2007	2	ART	2nd Semester	5 (104)	JOHN BAER	1.000	Art	\$30.00
573	1	ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000	English	\$15.00
232	2	BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000	BIOLOGY I	\$12.00
655	2	MATH	All Year	8 (150)	DAVID COUSINS	1.000	Math	\$15.00
233	2	ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000	ANATOMY I	\$80.00
						TOTAL COURSE FEES: \$284.00		
GENERAL FEES:		Description(s):		Amount(s):		TOTAL GENERAL FEES: \$88.00		
		grade level fees, STUDENT ID, supply fee, TECHNOLOGY		\$35.00, \$3.00, \$25.00, \$5.00				
PROGRAM FEES:						TOTAL PROGRAM FEES: \$0.00		
MISC FEES:						TOTAL MISC FEES: \$0.00		
MEMB FEES:						TOTAL MEMB FEES: \$0.00		
LOCKER COMBINATION: 01-20-10						LOCKER ROOM: _____		
						PRIOR YEAR FEES: \$280.00		
						TOTAL FEES: \$832.00		

### Schedule Format 6

Student fees will be projected onto the student card (format 6), based upon General Fees and Course Fees, if fees have not been assigned to a student as long as the Has Fees Assigned flag on the DASL Options – Fees tab has not been checked.

STUDENT SCHEDULE		DASL HIGH SCHOOL		2007-2008	
CONTRARY, JASON WILLIAM			NUMBER	7001	
90 ELM STREET			GRADE	11	
LIMA, OH 45801			BIRTHDATE	02/14/1990	
TEAM NAME :			COMBINATION	01-20-10	
HOME SCHL:			PROGRAM		
			LOCKER	023	
			PHONE	(740)493-5555	
			COUNSELOR		

COURSE	SEC	COURSE NAME	TERM	MEETING TIME	TEACHER	CREDIT
962	3	ECON	All Year	1 (125)	LAURA CROFT	0.500
052	2	LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000
182	1	FRENCH I	1st Semester	3 (109)	LINDA WALTERS	1.000
240	2	PRAC GEOMETRY	2nd Semester	3 (112)	DONALD BERRY	1.000
423	1	SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500
255	2	AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000
431	1	PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000
2007	2	ART	2nd Semester	5 (104)	JOHN BAER	1.000
573	1	ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000
232	2	BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000
655	2	MATH	All Year	8 (150)	DAVID COUSINS	1.000
233	2	ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000

### Schedule Format 12

STUDENT SCHEDULE		DASL HIGH SCHOOL		2007-2008		STUDENT FEES	
LEE, HARPER (LEE)			NUMBER	1224			
23 MOCKINGBIRD LANE			HOMEROOM		GRADE	11	
LIMA, OH 45804			LOCKER	024	GENDER	F	
TEAM NAME :			SSN	678-66-8877		NAME	
PROGRAM :			BIRTHDATE	10/30/1999		NUMBER	1224
			PHONE	(419)345-2345		GRADE	11
			COUNSELOR				
			HOME SCHL				

COURSE	SEC	COURSE NAME	TERM	MEETING TIME	TEACHER	CREDIT	COURSE FEE	AMOUNT
962	3	ECON	All Year	1 (125)	LAURA CROFT	0.500	Economics	\$15.00
240	1	PRAC GEOMETRY	1st Semester	2 (112)	DONALD BERRY	1.000	Practical Geometry	\$10.00
052	2	LANGUAGE ARTS	2nd Semester	2 (103)	LAURA LAYMAN	1.000	Language Arts	\$15.00
182	3	FRENCH I	All Year	3,3A (109)	LINDA WALTERS	1.000	French	\$20.00
423	1	SOCIOLOGY	1st Semester	4 (122)	DEBRA BRIGGS	0.500	Sociology, Sociology Workbook	\$25.00, \$15.00
255	2	AP AM HISTORY	2nd Semester	4 (113)	JEFF BOYER	1.000	American History	\$20.00
431	1	PHYSICS	1st Semester	5 (123)	RONALD CASTLE	1.000	PHYSICS	\$12.00
2007	2	ART	2nd Semester	5 (104)	JOHN BAER	1.000	Art	\$30.00
573	1	ENGLISH	1st Semester	6 (124)	SUSAN CLARK	1.000	English	\$15.00
232	2	BIOLOGY I	2nd Semester	7 (110)	SAM BAUM	1.000	BIOLOGY I	\$12.00
655	2	MATH	All Year	8 (150)	DAVID COUSINS	1.000	Math	\$15.00
233	2	ANATOMY	2nd Semester	9 (111)	BILLY BELL	1.000	ANATOMY I	\$80.00

GENERAL FEES:	Description(s): grade level fees, STUDENT ID, supply fee, TECHNOLOGY	Amount(s): \$35.00, \$3.00, \$25.00, \$5.00	TOTAL COURSE FEES: \$284.00	TOTAL GENERAL FEES: \$68.00
---------------	---	--	-----------------------------	-----------------------------

### Schedule Format 16

## Add/Drop Audit Report (R209)

Navigation: Home – SIS – Scheduling – Scheduling Reports – Add/Drop Audit Report (R209)

This report is a listing of course section scheduling activity for students enrolling and withdrawing from course sections. The report lists the following fields: Date, Course Code, Teacher ID, Period, Course Term, Student Number, Action Type, Teacher Name, Program, Administrative Homeroom.

Home >> SIS >> Scheduling >> Scheduling Reports >> Add/Drop Audit Report (R209)

### Add/Drop Audit Report (R209)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Schedule: Default Schedule

Schedule Result: Default Schedule Result

Date Range: 8/20/2013 to 6/2/2014  
 Add/Drop/Remove Date    Modified Date

Homeroom Date: 2/14/2014

**Course ID**

0001 - LUNCH  
0002 - LUNCH  
001 - ENGLISH 9  
001R - ENGLISH 9R

**Course Section**

1  
2  
3  
4

**Course Term**

1st Semester  
All Year  
2nd Semester

**Action Type:**    Add    Drop    Remove

**Page Break on First Sort Term?**

**Sorting Options**

Action Date (ASC)  
Action Date (DESC)  
Action Type (ASC)  
Action Type (DESC)

**Delivery Method:** Pickup  

**Email Address:** SilvaT@software-answers.com

**Report Format:** Adobe PDF

**Description:**

Add/Drop Audit Report Parameters Screen

**Ad-Hoc Membership** (optional) – Select the appropriate Ad-Hoc Membership from the drop-down list. Note selecting an Ad-Hoc Membership will limit the report to only include students associated with the selected Membership.

**Schedule** (required) – Select the Schedule for which you wish to run this report. This is only modifiable until the Schedule is finalized.

**Schedule Result** (required) – Select the Schedule Result for which you wish to run this report. This is only modifiable until the Schedule is finalized.

**Date Range** (optional) – Specify a date range in each of the date boxes to designate the scheduling activity you want to report (from and to dates). Leave blank to select the entire year. Select the basis of the date range as follows:

- **Add/Drop/Remove Date** – Runs based on the effective date the student added, dropped or was removed from the course
- **Modified Date** – Runs based on the date you performed the add/drop/remove transaction

**Homeroom Date** (required) – Specify the date to use to retrieve student's homeroom. Defaults to today's date.

**Course ID** (optional) – If no Courses are selected, the report will select all Courses. You can also filter by selecting specific Courses for your report.

**Course Section** (optional) – If no Course Sections are selected, the report will select all Course Sections. You can also filter by selecting specific Course Sections for your report.

**Course Term** (optional) – If no Course Terms are selected, the report will select all Course Terms. You can also filter by selecting specific Course Terms for your report.

**Action Type** (required) – Indicate the Action Type(s) to be displayed on the report. Check one or more of the following: Add, Drop, Remove. At least one Action Type must be selected.

**Page Break on First Sort Term?** (optional) – If checked, the report will skip to a new page based on the first Sorting Option selected. For example, if Teacher Code is selected as the first Sorting Option and Page Break on First Sort Term? is selected, then the report will sort by Teacher Code and skip to a new page when a new Teacher Code is encountered.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (Auto-populated from your StudentInformation profile.)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

## Course Section Summary Report

Navigation: Home – SIS – School – Course Section Summary Report

This on-line report shows course information for the selected criteria.

**Course Section Summary Report Search Criteria**

**Term** (required) – Select the Course Term from the drop-down list. Course Terms are defined by building.

**Period** (required) – Select the period of the day. Periods of the day are defined by building and course/sections are assigned to specific periods of the day.

**Course/Section** (optional) – Enter the Course number or the Course/Section combination.

 – Invoke the Course Selection Wizard for additional course selection criteria.

Course ^	Section	Title	Term	Teacher	Room	Capacity	Enrolled	Status
005	1	HOMEROOM	All Year	Mrs. Carpenter	20	25	0	
005	2	HOMEROOM	All Year	Mr. Bunker	30	25	0	
005	3	HOMEROOM	All Year	Mr. Theodore	10	25	0	
005	4	HOMEROOM	All Year	Mr. Theodore	11	25	0	

**Course Section Summary Report Screen**

**Selection Criteria** – Enter the criteria to narrow down your course selection using the various drop-down lists.

**Search** – Search for the courses that match the selected criteria.

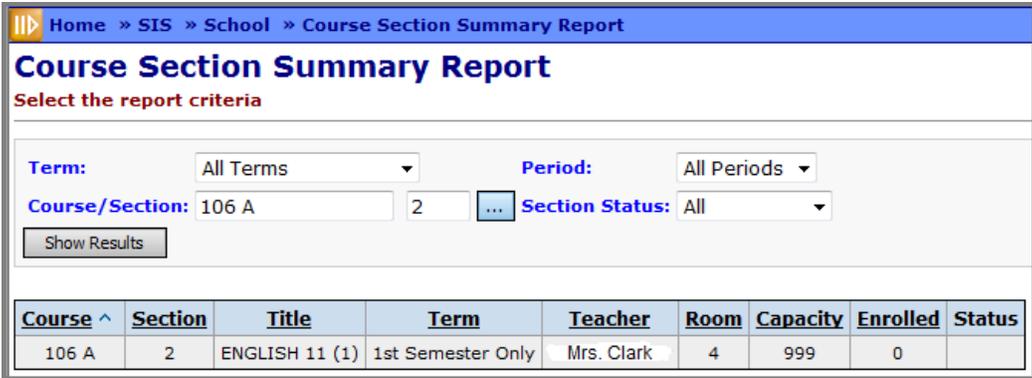
**Clear** – Clear the search criteria.

**Cancel** – Cancel and close the Course Selection Wizard and return to the Course Section Summary Report.

 – Select this course and return to the Course Section Summary Report where this selection will be entered into the Course field.

**Section Status** (required) – Choose All, Open Only or Closed Only. The Section Status will be displayed on the screen.

**Show Results** – Show the courses that match the selected criteria.



The screenshot shows the 'Course Section Summary Report' interface. At the top, there is a breadcrumb trail: Home » SIS » School » Course Section Summary Report. Below this is the title 'Course Section Summary Report' and a sub-header 'Select the report criteria'. The search criteria section includes: 'Term:' with a dropdown menu set to 'All Terms'; 'Period:' with a dropdown menu set to 'All Periods'; 'Course/Section:' with a text input containing '106 A' and a dropdown set to '2'; and 'Section Status:' with a dropdown menu set to 'All'. A 'Show Results' button is located below the search criteria. Below the search area is a table with the following data:

Course ^	Section	Title	Term	Teacher	Room	Capacity	Enrolled	Status
106 A	2	ENGLISH 11 (1)	1st Semester Only	Mrs. Clark	4	999	0	

**Search Results on the Course Section Summary Report Screen**

**Sorting** – You may sort by any column (Course, Section, Title, Term, Teacher, Room, Capacity, Status) in ascending or descending order by clicking on the column header.

**Course** – Course Number

**Section** – Course Section Number

**Title** – Title of the Course.

**Term** – Course Term which are defined by building.

**Teacher** – Teacher assigned to the course section.

**Room** – Room assigned to the course section.

**Capacity** – Maximum number of students that can be enrolled in this course section.

**Enrolled** – Number of students currently enrolled in this course section.

**Status** – If the status of the course section is Open, the status will show blank. If the status of the course section is Closed, the word **\*\*Closed\*\*** will appear.

---

# ProgressBook StudentInformation Student and Registration Guide



# **ProgressBook StudentInformation Student and Registration Guide**

(This document is current for v14.9.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

## Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Student and Registration Guide* have been made.

Product Version	Heading	Page	Reason
14.9.0	<i>"Civil Rights Reporting"</i>	245	Updated section to reflect revised Civil Rights reporting requirements.
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.7.0	"Show Inactive Family Groups"	N/A	Section removed. Inactive family groups no longer display.
14.7.0	<i>"Add/Edit Contact Type Code"</i>	17	Updated image to show new "Authorized to Pickup" option.
14.7.0	<i>"Student Contact Information"</i>	130	Added description of new "Authorized to Pickup" option and updated images.
14.7.0	<i>"Add Contact"</i>	131	Added description of new <b>Legal District of Residence Change Date</b> field. Updated image and reordered field descriptions to show reordering of some fields on the window.
14.7.0	<i>"Edit Contact"</i>	134	Updated image to show new <b>Legal District of Residence Change Date</b> field and reordering of some other fields.
14.7.0	<i>"Family Groups"</i>	152	Updated section to show new <b>Number of Family Groups Per Page</b> option on <b>Family Groups</b> screen.
14.7.0	<i>"Create a Family Group"</i>	154	Updated procedure and images to show removal of <b>Is Active</b> check box on <b>Group</b> tab and <b>Save</b> button on <b>Students</b> tab.
14.7.0	<i>"Modify a Family Group"</i>	157	Deleted step referencing removed <b>Is Active</b> check box.
14.7.0	<i>"Add Contacts to a Family Group"</i>	158	Added initial steps to search for and access the correct family group.  Added "Authorized to Pickup" option to note.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.7.0	<i>“Delete a Family Group”</i>	161	Removed reference to viewing inactive family groups.
14.7.0	<i>“Set District Courier Policy”</i>	162	Updated image to show new <b>Grade</b> multi-select list. Added optional step of excluding students in certain grade levels from being assigned as courier.
14.7.0	<i>“Set Page Level Security for Family Groups Contacts”</i>	163	Updated image to show new <b>Grade</b> multi-select list.
14.7.0	<i>“Create Family Groups with the Family Groups Wizard”</i>	164	Updated image to show new <b>Family Group Name</b> field and new <b>Number of Family Groups Per Page</b> option on <b>Display Groups</b> tab.
14.7.0	<i>“Modify Groups in Family Groups Wizard”</i>	167	Update images to show removal of <b>Contacts</b> tab. Removed text referring to the removed <b>Is Active</b> check box on the <b>Group</b> tab.
14.6.7	<i>“Student Profile – FS-Attendance Tab”</i>	79	Updated field names/descriptions and image to reflect ODE change from days to hours reporting for attendance.
14.6.7	<i>“Edit FS Student Attendance Records”</i>	80	Split information on editing FS Student Attendance records into its own topic.
14.6.7	<i>“Student Profile – Transportation Tab”</i>	96	Added description of new <b>Distance student was transported from residence to school building</b> drop-down list and updated image.
14.6.4	<i>“Student Profile – FN-Attributes Tab”</i>	91	Updated image and field description to show <b>Updated December 1<sup>st</sup> IEP Outcome</b> field renamed to <b>Oct Childcount IEP Outcome</b> .
14.6.0	<i>“Student Profile – FN-Attributes Tab”</i>	91	Updated description of <b>Attending Building IRN Next Year</b> field to describe newly registered students.
14.5.0	<i>“Student Profile – FD-Attributes Tab”</i>	82	Added description of new <b>Reporting Calendar</b> field and updated associated images.
14.4.3	<i>“Student Profile – FN-Attributes Tab”</i>	91	Removed reporting period information, added <b>Attending District IRN Last October</b> field description and updated image.
14.4.3	<i>“Student Profile – Transportation Tab”</i>	96	Added description of <b>Countweek Transportation Days</b> section and updated image.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.4.3	<i>"Create Family Groups with the Family Groups Wizard"</i>	164	Added note about setting the correct default school year before running the Family Groups Wizard.
14.4.0	<i>"Student Profile – FN-Attributes Tab"</i>	91	Added option of EX (Exempt from Diagnostic Assessment) to description of <b>Third Grade Reading Guarantee</b>
14.3.0	<i>"Contact Type Codes Maintenance"</i>	15	Updated district level image to show new <b>NCES Contact Type</b> column.
14.3.0	<i>"Add/Edit Contact Type Code"</i>	17	Added description of new <b>NCES Contact Type Code</b> drop-down list and updated image.
14.3.0	<i>"Map District Contact Type Codes to Professional Contact Codes"</i>	18	Updated image to show new <b>NCES Contact Type</b> column.
14.3.0	<i>"Student Photographs"</i>	186	Moved section from the <i>ProgressBook StudentInformation Getting Started Guide</i> to this guide.
14.1.0	<i>"Custody Type Codes"</i>	13	Added description of new <b>Custody</b> check box, rewrote add/edit section as procedural steps and updated screen shots.
14.1.0	<i>"Student Profile – General Tab"</i>	58	Added note about changing the <b>Address of Residence</b> of a student with contacts sharing the same address.
14.1.0	<i>"Student Profile – FN-Attributes Tab"</i>	91	Added description of new <b>Admission to Current High School Date</b> field and updated screen shot.
14.1.0	<i>"Student Profile – FN-Graduate Tab"</i>	94	Added description of new <b>CORE Graduation Requirement Exemption Date, CORE Graduation Requirement Met</b> and <b>Expected Graduation Date</b> fields and updated screen shot.
14.1.0	<i>"Edit Contact"</i>	134	Updated screen shot to show address fields disabled because <b>Same As Student Address</b> check box is selected.
14.1.0	<i>"Student Roster Detail (R101-A)"</i>	215	Added description of new <b>Use Family Group Couriers</b> option and updated screen shot.
14.0.0	<i>"Contact Type Codes Maintenance"</i>	15	Updated screen shots and added procedure for mapping district codes to professional codes.

This page intentionally left blank.

# Table of Contents

Change Log.....	i
Table of Contents.....	v
Student and Registration Overview.....	1
Understanding Student and Student Registration .....	1
Student Registration Outline and Flow .....	2
Student Codes Maintenance .....	6
Student Status Codes.....	6
Add/Edit Student Status Code .....	7
Team Codes Maintenance.....	8
Add/Edit Team Code.....	9
Ethnicity Codes Maintenance .....	9
Add/Edit Ethnicity Code .....	11
Student Program Codes .....	11
Add/Edit Program Code .....	12
Custody Type Codes .....	13
Add Custody Type Codes .....	13
Edit Custody Type Codes .....	14
Contact Type Codes Maintenance .....	15
Add/Edit Contact Type Code.....	17
Map Building Contact Type Codes to District Contact Type Codes .....	17
Map District Contact Type Codes to Professional Contact Codes .....	18
Admission Codes Maintenance .....	19
Add/Edit Admission Code .....	21
Withdrawal Codes Maintenance .....	21
Add/Edit Withdraw Code .....	22
Birthdate Verification Codes .....	23
Add/Edit Birthdate Verification Code.....	24
Membership Group Codes.....	24
Add/Edit Membership Group .....	26
Membership Codes Maintenance .....	26

Add/Edit Membership.....	28
Miscellaneous Data Groups.....	29
Add Miscellaneous Data Group.....	30
Miscellaneous Data Definitions.....	31
Add/Edit Miscellaneous Data Definition .....	33
Registering Students .....	35
Registration Wizard .....	36
Registration Wizard – Registration Pre-requisites Tab.....	37
Registration Wizard – Possible Matches Tab.....	38
Registration Wizard – Complete Registration Tab .....	41
Registration Wizard – Family Group Tab .....	45
Registration Wizard – EMIS Tab .....	46
Registration Wizard – Course History Tab .....	49
Registration Wizard –Attendance Tab.....	53
Registration Wizard – Assessment Tab .....	53
Student Profile .....	54
StudentInformation/ProgressBook Integration Note.....	54
Common Profile Controls .....	56
Student Profile – General Tab.....	58
Student Profile – Additional Tab.....	62
Student Profile – Custom Tab .....	65
Student Profile – Private Tab .....	66
Student Profile – FS-Standing Tab.....	67
Student Profile – FS-Attendance Tab.....	79
Student Profile – FD-Attributes Tab .....	82
Student Profile – FN-Attributes Tab .....	91
Student Profile – FN-Graduate Tab.....	94
Student Profile – Transportation Tab .....	96
Students Failing Address Verification .....	97
Student Information .....	98
Admission/Calendar History .....	98

View Calendar History .....	99
View Admission History .....	100
Edit History Details .....	101
Delete Admission Event .....	102
Edit Admission Event .....	104
Withdraw Student .....	106
Student Transfers .....	109
Student Transfer .....	110
View Pending Transfers .....	112
Transfer History.....	124
Bulk Student Transfer .....	126
WebService Administration .....	128
Student Community Service Hours.....	128
Add/Edit/Delete Community Service Hours.....	129
Student Contact Information .....	130
Add Contact .....	131
Edit Contact .....	134
Change Primary Contact.....	135
Reorder Contacts .....	136
Delete Contact .....	137
Student Memberships.....	137
View Student Memberships .....	138
Edit Student Memberships .....	139
Membership Members Screen .....	143
Copy Ad-Hoc Membership to Membership .....	150
Family Groups .....	152
Create a Family Group.....	154
Modify a Family Group .....	157
Add Contacts to a Family Group .....	158
Delete a Family Group .....	161
Set District Courier Policy .....	162

Set Page Level Security for Family Groups Contacts .....	163
Family Groups Wizard.....	164
Student Alert Screens.....	169
Custody Alert.....	170
Disability Alert .....	173
Miscellaneous Alert.....	176
Medical Alert .....	178
Outstanding Fees Alert .....	178
Student Note Maintenance .....	180
Student Miscellaneous Data.....	181
Filter by Group .....	181
Add/Edit Student Miscellaneous Data .....	183
Student Counselor Assignment .....	184
View-Only Student Profile .....	184
Student Photographs.....	186
View Student Profile .....	186
Student Context Information.....	187
I want to... Drop-down List .....	188
Student Reports .....	188
Student Lunch Free/Reduced (LUNCH) .....	188
Student Alerts (STD_ALERT) .....	191
Student with No SSID (SSID) .....	194
Student with No SSNO (SSNO).....	197
Student Contact List (CONT).....	198
Student Locker Allocation (LOCK).....	201
Student Location Report (Report Builder).....	204
Withdrawal List (WITH).....	207
Student Status/Attendance Code (STAT) .....	208
Admission/Withdrawals (AWEX).....	210
Ethnicity Summary Report .....	213
Student Roster Detail (R101-A).....	215

Without Demographics.....	219
With Demographics.....	219
Student Roster Summary (R101-B).....	220
Student Roster Summary by Home School (R101-B By Home School).....	222
Student Roster Summary by Homeroom (R101-B By Homeroom).....	225
Student Roster Summary by Program (R101-B By Program).....	228
Administrative Homeroom List Summary (R201B).....	231
Administrative Homeroom List Detail (R201-A).....	233
Student Roster by Membership (R102).....	236
With Address.....	239
Without Address.....	240
Principals Report of Enrollment (R305).....	240
Year-End Enrollment Summary (R306-B).....	242
Grade and Beginning Enrollment Grid.....	244
Admission Grid.....	244
Withdrawal Grid.....	245
Civil Rights Reporting.....	245
Understand Civil Rights Report Calculations.....	246
Student Calculations.....	246
Ethnicity Determination.....	246
Complete Civil Rights Data Collection.....	247
Run Civil Rights Report – Part 1.....	252
Run Civil Rights Report – Part 2.....	271
View Archived Student Data.....	290
Archived Student Details – Student Profile Tab.....	291
Archived Student Details – Scheduling Tab.....	291
Archived Student Details – Marks Tab.....	292
Archived Student Details – Fees Tab.....	292
Marking Pattern Mapping.....	292
Add Marking Pattern Mapping.....	294
Edit Marking Pattern Mapping.....	295

Deactivate Marking Pattern Mapping..... 295

---

## Student and Registration Overview

The ProgressBook StudentInformation Student and Student Registration program will be used by school personnel to enter all types of information on new and existing students. This data will be used by the district as well as for EMIS reporting needs.

The Student program is made up of several elements which are defined by code tables. These tables work in combination with the various student screens, as validation for fields within the applications. This helps to maintain the integrity of data entered. Once these code tables have been defined, the user can begin adding records for students. Staff members will also have the capability to modify, change, and delete various student records as needed. The “StudentInformation modules”, such as Miscellaneous Data, Memberships, Alerts and Contact Information, help to meet the reporting needs of the school and/or district.

---

## Understanding Student and Student Registration

The Student “master” or Profile Record as it is called in SIS has many properties. Some properties are specific to the student at the school building level, while others properties are specific to the student at the district level. And EMIS reporting requirements necessitate the addition of still other properties. Each will be outlined and explained in this chapter.

The Student and Student Registration encompass several collection and reporting capabilities as well. Those areas include:

- Registration of new students and updating of existing students’ demographic information.
- Admission and withdrawal history for all students.
- Ability to define Disability, Medical, Custody and Miscellaneous alerts for individual students.
- Collection and reporting of all EMIS student demographic requirements.
- Create Contact information for students with the ability to view and edit same.
- Define student memberships with beginning and ending dates.
- Capability to set up Miscellaneous screens for collection of other/miscellaneous data.

---

## Student Registration Outline and Flow

### 1. Student Codes Maintenance

**Student Status Codes** – Codes used to define the enrollment status of a student, indicating if they are actively enrolled, inactive, expelled, etc.

**Team Codes** – Available to group students together according to academic levels for the purpose of scheduling students as a common group to common course sections.

**Ethnicity Codes** – Codes used to describe a student's ethnic background.

**Program Codes** – Defines a collective course of study and typically used to group students in a common education program.

**Custody Type Codes** – Codes used to describe parental or guardianship custody of a student.

**Contact Type Codes** – Defines the type of contact or relationship of a contact to the associated student. Some Contact codes will require that the custody code be included as well.

**Admission Codes** – Codes used to describe the reason a student is being admitted to a school, such as new resident, from non-public school, first school attended, etc.

**Withdrawal Codes** – Codes used to describe the reason a student is leaving the school, such as moving, drop out, etc.

**Birthdate Verification Codes** – Codes that signify permitted methods of birth date verification.

**Membership Group Codes** – Used to group related memberships together, such as fall sports teams, academic clubs, etc.

**Membership Codes** – Used to group related students to indicate a common affiliation or activity.

**Miscellaneous Data Groups Maintenance** – Defines the valid miscellaneous groups with field definitions, for entry of additional student data not currently stored in any other area.

**Miscellaneous Data Definitions Maintenance** – Used to define the field definitions for the Miscellaneous Group.

### 2. Registering Students

**A. Registration Wizard** – Initial screen used to register students in the working school.

1. **Registration Pre-requisites tab**

2. **Possible Matches tab**

3. **Complete Registration tab**

4. **EMIS tab**

**B. Student Profile** – Series of tabs used for input of student information.

1. **General tab** – Detailed student demographic information.
2. **Additional tab** – Additional demographic info and some scheduling information.
3. **Custom tab** – Miscellaneous data definitions.
4. **Private tab** – Private student information.
5. **FS-Standing tab** – EMIS FS Student Standing records.
6. **EMIS Situation Wizard**
7. **FS-Attendance tab** – EMIS FS Student Attendance records.
8. **FD-Attributes tab** – EMIS FD Attributes records.
9. **FN-Attributes tab** – EMIS FN Attributes records.
10. **FN-Graduate tab** – EMIS FN Graduate record.
11. **Transportation tab** – Student transportation info.

### 3. Student Information

- A. **Admission/Calendar History** – Displays admission and withdrawal history as well as calendar changes for the selected student.
- B. **View Calendar History** – Displays calendar history for the selected student.
- C. **View Admission History** – Displays admission and withdrawal history for the selected student.
- D. **Edit History Details** – Displays and allows editing and deletion of the selected student's admission events.
- E. **Withdraw Student** – Screen used to withdraw students from the district.
- F. **Student Transfers** – Screen used to track transfer students.
- G. **Student Community Service Hours** – Screen used to track Community Service Hours for each student.
- H. **Student Contact Information** – Viewable information for all contacts designated for the selected student.
- I. **Student Memberships and Membership Staff Members**
  1. **View Student Memberships** – View only of the selected student's associated memberships.
  2. **Membership Staff Members** – View of student's memberships and the staff member (if applicable) assigned to that code.
  3. **Memberships Members** – Screen used for adding students in bulk, to a specific membership.
  4. **View Memberships**
  5. **Add Students to Membership**
  6. **Delete Students from Membership**
  7. **Bulk Addition of Students**
  8. **Copy Ad-Hoc Membership to Membership** – Copy students in a selected ad-hoc membership to a "regular" membership.

- 9. **Copy Membership from Year to Year** – Copy selected student’s membership from the previous year to the current year in context.
  - J. **Family Groups** – Enables you to create a group of students who are living in the same household so that when the district or school needs to notify the parents of an event, such as by phone or mail, only one notification is set per household.
  - K. **Student Alerts**
    - 1. **Custody Alert** – Used to display and remove existing custody alerts for a student.
    - 2. **Disability Alert** – Used to display and remove existing disability alerts for a student.
    - 3. **Miscellaneous Alert** – Used to display and remove existing miscellaneous alerts for a student.
    - 4. **Medical Alert** – Used to display and remove existing medical alerts for a student. See *ProgressBook StudentInformation Student Medical Guide*.
  - L. **Student Note** – This page provides the ability to maintain the properties of a student note or to create a new student note.
  - M. **Student Miscellaneous Data** – Provides the ability to define the valid miscellaneous groups with field definitions, for entry of additional student data not currently stored in any other area.
  - N. **Student Counselor Assignment** – View students assigned to a specific counselor.
- 4. **View-Only Student Profile** – Basic demographic information for selected student, including picture of student if available. Page has links to other areas of the student’s records.
  - A. **View Student Profile**
  - B. **Student Context Information**
  - C. **I Want To...drop-down list**
  - D. **View Buttons**
- 5. **Student Reports**
  - A. **Student Lunch Free/Reduced (LUNCH)** – Will list students on the free/reduced lunch program.
  - B. **Student Alerts (STD\_ALERT)** – The student alerts report displays all student alerts for students meeting the specified criteria and having the selected alerts.
  - C. **Student With No SSID (SSID)** – Will list all students meeting the specified criteria with no State Student ID (SSID) recorded in their demographic record. The report can also display a listing of students meeting the specified criteria and the SSID record in their demographic record.
  - D. **Student With No SSNO (SSNO)** – Will list students meeting the specified criteria with no Social Security Number (SSN) record in their demographic

record. The report can also display a listing of students meeting the specified criteria and the SSN recorded in their demographic record.

- E. Student Contact List (CONT)** – Displays contact information for contact of specified types and students meeting specified criteria.
- F. Student Locker Allocation (LOCK)** – Will display all lockers of specified type and status when assigned to students meeting the user specified student selection criteria. Additional options permit printing of unassigned lockers as well, and locker combinations may be optionally displayed on the report.
- G. Withdrawal List (WITH)** – Displays all students who have withdrawn within a specified date range.
- H. Student Status/Attendance Code (STAT)** – The report displays students' EMIS situations. The students reported can be limited by EMIS handicap situation and other student properties.
- I. Admission/Withdrawals (AWEX)** – Displays school admission and withdrawal events for specified date ranges and specified admission and withdrawal types.
- J. Ethnicity Summary Report** – Will display students by ethnical origin classification. The report will display ethnicity code specific to the schools context as well as EMIS standard ethnicity codes.
- K. Student Roster Detail (R101-A)** – This report is used to generate a detailed listing of all students, as well as create address labels. This report can be used to generate student rosters for specific groups of students by grade, age, program, previous school, etc.
- L. Student Roster Summary (R101-B)** – This report is used to generate a summary listing of all students attending the school, as well as creates address labels.
- M. Student Roster Summary (R101-B By Home School)** – This report generates a summary listing of all students attending a selected group of schools by grade, gender, and home school. Similar to the Student Roster Summary (R101-B).
- N. Student Roster Summary (R101-B By Homeroom)** – This report generates a summary listing of all students attending a selected group of schools by grade, gender, and homeroom.
- O. Student Roster Summary (R101-B By Program)** – This report generates a summary listing of all students attending a selected group of schools by grade, gender, and program.
- P. Administrative Homeroom Summary (R201-B)** – Will print summary of student information by homeroom.
- Q. Administrative Homeroom Detail (R201-A)** – Will print detailed student information by homeroom.

- R. Student Roster by Membership (R102)** – This report is used to generate a list of students that all belong to a group/membership. The group is some factor that is similar to all the students in the group.
- S. Principals Report of Enrollment (R305)** – This report shows enrollment by grade, age and gender.
- T. Year-End Enrollment Summary (R306B)** – This interactive report shows enrollment by grade and admission/withdrawal codes.

## Student Codes Maintenance

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

Most Student Codes may be defined globally (by the ITC), at the district level, or at the school level per the chart below.

	<b>Visibility and Use</b>	<b>Editable</b>
<b>Global Level</b>	ITC, District, School	ITC
<b>District Level</b>	ITC, District, School	ITC, District
<b>School Level</b>	ITC, District, School	ITC, District, School

 – Codes with the Lock icon in place of the Delete and Edit icons have been defined at a higher level, as described above. You can only delete or edit codes at the same level they were defined.

## Student Status Codes

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

Student Status Codes are used to define the enrollment status of a student, indicating if they are actively enrolled, inactive, expelled, etc.

Home » Management » School Administration » Student Codes Administration » Student Status Codes

### Student Status Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to student status codes.

Add Status Code

	Code	Name ^	Overall Student Status	Description	Active
	A	ACTIVE RES	Active	ACTIVE RES	
	D	DELETED	Deleted	DELETED	
	F	Flagged for Review	Active		
	I	INACTIVE	Inactive	INACTIVE	
	Open	Open Enrolled Student	Active		
	O	OTH NONRES	Inactive	OTH NONRES	
	U	OTH RE A/E	Active	OTH RE A/E	
	Q	OTH RESIDE	Inactive	OTH RESIDE	
	Res	Resident Attending Elsewhere	Inactive		
	JVS	Student Attending JVS	Inactive		

Show Active Only

#### Student Status Codes Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Overall Student Status, Description, Active) in ascending or descending order by clicking on the column header.

#### Add/Edit Student Status Code

Home » Management » School Administration » Student Codes Administration » Student Status Codes

### Student Status Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to student status codes.

Code:

Name:

Overall Student Status:  Deleted  Inactive  Active

Description:

Is Active:

Save Save and New Cancel

#### Add/Edit Student Status Code Screen

**Code** (required) – Enter up to 4 characters – alphanumeric –for Status Code. If you try to use an existing inactive Status Code, you will be prompted to reactivate this inactive Status Code if you wish.

**Name** (required) – Enter Name of Status Code.

**Overall Student Status** (required) – Is this New Student Status code to be considered with an overall status of Deleted, Inactive or Active.

**Description** (optional) – Enter a description for the status code.

## Team Codes Maintenance

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

Team codes are used to group students together according to academic levels for purposes of scheduling students as a common group to common course sections.

		Code	Name ^	Description	Active
		Band	Band Grade 9		
		Blue	Blue Team		
		DT	District Team		
		Gold	Gold Team		

Show Active Only

**Team Codes Maintenance Screen**

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

## Add/Edit Team Code

Home >> Management >> School Administration >> Student Codes Administration >> Team Codes

### Team Codes Maintenance

From this screen, you can display, add, change and delete Team codes.

**Code:**  ⚡

**Name:**  ⚡

**Description:**

**Is Active:**

**Add/Edit Team Codes Maintenance Screen**

**Code** (required) – Enter up to 4 characters – alphanumeric – for Team Code. If you try to use an existing inactive Team Code, you will be prompted to reactivate this inactive Team if you wish.

**Name** (required) – Enter the name of Team Code.

**Description** (optional) – Enter a description of the Team Code.

## Ethnicity Codes Maintenance

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

The Ethnicity Codes describe a student's ethnic background. The Ethnicity values located in Ethnicity Codes Maintenance are utilized in the Local Ethnic Category field located on the General tab on the Student Profile screen.. StudentInformation uses these values in many reports that include values for ethnicity. Ethnicity is also reported to EMIS; however, the values reported to EMIS are reported from the Summative Race field, which is also located on the General tab on the Student Profile screen.

Home » Management » School Administration » Student Codes Administration » Ethnicity Codes Advanced Search | Feedback | Mgmt | Help | Version | Print

### Ethnicity Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to ethnicity codes.

Code ^	Name	Description	Active
A	Asian	Origins in Far East, Southeast Asia or India. EX: Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, Philippine Islands, Thailand, & Vietnam.	
B	Black or African American	Persons having origins in any of the black racial groups in Africa.	
H	Hispanic	Persons of Mexican, Puerto Rican, Cuban, Central or South America or Other Spanish culture or origin, regardless of race.	
I	American Indian	Persons in any of the original peoples of North & South America, Central America, & who maintain tribal affiliation or community attachment.	
M	Multiracial	Person having origins in two or more of the above options.	
P	Hawaiian or Pacific Islander	Persons having origins in any of the original peoples of Hawaii, Guan, Samoa, or other Pacific Islands.	
W	White	People who have origins in any of the original peoples of Europe, North Africa, or the Middle East.	

Show Active Only

### Ethnicity Codes Maintenance Screen

Home » SIS » Student » Edit Profile FY09 Advanced Search | Feedback

### Edit Student Profile

From this screen, you can display and change information regarding a student's profile.

General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | FN-Graduate | Transportation

Last Modified: 11/5/2010 9:49 AM by User: rudeppen

Student Number: 390184  Auto-Assign Student Status: A - ACTIVE RES

First Name: JOYCE Middle Name: Last Name: KEITH Called Name: Last Name Suffix: **Not reported to EMIS.**

Gender: F Birthdate: 7/23/1995 Age: 17

Local Ethnic Category: W - White Verified With: B - Birth Certificate

Hispanic/Latino: N - No, the student is not Hispanic/Latino Birthplace City: Racial Group(s):  A-Asian  B-Black or African American  I-American Indian or Alaska Native  P-Native Hawaiian or Other Pacific Islander  W-White

Summative Race: W - White, Non-Hispanic **Reported to EMIS.** Native Language: ENG - English (Default) Home Language: \*\*\* - Neither LEP nc

Address of Residence (For Address Verification) Mailing Address  Use Address of Residence

Street: 6770 West Snowville Road Street: 6770 West Snowville Road

City, State, Zip: Brecksville OH 44141 City, State, Zip: Brecksville OH 44141

Bypass Address Standardization/Verification  Bypass Address Standardization

Phone Number: (555) 555-5555  Unlisted Email: Building Grade: 12 - 12 Grade Next Year: GR - GR

EMIS Grade: 12 EMIS Grade Next Year: GR

Changing the Building Grade does not change the State Equivalent Grade. The FD tab can be used to change the State Equivalent Grade.  Changing the Grade Next Year does not change the EMIS Grade Next Year. The FN tab can be used to change the EMIS Grade Next Year.

Program: Home school IRN: Home School: Attendance Calendar: Default (Default) Report to EMIS:

### Local Ethnic Category and Summative Race Fields on the Edit Student Profile Screen

The Ethnicity Code Maintenance screen has standard add, edit, and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, EMIS Code, Description, Active) in ascending or descending order by clicking on the column header.

### Add/Edit Ethnicity Code

Home » Management » School Administration » Student Codes Administration » Ethnicity Codes

## Ethnicity Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to ethnicity codes.

**Code:**  ⚡

**Name:**  ⚡

**Description:**  ⚡

**Is Active:**

#### Add/Edit Ethnicity Codes Maintenance Screen

**Code** (required) – Enter up to 4 characters – alphanumeric – for Ethnicity Code. If you try to use an existing inactive Ethnicity Code, you will be prompted to reactivate this inactive Ethnicity if you wish.

**Name** (required) – Enter Name of Ethnicity Code.

**Description** (optional) – Enter a description of the new Ethnicity Code.

### Student Program Codes

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

Student program codes give the school the ability to define special programs, groups or activities that students may participate in. Programs are typically used by Joint Vocational Schools to indicate the area of study a student has enrolled in. Each program code may contain a weight indicator to be used when calculating course filling counts.

Home » Management » School Administration » Student Codes Administration » Program Codes

## Program Code Maintenance

From this screen, you can display, add, change and delete data pertaining to program codes.

Add Program Code

	Code ^	Name	Description	Weight	Active
✕ ✎	JAB	Jr Auto Body			💡
✕ ✎	JAG	Jr AG Mechanics			💡
✕ ✎	JCOS	Jr Cosmetology	Cosmetology	.0	💡
✕ ✎	SAB	Sr Auto Body			💡
✕ ✎	SAG	Sr AG Mechanics			💡
✕ ✎	SCOS	Sr Cosmetology			💡
✕ ✎	VOAG	Vocational Agriculture	Vocational Agriculture	.0	💡

Show Active Only

### Program Code Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Weight, Active) in ascending or descending order by clicking on the column header.

### Add/Edit Program Code

Home » Management » School Administration » Student Codes Administration » Program Codes

## Program Code Maintenance

From this screen, you can display, add, change and delete data pertaining to program codes.

Code:  ✎

Name:  ✎

Description:

Weight:

Is Active:

Save Save and New Cancel

### Add/Edit Program Code Maintenance

**Code** (required) – Enter up to 4 characters – alphanumeric –for Program Code. If you try to use an existing inactive Program Code, you will be prompted to reactivate this inactive Program Code if you wish.

**Name** (required) – Enter the name of the Program Code.

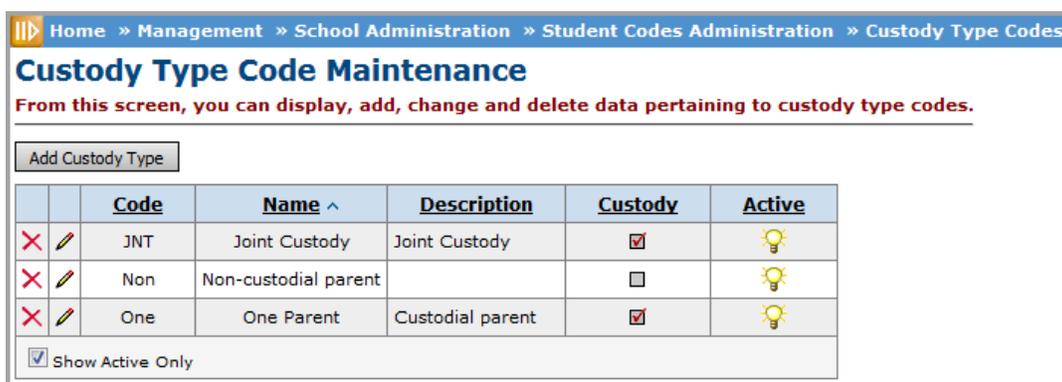
**Description** (optional) – Enter a description of the Program Code.

**Weight** (optional) – numeric value used as a multiplier for calculating course fillings. Example 1.5 may be used and any student with that particular program would count as 1.5 students when filling courses during scheduling process.

## Custody Type Codes

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

Use custody type codes to define types of custody arrangements that you can assign to a student's contact.



The screenshot shows the 'Custody Type Code Maintenance' screen. At the top, there is a breadcrumb trail: Home » Management » School Administration » Student Codes Administration » Custody Type Codes. Below the title, a red text line states: 'From this screen, you can display, add, change and delete data pertaining to custody type codes.' There is a button labeled 'Add Custody Type'. Below this is a table with the following data:

		<u>Code</u>	<u>Name ^</u>	<u>Description</u>	<u>Custody</u>	<u>Active</u>
X		JNT	Joint Custody	Joint Custody	<input checked="" type="checkbox"/>	
X		Non	Non-custodial parent		<input type="checkbox"/>	
X		One	One Parent	Custodial parent	<input checked="" type="checkbox"/>	

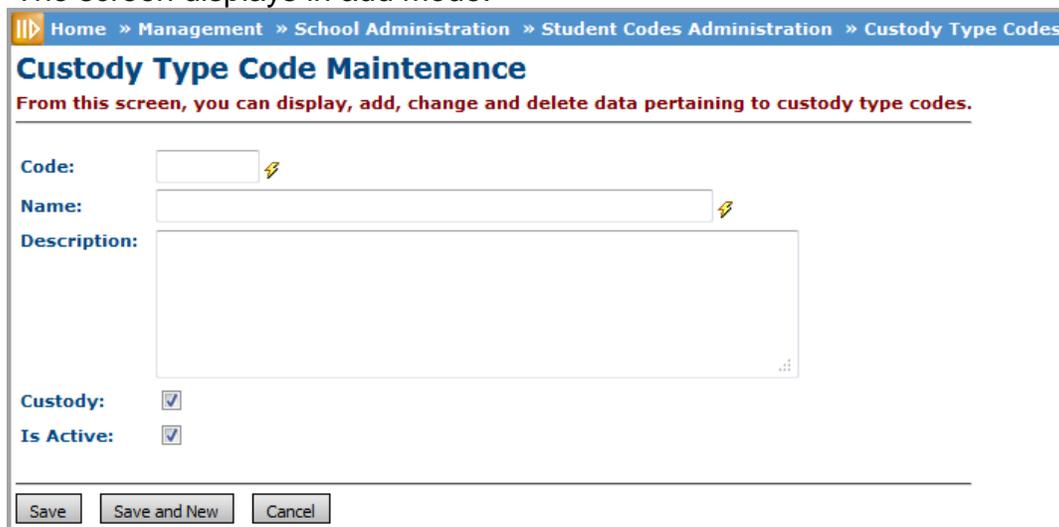
At the bottom of the table area, there is a checkbox labeled 'Show Active Only' which is checked.

**Custody Type Code Maintenance Screen**

### Add Custody Type Codes

1. On the **Custody Type Code Maintenance** screen, click **Add Custody Type**.

The screen displays in add mode.



The screenshot shows the 'Custody Type Code Maintenance' screen in add mode. The breadcrumb trail is the same. Below the title, the same red text line is present. The form fields are:

- Code:** A text input field with a lightning bolt icon.
- Name:** A text input field with a lightning bolt icon.
- Description:** A large text area.
- Custody:** A checkbox that is checked.
- Is Active:** A checkbox that is checked.

At the bottom, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

**Add Custody Type Codes**

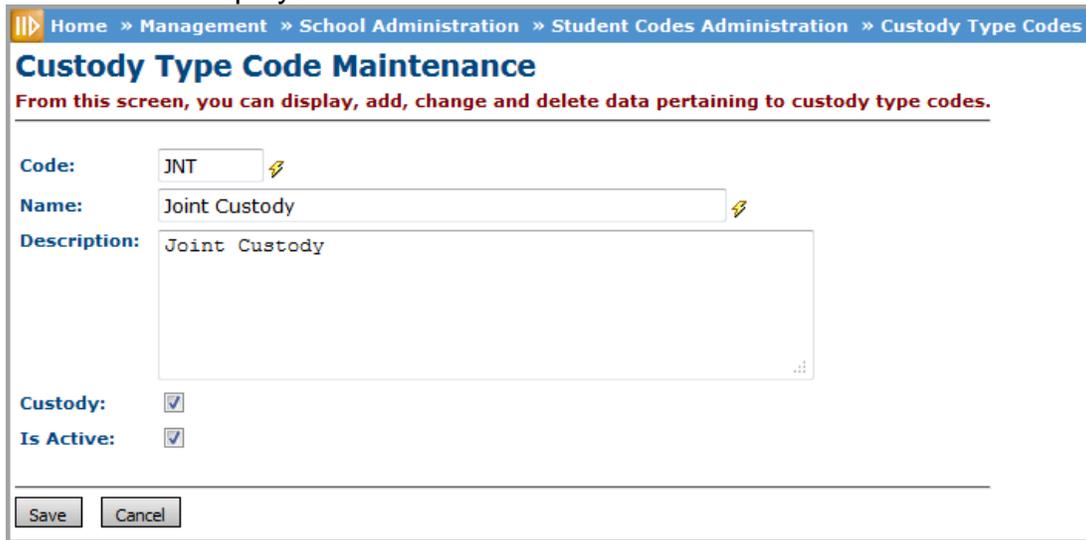
2. Enter information in the following fields:

- **Code** – Up to 4 alphanumeric characters
  - **Name** – Enter a name for this custody type code.
  - **Description** (optional) –Enter a description of this custody type code.
  - **Custody** – If a person assigned this custody type does not have any type of custody, deselect this check box.
  - **Is Active** – To inactivate the custody type, deselect this check box.
3. Click **Save** to save the record or **Save and New** to save and continuing adding records.

### Edit Custody Type Codes

1. On the **Custody Type Code Maintenance** screen, in the row of the custody type code you want to edit, click .

The screen displays in edit mode.



Home » Management » School Administration » Student Codes Administration » Custody Type Codes

### Custody Type Code Maintenance

From this screen, you can display, add, change and delete data pertaining to custody type codes.

Code: JNT

Name: Joint Custody

Description: Joint Custody

Custody:

Is Active:

Save Cancel

### Edit Custody Type Codes

2. Edit any information in the following fields:
  - **Code** – Up to 4 alphanumeric characters
  - **Name** – Name of this custody type code
  - **Description** (optional) – Description of this custody type code
  - **Custody** – If selected, indicates that a person assigned this custody type has some type of custody.
  - **Is Active** – Indicates if the custody type record is active or inactive.
3. Click **Save**.

## Contact Type Codes Maintenance

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

Use contact type codes to define the relationship of a student contact to the student, such as Mother, Father, Grandparent, Aunt, etc.

If you maintain contact type codes at the district level, you can map your building-level codes to them. (See [“Map Building Contact Type Codes to District Contact Type Codes.”](#)) You can also map district-level contact type codes to professional codes. (See [“Map District Contact Type Codes to Professional Contact Codes.”](#))

Home » Management » School Administration » Student Codes Administration » Contact Type Codes

### Contact Type Codes Maintenance

From this screen, you can display, add, change and delete contact type codes.

	Code	Name ^	Description	Count	District Codes	Professional Contact	NCES Contact Type	Active
	1749	Adoptive parents	Adoptive parents	0	-- Select a Professional Code --		1749 - Adoptive parents	
	DAYC	Day Care Center	Day Care Center	26	-- Select a Professional Code --			
	DENT	Dentist	Dentist	401	-- Select a Professional Code --			
	DOCT	DOCTOR	Doctor	59	-- Select a Professional Code --			
	DR	Dr District Contact	Doctor	1	-- Select a Professional Code --			
	ED	Eye Doctor	Ophthalmologist	0	DOCT - DOCTOR			
	HOSP	Hospital	Hospital	0	-- Select a Professional Code --			
	PARO	Parole Officer	Parole Officer	5	-- Select a Professional Code --			
	PRBA	Probation Officer	Probation Officer	1	-- Select a Professional Code --			
	REL	Relative	Combined Relative Contact Type	3	-- Select a Professional Code --			
	SOCI	Social Worker	Social Worker	119	-- Select a Professional Code --			
	THER	Therapist	Therapist	2	-- Select a Professional Code --			

Show Active Only

**Contact Type Codes Maintenance Screen – District Level**

Home » Management » School Administration » Student Codes Administration » Contact Type Codes

### Contact Type Codes Maintenance

From this screen, you can display, add, change and delete contact type codes.

Add Contact Type Code    Map Contact Codes

	Code	Name ^	Description	Count	District Codes	Professional Contact	Active
	C	Custodial Paren	Custodial Paren	38	-- Select a District Code --		
	FC	FATHER CELL	FATHER CELL	80	-- Select a District Code --		
	FP	FATHER PAGER	FATHER PAGER	4	-- Select a District Code --		
	FW	FATHER WORK	FATHER WORK	101	-- Select a District Code --		
	FOST	FOSTER	FOSTER	2	-- Select a District Code --		
	FR	FRIEND	FRIEND	39	-- Select a District Code --		
	G1	GRANDPARENT 1	GRANDPARENT 1	203	-- Select a District Code --		
	G2	GRANDPARENT 2	GRANDPARENT 2	17	-- Select a District Code --		
	G	Guardian	Guardian	7	-- Select a District Code --		
	MC	MOTHER CELL	MOTHER CELL	100	-- Select a District Code --		
	MP	MOTHER PAGER	MOTHER PAGER	5	-- Select a District Code --		
	MW	MOTHER WORK	MOTHER WORK	102	-- Select a District Code --		
	N1	NEIGHBOR 1	NEIGHBOR 1	9	-- Select a District Code --		
	N2	NEIGHBOR 2	NEIGHBOR 2	3	-- Select a District Code --		
	O	Other	Other	12	-- Select a District Code --		
	P	Parent(s)	Parent(s)	337	-- Select a District Code --		
	R	Relative	Relative	61	-- Select a District Code --		
	RE	RELATIVE	RELATIVE	59	-- Select a District Code --		
	SI	SITTER	SITTER	6	-- Select a District Code --		
	SP	STEP-PARENT	STEP-PARENT	15	-- Select a District Code --		

Show Active Only

20 Records Displayed [Back To Top](#)

### Contact Type Codes Maintenance Screen – Building Level

This page contains standard add record, edit record and delete record controls.

Records on this page are not deleted but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – Click any column header to sort by that column in ascending or descending order.

**Count** – Displays the number of student contact records using the contact type.



**Professional Contact** – The  icon indicates the contact is a professional contact, such as a day care center, doctor, dentist, parole officer, etc. and displays for preloaded professional contacts when you have a district in context. Students can share this type of contact.

**Note:** The **Professional Contact** column is blank at the building level.

## Add/Edit Contact Type Code

Home » Management » School Administration » Student Codes Administration » Contact Type Codes

### Contact Type Codes Maintenance

From this screen, you can display, add, change and delete contact type codes.

Code:

Name:

Description:

**Default Settings for Contacts of this type:**

Legal Guardian     Migrant Work     Same as Student Address

Medical Contact     Emergency Contact     Copied on Correspondence

Available at Work     Living with Student     Willing to Volunteer

Authorized to Pickup

**Is Active:**

**NCES Contact Type Code:**

Save    Save and New    Cancel

### Add/Edit Contact Type Codes Maintenance Screen

**Code** (required) – Enter up to four alphanumeric characters for the contact type code. If you try to use an existing inactive contact type code, you are prompted to reactivate this inactive contact type code, if desired.

**Name** (required) – Enter a name for the contact type code.

**Description** (optional) – Enter a description of the contact type code.

**Default Settings for Contacts of this type** – Select the applicable check boxes for default settings that you want to use the next time you use this contact type when adding student contacts. These values are only initial settings. If you change them in a contact type code, this does not affect existing contacts of this type. For more information on these settings, see *“Student Contact Information.”*

**NCES Contact Type Code** (optional) – Select the appropriate eTranscript-identified National Center for Education Statistics (NCES) contact type for this contact type code.

### Map Building Contact Type Codes to District Contact Type Codes

1. On the **Contact Type Codes Maintenance** screen, with the building in context, in the **District Codes** drop-down list in the row of the code you want to map to a district code, select the district-level contact type code.
2. Click **Map Contact Codes**.

Home » Management » School Administration » Student Codes Administration » Contact Type Codes

### Contact Type Codes Maintenance

From this screen, you can display, add, change and delete contact type codes.

	Code	Name ^	Description	Count	District Codes	Professional Contact	Active
	C	Custodial Paren	Custodial Paren	38	-- Select a District Code --		
	FC	FATHER CELL	FATHER CELL	80	-- Select a District Code --		
	FP	FATHER PAGER	FATHER PAGER	4	-- Select a District Code --		
	FW	FATHER WORK	FATHER WORK	101	-- Select a District Code --		
	FOST	FOSTER	FOSTER	2	-- Select a District Code --		
	FR	FRIEND	FRIEND	39	-- Select a District Code --		
	O	Other	Other	12	-- Select a District Code --		
	P	Parent(s)	Parent(s)	337	-- Select a District Code --		
	R	Relative	Relative	61	1782 - Stepson 4987 - Stepdaughter 5006 - Adopted Daughter 9998 - None 9999 - Other		
	RE	RELATIVE	RELATIVE	59	DAYC - Day Care Center DENT - Dentist		
	SI	SITTER	SITTER	6	DOCT - Doctor HOSP - Hospital		
	SP	STEP-PARENT	STEP-PARENT	15	PARO - Parole Officer PRBA - Probation Officer SOCL - Social Worker THER - Therapist		

Show Active Only

#### Map Building Contact Type Code to District Contact Type Code

StudentInformation maps the building-level contact type code to the selected district-level contact type code.

	Code	Name ^	Description	Count	District Codes	Professional Contact	Active
	O	Other	Other	0	THER - Therapist		

#### Building Contact Type Code Mapped to District Contact Type Code

#### Map District Contact Type Codes to Professional Contact Codes

1. On the **Contact Type Codes Maintenance** screen, with the district in context, in the **District Codes** drop-down list in the row of the code you want to map to a professional contact code, select the professional code.
2. Click **Map Professional Contact Codes**.

Home » Management » School Administration » Student Codes Administration » Contact Type Codes

### Contact Type Codes Maintenance

From this screen, you can display, add, change and delete contact type codes.

Add Contact Type Code    **Map Professional Contact Codes**

	Code	Name ^	Description	Count	District Codes	Professional Contact	NCES Contact Type	Active
X	DAYC	Day Care Center	Day Care Center	12	-- Select a Professional Code --			
X	DENT	Dentist	Dentist	372	-- Select a Professional Code --			
X	DOCT	DOCTOR	Doctor	21	-- Select a Professional Code --			
X	DR	Dr	Doctor	5	-- Select a Professional Code --			
X	ED	Eye Doctor	Ophthalmologist	0	-- Select a Professional Code --			
X	HOSP	Hospital	Hospital	0	DAYC - Day Care Center DENT - Dentist <b>DOCT - DOCTOR</b> HOSP - Hospital PARO - Parole Officer PRBA - Probation Officer SOCI - Social Worker THER - Therapist			
X	PARO	Parole Officer	Parole Officer	3	-- Select a Professional Code --			
X	PRBA	Probation Officer	Probation Officer	0	-- Select a Professional Code --			

### Map District Contact Type Code to Professional Contact Code

StudentInformation maps the district-level contact type code to the selected professional contact code.

	Code	Name ^	Description	Count	District Codes	Professional Contact	Active
X	DR	Dr	Doctor	5	DOCT - DOCTOR		

### District Contact Type Code Mapped to Professional Contact Code

## Admission Codes Maintenance

Navigation: Home – Management – School Administration – Student Codes Administration – Admission Codes

Admission codes are used to define the reason a student is being admitted to a school, such as new resident, from non-public school, first school attended, etc.

Home » Management » School Administration » Student Codes Administration » Admission Codes

## Admission Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to admission codes.

Add Admission Code

		Code	Name ^	Description	Active
		11	Court referral	Court referral	
		15	From a JVSJ preschool	From a JVSJ preschool	
		13	From a licensed kindergarten	From a licensed kindergarten	
		12	From a licensed preschool - other than JVS	From a licensed preschool - other than JVS	
		02	From a non-public school	From a non-public school	
		08	From an institution	From an institution	
		06	From another Country	From another Country	
		03	From another public school district - same county	From another public school district - same county	
		05	From another public school district out of state	From another public school district out of state	
		04	From another School district-in Ohio (diff county)	From another School district-in Ohio (diff county)	
		14	From Head Start	From Head Start	
		07	From home schooling	From home schooling	
		09	From MR/DD	From MR/DD	
		01	Only school district attended	Only school district attended	
		10	Previously dropped out	Previously dropped out	

Show Active Only

### Admission Codes Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

## Add/Edit Admission Code

Home >> Management >> School Administration >> Student Codes Administration >> Admission Codes

### Admission Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to admission codes.

**Code:**

**Name:**

**Description:**

**Is Active:**

**Add/Edit Admission Codes Maintenance Screen**

**Code** (required) – Enter up to 4 characters – alphanumeric – for Admission Code. If you try to use an existing inactive Admission Code, you will be prompted to reactivate this inactive Admission Code if you wish.

**Name** (required) – Enter the name of the Admission Code.

**Description** (optional) – Enter a description of the Admission Code.

## Withdrawal Codes Maintenance

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

Withdrawal Codes are used to describe the reason a student is leaving school such as moving, dropout, etc. Withdrawal codes are also reported to EMIS so Withdrawal Codes that need to be reported to EMIS must be mapped to a valid EMIS withdrawal code.

Home » Management » School Administration » Student Codes Administration » Withdraw Codes Advanced Search | Feedback | Mgmt | Help | Print

### Withdraw Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to withdraw codes.

	Code	EMIS Code	Name ^	Description	Active	
		75	75	Completed Course Requirements	Completed Course Requirements	
		99	99	Completed Graduation Requireme	Completed Graduation Requirements	
		36	36	Completed Preschool Program	PS student has completed the preschool program requirements and will not be enrolled in the same district next year for preschool or KG programs	
		52	52	Death	Death	
		48	48	Expelled	Expelled	
		74	74	Moved; not known to be continuing	Moved; not known to be continuing	
		**	**	Not Applicable		
		73	73	Over 18 years of age	Over 18 years of age	
		72	72	Pursued employ./work permit (Supt. approv. on file	Pursued employ./work permit (Supt. approv. on file	
		45	45	Trans. by Court Order/Adjudication	Trans. by Court Order/Adjudication	
		46	46	Trans. out of the United States	Trans. out of the United States	
		43	43	Trans. to a home schooling (Supt. approval on file	Trans. to a home schooling (Supt. approval on file	
		42	42	Trans. to a private (transcript request on file)	Trans. to a private (transcript request on file)	
		41	41	Trans. to Ohio Local, ex. village or city school	Trans. to Ohio Local, ex. village or city school	
		44	44	Trans. to Pub. Comm. (transcript request on file)	Trans. to Pub. Comm. (transcript request on file)	
		40	40	Transferred to another school outside of Ohio	Transferred to another school outside of Ohio	
		51	51	Verified Medical Reasons (Doctor's auth. on file)	Verified Medical Reasons (Doctor's auth. on file)	
		71	71	W/D due to truancy/nonattendance	W/D due to truancy/nonattendance	
		47	47	W/D pursuant to Yoder vs Wisconsin	W/D pursuant to Yoder vs Wisconsin	
		37	37	Withdrawn from Kindergarten	KG Student has withdrawn because it has been deemed to be in the best interest of the student if he/she waits one more year until starting his/her KG experience	

Show Active Only

20 Records Displayed [Back To Top](#)

### Withdraw Codes Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, EMIS Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

### Add/Edit Withdraw Code

Home » Management » School Administration » Student Codes Administration » Withdraw Codes

### Withdraw Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to withdraw codes.

Code:

EMIS Code:

Name:

Description:

Is Active:

### Withdraw Codes Maintenance Screen

**Code** (required) – Enter up to 4 characters – alphanumeric – for Withdrawal Code. If you try to use an existing inactive Withdrawal Code, you will be prompted to reactivate this inactive Infraction if you wish.

**Name** (required) – Enter Name of Withdrawal Code (50 character limit).

**EMIS Code** (required) – Select the appropriate EMIS code that the new Withdrawal Code should be “mapped” to for EMIS reporting purposes (withdrawal codes must have an EMIS withdrawal code, and some withdrawal codes loaded from SIS may not have an EMIS code currently assigned).

**Description** (optional) – Enter a description of the new Withdrawal Code.

## Birthdate Verification Codes

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

Birthdate Verification Codes signify permitted methods used for verification of student birth dates.

	Code	Name ^	Description	Active
	Brth	BIRTH CERTIFICATE	BIRTH CERTIFICATE	
	GC	Green Card		
	HCer	Hospital Certificate	Hospital Certificate	
	Oth	Other	Other	
	Pass	Passport	Passport	

Show Active Only

### Birthdate Verification Codes Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

## Add/Edit Birthdate Verification Code

Home » Management » School Administration » Student Codes Administration » Birthdate Verification Codes

### Birthdate Verification Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to birthdate verification codes.

Code:

Name:

Description:

Is Active:

Save Save and New Cancel

### Add/Edit Birthdate Verification Codes Maintenance Screen

**Code** (required) – Enter up to 4 characters – alphanumeric –for Birthdate Verification Code. If you try to use an existing inactive Birthdate Verification Code, you will be prompted to reactivate this inactive Birthdate Verification Code if you wish.

**Name** (required) – Enter name of Birthdate Verification Code.

**Description** (optional) – Enter a description of the Birthdate Verification Code.

## Membership Group Codes

### Navigation: Home – Management – School Administration – Membership Groups

A Membership Group Code is used to define a group that can be used to then group related membership codes together.

Memberships Codes are used to group related students to indicate a common affiliation or activity, such as athletic team members, band members, special education program, etc.

Home » Management » School Administration » Membership Groups Adv

## Membership Group Maintenance

From this screen, you can display, add, change and delete data pertaining to membership groups.

	<u>Code</u> ^	<u>Name</u>	<u>Description</u>	<u>Active</u>
		10 <b>Regular Programs</b>	Regular Programs	
		11 <b>Intervention</b>	Intervention	
		12 <b>Post-secondary Enrollment Options Program</b>	Post-secondary Enrollment Options Program	
		13 <b>Other Regular Programs</b>	Other Regular Programs	
		14 <b>Extended Learning Ti</b>	Extended Learning Ti	
		15 <b>Intervention</b>	Intervention	
		16 <b>Student Placement</b>	Student Placement	
		20 <b>Specialized Instructions</b>	Specialized Instructions	
		21 <b>Placement Options</b>	Placement Options	
		22 <b>Disadvantaged Pupil Programs (DPPF)</b>	Disadvantaged Pupil Programs (DPPF)	
		23 <b>Title I</b>	Title I	
		24 <b>Emergency Immigrant Education Program</b>	Emergency Immigrant Education Program	
		30 <b>Vocational Programs</b>	Vocational Programs	
		40 <b>Extracurricular/Intracurricular Programs and Servi</b>	Extracurricular/Intracurricular Programs and Services	
		41 <b>Academic Intracurricular Descriptions (Vocational</b>	Academic Intracurricular Descriptions (Vocational Student Organizat	
		42 <b>Interscholastic Athletics</b>	Interscholastic Athletics	
		49 <b>Other</b>	Other	
		50 <b>Previous Dropout</b>	Previous Dropout	
		60 <b>60</b>	60	
		80 <b>COMMUNITY SERVICE</b>	COMMUNITY SERVICE	
		90 <b>Enterprise Programs</b>	Enterprise Programs	
		AD-HOC <b>Ad-hoc</b>	Ad-hoc	

Show Active Only

22 Records Displayed [Back To Top](#)

### Membership Group Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

– The lock icon either means that this Membership Group Code has been entered at the Global Level or District Level and cannot be changed at the Building Level, or it is a pre-defined group (such as AD-HOC).

**Interscholastic Athletics** – If you click on the blue name of a Membership Group, you will be taken to the Memberships Maintenance page for the members of that Group (see “*Add/Edit Membership Group*”).

## Add/Edit Membership Group

**Add/Edit Membership Group Maintenance Screen**

**Code** (required) – Enter up to 4 characters – alphanumeric – for Membership Group Code. If you try to use an existing inactive Membership Group Code, you will be prompted to reactivate this inactive Membership Group if you wish.

**Name** (required) – Enter the name of the Membership Group Code.

**Description** (optional) – Enter a description of the Membership Group Code.

## Membership Codes Maintenance

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

Membership Codes are used to group related students together to indicate a common affiliation or activity, such as athletic team members, band members, etc. Each membership must belong to one and only one Membership Group.

To see what Membership Codes belong to which Membership Group, or to add, update or delete Membership Codes, first access the Membership Groups Maintenance page, and click on the blue Group name to view Memberships.

Code ^	Name	Description	Active
10	<a href="#">Regular Programs</a>	Regular Programs	☀
11	<a href="#">Intervention</a>	Intervention	☀
12	<a href="#">Post-secondary Enrollment Options Program</a>	Post-secondary Enrollment Options Program	☀

Home » Management » School Administration » Membership Groups » Memberships

## Memberships Maintenance - Intervention

From this screen, you can display, add, change and delete data pertaining to memberships.

Add Membership

	Code	EMIS Program Code	Name ^	Description	Active
 	115001	115001	<a href="#">Correspondence course option</a>		
 	115002	115002	<a href="#">Educational travel</a>		
 	110003	110003	<a href="#">English composition</a>		
 	115003	115003	<a href="#">Independent study</a>		
 	110004	110004	<a href="#">Intervention program</a>		
 	110001	110001	<a href="#">Mathematics</a>		
 	115004	115004	<a href="#">Mentor program</a>		
 	115006	115006	<a href="#">Other local option program</a>		
 	110002	110002	<a href="#">Reading</a>		
 	115005	115005	<a href="#">Tutorial program</a>		

Show Active Only

Back to Groups

### Membership Maintenance Codes

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, EMIS Program Code, Name, Description, Active) in ascending or descending order by clicking on the column header.

**Back to Groups** – Go Back to Membership Groups Maintenance Table.

**Educational travel** – If you click on a blue Membership Name, you will be taken to the Membership Members screen, with this membership pre-selected. This allows you to see a list of all students listed as active members of that membership. This page is detailed in *“Membership Members Screen.”*



## Miscellaneous Data Groups

**Navigation: Home – Management – School Administration – Miscellaneous Data Groups**

Miscellaneous Data Groups will be used to group related miscellaneous data items together. Miscellaneous Data groups may be defined at the ITC level, district level or building level.

Miscellaneous Data provides a facility to store additional information for a student to support special requirements not already provided in the StudentInformation application. Miscellaneous Data Groups must be established and then data definitions for each Data Group defined. Once defined students can then be added to the group.

	Code	Name ^	Description	# Fields	Data Definitions	Active	Read Only
	ESTD	eStudent Login		2	<a href="#">View Definitions</a>		
	PROF	Profile Data	Student Profile Information	1	<a href="#">View Definitions</a>		

Show Active Only

### Miscellaneous Data Groups Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Description, # Fields, Data Definitions, Active, Read Only) in ascending or descending order by clicking on the column header.

**View Definitions** – View Miscellaneous Data Definitions for this Group (see *“Add Miscellaneous Data Group”*).

– Read-Only Miscellaneous Data Group Code – cannot be used on new Student Records but can view existing information.

– Non Read-Only Miscellaneous Data Group Code – can be used on new Student Records.

## Add Miscellaneous Data Group

Home » Management » School Administration » Miscellaneous Data Groups

### Miscellaneous Data Groups Maintenance

From this screen, you can display, add, change and delete data pertaining to miscellaneous data groups.

Code:  ⚡

Name:  ⚡

Description:

Is Active:

Is Read-Only:

Save Save and New Cancel

**Add/Edit Miscellaneous Data Groups Maintenance Screen**

**Code** (required) – Enter up to 4 characters – alphanumeric – for Miscellaneous Data Group Code. If you try to use an existing inactive Miscellaneous Data Group Code, you will be prompted to reactivate this inactive Miscellaneous Data Group if you wish.

**Name** (required) – Enter the name of the Miscellaneous Data Group Code.

**Description** (optional) – Enter a description of the Miscellaneous Data Group Code.

**Is Read-Only** (optional) – Yes or No. If Miscellaneous Data Group is listed as Read-Only, no new members may be added, but information will be available for view (for instance, Miscellaneous Data Groups with testing data that has been converted using the Misc To AAT procedure becomes read-only). The Miscellaneous Data Group records marked as Read-Only may not be modified.

**Note:** If marked Read Only the Miscellaneous Data Group will display with an ⚡ icon in the Read-Only column as shown in the following figure.

Home » Management » School Administration » Miscellaneous Data Groups

### Miscellaneous Data Groups Maintenance

From this screen, you can display, add, change and delete data pertaining to miscellaneous data groups.

Add Miscellaneous Group

	Code	Name ^	Description	# Fields	Data Definitions	Active	Read-Only
✗	ESTD	eStudent Login		2	<a href="#">View Definitions</a>	⚡	⚡
🔒	PROF	Profile Data	Student Profile Information	1	<a href="#">View Definitions</a>	⚡	⚡

Show Active Only

**Read Only Code on Miscellaneous Data Groups Maintenance Screen**

Once the Miscellaneous Data Group has been added, Miscellaneous Data Definitions must be defined for the Miscellaneous Data Group. For more information, refer to [“Miscellaneous Data Definitions.”](#)

## Miscellaneous Data Definitions

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

Miscellaneous Data Definitions are used to define what values are valid for each field in the Miscellaneous Group. A Miscellaneous Group may have up to 14 fields or data elements defined. The user can define the item name, data type from a predefined list of available types, maximum length, and can specify the appropriate values via a regular expression pattern. Pure numeric data types and date/time items may also specify a display format.

Each miscellaneous data item will be associated with one and only one miscellaneous data group.

	Code	Name ^	Description	# Fields	Data Definitions	Active	Read Only
✗ ✎	ESTD	eStudent Login		2	<a href="#">View Definitions</a>	💡	💡
🔒 ✎	PROF	Profile Data	Student Profile Information	1	<a href="#">View Definitions</a>	💡	💡

Show Active Only

### View Definitions Link on Miscellaneous Data Groups Maintenance Screen

Once the Miscellaneous Group has been established, the Data Definitions for that group must be defined. To view or define Miscellaneous Data Definitions, click on the “View Definitions” link, as shown above.

	Field Title	Field Type	Data Type	Used By	Field Length	Sort Order ^	Searchable	On Profile	Active	Read Only
✗ ✎	Username	Textbox	Alpha Numeric	1	10	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	💡	💡
✗ ✎	Password	Textbox	Alpha Numeric	1	10	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	💡	💡

Show Active Only

[Back to Groups](#)

### Miscellaneous Data Definitions Maintenance Screen

This page has standard add record, edit record and delete record controls.

Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Field Title, Field Type, Data Type, Used By, Field Length, Value Expression, Sort Order, Searchable, On Profile, Active, And Read Only) in ascending or descending order by clicking on the column header

💡 – Read-Only Miscellaneous Data Definition – cannot be used on new Student Records but can view existing information

💡 – Non Read-Only Miscellaneous Data Definition – can be used on new Student Records

**Back to Groups** – Go Back to Miscellaneous Data Groups Maintenance Table

**Used By** – This column shows how many students have data in this Definition. Clicking on the blue number will show a list of students with data, as well as their data value for this field.

Home >> Management >> School Administration >> Miscellaneous Data Groups >> Student Misc. Data

### Students Using Miscellaneous Data

From this screen, you can view the students using the current miscellaneous data definition

By default, **only** ten records are displayed in the grid below. If you would like to see all the records, simply click on the 'Show All' checkbox below the grid.

Student ID	Student Name	Username
48652258	<a href="#">Banana, Hannah</a>	h.banana

Show All (Records: 1 of 1)

[Back to Definitions](#)

#### Students Using Miscellaneous Data Screen

This page shows up to ten records. Check the “Show All” box to view all records (the number of records will be listed).

**Banana, Hannah** – Click on a blue student name to view that student's View Profile page.

**Back to Definitions** – Go back to the Miscellaneous Data Definitions table.

## Add/Edit Miscellaneous Data Definition

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

### Miscellaneous Data Definitions Maintenance - ESTD - eStudent Login

From this screen, you can display, add, change and delete data pertaining to miscellaneous data field definitions.

**Field Title:**

**Field Type:**  Textbox  Pre-Defined List  Checkbox

**Data Type:**  ▼

**Field Length:**

**Sort Order:**

**On Student Profile:**

**Is Searchable:**

**Is Active:**

**Is Read-Only:**

Save Save and New Cancel

### Add/Edit Miscellaneous Data Definitions Maintenance Screen

**Field Title** (required) – Enter a title for the field that will be displayed for this item in labels and this application.

**Field Type** (required) – Select Textbox, Pre-Defined List or Check box for the type of field. Each Field Type has different values and fields, as described below.

**Sort Order** (required) – Enter Sort order for this item to appear in the list of Data Definitions.

**On Student Profile** (optional) – Yes or No. If checked, this field will display on the Student Profile – Custom tab. These fields will be sorted by the sort order of the data definition first, and then by the definition field title, each in ascending order. Only active data definitions will be included on the Student Profile – Custom tab.

**Is Searchable** (optional) – Please Note: This field has no functionality at this time.

**Is Read-Only** (optional) – Yes or No; If Miscellaneous Data Definition is listed as Read-Only, no new members may be added, but information will be available for view. The Miscellaneous Data Definitions marked as Read-Only may not be modified.

### Field Type: Textbox

**Field Type:**  Textbox  Pre-Defined List  Checkbox

**Data Type:**  ▼

**Field Length:**

The Textbox Field Type is a field in which a user needs to enter a value.

**Data Type** (required) – Select a type of Data from the following list: Alpha Numeric, Whole Number, Decimal, Currency, Date, Phone Number, Email Address, Web Address, and Time. Each of these Data Types has a different default Field Length value.

**Field Length** (required) – The field length indicates the number of characters allowed for data input for the field. Defaults are 10 for Whole Number, Decimal and Date, 8 for Currency and Time, 14 for Phone Number, and 100 for Email Address and Web Address. These default values (except for Phone Number) may be edited once the Data Type is selected.

The screenshot shows a configuration box with the following elements:

- Field Type:** Three radio buttons:  Textbox,  Pre-Defined List,  Checkbox.
- Data Type:** A dropdown menu showing "Alpha Numeric" with a lightning bolt icon to its right.
- Field Length:** An empty text input field with a lightning bolt icon to its right.
- Regular Expression:** An empty text input field.

The Alpha Numeric Data Type opens an additional optional field.

**Regular Expression** (optional) – Enter a regular expression for the field.

**Field Type: Pre-Defined List**

The screenshot shows a configuration box with the following elements:

- Field Type:** Three radio buttons:  Textbox,  Pre-Defined List,  Checkbox.
- List Type:** Two radio buttons:  Radio Buttons,  Drop Down List.
- View Pre-Defined List:** A blue button.

The Pre-Defined List Field Type is a field where the user needs to select an option from a list defined on this screen.

**List Type** (required) – Select either Radio Buttons or drop-down list.

**View Pre-Defined List** – Click this button to define values for the radio buttons or drop-down list options. (You must enter a Field Title and Sort Order for the Miscellaneous Data Definition before clicking this button.)

The screenshot shows a web interface with a breadcrumb trail: Home » Management » School Administration » Miscellaneous Data Groups » Miscellaneous Data Definitions » Misc. Data Options. Below the breadcrumb is the title "Miscellaneous Data Definitions Option List" and a red instruction: "From this screen, you can display, add, change and delete options pertaining to miscellaneous data definitions." There is an "Add Option" button, a table with three rows, and a "Back to Definitions" button.

	Option Value	Sort Order
	Never	1
	Six Months	2
	Twelve Months	3

**Miscellaneous Data Definitions Option List Screen**

**Add Option** – Add an option to the list.

– Delete an option from the list (this gives a standard confirmation screen, and completely removes the option if confirmed).

– Edit an option in the list.

Adding a List Option is very similar to adding other types of records.

Home » Management » School Administration » Miscellaneous Data Groups » Miscellaneous Data Definitions » Misc. Data Options

### Miscellaneous Data Definitions Option List

From this screen, you can display, add, change and delete options pertaining to miscellaneous data definitions.

Option Value:  ⚡

Sort Order:  ⚡

Save Save and New Cancel

#### Add/Edit Miscellaneous Data Definitions Option List Screen

**Option Value** (required) – Indicate the option(s) that you wish to appear in the pre-defined list.

**Sort Order** (required) – Enter Sort order for this item to appear in the Pre-Defined list.

#### Field Type: Check box

Field Type:  Textbox  Pre-Defined List  Checkbox

Sort Order:  ⚡

The Check box Field Type is a simple “yes/no” check box, and requires no additional options selected or values set.

## Registering Students

The student is the primary entity of the StudentInformation application. A student is described by many properties. Some properties are specific to the student at the district level; others are specific to the student at the school level. EMIS reporting requirements necessitate additional properties for the student as well.

A student must have a master record before any additional elements can be defined for the student. A Master record or Student Profile will include all required fields such as Name, birthdate, gender, etc. Instructions on creating a student profile or master record will be described later in this chapter. There will be one district record for a student, but a student may have information in several buildings within the district.

To begin entering data for any student, they must first be registered in the building for which you wish to report that student’s information.

As part of EMIS Reporting Period G requirements, the following rules now apply when using Student Registration or Registration Wizard.

If a student is not newly enrolled in the district (i.e. was previously enrolled), then do not update the graduate fields.

If a student is newly enrolled in the district then initialize the graduate fields as shown in the table below.

<b>Field</b>	<b>Default</b>
CORE Economics and Financial Literacy Requirement Met	N
CORE Fine Arts Requirement Met	N
CORE Graduation Requirement Exception	*
Exempted from Physical Education Graduation Requirement	N
Graduation Date	Blank (null)
Diploma Type	*
OGT Graduation Alternative	0
Military Compact Graduation Alternative	0

## Registration Wizard

### Navigation: Home – SIS – Registration Wizard

The Student Registration Wizard is used for registering or re-enrolling students. Users can use the Registration Wizard to create a new student record or enroll a new or previously attending student to the school.

Students must first be registered in the working building, before data can be collected for EMIS reporting, attendance, grades, etc. Student Registration will automatically create new FS, FN and FD records for the student with the proper effective dates where applicable.

The “Exclude from Fall Initialization” flags will be set to false when:

- A student is newly enrolled or re-enrolls in the district.
- A student is promoted/bulk enrolled into a new school year.
- A student transfers into a new school district.

Three specific situations must now be identified when registering a student:

1. The student is new to the district or is re-enrolling after previously withdrawing from the district. This situation requires the EMIS data to be updated to reflect that the student is now enrolled in the district. The Effective Start date will be equal to the Admission Date.
2. The student is currently registered in the district at another building and this registration will change the primary building / EMIS attending building. This situation requires the EMIS data to be updated to reflect that the student’s EMIS attending building has changed. The Effective Start date will be equal to the Admission Date.
3. The student is currently registered in the district at another building and this registration will not change the primary building / EMIS attending building. EMIS data does not have to be updated in this situation.

To use the Registration screen, specific Registration Defaults must be entered at either the district or building level. If the proper defaults are not entered, you will receive the message shown below.



Click **Registration Defaults Page** to go to the Registration Defaults.

Registration Defaults can be entered at the district or building level to pre-populate registration fields. The Registration Defaults page can be found at Home – Management – School Administration – School Building Administration – Registration Defaults. Refer to *ProgressBook StudentInformation School Setup and Configuration Guide* for more information on Registration Defaults.

## Registration Wizard – Registration Pre-requisites Tab

### Navigation: Home – SIS – 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 the 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.

**First Name** (required) – Legal First Name of student, up to 50 characters.

**Middle Name** (optional) – Legal Middle Name of student, up to 50 characters.

**Last Name** (required) – Legal Last Name of student, up to 100 characters.

**Last Name Suffix** (optional) – Suffix if applicable. Example Jr. or III

**Called Name** (optional) – Student’s called name. Example – Becky for Rebecca, or TJ, etc.

**Social Security** (optional) – Student’s Social Security number.

**EMIS ID** (optional) – The EMIS ID number may be manually entered here (a combination of your school code and a random number) or automatic assignment of

EMIS ID numbers must be configured on the School Demographics screen for the district (refer to *ProgressBook StudentInformation School Setup and Configuration Guide* for more details).

**Student Number** (optional) – If you do not enter a specific number in this field, StudentInformation will automatically create a student number for this student.

**Note on Auto-Assign Student Numbers:** Auto-Assign will use the District Student Number Seed (as defined on the district School Demographics screen) to begin with when creating new student numbers using Auto-Assign. The Maximum Increment from Seed (as defined on the district School Demographics page) is the maximum number the Student Number Auto-Assign will use when incrementing to find an unused student number.

If District Student Number Seed (as defined on the district School Demographics screen) is not used, StudentInformation will start from the largest student number currently in the district when auto-assigning student numbers. If the Maximum Increment from Seed (as defined on the district School Demographics screen) is not set, StudentInformation will increment by 1 to find the next unused student number. If the maximum student number allowable has been used, StudentInformation will begin searching for unused student numbers beginning with the smallest student number in the district. Refer to *ProgressBook StudentInformation School Setup and Configuration Guide* for more information on the School Demographics screen.

**Birthdate** (required) – Enter student’s birthdate.

**Age** – This field will calculate the student’s age automatically from the student’s birthdate field.

**Gender** (required) – Enter the student’s gender.

**Grade** (required) – Select appropriate option from drop-down menu.

**Next>** – Takes the user to the next appropriate tab in the Registration Wizard. If there are no possible matches, the next button will skip the Possible Matches tab and take the user to the Complete Registration tab.

## Registration Wizard – Possible Matches Tab

### Navigation: Home – SIS – Registration Wizard – Possible Matches Tab

If certain parts of a student’s required information (on the Registration Pre-requisites tab) matches any existing student’s information, this tab will display.

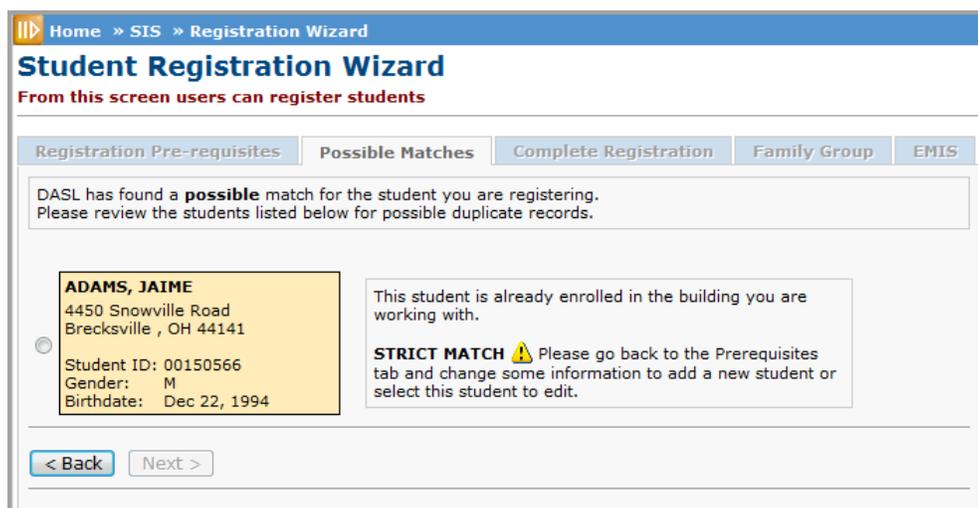
StudentInformation will find a Strict Match if the Social Security Number or EMIS ID match an existing student in the district or the school building. StudentInformation will find a Non-Strict Match if the first initial of the student’s First Name, as well as the student’s Last Name, Birthdate and Gender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

These possible matches fall into four categories: Strict Match, Same School; Strict Match, Different School; Non-Strict Match, Same School; and Non-Strict Match,

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

### **Strict Match**

If the social security number or EMIS ID number for a student being registered matches an existing student, StudentInformation will not permit registration of a new student. This is an effort to prevent duplication of students.



**Strict Match of Student on the Student Registration Wizard Screen**

Select a matching student and click **Next>** to edit that student's profile instead of registering a new student.

**<Back** – Return to the Registration Pre-requisites tab and edit the entered information.

**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 a student's First Name's first initial, Last Name, Gender and Birthdate all match an existing student or students in the school, StudentInformation will warn the user of a Non-Strict possible match. You may either continue registering the new student as a brand new student (not using any information from any matching student's record), edit a matching student's profile (if the student is found in the current building and year), or enroll a matching student to the current building and year (if the 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.

**Non-strict Match of Student on the Student Registration Wizard Screen**

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).

**<Back** – Return to the Registration Pre-requisites tab and edit the entered information.

Select a matching student and click **Next>** to register this matching student by continuing on to the Complete Registration tab.

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.

**Change Primary/EMIS Attending Building Message**

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.

## Registration Wizard – Complete Registration Tab

### Navigation: Home – SIS – Registration Wizard – Complete Registration Tab

Fill out all required fields and any optional fields on the Registration page. A student must have a master record before any additional elements can be defined for the student. Any Registration Defaults defined previously (refer to *ProgressBook StudentInformation School Setup & Configuration Guide*) will already be filled in on this screen.

The screenshot shows the 'Complete Registration' tab of the Student Registration Wizard. The form is divided into several sections:

- Registration Pre-requisites:** Includes tabs for 'Registration Pre-requisites', 'Possible Matches', 'Complete Registration', 'Family Group', and 'EMIS'. Below these are dropdowns for 'Hispanic/Latino' (set to '\* - Not Re-Collected'), 'Local Ethnic Category' (set to 'W - White'), 'Racial Group(s)' (checkboxes for A-Asian, B-Black or African American, I-American Indian or Alaska Native, P-Native Hawaiian or Other Pacific Islander, W-White), and 'Summative Race' (set to 'W - White, Non-Hispanic').
- Personal Information:** Includes 'Citizenship' (04 - United States ci), 'Native Language' (ENG), 'Birthplace City' (Middleburg Hts), 'Birthdate Verified', 'Admission Date', 'Home Language', 'Student Status', 'Building Prog Track' (ASED - Edison eleme), 'Admission Code', 'Attendance Calendar' (Default (Default)), 'Mother's Maiden Name', 'Program', 'Locker Assignment' (Assign Primary Locker), 'Free/Reduced Lunch Status' (None), 'Last Name Suffix', 'Homeroom', 'Include In Ranking' (checked), 'Include In Honor Roll' (checked), 'Counselor', 'Scheduling Priority' (5), 'Include In GPA' (checked), 'Home School IRN', 'Primary Grad. Rule', 'Secondary Grad. Rule', 'Country Of Origin', 'Grade' (09), and 'Graduation Year'.
- Address:** Includes 'Address of Residence (For Address Verification)' and 'Mailing Address'. Both sections have 'Street' (6770 West Snowville Road), 'City, State, Zip' (Brecksville, OH, 44141), and a 'Validate' button. There are checkboxes for 'Bypass Address Standardization/Verification' and 'Use Address of Residence'.
- Phone and Email:** 'Phone Number' is (555) 555-5555 with an 'Unlisted' checkbox. 'Email' is an empty field.
- Transfer Options:** Radio buttons for 'I don't want to transfer course history, attendance records and assessments.' and 'I want to ...'. Under 'I want to ...' are checkboxes for 'Transfer Course History (Currently not available for ITC to ITC transfer)', 'Transfer Attendance', and 'Transfer Assessment'.
- Admission Reason:** 6 - Transferred from other Ohio public district/community school.
- Admitted From IRN:** 048462 - Black River Local SD.
- County of Residence:** 18 - Cuyahoga.

At the bottom, there are buttons for 'Edit Profile', '< Back', 'Next >', and 'Finish'.

### Complete Registration Tab on the Student Registration Wizard Screen

**Hispanic/Latino** (required) – This drop-down is populated with values from EMIS field GI580. Note: If the student must be coded with the new Race/Ethnicity options then only the Y and N options are shown.

**Local Ethnic Category** – This is the 2009-2010 Ethnicity field renamed to avoid confusion. Changing the value of this field no longer sets the EMIS Ethnicity. Although this field is not required, we recommend that you update this field as it is used by most of the SIS StudentInformation reports.

**Racial Group(s)** (required) – These fields are enabled if the user selects Y or N in the Hispanic/Latino field or if the student must be coded with the new Race/Ethnicity coding. These fields will be disabled if the user chooses “\*” in the Hispanic/Latino field.

**Summative Race** (required) – This drop-down is populated with values from EMIS field GI090. This is the old EMIS Ethnicity field. It will be disabled if the user selects Y or N in the Hispanic/Latino field or if the student must be coded with the new Race/Ethnicity coding. This field will be enabled if the user chooses “\*” in the Hispanic/Latino field.

**Citizenship** (optional) – Select appropriate option from drop-down menu.

**Native Language** (optional) – Select appropriate option from drop-down menu. The Native Language field is the language spoken at the onset of speech.

**Birthplace City** (optional) – Enter student’s city of birth.

**Birthdate Verified** (optional) – Select appropriate option from drop-down menu to indicate the method used to verify the student’s birthdate.

**Admission Date** (required) – Enter student’s admission date; field defaults to the current date.

**Home Language** (optional) – Select appropriate option from drop-down menu. The Home Language field is the language spoken at home.

**Student Status** (required) – Select appropriate option from drop-down menu.

**Building ProgTrack** (optional) – Building Progression Tracks describe a path a student can take through schools within a district. Select the appropriate option from drop-down menu.

**Admission Code** (optional) – Select appropriate option from drop-down menu

**Attendance Calendar** (required) – Select the appropriate attendance calendar from the drop-down menu. Direct any questions concerning which calendar to use to your building’s designated EMIS person. Defaults to the calendar selection in DASL Options.

**Mother’s Maiden Name** (optional) – Enter the student’s mother’s maiden name (for security purposes).

**Program** (optional) – Select appropriate option from drop-down menu.

**Locker Assignment** – Click **Assign Primary Locker** to open a popup window allowing the user to quickly find and select a locker for the student – the Locker Selection Wizard. If desired, you can also change the combination series of the locker to be assigned as part of the assignment process. Refer to *ProgressBook StudentInformation Student Lockers Guide* for more information about using the Assign Primary Locker button.

**Free/Reduced Lunch Status** (required) – Select the appropriate option from the drop-down list. Note that selecting Free or Reduced will set the student's Disadvantage to 1 – Economically Disadvantaged.

**Last Name Suffix** (optional) – Enter suffix if applicable. Example Jr. or III

**Homeroom** (optional) – Click **Assign Homeroom** to assign the student to a homeroom, or select a homeroom from the drop-down menu, or click the Homeroom title to go to Student Homeroom Assignment. For more details, refer to *ProgressBook StudentInformation Student Homeroom Guide*.

**Include in Ranking** (optional) – Un-check if the student should have no bearing on GPA calculations and ranks; defaults to the value selected for the student’s building grade level.

**Include in Honor Roll** (optional) – Check/Un-check to determine if the student should be included/excluded from the honor roll; defaults to the value selected for the student’s building grade level.

**Include in GPA** (optional) – Check/Un-check to determine if the student should be included/excluded from GPA calculations; defaults to the value selected for the student’s building grade level.

**Counselor** (optional) – Select student’s counselor from drop-down menu; defaults to value selected for Building Grade Level.

**Scheduling Priority** (optional) – Select priority level, from 1-9 in drop-down menu, to set the priority of this student’s scheduling in the scheduling process. Defaults to the value selected for Building Grade Level.

**Primary Grad. Rule** (optional) – Select the student’s primary graduation rule used for Graduation Verification.

**Home School IRN** (optional) – Used with JVS students. Refers to the IRN of the sending or home building. The magnifying glass will assist with the search for the building IRN by accessing the ODE IRN Search. Please note that this is the building IRN and not the district IRN.

**Secondary Grad. Rule** (optional) – Select the student’s secondary graduation rule used for Graduation Verification.

**Flags** (optional) – These flags were converted from SIS, and can be used for marking students with various letters or numbers, as determined by the school, for use with reports and grouping like students together

**Country of Origin** (optional) – Select student’s country of origin from drop-down menu.

**Grade** (required) – Grade is automatically populated from the Pre-requisites tab.

**Graduation Year** (optional) – Enter the school year in which the student will graduate. When registering a student that has been transferred to the district or school in context, the student’s graduation year from the previous district or school is displayed here.

**Address of Residence** (required) – Enter the Street Address, City, State and Zip Code where the student lives in these fields (the second address line is optional). Once you enter a zip code, Address Standardization and Verification will run on this address. Refer to *ProgressBook StudentInformation Getting Started Guide* for more information on Address Standardization and Verification.

**Bypass Address Standardization/Verification** – Yes or no; check this box to leave the Address of Residence as entered, and not run Address Standardization or Address Verification on the address. Use this check box only if you are certain that the address is accurate.



**NOTE: If you check the “Bypass” box for either Address, a new field will display.**

<b>Address of Residence (For Address Verification)</b>		<b>Mailing Address</b>		<input checked="" type="checkbox"/> <b>Use Address of Residence</b>
Street:	<input type="text"/>	Street:	<input type="text"/>	
	<input type="text"/>		<input type="text"/>	
City, State, Zip:	<input type="text"/> OH <input type="text"/>	City, State, Zip:	<input type="text"/> OH <input type="text"/>	
	<input checked="" type="checkbox"/> <b>Bypass Address Standardization/Verification</b>		<input type="checkbox"/> <b>Bypass Address Standardization</b>	
<b>Bypass Comments:</b>		<input type="text"/>		

### Address Standardization/Verification Fields

**Use Address of Residence** – Yes or no; check this box to duplicate the Address of Residence data in the Mailing Address fields.

**Bypass Comments** (required) – If bypassing standardization or verification, you must enter a reason why you are doing so in this field.

**Mailing Address** (required or optional) – Enter the Street Address, City, State and Zip Code where the student receives mail in these fields (the second address line is optional). Once you enter a zip code, Address Standardization will run on this address. Refer to *ProgressBook StudentInformation Getting Started Guide* for more information on Address Standardization.

**Bypass Address Standardization** – Yes or no; check this box to leave the Mailing Address as entered, and not run Address Standardization on the address. Use this check box only if you are certain that the address is accurate.

**Phone Number** (optional) – Enter student’s phone number with area code.

**Unlisted** (optional) – Yes or No; if checked, student phone number will not print or be displayed on various screens/reports for privacy purposes.

**Email** (optional) – Enter student’s Email address. When registering a student that has been transferred to the district or school in context, the student’s Email address from the previous district or school is displayed here.

**Transfer Options** (required) – Choose to transfer this student’s course history (not available for ITC to ITC student transfers), attendance, assessments (not available for ITC to ITC student transfers) or any combination of these options when transferring this student between ITCs or districts. The Course History, Attendance and Assessment tab headings are visible when transferring a student. These tabs are available and used when the appropriate transfer options are selected. These options are not available when transferring a student between buildings within the same district.

**Admission Reason** (required) – Select reason this student entered the district.

**Admitted From IRN** (required) – Enter the IRN of the district from which the student was admitted in this field. Click  to go to the Ohio Department of Education Search

Organization Web page. This field is enabled and required for students newly enrolled after July 1 with an admission reason 3, 6 or 7. Joint Vocational School Districts (JVSDs) and Education Service Centers (ESCs) are required to report \*\*\*\*\* in this field. This field is defaulted to \*\*\*\*\* and disabled when re-registering a student into a building in the same district as the building from which the student was withdrawn. This field is disabled and given a value of \*\*\*\*\* when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).

**County of Residence** (required) – Select the county in which the student resides.

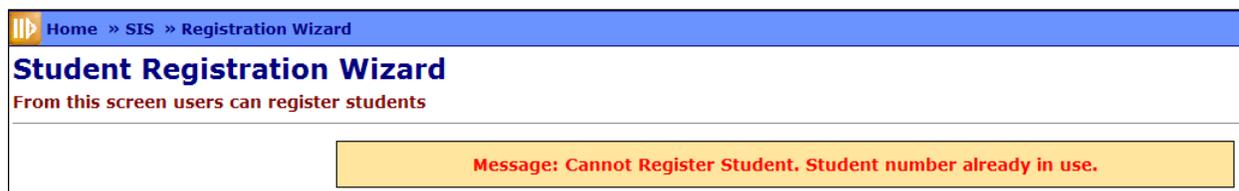
**Edit Profile** – Option to continue adding information for this particular student.

**<Back** – Takes user back to Registration Pre-requisites tab.

**Next>** – Continue on to the **Family Group** tab for this student.

**Finish** – Finish registration for this student and continue to register new students.

If you are attempting to register a student with the same Student Number as another student, the screen will display the following error message.



**Student Number Already In Use Message**

## Registration Wizard – Family Group Tab

### Navigation: Home – SIS – Registration Wizard – Family Group Tab

Add the student you are registering to an existing family group.

1. To search for an existing family group to which to add the student, in the **Family Group Search** area, select either to **Search By Family Group Name** or **Search By Family Group Criteria**.
2. If you are searching by name, in the **Family Group Name** field, enter the family group name. If you are searching by criteria, in the **Matching Criteria** section, select your search criteria.
3. Click **Search**.

The family groups (if any) that match your search criteria display in a grid.

Home » SIS » Registration Wizard

## Student Registration Wizard

From this screen users can register students

Registration Pre-requisites   Possible Matches   Complete Registration   **Family Group**   EMIS

**Family Group Search:**

Search By Family Group Name  
 Search By Family Group Criteria

**Family Group Name:**

**Matching Criteria:**

Address    City    State  
 Zip Code    Student Last Name    Phone Number

**1 FamilyGroup Found**

	Family Group ^	Description	Students In Group
<input type="checkbox"/>	Aguirre Family	Aguirre Family at 6770 W. Snowville Rd., Brecksville.	<input checked="" type="radio"/> AGUIRRE, BETH <input type="radio"/> AGUIRRE, RAUL

**Family Group Tab on the Student Registration Wizard Screen**

4. Select the check box in the row of the correct family group.
5. To proceed to the **EMIS** tab, click **Next >**. To finish registration for this student, click **Finish**.

### Registration Wizard – EMIS Tab

#### Navigation: Home – SIS – Registration Wizard – EMIS Tab

Fill out all required fields and any optional fields on the Registration page. A student must have a master record before any additional elements can be defined for the student.

Home » SIS » Registration Wizard

## Student Registration Wizard

From this screen users can register students

Registration Pre-requisites Possible Matches Complete Registration Family Group **EMIS** Course History Attendance Assessment

EMIS Situation: 5 - Resident attending Full Time

District Relationship: 1 - Stud. rcvg instr. in whole/part frc  
 How Received: \* - Not Applicable  
 Percent of Time: 100  
 Attending Building IRN: 999999 - XXXXXXXX High School

District of Residence: XXXXXX - XXXXXXXX City SD  
 How Received IRN: \*\*\*\*\*  
 Tuition Type: N - Non-tuition student (default)  
 Assigned Building IRN: \*\*\*\*\*

Sent To 1:  
 Reason: NA - Not sent to another district  
 IRN: \*\*\*\*\*  
 Percent of Time:

Sent To 2:  
 Reason: NA - Not sent to another district (default)  
 IRN: \*\*\*\*\*  
 Percent of Time: 0

Legal Names are only needed if different from Demographics Names

Legal First Name: First  
 Legal Middle Name: Middle  
 Legal Last Name: Last  
 State Student ID (SSID): ZZ9999999  
 Disability Condition: \*\* - Not Applicable

< Back Next >

### EMIS Tab on the Student Registration Wizard Screen

**EMIS Situation** (required) – Select student’s EMIS situation from drop-down menu validated against EMIS situation codes.

... – Open the EMIS Situation Wizard to assist with selecting the appropriate EMIS situation. This will set several of the following fields according to EMIS Situation.

**District Relationship** (optional) – Select the appropriate educational relationship between the student and the district.

**District of Residence** (optional) – Enter the district of the student’s legal residence.

Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**How Received** (optional) – Select how the student arrived at the district.

**How Received IRN** (optional) - Enter the district from which a student is received. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**Percent of Time** (optional) – Enter the average percent of time, for the week, that the student participates in any instruction provided by a certified/licensed employee.

**Tuition Type** (optional) – Select the appropriate manner in which the student is paying tuition to the reporting district.

**Attending Building IRN** (optional) – Enter the IRN of the building within the district that the student attends between the effective dates inclusive of the record being reported.

Click  to go to the Ohio Department of Education Search Organization Web page.

SMART logic will be invoked to help determine the correct value. The Attending Building IRN can be a District IRN only when the value of “How Received” is one of the following:

- 6 – Non-Public (Services Only)
- F – Career Assessment Only
- I – Non-instructional, Supplementary, or Related Services
- P – Court Placed Students, Excluding foster Care
- T – Students Placed in Institutions, Non-Court Ordered
- V – Pre-school, Evaluated Only, Found Ineligible

**Assigned Building IRN** (optional) – Enter the IRN of the building the student would normally attend according to the standard district attendance policy. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**Sent To Reason 1** (optional) – Select the reason a student is sent to another district.

**Sent To Reason 2** (optional) – Select the reasons the student is sent to another district if the student is sent to a second district.

**Sent To IRN 1** (optional) – Enter the district to which a student is sent. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**Sent To IRN 2** (optional) – Enter the district to which a student is sent if the student is simultaneously being sent to a second district. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**Sent to Percent of Time 1** (optional) – Enter the average percent of time for the week that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

**Sent to Percent of Time 2** (optional) – Enter the average percent of time for the week that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

**Legal First Name** (optional) – Enter if different from name on Pre-requisites tab.

**Legal Middle Name** (optional) – Must be \* if student has no middle name.

**Legal Last Name** (optional) – Enter if different from name on Pre-requisites tab.

**State Student ID (SSID)** (optional) – Enter the student’s 9-digit alphanumeric ID code unique to each public school student in Ohio; this code may be hidden through Security settings. See *ProgressBook StudentInformation Security Guide* for details.

**Disability Condition** (optional) – Indicate the student’s primary handicap code. Changing to \*\* will update prior Disability.

**Edit Profile** – Option to continue adding information for this particular student.

**<Back** – Takes user back to **Family Group** tab.

**Next** – Continue on to the Course History tab for this student if marks are being transferred.

**Finish** – Finish registration for this student and continue to register new students.

### Registration Wizard – Course History Tab

The Course History tab is available when registering a pending transfer student (already transferred from another school or district within the same ITC) and then selecting the Transfer Course History transfer option on the Complete Registration tab. Only marks of high school credit courses are transferred. Fill out all required fields and any optional fields on this screen. A student must have a master record before any additional elements can be defined for the student.

#### Navigation: Home – SIS – Registration Wizard – Course History Tab

<input type="checkbox"/>	Sending School	Marks available to transfer from School Year	Mapping Status
<input type="checkbox"/>	XXXXXXHIGH SCHOOL	2011-2012	Temporary Mapping
<input type="checkbox"/>	XXXXXXMIDDLE SCHOOL	2010-2011	Default Mapping

#### Course History Tab on the Student Registration Wizard Screen

**Sending School** – The schools from which marks can be transferred.

**Marks Available to Transfer From School Year** –The school year from which to transfer marks.

**Mapping Status** – The current status of the mapping for this sending school, receiving school and school year combination. A No Mapping status means no mapping for this combination has been saved or it is currently inactive. A Default Mapping status means that a mapping for this combination is already active in the system and is being used. A Temporary Mapping status means that the mapping for this combination has been created or activated using the icon for this combination.

Select the years of course history you wish to transfer. All years of course history do not need to be transferred; however, this is the only opportunity to transfer a student’s course history.

Clicking the icon causes StudentInformation to retrieve the marking pattern and marking pattern rule information for the selected school and school year and display a table similar to the following. This table determines which marks are transferred.

Home » SIS » Registration Wizard

## Student Registration Wizard

From this screen users can register students

Registration Pre-requisites Possible Matches Complete Registration Family Group EMIS **Course History** Attendance Assessment

Sending District: 000000 - XXXXXXX Local Schools  
 Sending School: ABHS - AAAAAA HIGH SCHOOL  
 Receiving School: BBHS - BBBBBB HIGH SCHOOL  
 Marks Available to Transfer From School Year: 2011-2012  
 Active:

Sending Marking Pattern	Sending Marking Pattern Rule	Receiving Marking Pattern	Receiving Reporting Term	Receiving Mark Type	Receiving Significance Level
ALYR	AV1	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
ALYR	AV2	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
ALYR	FIN	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
ALYR	GP1	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
ALYR	GP2	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
ALYR	GP3	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
ALYR	GP4	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM1	AV1	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM1	FIN	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM1	GP1	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM1	GP2	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM2	AV2	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM2	FIN	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM2	GP3	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --
SEM2	GP4	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --	-- Not Loaded --

Use Alpha Marks  
 Use Numeric Marks (Both Sending and Receiving School must be Numeric Marks)

### Marking Pattern and Marking Pattern Rule Information on Course History Tab

**Receiving Marking Pattern** (required) – The marking pattern of the receiving school that corresponds to the marking pattern and reporting term combination of the sending school for the marks to be transferred.

**Receiving Reporting Term** (required) – The appropriate reporting term of the sending marking pattern of the receiving school for the marks to be transferred.

**Use Alpha Marks** (required) – Transfer alpha marks from the sending school to the receiving school. A table similar to the following is displayed. Select the receiving school alpha mark that corresponds to each sending school alpha mark.

Sending School Alpha Marks	Sending School Numeric Marks	Receiving School Alpha Marks	Receiving School Numeric Marks
A+		A+ ▼	
A		A ▼	
A-		A- ▼	
AU		-- Not Loaded -- ▼	
B+		B+ ▼	
B		B ▼	
B-		B- ▼	
BLK		-- Not Loaded -- ▼	
C+		C+ ▼	
C		C ▼	
C-		C- ▼	
D+		D+ ▼	
D		D ▼	
D-		D- ▼	
EX		-- Not Loaded -- ▼	
F		F ▼	
I		I ▼	
N		-- Not Loaded -- ▼	
P		P ▼	
S		S ▼	
U		U ▼	
WD		WD ▼	
WF		WF ▼	
WP		WP ▼	

24 Records Displayed [Back To Top](#)

### Transferring Alpha Marks

**Use Numeric Marks (Both Sending and Receiving School must be Numeric Marks)** (required) – Transfer numeric marks from the sending school to the receiving school. A table similar to the following is displayed. This table lists the numeric scale of the sending and receiving schools. Select the receiving school alpha mark that corresponds to each sending school alpha mark listed.

Sending School Alpha Marks	Sending School Numeric Marks	Receiving School Alpha Marks	Receiving School Numeric Marks
*		-- Not Loaded --	
A+		A	
A	91.50 - 125.00	A	94.50 - 100.00
A-		A-	89.50 - 94.49
AUD		-- Not Loaded --	
B+		B+	86.50 - 89.49
B	82.50 - 91.49	B	82.50 - 86.49
B-		B-	79.50 - 82.49
C+		C+	76.50 - 79.49
C	73.50 - 82.49	C	72.50 - 76.49
C-		C-	69.50 - 72.49
D+		D+	66.50 - 69.49
D	64.50 - 73.49	D	62.50 - 66.49
D-		D-	59.50 - 62.49
F	0.00 - 64.49	F	0.00 - 59.49
I		I	
O		O	
P		P	
S		S	
U		U	
WD		WD	
WF		WF	
WP		WP	

23 Records Displayed [Back To Top](#)

### Transferring Numeric Marks

**Add** – Compiles the marks information for this student and creates a temporary mapping that is stored in memory for use by this registration of this student only. You are returned to the initial Course History tab grid.

**<Back** – Return to the EMIS tab.

**Next>** – Continue on to the Attendance tab for this student if attendance is being transferred.

**Finish** – Finish registration for this student and continue to register new students. If all school years for the student have not been mapped, a message states that and asks if you want to continue transferring the marks.

## Registration Wizard –Attendance Tab

### Navigation: Home – SIS – Registration Wizard – Attendance Tab

The Attendance tab is available when registering a transfer pending student (already transferred from another school or district) and selecting the Attendance option on the Complete Registration tab. Select the years of attendance to be transferred. Not all years of attendance need to be transferred; however, this is the only opportunity to transfer a student's attendance. A student must have a master record before any additional elements can be defined for the student.

<input type="checkbox"/>	Sending School	School Year
<input type="checkbox"/>	ZZZZZZZZ MIDDLE SCHOOL	2006-2007
<input type="checkbox"/>	ZZZZZZZZ MIDDLE SCHOOL	2007-2008
<input type="checkbox"/>	AAAAAA HIGH SCHOOL	2008-2009
<input type="checkbox"/>	AAAAAA HIGH SCHOOL	2009-2010
<input type="checkbox"/>	AAAAAA HIGH SCHOOL	2010-2011
<input type="checkbox"/>	AAAAAA HIGH SCHOOL	2011-2012

#### Attendance Tab on the Student Registration Wizard Screen

**<Back** – Takes user back to Course History or EMIS tab.

**Next>** – Continue on to the Assessment tab for this student if assessments are being transferred.

**Finish** – Finish registration for this student and continue to register new students. If all course history has not been mapped or all attendance school years have not been selected, a message states that and asks if you want to continue transferring.

## Registration Wizard – Assessment Tab

### Navigation: Home – SIS – Registration Wizard – Assessment Tab

The Assessment tab is available when registering a transfer pending student (already transferred from another school or district within the same ITC) and selecting the Assessment option on the Complete Registration tab. Select the high school assessments (ACT, PSAT, SAT, OGT and PLAN) to transfer. A student must have a master record before any additional elements can be defined for the student.



### Assessment Tab on the Student Registration Wizard Screen

**<Back** – Takes user back to Attendance, Course History or EMIS tabs.

**Finish** – Finish registration for this student and continue to register new students. If all course history has not been mapped, all attendance school years have not been selected or all assessments have not been selected, a message states that and asks if you want to continue transferring.

## Student Profile

### Navigation: Home – SIS – Student – Edit Student Profile

Once a student is registered, you may edit the student’s profile as shown in the following figure

As of 08-09, the student profile tabs are now configured to capture EMIS data according to the record it is to be reported on. The new tabs as presented in this section are only available from 2008-2009 on. Previous year’s student profiles show the old format.

As of 08-09, there is no longer a LIVE record for the Student Profile. Instead FN – EMIS Time period records will be created specifically for each time period.

### StudentInformation/ProgressBook Integration Note

If specific students are not being extracted properly from StudentInformation into ProgressBook, please check the following:

- Student Profile – Additional tab: Make sure the Primary Building is the actual building the student is in and not the district.
- Student Profile: Make sure the student has an FS record with an Effective Start Date that is not in the future.
- Student Profile: Make sure the student has an FD record with an Effective Start Date that is not in the future.

<b>DASL</b>	Student68522, TREVOR HIGH SCHOOL 2008-2009 Calendar: 1	ID: 000057 Gender: M Grade: 07	Counselor: Homeroom: 208 Status: A	<b>HIGH SCHOOL</b> [Find Students] Find
-------------	--	--------------------------------------	--	--

Home » SIS » Student » Edit Profile FY09

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Arrival FD-Attributes FN-Attributes FN-Graduate Transportation

Save Cancel Last Modified: 04/4/2009 5:08 AM by User: stavengj

Student Number: 00005745  Auto-Assign Student Status: A - ACTIVE RES

First Name: TREVOR Middle Name: ALLEN  
Last Name: Student68522 Called Name:  
Last Name Suffix:

Gender: M Birthdate: 10/29/1995 Age: 13  
Ethnicity: W - WHITE Verified With: B - BIRTH CERT.  
EMIS Ethnicity: W - White, Non-Hispanic Birthplace City: LIMA  
Native Language: ENG - English (Default)

Address of Residence (For Address Verification) Mailing Address  Use Address of Residence

Street: 645 S Main St Street: 645 S Main St  
City, State, Zip: Lima OH 45804-1241 City, State, Zip: Lima OH 45804-1241  
 Bypass Address Standardization/Verification  Bypass Address Standardization

Phone Number: (555) 555-5555  Unlisted Email:  
Building Grade: 07 - 07 Grade Next Year: 08 - 08  
EMIS Grade: 07 EMIS Grade Next Year: 08

Changing the Building Grade does not change the EMIS Grade. The FD tab can be used to change the EMIS Grade.  
 Changing the Grade Next Year does not change the EMIS Grade Next Year. The FN tab can be used to change the EMIS Grade Next Year.

Program: Home school IRN:  
Home School:  
Attendance Calendar: 1 (Default) Report to EMIS:

### Edit Student Profile Screen

This profile contains the following tabs, for inputting information for the selected student:

- **General** – Basic information such as Name, birthdate, gender, address, etc.
- **Additional** – Homeroom, building, graduation, etc.
- **Custom** – This tab lists Miscellaneous Data Definitions that have been specified to be included on the student profile. Active Miscellaneous Definitions will be displayed in their Sort Order, grouped by Miscellaneous Data Group.
- **Private** – Private information such as SSN, SSID, Birthplace city, Mother's maiden name, etc.
- **FS-Standing** – EMIS FS Student Standing data which describes the standing of the student within the district reporting the student.

- **FS-Attendance** – EMIS FS Student Attendance totals for the October Count Week, February Count Weeks and the School Year.
- **FD-Attributes** – EMIS FD Attributes data for a student that change over time and the date of change can have a financial or other impact.
- **FN-Attributes** – EMIS FN Student Attributes data for a student have only a single value and that need to be reported for the student each reporting period or at year end.
- **FN-Graduate** – This is data for reporting in Period G. These fields are not school or reporting period specific and are only reported once in the Period G when the student graduates.
- **Transportation** – Information related to the student’s transportation to and from school.

***Note:** Users must have proper security access in order to view and/or update the FS-Standing, FS-Attendance, FD-Attributes, FN-Attributes and Custom tab. These profile tabs are controlled by Extra System Permissions. In the EMIS Extra System Permissions folder, "Edit Student Profile" controls the EMIS and Private tabs. In the SIS Extra System Permissions folder, "Custom Profile Data" controls the Custom tab.*

## Common Profile Controls

Last Modified: 07/30/2008 9:31 AM by User: noacsc.chris

– This shows the date, time and user of this student’s profile most recent update. This Last Modified information applies only to updates made through the Student Profile and updates made through the Student Profile Bulk Update will not affect the Last Modified information. Please note that the Last Modified date/time/name is not tab specific, as it reflects the last time any data on the Student record (tblStudent) was updated.

**Save** – Saves current Student Profile and returns to Student Profile listing where you will see the updated information.

**Cancel** – Clears data already entered.

If your search for a student yielded multiple results, the following four buttons display in the menu bar to enable you to navigate between records. The last profile tab you were viewing displays for the next record.

 – Navigates to the first student in the search results.

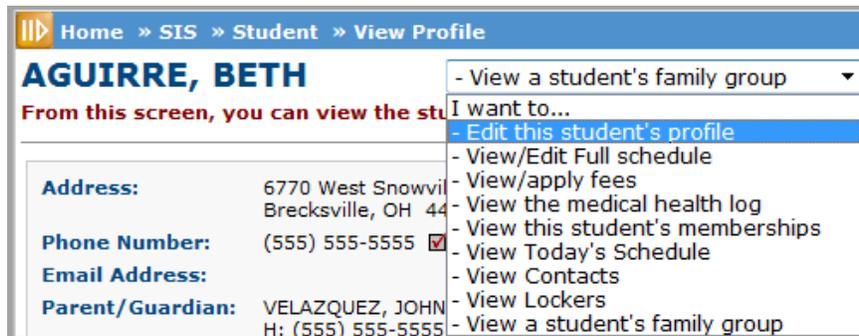
 – Navigates to the last student in the search results.

 – Navigates to the previous student in the search results.

 – Navigates to the next student in the search results.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.

You may also edit the student profile by selecting that option from the navigational side menu or by selecting that option from the I want to... drop-down list, as shown in the following screen shot.



**Edit This Student's Profile Option on the View Profile Screen**

## Student Profile – General Tab

Home » SIS » Student » Edit Profile FY09 Advanced Search | Feedback

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation

Save Cancel Last Modified: 10/27/2011 1:06 PM by User:

**Student Number:** 200800171  Auto-Assign **Student Status:** A - ACTIVE RES

**First Name:** Dave **Middle Name:**

**Last Name:** Jones **Called Name:**

**Last Name Suffix:**

**Gender:** M **Birthdate:** 5/25/1996 **Age:** 15

**Local Ethnic Category:**  **Verified With:**

**Hispanic/Latino:** N - No, the student is not Hispanic/Latino **Birthplace City:**

**Racial Group(s):**  A-Asian  B-Black or African American  I-American Indian or Alaska Native  P-Native Hawaiian or Other Pacific Islander  W-White

**Summative Race:** B - Black or African American/Non-Hispanic

**Native Language:** ENG - English (Default) **Home Language:** ENG - English

**Address of Residence (For Address Verification)** **Mailing Address**  Use Address of Residence

**Street:** 888 South Hampton **Street:** 888 South Hampton

**City, State, Zip:** Lima OH 45804 **City, State, Zip:** Lima OH 45804

Bypass Address Standardization/Verification  Bypass Address Standardization

**Phone Number:**   Unlisted **Email:**

**Building Grade:** 12 - 12 **Grade Next Year:** GR - GR

**EMIS Grade:** 12 **EMIS Grade Next Year:** GR

Changing the Building Grade does not change the State Equivalent Grade. The FD tab can be used to change the State Equivalent Grade.  Changing the Grade Next Year does not change the EMIS Grade Next Year. The FN tab can be used to change the EMIS Grade Next Year.

**Program:**  **Home school IRN:**

**Home School:**

**Attendance Calendar:** 1 (Default) **Report to EMIS:**

### General Tab on the Edit Student Profile Screen

Information entered during initial registration will populate many fields on this screen, but may be modified at this time if needed. Please note that Student Demographics information and student pictures are NOT school year specific. If you change student demographic information or re-load student pictures in one school year, the information changes it in all school years.

**Student Number** (required) – May manually modify the student number here, or have the system automatically re-assign a number.

**Auto-Assign** – Check this box if you want the system to reassign the student number.



**The Auto-Assign check box will be grayed out if the user does not have the extra system permissions for reassigning student numbers in security settings.**

**Note on Auto-Assign Student Numbers:** Auto-Assign will use the District Student Number Seed (as defined on the District School Demographics page) to begin with when creating new student numbers using Auto-Assign. The Maximum Increment from Seed (as defined on the District School Demographics page) is the maximum number the Student Number Auto-Assign will use when incrementing to find an unused student number.

If District Student Number Seed (as defined on the District School Demographics page) is not used, StudentInformation will start from the largest student number currently in the district when auto-assigning student numbers. If the Maximum Increment from Seed (as defined on the District School Demographics page) is not set, StudentInformation will increment by 1 to find the next unused student number. If the maximum student number allowable has been used, StudentInformation will begin searching for unused student numbers beginning with the smallest student number in the district. See *ProgressBook StudentInformation School Setup and Configuration Guide* for more information on the School Demographics page.

**Student Status** (required) – May choose different option from the drop-down menu. This status is not EMIS related, but refers to the student’s status in the building.

**First Name** (required) – First Name of student, up to 50 characters.

**Middle Name** (optional) – Middle Name of student, up to 50 characters.

**Last Name** (required) – Last Name of student, up to 100 characters.

**Called Name** (optional) – Student’s called name. Example – Becky, TJ, etc.

**Last Name Suffix** (optional) – Suffix if applicable. Example Jr. or III.

**Gender** (required) – Select appropriate option from drop-down menu.

**Birthdate** (required) – Student’s birthdate in mm/dd/yyyy format.

**Age** (automatic) – Once a birthdate is entered, the student’s current age automatically displays in this field.

**Local Ethnicity Category** (optional) – Select appropriate option from drop-down menu. This field is not associated with ethnicity for EMIS purposes.

**Verified With** (optional) – Select appropriate option from drop-down menu.

**Hispanic/Latino** (required) – Yes or No; this field displays values from EMIS field GI580.

**Birthplace City** (required for SSID assignment) – Place/Name for the location where the student was born as it appears on the birth certificate (see *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element).

**Racial Group(s)** (required) – Select the racial groups to which the student is a member. Hovering over a racial group displays an explanation of that group.

**Summative Race** (view only) – This read-only field is calculated based on the values set in the Hispanic/Latino and Racial Group(s) fields when the screen is saved. If the Hispanic/Latino field is set to Y, Summative Race will display “H – Hispanic/Latino”. If the Hispanic/Latino field is set to N and only one racial group is selected, Summative

Race will display the selected group (“A – Asian” for example). If the Hispanic/Layout field is set to N and multiple racial groups are selected, Summative Race will display “M – Multiracial”. Values from EMIS field GI090 are used to populate this field.

**Native Language** (optional) – May select from drop-down list validated against predefined code table. The Native Language is the language spoken at the onset of speech.

**Home Language (optional)** - May select from drop-down list validated against predefined code table. The Home Language is the language spoken at home.

**Address of Residence** (required) – Enter the Street Address, City, State and Zip Code where the student lives in these fields (the second address line is optional). Once you enter a zip code, Address Standardization and Verification will run on this address. See *ProgressBook StudentInformation Getting Started Guide* for more information on Address Standardization and Verification.

**Note:** *If you change the student’s address and the student has any contacts with the **Same As Student Address** check box selected in the contact record, a grid displays these contacts and allows you to select or deselect which contacts’ address you want to update along with the student’s address.*

**Bypass Address Standardization/Verification** – Yes or no; check this box to leave the Address of Residence as entered, and not run Address Standardization or Address Verification on the address. Use this check box only if you are certain that the address is accurate.

**Note:** *If you check the “Bypass” box for either Address, a new field will display.*

### Address Standardization/Verification Fields

**Bypass Comments** (required) – If bypassing standardization or verification, you must enter a reason why you are doing so in this field. Click **View Log** to see a log of all comments used to bypass standardization and/or verification, including Username.



### Address Verification Bypass Log

If the student's address was previously bypassed, the Bypass Comments field will still be present, but it will not be required.

**Use Address of Residence** – Yes or no; check this box to duplicate the Address of Residence data in the Mailing Address fields.

**Mailing Address** (required or optional) – Enter the Street Address, City, State and Zip Code where the student receives mail in these fields (the second address line is optional). Once you enter a zip code, Address Standardization will run on this address. See *ProgressBook StudentInformation Getting Started Guide* for more information on Address Standardization.

**Bypass Address Standardization** – Yes or no. Check this box to leave the Mailing Address as entered, and not run Address Standardization on the address. Use this check box only if you are certain that the address is accurate.

**Phone Number** (optional) – Student's phone number with area code.

**Unlisted** (optional) – Yes or No; if checked, student phone number will not print or be displayed on various screens/reports for privacy purposes.

**Email** (Optional) – Input student's email address if desired.

**Building Grade** (required) – Grade Level that the student is currently enrolled in at this building. Please note that changing the Building Grade does not change the EMIS Grade. Please see the FD-Attributes tab to change the EMIS Grade.

**Grade Next Year** (optional) – Grade Level that the student will be in next year. Please note that changing the Grade Next Year does not change the EMIS Grade Next Year. See the FN-Attributes tab to change the EMIS Grade Next Year. Whenever you edit a student's General tab and save, the Grade Next Year is auto-populated based on the Building Progression Track, unless it is overridden manually.

**EMIS Grade** (view only) – The EMIS Grade from the FD-Attributes tab.

**EMIS Grade Next Year** (view only) – The EMIS Grade Next Year from the FN-Attributes tab.

**Program** (optional) – Select appropriate program from drop-down menu if applicable.

**Home School IRN** (optional) – Used with JVS students. Refers to the IRN of the sending or home building. The magnifying glass will assist with the search for the building IRN by accessing the ODE IRN Search. Please note that this is the building IRN and not the district IRN. In some cases (i.e. community schools), the district and building IRN are the same. **Please Note:** If a student is direct enrolled to the JVS, the home school field should be left blank.

**Home School** (view only) – The Home School name will display based on the Home School IRN entered.

**Attendance Calendar** – Select appropriate attendance calendar from drop-down menu if student should not be assigned to the default Attendance Calendar. For more information on the attendance Calendar, see *ProgressBook StudentInformation Attendance and Calendar Guide*.

**Report to EMIS** – If this box is checked, this student will be reported to EMIS. You can only un-check or check this box from the EMIS tabs.

**Save** – Will save current Information on this student.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.



### Changes Have Not Been Saved Warning Message

**Cancel** – Will clear out data already entered.

### Student Profile – Additional Tab

A screenshot of the 'Edit Student Profile' screen. At the top, a blue navigation bar contains 'Home > SIS > Student > Edit Profile FY09' and a yellow warning banner reads 'WARNING: You are working with a Future School Year'. The main heading is 'Edit Student Profile' in blue. Below this, a red warning message reads: 'From this screen, you can display and change information regarding a students profile.' Below the warning, there are several tabs: 'General', 'Additional', 'Custom', 'Private', 'FS-Standing', 'FS-Attendance', 'FD-Attributes', 'FN-Attributes', 'FN-Graduate', and 'Transportation'. The 'Additional' tab is selected. Below the tabs are two buttons: 'Save' and 'Cancel'. To the right, it says 'Last Modified: 06/25/2010 9:44 AM by User: Amy'. The form contains several fields: 'Primary Building' (dropdown menu showing 'HIGH SCHOOL'), 'Special Ed' (text input '100'), 'Country of Origin' (dropdown menu), 'Citizenship' (dropdown menu), 'Building Progression Track' (dropdown menu showing 'GE to HS - Elementary to High School'), 'Graduation Year' (text input), 'New School' (dropdown menu), 'Pri. Graduation Rule' (dropdown menu), 'Alt. Graduation Rule' (dropdown menu), 'Counselor' (dropdown menu showing '-- Select Counselor --'), 'Scheduling Priority' (dropdown menu showing '5'), 'Locker Assignments' (button 'Assign Primary Locker'), 'Team' (dropdown menu), 'Homeroom' (dropdown menu) and 'Auto-Assign' (button), and a note: 'Choose from drop down or click Auto-Assign which will randomly assign an available grade-level appropriate homeroom to the student.' At the bottom, there are checkboxes for 'Include in Honor Roll', 'Include in Ranking', and 'Include in GPA', all of which are checked. To the right, there are five checkboxes labeled '1', '2', '3', '4', and '5' under the heading 'Flags'.

### Additional Tab on the Edit Student Profile Screen

**Primary Building** (optional) – The drop-down will be populated with all the schools that a student is involved with this year. Will default to the working building in which the

student record was added. If a student is enrolled in more than one building in the district this should reflect the Primary or “reporting” building for the student (for EMIS reporting purposes). Please note that if this value contains a district (and not a building), the student will be in the in the DASL/ProgressBook StudentPersonal.xml extract file but will not be in the DASL/ProgressBook SchoolEnrollment.xml extract file. This could cause the student not to display properly in ProgressBook.

**Special Ed** (optional) – Optional field for inputting information pertaining to special education. As of 9.0, this field is no longer used and can be updated to a zero or blank value.

**Country of Origin** (optional) – May select from drop-down list validated against predefined code table.

**Citizenship** (optional) – May select from drop-down list validated against predefined code table.

**Building Progression Track** – Building Progression Tracks describe a path a student can take through schools within a district. Select the appropriate option from drop-down menu.

**Graduation Year** (optional) – Student’s graduation year. This displays in the student context area in parentheses between the school name and school year.

**New School** (optional) – The school for next year based on the progression track and the grade next year. This is populated by the Student Promotion process. If you choose to set a separate New School, you should remove any Building Progression Track assigned, or the New School setting will be overwritten and replaced by the Student Promotion process.

**Pri. Graduation Rule** (optional) – The primary graduation rule applied to selected student and used with the graduation verification package.

**Alt. Graduation Rule** (optional) – The alternate graduation rule applied to selected student and used with the graduation verification package.

**Counselor** (optional) – select appropriate counselor from drop-down menu. Teacher must have been defined (in security) as a counselor job function (explained in detail in security documentation).

**Scheduling Priority** (optional) – Select a student scheduling priority from drop-down list. Valid options are 1-9 with 9 being the highest priority.

**Show grade appropriate counselors only** – If checked, only counselors listed with the selected student’s grade level assignment will be displayed in the drop-down list.

**Locker Assignments** – Click on the Locker Assignments hyperlink to display the Student Locker Assignment screen. See *ProgressBook StudentInformation Student Lockers Guide* for more information about using the Locker Assignment functionality.

**Assign Primary Locker** – This button will open a popup window allowing the user to quickly fund and select a locker for the student – the Locker Selection Wizard. If desired, you can also change the combination series of the locker to be assigned as

part of the assignment process. See *ProgressBook StudentInformation Student Lockers Guide* for more information about using the Locker Assignment functionality.

**Note:** *If accessing the Locker Assignment or Assign Primary Locker page, user must first click the **Save** button to save any modifications made to fields on Additional Tab or information will be lost.*

**Team** (optional) – Select from drop-down list that has been defined in the Team code Maintenance table. Used in the scheduling process.

**Homeroom** – Choose from drop-down list or click the Auto Assign button to randomly assign an available grade-level appropriate homeroom to the student.

**Note:** *If accessing the Homeroom Assignment Page, user must first click the Save button to save any modifications made to fields on Additional Tab or information will be lost.*

**Include in Honor Roll** (optional) – Check if this student is to be included in Honor Roll calculations. The registration process looks at the “Include in Honor Roll” values for the grade level selected and fills in the values according to the grade level defaults set up. If no grade level default values are defined, “Include in Honor Roll” will be checked by default on registration.

**Flags** (optional) – These flags were converted from SIS, and can be used for marking students with various letters or numbers, as determined by the school, for use with reports and grouping like students together.

**Flags:**                      **1**    **2**    **3**    **4**    **5**  
           

**Include in Ranking** (optional) – Check if this student is to be included in class ranking calculations. When a class ranking is calculated, only students marked as “Include in Ranking” will be considered in the calculation, and only these students will be shown on any ranking report. Students not included in ranking will have no bearing on the ranking reports and calculations. Students who are marked to be excluded from ranking will still be included in the GPA set and have a GPA calculated. “Include in Ranking” is checked by default.

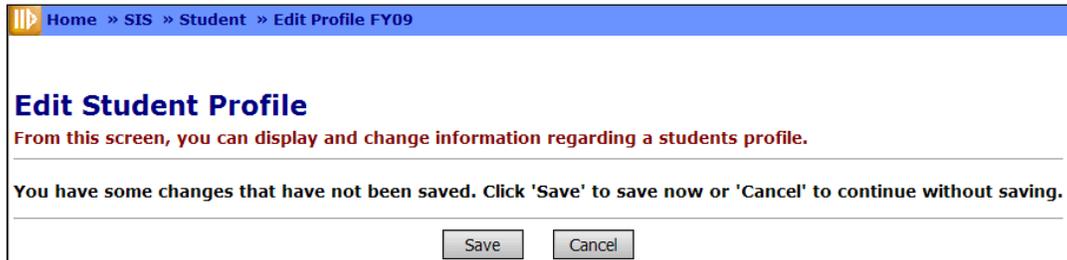
The registration process looks at the “Include in Ranking” values for the grade level selected and fills in the values according to the grade level defaults set up. If no grade level default values are defined, “Include in Ranking” will be checked by default on registration.

**Include in GPA** (optional) – Check if this student is to be included in GPA calculations. The registration process looks at the “Include in GPA” values for the grade level selected and fills in the values according to the grade level defaults set up. If no grade level default values are defined, “Include in GPA” will be checked by default on registration.

**Save** – Will save current Information on this student.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the

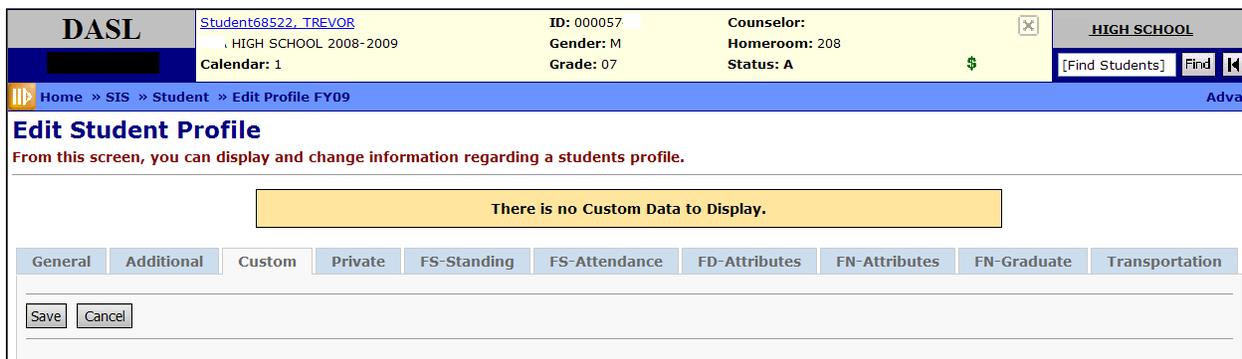
changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.



**Changes Have Not Been Saved Warning Message**

**Cancel** – Will clear out data already entered.

### Student Profile – Custom Tab



**Custom Tab on the Edit Student Profile Screen**

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 sorted by the sort order of the data definition first, and then by the definition field title, each in ascending order. 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.

**Save** – Will save current Custom information.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen

tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.

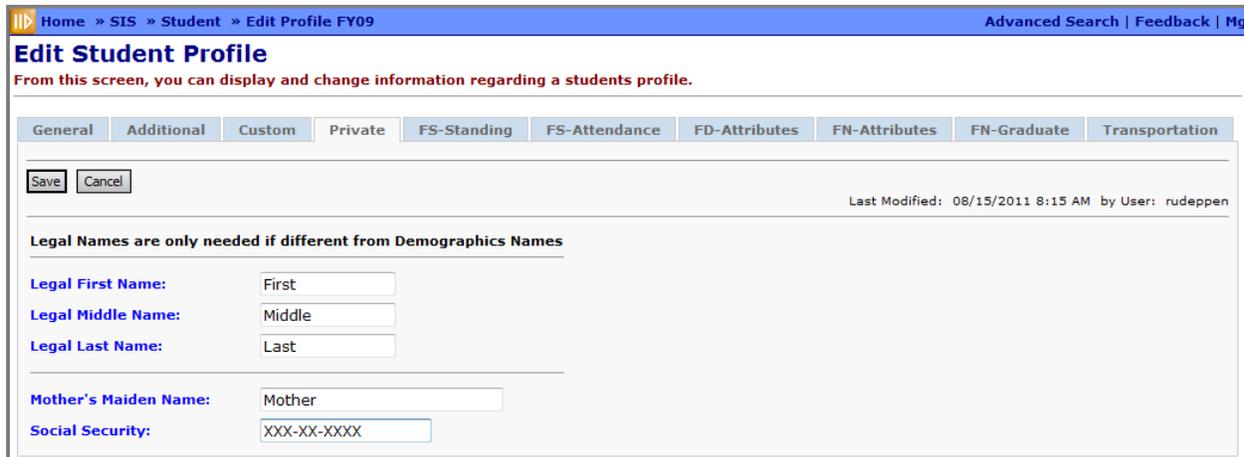


### Changes Have Not Been Saved Warning Message

**Cancel** – Will clear out data already entered.

### Student Profile – Private Tab

This tab is available for reporting Private information for the selected student. Note that reported names are only needed IF different from the Demographic Names located on the General Tab.



### Private Tab on the Edit Student Profile Screen

**Legal First Name** (optional) – Legal first name of student (used for SSID assignment purposes). Only necessary if different from name on General tab.

**Legal Middle Name** – Legal middle name of student (used for SSID assignment purposes). Enter \* if the student has no middle name.

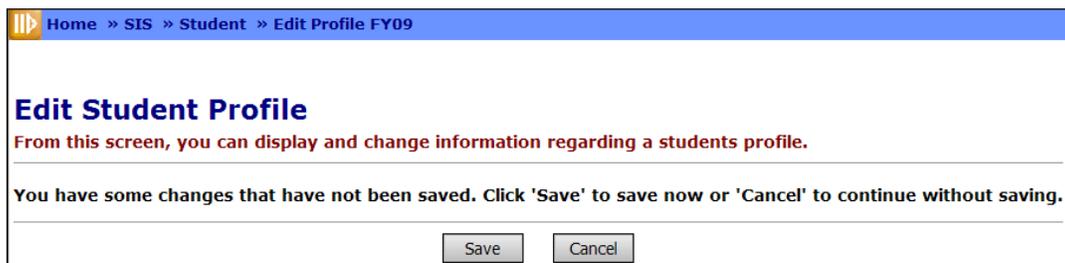
**Legal Last Name** (optional) – Legal last name of student (used for SSID assignment purposes). Only necessary if different from name on General tab.

**Mother's Maiden Name** (optional for SSID assignment) – Maiden name of the student's mother.

**Social Security** – Social Security Number of the student.

**Save** – Will save current student Private information.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.



#### Changes Have Not Been Saved Warning Message

**Cancel** – Will clear out data already entered.

#### Student Profile – FS-Standing Tab

This tab is used to view and enter the data describing the standing of a student in the district reporting that student. It also permits the entry of data describing situations in which the reporting district receives a student from another district and/or in which the reporting district sends a student to another district.

The tasks that can be performed on this tab are:

- View the Student Standing History and individual record details.
- Add a new Student Standing record.
- Correct a previously entered Student Standing record.
- Adjust the effective start of a previously entered Student Standing record.
- Delete a Student Standing record.

The functionality to select the proper EMIS situation or to launch the EMIS Situation Wizard to aid in correctly entering some of the required student standing data along with the appropriate data validation is also included on this tab. The new EMIS Situation table selection and EMIS Situation Wizard will assist the user in coding the following fields:

- District Relationship
- How Received
- How Received IRN
- Sent Reason
- Sent To IRN
- Tuition Type
- Percent of Time.

Smart Logic has been built into the page to perform checks on field values based on the selected EMIS Situation. The Smart Logic guides the user in coding the student correctly the first time.

**IMPORTANT: Because the FS Student Standing record is a date effective record that captures the change events for data related to the student, it is very important to understand the difference between a change and a correction.**

- **Change** – Means a change to the value of the element for the student. This will require a new FS Student Standing record to be created. See [“Student Profile – Create New FS-Standing Record.”](#)
- **Correction** – Means correcting a value on an existing record because it is wrong—not because it has changed. This will require editing an existing FS Student Standing record. See [“Student Profile – Edit FS-Standing Record.”](#)

Home » SIS » Student » Edit Profile FY09 Advanced Search | Feedback | Mgmt | Help | Ver

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General | Additional | Custom | Private | **FS-Standing** | FS-Arrival | FD-Attributes | FN-Attributes | FN-Graduate | Transportation

	Start Date	Withdraw Date	Withdraw Reason	EMIS Situation	District Relationship	District Of Residence	How Received	How Received IRN	Percent Of Time	Attending Building IRN	Sent To Reason 1	Sent To IRN 1	Sent To % Of Time 1
	7/1/2012		**	5	1	043505	*	*****	100	001081	NA	*****	0

Show Current Year Only

Save Cancel New Student Standing  Ignore EMIS Situation Errors

Last Modified: 02/16/2012 11:57 AM by User: rudeppen

---

EMIS ID: 285414985 State Student ID (SSID): GC5821476

Effective Start Date: 7/1/2012

District Admission Date: 8/29/2000 Admission Reason: 7 - Not newly enrolled in this school district

Admitted From IRN: \*\*\*\*\*

District Withdraw Date: Withdraw Withdraw Reason: \*\* - Not Applicable, Did not withdraw/was not truant

Withdrawn To IRN: \*\*\*\*\*

---

EMIS ID: 285414985 State Student ID (SSID): GC5821476

Effective Start Date: 7/1/2012

District Admission Date: 8/29/2000 Admission Reason: 7 - Not newly enrolled in this school district

Admitted From IRN: \*\*\*\*\*

District Withdraw Date: Withdraw Withdraw Reason: \*\* - Not Applicable, Did not withdraw/was not truant

Withdrawn To IRN: \*\*\*\*\*

---

EMIS Situation: 5 - Resident attending Full Time

District Relationship: 1 - Stud. rcvg instr. in whole/part from rep. dist District of Residence: 043505 - Ashland City SD

How Received: \* - Not Applicable How Received IRN: \*\*\*\*\*

Percent of Time: 100 Tuition Type: N - Non-tuition student (default)

Attending Building IRN: 001081 - Ashland High School Assigned Building IRN: \*\*\*\*\*

County of Residence: 18 - Cuyahoga

---

Sent To 1: Reason: NA - Not sent to another district Sent To 2: Reason: NA - Not sent to another district (default)

IRN: \*\*\*\*\* IRN: \*\*\*\*\*

Percent of Time: 0 Percent of Time: 0

Exclude FS Records from Fall Initialization Updates

### FS-Standing Tab on the Edit Student Profile Screen

The top of the screen contains a history list showing a summary of the FS Student Standing records. The bottom of the screen contains a detail area where FS Student Standing details are viewed or modified. When the FS-Standing tab is initially displayed, the most recent record will be displayed in the detail area. When a record is displayed in the detail area, the corresponding row in the history list will be highlighted.

**EMIS ID** (required) – ID assigned during initial registration used for EMIS reporting purposes (this is for local use only; ODE does not receive this information).

**State Student ID (SSID)** – State Student Identifier. The nine digit alphanumeric identification code that is unique to this student. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element. This field may be hidden by the Security settings.

**Effective Start Date** (required) – The Effective Start Date of this FS Standing record. It is recommended by StudentInformation State Support to use July 1 as the Effective Start Date for students who are promoted. For new students who are registered in the summer, it is recommended to use August 1. Using a date before the first day of school

also ensures that ProgressBook extracts on the first day of school will pick up these students.

**District Admission Date** (required) – Indicates the date of the student’s most recent admission to the district. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Admission Reason** (required) – Select from pull-down menu. This field should be used if the student needs an SSID assigned via SSID Import or Export.

**Admitted From IRN** – IRN of the district from which the student was admitted. This field is enabled and required when the district admission date is July 1 or later of the current school year AND admission reason 3, 6 or 7 is selected. Click  to go to the Ohio Department of Education Search Organization Web page. The default value is \*\*\*\*\*. Joint Vocational School Districts (JVSDs) and Education Service Centers (ESCs) are required to report \*\*\*\*\* in this field. This field is disabled and given a value of \*\*\*\*\* when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).

**District Withdraw Date** – Indicates the most recent date a student withdrew from the district. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Withdrawn To IRN** – IRN of the school to which the student was withdrawn. This field is enabled and required when withdraw reason 41, 42 or 45 is selected. Click  to go to the Ohio Department of Education Search Organization Web page. The default value is \*\*\*\*\*. This field is disabled and given a value of \*\*\*\*\* when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).

**Withdraw Reason** (optional) – Choose the reason for withdrawal from the drop-down list.

**EMIS Situation** (required) – Choose from a drop-down list (or use the EMIS situation Wizard) validated against EMIS options file of all valid EMIS situations. Both the EMIS Situation number and description are displayed. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**District Relationship** (optional) – Select the appropriate educational relationship between the student and the district.

**District of Residence** (optional) – Enter the district of the student’s legal residence.

Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**How Received** (optional) – Select how the student arrived at the district. SMART validation requires that How Received be selected.

**How Received IRN** (optional) - Enter the district from which a student is received. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**Percent of Time** (optional) – Enter the average percent of time, for the week, that the student participates in any instruction provided by a certified/licensed employee.

**Tuition Type** (optional) – Select the appropriate manner in which the student is paying tuition to the reporting district.

**Attending Building IRN** (optional) – Enter the IRN of the building within the district that the student attends between the effective dates inclusive of the record being reported.

Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value. The Attending Building IRN can be a District IRN only when the value of “How Received” is one of the following:

- 6 – Non-Public (Services Only)
- F – Career Assessment Only
- I – Non-instructional, Supplementary, or Related Services
- P – Court Placed Students, Excluding foster Care
- T – Students Placed in Institutions, Non-Court Ordered
- V – Pre-school, Evaluated Only, Found Ineligible

**County of Residence** (required) – Select the county in which the student resides.

**Assigned Building IRN** (optional) – Enter the IRN of the building the student would normally attend according to the standard district attendance policy. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

The value in the Assigned Building IRN field should only be an IRN if the student is attending a building other than the building the student would normally attend. If the student is attending the building to which a student would normally be assigned, the value in this field must remain “\*\*\*\*\*”.

**Sent To Reason 1** (optional) – Select the reason a student is sent to another district.

**Sent To Reason 2** (optional) – Select the reason the student is sent to another district if the student is sent to a second district.

**Sent To IRN 1** (optional) – Enter the district to which a student is sent. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**Sent To IRN 2** (optional) – Enter the district to which a student is sent if the student is simultaneously being sent to a second district. Click  to go to the Ohio Department of Education Search Organization Web page. SMART logic will be invoked to help determine the correct value.

**Sent to Percent of Time 1** (optional) – Enter the average percent of time for the week that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

**Sent to Percent of Time 2** (optional) – Enter the average percent of time for the week that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

**Exclude FS Record from Fall Initialization Updates** – If checked will exclude student from Fall Initialization. By default, it is unchecked. There is only one flag that applies to all FS records.

The “Exclude from Fall Initialization” flags will be set to false when:

- A student is newly enrolled or re-enrolls in the district.
- A student is promoted/bulk enrolled into a new school year.
- A student transfers into a new school district.

**Ignore EMIS Situation Errors** – If checked will ignore certain required EMIS fields for this session only, so that the user may continue working with student information or another StudentInformation module.

***Note:** See the following sections for creating, editing and deleting a FS Student Standing Record.*

### FS Student Standing History List

	Start Date	Withdraw Date	Withdraw Reason	EMIS Situation	District Relationship	District Of Residence	How Received	How Received IRN	Percent Of Time	Attending Building IRN	Sent To Reason 1	Sent To IRN 1	Sent To % Of Time 1
	8/26/2008		**	5	1	043877	*	*****	100	020511	NA	*****	0
	7/1/2008		**	5	1	043877			100	033084	NA	*****	0

Show Current Year Only

### FS Student Standing History List

The history list displays the FS Student Standing records for the student in context. By default, only current fiscal year records are displayed. Uncheck **Show Current Year Only** to show all FS Student Standing records.

The history list is sorted in descending order by Effective Start Date.

When a detail record is displayed in the FS-Standing tab, the corresponding history record will be highlighted.

The first student standing record in a school year cannot be deleted.

Hover help is available in the history list moving and holding your cursor over the individual fields in the history list.

g	Sent To	Sent To	Sent To %
IRN	Reason 1	IRN 1	Of Time
	NA	*****	

Not sent to another district

Hoover Help

### **Student Profile – Create New FS-Standing Record**

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

You can insert a record with an Effective Start Date that falls between the Effective Start Dates of two existing FS records if the information in the new 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 must be greater than the earliest Effective Start Date for this school.
- The District Admission Date is greater than or equal to the current District Admission Date.

To add a new FS Student Standing record for the student in context:

1. Click **New Student Standing**.
2. The detail section (bottom part of the screen) of the FS-Standing tab will be filled in with the values of the most recent FS Student Standing record for this student with the exception of the Effective Start Date field.
3. Enter an Effective Start Date for this FS Student Standing record and modify fields as needed in the detail section for the new FS Student Standing record.

**Note:** *It is recommended by StudentInformation State Support to use July 1 as the Effective Start Date for students who are promoted. For new students who are registered in the summer, it is recommended to use August 1. Using a date before the first day of school also ensures that ProgressBook extracts on the first day of school will pick up these students.*

4. Click **Save**. This will save the new FS Student Standing record in the history section (top part of the screen) of the FS-Standing tab. If there any data errors preventing this new FS Student Standing record from saving correctly, they will display on the screen. You must correct any errors before saving the new FS Student Standing record.

5. You will receive the following message, when your save is successful:

**The FS - Student Standing information was successfully saved**

6. The new FS Student Standing record will then appear in the history section. The history list is sorted descending by Effective Start Date.

	Start Date	Withdraw Date	Withdraw Reason	EMIS Situation	District Relationship	District Of Residence	How Received	How Received IRN	Percent Of Time	Attending Building IRN	Sent To Reason 1	Sent To IRN 1	Sent To % Of Time 1
	8/26/2008		**	8	1	043877	*	*****	100	020511	PI		
	8/25/2008		**	5	1	043877	*	*****	100	020511	NA	*****	
	7/1/2008		**	5		043877			100	033084			

Show Current Year Only

**New FS Student Standing Record**

**Note:** When the most recent FS Student Standing record indicates a withdrawal (i.e. the record has a Withdraw Date and Withdraw Reason is not “\*\*”), then a new FS Student Standing record will not be able to be created. The student must be re-registered or the Withdraw Date and Reason must be removed.

## Student Profile – Edit FS-Standing Record

Home » SIS » Student » Edit Profile FY09 Advanced Search | Feedback | M

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Arrival FD-Attributes FN-Attributes FN-Graduate Transportation

	Start Date	Withdraw Date	Withdraw Reason	EMIS Situation	District Relationship	District Of Residence	How Received	How Received IRN	Percent Of Time	Attending Building IRN	Sent To Reason 1	Sent To IRN 1	Sent To % Of Time 1
	7/1/2012		**	5	1	043505	*	*****	100	001081	NA	*****	0

Show Current Year Only

Save Cancel New Student Standing  Ignore EMIS Situation Errors

Last Modified: 04/23/2012 1:41 PM by User: rudeppen

EMIS ID: 278894984 State Student ID (SSID): FZ6983505

Effective Start Date: 7/1/2012

District Admission Date: 2/21/2012 Admission Reason: 6 - Transferred from other Ohio public district/community school  
 Admitted From IRN: \*\*\*\*\* -

District Withdraw Date: Withdraw Reason: \*\* - Not Applicable, Did not withdraw/was not truant  
 Withdrawn To IRN: \*\*\*\*\* -

EMIS Situation: 5 - Resident attending Full Time

District Relationship: 1 - Stud. rcvg instr. in whole/part from rep. dist District of Residence: 043505 - Ashland City SD

How Received: \* - Not Applicable How Received IRN: \*\*\*\*\* -

Percent of Time: 100 Tuition Type: N - Non-tuition student (default)

Attending Building IRN: 001081 - Ashland High School Assigned Building IRN: \*\*\*\*\*

County of Residence: 18 - Cuyahoga

Sent To 1: Reason: NA - Not sent to another district Sent To 2: Reason: NA - Not sent to another district (default)  
 IRN: \*\*\*\*\* - IRN: \*\*\*\*\* -

Percent of Time: 0 Percent of Time: 0

Exclude FS Records from Fall Initialization Updates

### Editing an FS Student Standing Record

To edit an FS Student Standing record for the student in context:

1. Click the on the row in the FS-Standing history list (top of the screen) that you wish to edit.
2. The FS-Standing tab will now display the data from the selected record in the detail section (bottom part of the screen).
3. Modify the FS Student Standing fields as needed in the detail section of the FS-Standing tab. It is recommended by StudentInformation State Support to use July 1 as the Effective Start Date for students who are promoted. For new students who are registered in the summer, it is recommended to use August 1. Using a date before the first day of school also ensures that ProgressBook extracts on the first day of school will pick up these students.
4. Click **Save**. This will save the new FS-Standing record in the history section (top part of the screen) of the FS-Standing tab. If there any data errors preventing this

new FS-Standing record from saving correctly, they will display on the screen. You must correct any errors before saving the updated FS-Standing record.

- You will receive this message, when your save is successful.

**The FS - Student Standing information was successfully saved**

- The updated FS Student Standing record will then appear in the history list.

### Student Profile – Delete an FS-Standing Record

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

Home » SIS » Student » Edit Profile FY09
Advanced Search | Feedback | M

#### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General
Additional
Custom
Private
FS-Standing
FS-Arrival
FD-Attributes
FN-Attributes
FN-Graduate
Transportation

	Start Date	Withdraw Date	Withdraw Reason	EMIS Situation	District Relationship	District Of Residence	How Received	How Received IRN	Percent Of Time	Attending Building IRN	Sent To Reason 1	Sent To IRN 1	Sent To % Of Time 1
✖	9/20/2012		**	5	1	043505	*	*****	100	001081	NA	*****	0
✎	7/1/2012		**	5	1	043505	*	*****	100	001081	NA	*****	0

Show Current Year Only

Save
Cancel
New Student Standing
 Ignore EMIS Situation Errors

Last Modified: 10/31/2012 4:40 PM by User: EmhoffH

EMIS ID:  State Student ID (SSID):

---

Effective Start Date:

---

District Admission Date:  Admission Reason:

Admitted From IRN:  -

District Withdraw Date:   Withdraw Reason:

Withdrawn To IRN:  -

---

EMIS Situation:

---

District Relationship:  District of Residence:

How Received:  How Received IRN:  -

Percent of Time:  Tuition Type:

Attending Building IRN:  Assigned Building IRN:

County of Residence:

---

Sent To 1: Reason:  Sent To 2: Reason:

IRN:  -  IRN:  -

Percent of Time:  Percent of Time:

---

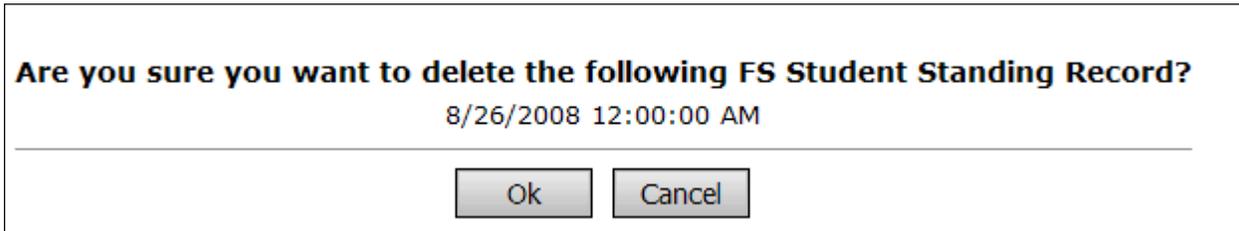
Exclude FS Records from Fall Initialization Updates

#### Deleting an FS Student Standing Record

To delete an FS Student Standing record for the student in context:

- Click the on the row in the FS-Standing history list that you wish to delete.

You will receive a confirmation message. Click OK to continue with the delete or cancel to not continue with the delete.



#### Deletion Confirmation Message

2. After clicking OK, you will receive the follow successful delete message

**The selected Student EMIS FS record was successfully deleted**

3. The FS-Standing history grid will no longer show this record.

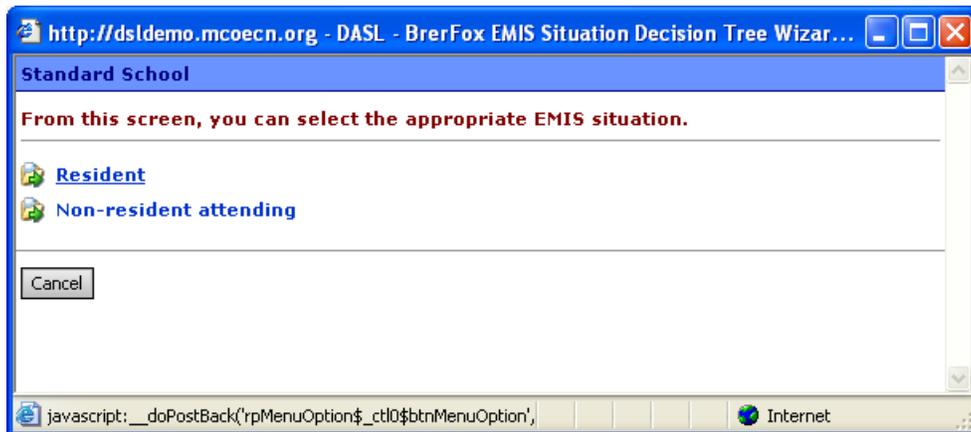
4. Please note that the first FS Student Standing record in a school year is “locked”

 and cannot be deleted.

### **EMIS Situation Wizard**

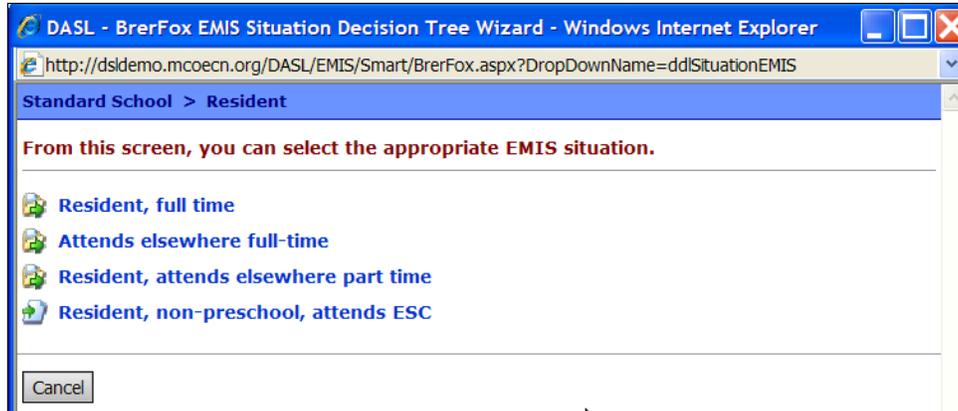
Click on the ellipse button beside any EMIS Situation drop-down to access the EMIS Situation Wizard, which will walk you through selecting the appropriate EMIS situation.

This Wizard will open a new window. If you do not see this window, you may need to disable your popup blocker, or authorize pop-ups from your StudentInformation site.

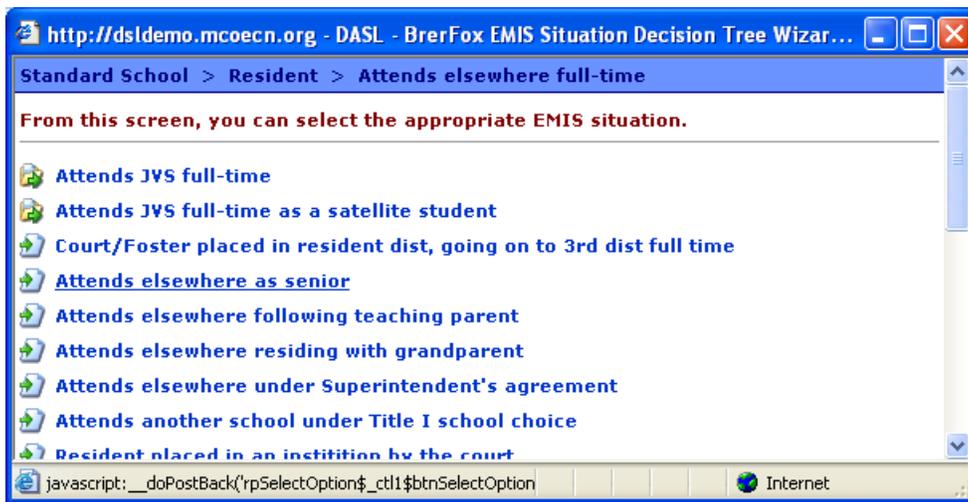


#### EMIS Situation Wizard – Standard School Screen

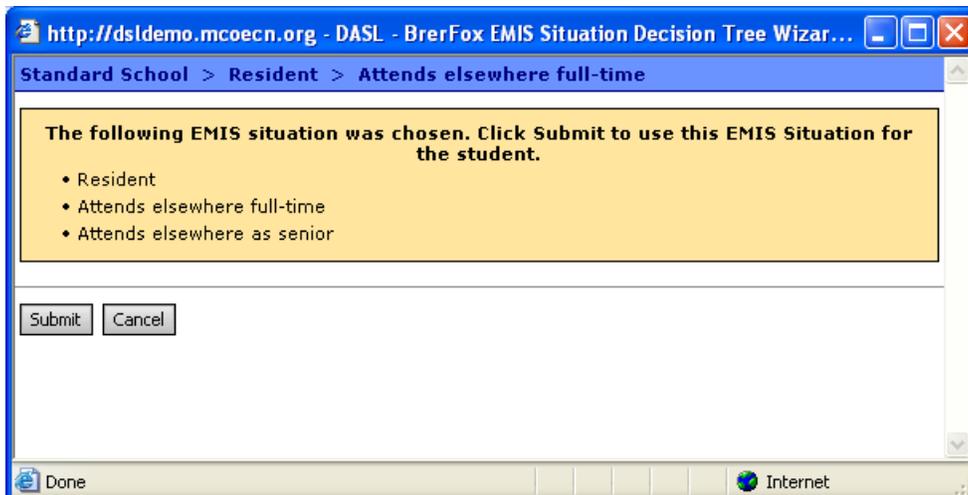
Continue selecting the appropriate options from each screen.



**EMIS Situation Wizard - Resident Screen**



**EMIS Situation Wizard - Attends Elsewhere Full-Time Screen**



**EMIS Situation Wizard - Review Selections Screen**

**Submit** – Will submit the EMIS situation that you have stepped through using the wizard and modify specific EMIS fields on the EMIS tabs of the Student Profile.

**Cancel** – Will cancel the situation wizard and return user to the Student Profile.

After submitting the results of the EMIS situation wizard, various fields on the EMIS tabs of the Student Profile will be populated with the results indicated by the wizard selection if applicable. (EMIS situation, EMIS status, Percent of time, district of residence, attending/home IRN Indicator.)

Once this screen has been completed and the save button clicked, the user will be notified if some of the EMIS fields do not have valid data, as per the EMIS situation.

To continue to save without correcting the errors, you must check the Ignore EMIS Situation Errors check box to continue. The next time this screen is accessed the user will receive the error again, until the correction has been made.

**Note:** The box at the bottom of the EMIS tab is used to ignore EMIS situation errors – The fields to which the Ignore EMIS situation Errors check box applies are EMIS Situation number, EMIS Status, Percent of time, district of residence and attending/home IRN Indicator. If the box is checked, then you may leave the screen if there are errors in any of these fields. If it's in another field, then you must make the correction before leaving the screen.

## Student Profile – FS-Attendance Tab

Use this tab to view and enter student attendance absence totals for the school year.

**Note:** You cannot add new FS records on this tab. You can only add new FS records on the **FS-Standing** tab. (For more information about editing an FS Student Standing record, see “Student Profile – Edit FS-Standing Record.”)

StudentInformation > SIS > Student > Edit Profile

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General | Additional | Custom | Private | **FS-Standing** | **FS-Attendance** | FD-Attributes | FN-Attributes | FN-Graduate | Transportation

	Start Date	Withdraw Date	Withdraw Reason	School Year Attendance Hours	School Year Excused Absence Hours	School Year Unexcused Absence Hours	Other SY Attendance Hours	Other SY Excused Absence Hours	Other SY Unexcused Absence Hours
	7/1/2014		**	448.50	0.00	6.50	0.00	0.00	0.00

Show Current Year Only

Last Modified: 02/13/2014 11:16 AM by User: \_\_\_\_\_

Effective Start Date:

District Withdraw Date:

The relation between Days and Hours may not be equal due to the accuracy of the calculations and values entered on the calendars. Days are for reference only, hours will be reported.

	Current Entity		Other Entity	
	Days	Hours	Days	Hours
Attendance	<input type="text" value="69.00"/>	<input type="text" value="448.50"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Excused Absence	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Unexcused Absence	<input type="text" value="1.00"/>	<input type="text" value="6.50"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

**FS-Attendance Tab on the Edit Student Profile Screen**

The top of the screen contains a historical list showing a summary of the attendance records. The bottom of the screen contains a detail area where you can view or modify details of the most recent attendance record.

**Effective Start Date** – From the **FS-Standing** tab

**District Withdraw Date** – From the **FS-Standing** tab

**Current Entity** – Reports attendance information for the student at the current school

***Note:** The value in the **Hours** fields is reported to EMIS. These fields are automatically updated by the verify attendance process (ATTUPEMIS). After running the verify process, you can manually update these fields as needed to correct attendance values. The **Days** fields contain calculated values for reference purposes only.*

**Other Entity** – Reports attendance information for the student at any other school the student attended

***Note:** The value in the **Hours** fields is reported to EMIS. You must enter these values manually. The **Days** fields contain calculated values for reference purposes only.*

**Attendance** – Number of **Hours** and **Days** the student was in attendance

**Excused Absence** – Number of **Hours** and **Days** the student was absent for excused reasons

**Unexcused Absence** – Number of **Hours** and **Days** the student was absent for any reasons not listed as excused, including truancy

### **Edit FS Student Attendance Records**

The FS Student Attendance history list displays the student’s historical FS Student Attendance records. By default, only the attendance records for the school year in context display in the list. To display the records for the school year in context and all prior years, deselect the **Show Current Year Only** check box.

	Start Date	Withdraw Date	Withdraw Reason	School Year Attendance Hours	School Year Excused Absence Hours	School Year Unexcused Absence Hours	Other SY Attendance Hours	Other SY Excused Absence Hours	Other SY Unexcused Absence Hours
	7/1/2014		**	448.50	0.00	6.50	0.00	0.00	0.00
	8/27/2013		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2013		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2012		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2011		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2010		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2009		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2008		**	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Show Current Year Only									

**FS Student Attendance History List**

**Note:** When a record displays in the detail area, the corresponding row in the history list is highlighted.

To edit the current record, make any needed changes in the detail section at the bottom of the screen.

To edit a previous year's record:

1. In the row of the record you want to edit, click .

StudentInformation > SIS > Student > Edit Profile

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation

	Start Date	Withdraw Date	Withdraw Reason	School Year Attendance Hours	School Year Excused Absence Hours	School Year Unexcused Absence Hours	Other SY Attendance Hours	Other SY Excused Absence Hours	Other SY Unexcused Absence Hours
	7/1/2014		**	448.50	0.00	6.50	0.00	0.00	0.00
	8/27/2013		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2013		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2012		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2011		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2010		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2009		**	0.00	0.00	0.00	0.00	0.00	0.00
	7/1/2008		**	0.00	0.00	0.00	0.00	0.00	0.00

Show Current Year Only

#### Edited FS Student Attendance Record

2. Make any needed changes in the detail section at the bottom of the screen.
3. Click **Save**.

**Save**

Last Modified: 12/3/2014 11:43 AM by User: \_\_\_\_\_

Effective Start Date:

District Withdraw Date:

The relation between Days and Hours may not be equal due to the accuracy of the calculations and values entered on the calendars. Days are for reference only, hours will be reported.

	Current Entity		Other Entity	
	Days	Hours	Days	Hours
Attendance	<input type="text" value="167.00"/>	<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="text" value="5.0"/>
Excused Absence	<input type="text" value="2.00"/>	<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Unexcused Absence	<input type="text" value="0.00"/>	<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

#### Save Edited FS Student Attendance Record

A confirmation message displays, and the updated FS Student Attendance record displays in the history list.

The FS - Attendance information was successfully saved									
General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation									
	Start Date	Withdraw Date	Withdraw Reason	School Year Attendance Hours	School Year Excused Absence Hours	School Year Unexcused Absence Hours	Other SY Attendance Hours	Other SY Excused Absence Hours	Other SY Unexcused Absence Hours
	7/1/2014		**	448.50	0.00	6.50	0.00	0.00	0.00
	8/27/2013		**	0.00	0.00	0.00	5.00	0.00	0.00

**Confirmation of Edited FS Student Attendance Record**

**Student Profile – FD-Attributes Tab**

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

The FD-Student Attributes tab is used to view and enter the data attributes for a student that change over time and the date of change can have a financial or other impact.

The tasks that can be performed on this tab are:

- View the Student Attributes history and individual record details
- Add a new Student Attributes record
- Correct a previously entered Student Attributes record
- Adjust the effective start date of a previously entered Student Attributes record
- Delete a Student Attributes record.

**IMPORTANT: Because the FD Attributes record is a date effective record that captures the change events for data related to the student, it is very important to understand the difference between a change and a correction.**

- **Change** – Means a change to the value of the element for the student. This will require a new FD Attributes record to be created. See *“Student Profile – Create New FD-Attributes Records.”*
- **Correction** – Means correcting a value on an existing record because it is wrong – not because it has changed. This will require editing an existing FD Attributes record. See *“Student Profile – Edit FD-Attributes Record.”*

StudentInformation > SIS > Student > Edit Profile

**Edit Student Profile**  
From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation

	Start Date	Withdraw Date	Withdraw Reason	St. Eq. Gr. Lvl.	Disability	504 Plan	Disadvantage	Free/Reduced Lunch	LEP	Migrant Status	Immigrant Status	Preschool Poverty
	7/1/2014		**	09	**	N	*	None	N	N	N	N

Show Current Year Only

Save Cancel New Student Attributes

Last Modified: 03/14/2014 12:34 PM by User: ACCESS

Effective Start Date: 7/1/2014

District Withdraw Date:

Withdraw Reason: \*\* - Not Applicable, Did not withdraw/was not truant

State Equivalent Grade: 09 - Ninth Grade

Changing the State Equivalent Grade does not change the Building Grade. The General tab can be used to change the Building Grade.

Disability Condition: \*\* - Not Applicable

Disadvantage: \* - Not Applicable

Limited English Proficiency: N - No, the student is not of Limited English Proficiency

Homeless Status: \* - Not Applicable

Migrant Status: N

Foreign Exchange Graduation Plan: \*

Attendance Pattern: \*\* - Not Applicable

Reporting Calendar: DFLT - Default

Section 504 Plan: N

Free/Reduced Lunch Status: None

LEP Reclass Date:

Homeless Unaccompanied Youth: \*

Immigrant Status: N

Preschool Poverty Level: N - Not a Preschool student

Exclude FD Records from Fall Initialization Updates

### FD-Attributes Tab on the Edit Student Profile Screen

The top of the screen contains a history list showing a summary of the FD Attributes records. The bottom of the screen contains a detail area where FD Attributes details are viewed or modified. When the FD-Attributes tab is initially displayed, the most recent record will display in the detail area. When a record is displayed in the detail area, the corresponding row in the history list will be highlighted.

**Effective Start Date** (required) – The Effective Start Date of this FD Attributes Effective Date record. It is recommended by StudentInformation State Support to use July 1 as the Effective Start Date for students who are promoted. For new students who are registered in the summer, it is recommended to use August 1. Using a date before the first day of school also ensures that ProgressBook extracts on the first day of school will pick up these students.

**District Withdraw Date** – Displayed from the FS-Standing tab.

**Withdraw Reason** – Displayed from the FS-Standing tab.

**State Equivalent Grade** – The grade level in which the student will be included for ODE reporting purposes. NOTE: Changing the State Equivalent Grade does not change the Building Grade. The General tab can be used to change the Building Grade.

**Disability Condition** – Indicates a student's primary handicap code, if applicable. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element. Selecting \*\* will update prior Disability condition.

**Section 504 Plan** – Yes or No; indicates if the student is identified with a disability under Section 504 Code. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Disadvantage** – This element indicates if the student meets the definition of economically or academically disadvantaged. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element). Note that selecting Free or Reduced for Free/Reduced Lunch Status will set this field to 1 - Economically Disadvantaged.

**Free/Reduced Lunch Status** – Select free or reduced (or default of none if not applicable) to indicate if the student is known to be eligible to receive the free or reduced-price lunch (a program through the National School Lunch and Child Nutrition Programs). Note that selecting Free or Reduced for this field will update the Disadvantage field to 1 - Economically Disadvantaged.

*Note: The Free/Reduced Lunch Status will only display if the user has been granted Display access to Extra System Permissions – EMIS – Free And Reduced Lunch Status.*

**Limited English Proficiency (required)** – Indicates a student with Limited English Proficiency. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**LEP Reclass Date** – Reported only during yearend (N) reporting, indicates when the student was reclassified as no longer LEP. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Homeless Status** – Indicates a student who lacks a fixed regular and adequate nighttime residence and whose residence is one of the options available in the drop-down list. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Homeless Unaccompanied Youth** – Yes or No; indicates a homeless student not in the physical custody of a parent or guardian. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Migrant Status** – Yes or No; indicates that the student or his/her parents or guardian is a migratory agricultural worker. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Immigrant Status** – Yes or No. A student meeting all of the following criteria is considered an immigrant:

Age three through 21.

Not born in the United States of America (any of the 50 states, District of Columbia, Commonwealth of Puerto Rico, United States Virgin Islands, Guam, American Samoa and Commonwealth of the Northern Mariana Islands).

Has not attended any school or schools in the United States of America for more than three full academic years.

**Foreign Exchange Graduation Plan** – The foreign exchange status of a student as it relates to the student’s graduation plans.

**Attendance Pattern** – Designates the student’s attendance pattern which will be used to calculate attendance. (This field populates based on your **Reporting Calendar** selection.) Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Reporting Calendar** – Select the student’s reporting calendar. (Your selection in this field determines the associated **Attendance Pattern**.)

**Preschool Poverty Level** – Indicates poverty level of the student’s family. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Exclude FD Records from Fall Initialization Updates** – If checked will exclude student from Fall Initialization. By default, it is unchecked. There is only one flag that applies to all FD records.

The “Exclude from Fall Initialization” flags will be set to false when:

- A student is newly enrolled or re-enrolls in the district.
- A student is promoted/bulk enrolled into a new school year.
- A student transfers into a new school district.

**Note:** See the following sections for creating, editing, and deleting a *FD Attributes* record.

### FD Attributes History List

General	Additional	Custom	Private	FS-Standing	FS-Attendance	FD-Attributes	FN-Attributes	FN-Graduate	Transportation		
Start Date	Withdraw Date	Withdraw Reason	St. Eq. Gr. Lvl.	Disability	504 Plan	Disadvantage	Free/Reduced Lunch	LEP	Migrant Status	Immigrant Status	Preschool Poverty
7/1/2014		**	09	**	N	*	None	N	N	N	N
<input checked="" type="checkbox"/> Show Current Year Only											
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="New Student Attributes"/>											

### FD Attributes History List

The history list displays the FD Attribute records for the student in context. By default, only current fiscal year records are displayed. Uncheck **Show Currently Year Only** to show all FD Attributes records.

The history list is sorted in descending order by Effective Start Date.

When a detail record is displayed in the FD Attributes history list, the corresponding history record will be highlighted.

## Student Profile – Create New FD-Attributes Record

StudentInformation > SIS > Student > Edit Profile

**Edit Student Profile**  
From this screen, you can display and change information regarding a students profile.

General | Additional | Custom | Private | FS-Standing | FS-Attendance | **FD-Attributes** | FN-Attributes | FN-Graduate | Transportation

	Start Date	Withdraw Date	Withdraw Reason	St. Eq. Gr. Lvl.	Disability	504 Plan	Disadvantagem	Free/Reduced Lunch	LEP	Migrant Status	Immigrant Status	Preschool Poverty
	7/1/2014		**	09	**	N	*	None	N	N	N	N

Show Current Year Only

Save Cancel New Student Attributes

Last Modified: 03/14/2014 12:34 PM by User: ACCESS

Effective Start Date: 7/1/2014

District Withdraw Date:

Withdraw Reason: \*\* - Not Applicable, Did not withdraw/was not truant

State Equivalent Grade: 09 - Ninth Grade

Changing the State Equivalent Grade does not change the Building Grade. The General tab can be used to change the Building Grade.

Disability Condition: \*\* - Not Applicable Section 504 Plan: N

Disadvantagem: \* - Not Applicable Free/Reduced Lunch Status: None

Limited English Proficiency: N - No, the student is not of Limited English Proficiency LEP Reclass Date:

Homeless Status: \* - Not Applicable Homeless Unaccompanied Youth: \*

Migrant Status: N Immigrant Status: N

Foreign Exchange Graduation Plan: \*

Attendance Pattern: \*\* - Not Applicable Preschool Poverty Level: N - Not a Preschool student

Reporting Calendar: DFLT - Default

Exclude FD Records from Fall Initialization Updates

### Creating a New FD Attributes Record

You can insert a record with an Effective Start Date that falls between the Effective Start Dates of two existing FD records if the information in the new 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 must be greater than the earliest Effective Start Date for this school.

To add a new FD Attributes record for the student in context:

1. Click **New Student Attributes**.
2. The detail section (bottom part of the screen) of the FD-Attributes tab will be filled in with the values of the most recent FD Attributes record for this student – with the exception of the Effective Start Date.
3. Enter an Effective Start Date for this FD Attributes record and modify fields as needed in the detail section for the new FD Attributes record.

**Note:** *It is recommended by StudentInformation State Support to use July 1 as the Effective Start Date for students who are promoted. For new students who are registered in the summer, it is recommended to use August 1. Using a date before the first day of school also ensures that ProgressBook extracts on the first day of school will pick up these students.*

4. Click **Save**. This will save the new FD Attributes record in the history section (top part of the screen) of the FD-Attributes tab. If there any data errors preventing this new FD Attributes record from saving correctly, they will display on the screen. You must correct any errors before saving the new FD Attributes record.

You will receive this message, when your save is successful.

**The FD - Student Attributes - Effective Date information was successfully saved**

5. The new FD Attributes record will then appear in the history section. The history list is sorted descending by effective start date.

General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation												
	Start Date	Withdraw Date	Withdraw Reason	St. Eq. Gr. Lvl.	Disability	504 Plan	Disadvantagemnt	Free/Reduced Lunch	LEP	Migrant Status	Immigrant Status	Preschool Poverty
	10/1/2014		**	09	**	N	*	None	N	N	N	N
	7/1/2014		**	09	**	N	*	None	N	N	N	N

Show Current Year Only

Save Cancel New Student Attributes

**FD Attributes History List**

## Student Profile – Edit FD-Attributes Record

StudentInformation > SIS > Student > Edit Profile [Find Students] [Go To]

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Attendance **FD-Attributes** FN-Attributes FN-Graduate Transportation

	Start Date	Withdraw Date	Withdraw Reason	St. Eq. Gr. Lvl.	Disability	504 Plan	Disadvantagemnt	Free/Reduced Lunch	LEP	Migrant Status	Immigrant Status	Preschool Poverty
	10/1/2014		**	09	**	N	*	None	N	N	N	N
	7/1/2014		**	09	**	N	*	None	N	N	N	N

Show Current Year Only

Save Cancel New Student Attributes Last Modified: 03/14/2014 12:34 PM by User: ACCESS

Effective Start Date:

District Withdraw Date:

Withdraw Reason:

State Equivalent Grade:

Changing the State Equivalent Grade does not change the Building Grade. The General tab can be used to change the Building Grade.

Disability Condition:  Section 504 Plan:

Disadvantagemnt:  Free/Reduced Lunch Status:

Limited English Proficiency:  LEP Reclass Date:

Homeless Status:  Homeless Unaccompanied Youth:

Migrant Status:  Immigrant Status:

Foreign Exchange Graduation Plan:

Attendance Pattern:  Preschool Poverty Level:

Reporting Calendar:

Exclude FD Records from Fall Initialization Updates

### Editing FD Attributes Record

To edit an FD-Attributes record for the student in context:

1. Click the on the row in the FD Attributes history list (top of the screen) that you wish to edit.
2. The FD-Attributes tab will now display the data from the selected record in the detail section (bottom part of the screen).
3. Modify the FD-Attributes fields as needed in the detail section of the FD-Attributes tab. It is recommended by StudentInformation State Support to use July 1 as the Effective Start Date for students who are promoted. For new students who are registered in the summer, it is recommended to use August 1. Using a date before the first day of school also ensures that ProgressBook extracts on the first day of school will pick up these students.

- Click **Save**. This will save the new FD-Attributes record in the history section (top part of the screen) of the FD-Attributes tab. If there any data errors preventing this new FD Attributes record from saving correctly, they will display on the screen. You must correct any errors before saving the updated FD-Attributes record.
- You will receive this message, when your save is successful.

**The FD - Student Attributes - Effective Date information was successfully saved**

- The updated FD Student Attributes record will then appear in the history list.

### Student Profile – Delete FD-Attribute Record

#### Navigation: Home – SIS – Student – Edit Student Profile – FD-Attributes tab

StudentInformation > SIS > Student > Edit Profile

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation

	Start Date	Withdraw Date	Withdraw Reason	St. Eq. Gr. Lvl.	Disability	504 Plan	Disadvantagemnt	Free/Reduced Lunch	LEP	Migrant Status	Immigrant Status	Preschool Poverty
	10/1/2014		**	09	**	N	*	None	N	N	N	N
	7/1/2014		**	09	**	N	*	None	N	N	N	N

Show Current Year Only

Save Cancel New Student Attributes

Last Modified: 07/25/2014 4:52 PM by User: SilvaT

**Effective Start Date:** 10/1/2014

**District Withdraw Date:**

**Withdraw Reason:** \*\* - Not Applicable, Did not withdraw/was not truant

**State Equivalent Grade:** 09 - Ninth Grade

Changing the State Equivalent Grade does not change the Building Grade. The General tab can be used to change the Building Grade.

**Disability Condition:** \*\* - Not Applicable **Section 504 Plan:** N

**Disadvantagemnt:** \* - Not Applicable **Free/Reduced Lunch Status:** None

**Limited English Proficiency:** N - No, the student is not of Limited English Proficiency **LEP Reclass Date:**

**Homeless Status:** \* - Not Applicable **Homeless Unaccompanied Youth:** \*

**Migrant Status:** N **Immigrant Status:** N

**Foreign Exchange Graduation Plan:** \* **Preschool Poverty Level:** N - Not a Preschool student

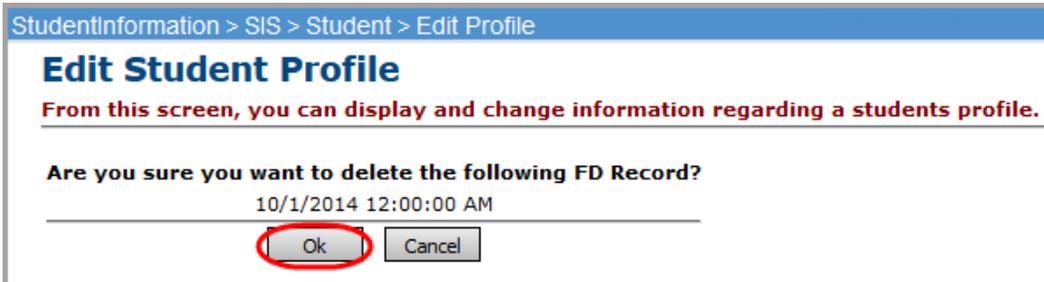
**Attendance Pattern:** \*\* - Not Applicable **Reporting Calendar:** DFLT - Default

Exclude FD Records from Fall Initialization Updates

### Deleting an FD Attribute Record

To delete an FD Attributes record for the student in context:

1. Click the  on the row in the FD Attributes history list that you wish to delete.
2. You will receive a confirmation message. Click OK to continue with the delete or cancel to not continue with the delete.



StudentInformation > SIS > Student > Edit Profile

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

Are you sure you want to delete the following FD Record?

10/1/2014 12:00:00 AM

3. After clicking OK, you will receive the follow successful delete message.

**The selected Student EMIS FD record was successfully deleted**

4. The FD-Attributes history grid will no longer show this record.
5. Please note that the first FD Attributes record in a school year is “locked”  and cannot be deleted.

## Student Profile – FN-Attributes Tab

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

The FN-Attributes tab is used to enter the data for a student that have only a single value that needs to be reported for the student.

StudentInformation > SIS > Student > Edit Profile

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Arrivance FD-Attributes **FN-Attributes** FN-Graduate Transportation

Save Cancel

Last Modified: 07/28/2014 8:59 AM by User: \_\_\_\_\_

**EMIS Grade Next Year:** GR - Student will complete educational requirements

Changing the EMIS Grade Next Year does not change the District Grade Next Year. The General tab can be used to change the District Grade Next Year.

**Retained Status:** \* - Student was not retained in the previous school year

**Oct Childcount IEP Outcome:** \*\*\*\* - No Change from latest IEP reported to ODE

**CTE Program Area:** \_\_\_\_\_ **Fiscal Year Began 9th:** 2012

**CTE Program of Concentration:** \*\* - Student is not a concentrator in any CTE Program **Tech Prep Completer:** N

**Majority Of Attendance IRN:** \*\*\*\*\*

**Accountability IRN:** \*\*\*\*\*

**Attending Building IRN Next Year:** 008003 - Dalton High School

**Admission to Current High School Date:** 8/22/2011

**Attending District IRN Last October:** \*\*\*\*\* - \_\_\_\_\_

**Third Grade Reading Guarantee**

**Math Diagnostic Result Code:** \*\* - Not Required

**Reading Diagnostic Result Code:** \*\* - Not Required

**Writing Diagnostic Result Code:** \*\* - Not Required

**Report To EMIS:**

Exclude FN Records from Fall Initialization Updates

### FN-Attributes Tab on the Edit Student Profile Screen

**EMIS Grade Next Year** – Indicates the grade level to which a student will be promoted, or the grade level to which they will be retained. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Note:** *Changing the EMIS Grade Next Year does not change the District Grade Next Year. The General tab can be used to change the District Grade Next Year.*

**Retained Status** – Element indicates whether a student who was retained at the end of the school year will advance to the next grade level as a result of the summer school experience. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Oct Childcount IEP Outcome** – This field designates the LRE outcome as of the October count week for a student whose IEP currently on file with ODE does not reflect the current LRE for a student with a disability. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Fiscal Year Began 9<sup>th</sup>** – Report the fiscal year that the student began the 9<sup>th</sup> grade. Must be reported for all students grades 09-12. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**CTE Program Area** – Choose a Program area for the CTE Program of Concentration element.

**CTE Program of Concentration** – Choose an element that designates the program of concentration for a CTE concentrator. The list of available values in the CTE Program of Concentration drop-down is dependent on the value selected for the CTE Program Area.

**Tech Prep Completer** – Indicates if a student completed a Tech Prep program.

**Majority of Attendance IRN** – Indicates the building IRN within the district (or district IRN) where the student was enrolled for at least 120 consecutive days. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Accountability IRN** – Used only if district determines that another building within the district (other than the building designated in the Majority of Attendance IRN field) should be accountable for testing results. Must be filled in with \*\*\*\*\* if there is no Accountability IRN. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Attending Building IRN Next Year** – This field is only visible for FY13 and future years. This element indicates the building within the school district the student will attend next year. The drop-down list includes the available IRNs and school names within the district in context. Asterisks (\*\*\*\*\*) indicate that the student is withdrawn, graduating in the current year or newly registered. When Promotion/Bulk Enrollment is run to move students to the next school year, the process updates the Attending Building IRN Next Year field on the FN tab in the current school year. Students who will be switching buildings in the upcoming year will have their field updated with the new value. Newly registered students in the current year (who have a default value of \*\*\*\*\*) will have the value updated to correspond with the building they will attend in the next school year. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Admission to Current High School Date** – Date the student was admitted to the current high school the student attends.

**Attending District IRN Last October** – This field is only visible for FY15 and future years. This element indicates the district the student attended as of the past October. If you leave this field blank, the transfer reports this element as asterisks (\*\*\*\*\*) indicating “not reported.”

**Third Grade Reading Guarantee** – This field is only visible for FY13 and future years. This element indicates the student’s math, reading and writing diagnostic result codes using values of \*\* (Not Required), AO (Assessed, On Track), NO (Assessed, Not On Track), RN (Required, Not Completed) and (for the Reading Diagnostic Result Code only) EX (Exempt from Diagnostic Assessment). Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Report to EMIS** – This is checked by default, indicating that this student will be reported to EMIS.

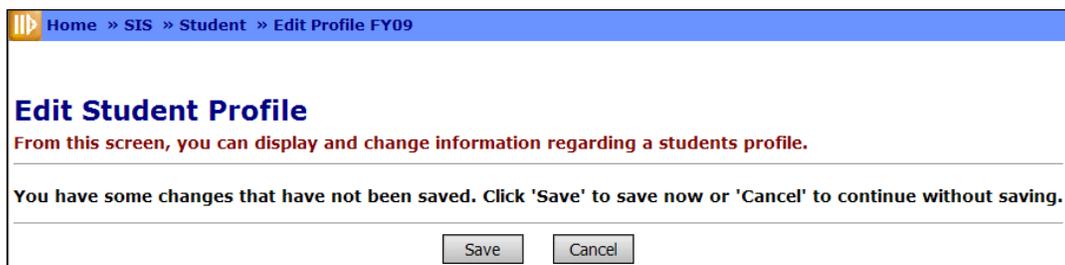
**Exclude FN Records from Fall Initialization Updates** – If checked will exclude student from Fall Initialization. By default, it is unchecked. There is only one flag that applies to all FN records.

The “Exclude from Fall Initialization” flags will be set to false when:

- A student is newly enrolled or re-enrolls in the district.
- A student is promoted/bulk enrolled into a new school year.
- A student transfers into a new school district.

**Save** – Will save the current FN Attributes record for this student.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.



**Changes Have Not Been Saved Warning Message**

**Cancel** – Will clear out data already entered.

## Student Profile – FN-Graduate Tab

This tab is available for reporting graduation information for the selected student.

The screenshot shows the 'Edit Student Profile' interface with the 'FN-Graduate' tab selected. The breadcrumb trail is 'Home > SIS > Student > Edit Profile FY09'. Below the title bar, there is a navigation menu with tabs: General, Additional, Custom, Private, FS-Standing, FS-Arrivance, FD-Attributes, FN-Attributes, FN-Graduate (selected), and Transportation. There are 'Save' and 'Cancel' buttons on the left. A status bar on the right indicates 'Last Modified: 05/28/2013 4:49 PM by User: ShawcrossH'. The main content area contains several fields with dropdown menus and checkboxes:

- CORE Economics and Financial Literacy Requirement Met:** N - District has not determined this student met requirement
- CORE Fine Arts Requirement Met:** N - District has not determined this student met requirement
- CORE Graduation Requirement Exemption:** \* - Student has not opted out of Ohio Core requirements (default)
- CORE Graduation Requirement Exemption Date:** [Dropdown menu]
- CORE Graduation Requirement Met:**
- Exempted from Physical Education Graduation Requirement:** N - District not adopted policy or student has not met all of policy re
- Expected Graduation Date:** [Dropdown menu] (Leave blank to use Grade Level default value: 6/1/2017)
- Graduation Date:** [Dropdown menu]
- Diploma Type:** \* - Not Applicable
- OGT Graduation Alternative:** 0 - Not Used
- Military Compact Graduation Alternative:** 0 - Student is not using the military compact alternative

### FN-Graduate Tab on the Edit Student Profile Screen

**CORE Economics and Financial Literacy Requirement Met** – Indicates if a student has met the CORE Economics and Financial Literacy Requirement. Refer to the *ODE EMIS Manual* for more details on reporting this element.

**CORE Fine Arts Requirement Met** – Indicates if a student has met the CORE Fine Arts Requirement. Refer to the *ODE EMIS Manual* for more details on reporting this element.

**CORE Graduation Requirement Exemption** – Indicates if a student qualifies for the CORE Graduation Requirement Exemption. Refer to the *ODE EMIS Manual* for more details on reporting this element.

**CORE Graduation Requirement Exemption Date** – Effective date of the CORE graduation requirement exemption

**CORE Graduation Requirement Met** – If selected, indicates the student has met the CORE graduation requirement.

**Exempted from Physical Education Graduation Requirement** – Indicates that the district has adopted a policy to exempt certain students from the Physical Education graduation credit requirement and that the student has met the policy's requirements. Refer to the *ODE EMIS Manual* for more details on reporting this element.

**Expected Graduation Date** – Date a student at this grade level is expected to graduate. Leave blank to accept the default value shown. You set the default values for each grade on the **Building Grade Levels Maintenance** screen.

**Graduation Date** – The date the student received his/her diploma. Refer to the *ODE EMIS Manual* for more details on reporting this element.

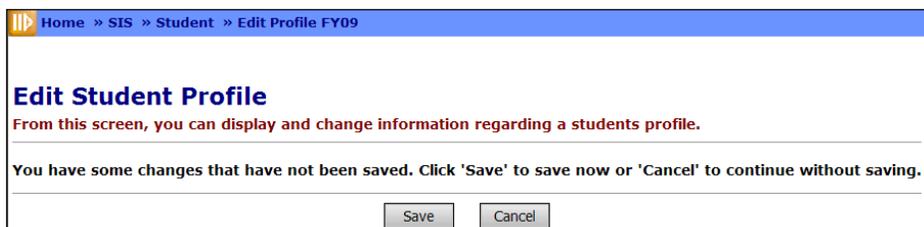
**Diploma Type** – The type of diploma received by the graduating student. Refer to the *ODE EMIS Manual* for more details on reporting this element.

**OGT Graduation Alternative** – Identifies that passage on one graduation test was met using the alternative criteria. Refer to the *ODE EMIS Manual* for more details on reporting this element.

**Military Compact Graduation Alternative** – Indicates that the student is using the Military Compact Graduation Alternative criteria or the number of Ohio graduation assessments the student is not required to pass. Refer to the *ODE EMIS Manual* for more details on reporting this element.

**Save** – Will save current student FN-Graduate information.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.



**Changes Have Not Been Saved Warning Message**

**Cancel** – Will clear out data already entered.

## Student Profile – Transportation Tab

This tab is available for reporting transportation information for the selected student.

The screenshot shows the 'Edit Student Profile' interface with the 'Transportation' tab selected. The breadcrumb trail at the top reads 'StudentInformation > SIS > Student > Edit Profile'. Below the title bar, there are navigation tabs: 'General', 'Additional', 'Custom', 'Private', 'FS-Standing', 'FS-Attendance', 'FD-Attributes', 'FN-Attributes', 'FN-Graduate', and 'Transportation'. The 'Transportation' tab is active. Below the tabs are 'Save' and 'Cancel' buttons. On the right side, there is a 'Last Modified: by User:' field. The main form area contains the following fields and options:

- Parking Permit:** Text input field.
- Assigned Space:** Text input field.
- Vehicle Description:** Text input field.
- License Plate:** Text input field.
- Driver's License Number:** Text input field.
- State:** Drop-down menu with 'OH' selected.
- Bus Number 1:** Text input field.
- Bus Number 2:** Text input field.
- Comments:** Text area.
- Distance To School:** Text input field.
- Transportation:** Radio buttons for 'Student Drives', 'Student is Bussed', and 'Student Walks'.
- Distance student was transported from residence to school building:** Drop-down menu with '\*\* - Student not transported' selected.
- Countweek Transportation Days:** Checkboxes for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', and 'Friday'.

Transportation Tab on the Edit Student Profile Screen

**Parking Permit** (optional) – Up to 4 characters to designate the student's parking permit number.

**Assigned Space** (optional) – Up to 30 characters to designate the student's assigned parking space.

**Vehicle Description** (optional) – Up to 65 characters to describe the student's vehicle.

**License Plate** (optional) – Up to 12 characters to designate the student's License Plate number.

**Driver's License Number** (optional) – Open text for student's driver's license number.

**State** – Choose state of student's driver's license from drop-down list.

**Bus Number 1** (optional) – Open text for typing in bus number.

**Bus Number 2** (optional) – Open text for typing in additional bus number.

**Comments** (optional) – Up to 200 characters for any additional comments needed for student transportation.

**Distance To School** (optional) – Open text for typing number of miles a student lives from school.

**Transportation** – Check all applicable boxes. Options are Student Drives, Student is Bussed and Student Walks.

**Distance student was transported from residence to school building** (community schools only) – Select the distance the student is transported during the selected days in the **Countweek Transportation Days** section.

**Countweek Transportation Days** (community schools only) – Select the check box for each day of count week in which the student uses school-provided transportation.

**Save** – Will save current student Transportation information.

The Edit Student Profile screen will warn the user if they make changes on a tab, but then they select another tab without saving the changes on the previous tab. If the changes on the previous tab are valid, the user will be given the option to Save the changes and proceed to the chosen tab, or Cancel changes and proceed to the chosen tab. If the changes on the previous tab are not valid, the user will be given the option to return to the previous tab to re-enter the changes or Cancel changes and proceed to the chosen tab.



**Changes Have Not Been Saved Warning Message**

**Cancel** – Will clear out data already entered.

## Students Failing Address Verification

**Navigation: Home – SIS – School – Address Verification – Failing Students**

This screen displays a listing of all students whose addresses have failed Address Verification. If a student is listed on this screen and should not be, you should enter that student's address in the District Addresses screen (Home – SIS – School – Address Verification – District Addresses) while the District is in context.



**Students Failing Address Verification Message**

**Ignore Bypassed Addresses** – If this box is checked, any addresses which used the “Bypass Residence Address Verification” check box will not display on this list. Un-checking it will display all addresses which fail Verification, whether bypassed or not.

**Board, Nicholas Lee** – Clicking on a student’s name will take you to their Edit Profile screen, General tab, so you can edit their Residence Address.

## Student Information

### Admission/Calendar History

**Navigation: Home – SIS – Student – Admission History**

The Admission/Calendar History page displays admission and withdrawal history as well as calendar changes for the selected student.

The screenshot shows the DASL interface for Jennifer Simon. The top navigation bar includes Home, SIS, Teacher Menu, EZ Query, Management, EMIS, and My. The student's profile information is displayed: ID: 0000, Gender: F, Grade: 12, Counselor: [blank], Homeroom: H1, Status: A. The breadcrumb trail is Home » SIS » Student » Admission History » Admission/Calendar History. The main heading is "Admission/Calendar History" with a sub-note: "This page displays admission and withdrawal history as well as calendar changes". The data is organized by school year:

School Year	Admission Code	School Code
2004-2005	8/15/2004 District Admission	Elida Local SD
	8/15/2004 Building Admission	XX High School 01 - Only school district attended Calendar: 1
2005-2006	Intrabuilding Progression	XX High School Calendar: 1
	Intrabuilding Progression	XX High School Calendar: 1
2007-2008	Intrabuilding Progression	XX High School Calendar: 1
	Intrabuilding Progression	XX High School Calendar: 1

#### Admission/Calendar History Screen

Each admission and withdrawal per building as well as calendar changes will be listed in chronological order. The most recent information will be at the bottom of the screen.

**Admission Date** – Most recent admission date to the building/district.

**Admission Code** – Admission code to describe the reason a student is being admitted to school.

**School Code** – The school building code for the admission record; these are the 4 character building codes that were used in SIS.

**School Name** – Name of the school.

**Withdraw Date** – Withdrawal date if applicable.

**Withdraw Code** – Withdrawal Code to describe the reason a student is leaving school if applicable. Otherwise all asterisks (\*\*) will be displayed.

**Comments** – The additional comments entered when the student withdrawal occurred.

**Calendar Name** – The attendance Calendar the student was assigned during this admission history record.

**School Year** – School year applicable to this admission history record.

**Dates** – Dates enrolled during the school year.

## View Calendar History

**Navigation: Home – SIS – Student – Admission History – View Calendar History**

The View Calendar History page displays calendar history for the selected student.

<b>DASL</b>	<a href="#">EYE, PRIVA</a>	ID: 00122445	Counselor:
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: F	Homeroom: A107
		Grade: 11	Status: A <span style="float: right;">\$</span>
Home » SIS » Student » Admission History » View Calendar History			
<b>Calendar History Summary</b>			
This page displays calendar history for the selected student			
<hr/>			
<b>School Year: 2003</b>			
• DASL HIGH SCHOOL			
Calendar: 1 9/25/2003 - 6/15/2004			
<hr/>			
<b>School Year: 2004</b>			
• DASL HIGH SCHOOL			
Calendar: 1 8/24/2004 - 6/1/2005			

### Calendar History Summary Screen

The calendar history will be listed in chronological order with the most recent information at the bottom of the screen.

**School Year** – School year applicable to this calendar history record. School Year 2004 designates the 2004-2005 school year.

**School Name** – Name of the school.

**Calendar Name** – The attendance Calendar the student was assigned during this calendar history record.

**Dates** – Dates that the student was assigned to a particular Calendar.

## View Admission History

**Navigation: Home – SIS – Student – Admission History – View Admission History**

The View Admission History screen displays the admission and withdrawal history for the selected student.

<b>DASL</b>	<a href="#">Conrardy, Jesse</a>	<b>ID:</b> 48652281	<b>Counselor:</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	<b>Gender:</b> M	<b>Homeroom:</b>
		<b>Grade:</b> 10	<b>Status:</b> A
<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Admission History</a> » <a href="#">View Admission History</a>			
<h3>Admission History Summary</h3> <p><b>This page displays admission and withdrawal history for the selected student</b></p>			
<hr/> <p><b>DASL Local SD</b></p> <ul style="list-style-type: none"> <li> <b>DASL HIGH SCHOOL</b>            3/14/2005 - 4/14/2005 Withdraw Code: 40 Transferred to another school outside of Ohio            4/14/2005 - 6/1/2005         </li> </ul>			

### Admission History Summary Screen

The admission history will be listed in chronological order with the most recent information at the bottom of the screen.

**School District** – Name of the school district that the student was admitted to.

**School Name** – Name of the school building that the student was admitted to.

**Dates** – Dates that the student was assigned to a particular school building.

**Description** – Description of Withdrawal Code.

## Edit History Details

**Navigation: Home – SIS – Student – Admission History – Edit History Details**

The Edit History Details screen allows the user to edit and delete the selected student's admission events.

Home » SIS » Student » Admission History » Edit History Details <span style="float: right;">Advanced Search   Feedback   Mgmt</span>						
<b>Admission/Calendar History Details</b>						
Click on the edit and delete icons to manage the student's admission events.						
School Year Type: <input type="text" value="Regular"/>						
	Year	Date	Event	School	Calendar	Code
	2002 - 2003	Aug 01, 2002	District Admission	Ottawa-Glandorf Local SD		
	2002 - 2003	Aug 01, 2002	Building Admission	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	Only school district attended
	2003 - 2004		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	
	2004 - 2005		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	
	2005 - 2006		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	
	2005 - 2006	May 25, 2006	Building Withdraw	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	Completed Grad Requirements (course and grad tests)
	2005 - 2006	May 25, 2006	District Withdraw	Ottawa-Glandorf Local SD		
	2006 - 2007		District Admission	Ottawa-Glandorf Local SD		
	2006 - 2007	Aug 28, 2006	Interbuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	
	2007 - 2008		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	
✗	2008 - 2009		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	
	2009 - 2010		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	

**Admission/Calendar History Details Screen**

The admission history will be listed in date order with the most recent information at the bottom of the screen.



**Please Note:** The initial admission into the district generates both a **District Admission** event and a **Building Admission** event. A **District Admission** event will be shaded in pale orange. The withdrawal from the district generates both a **District Withdraw** event and a **Building Withdraw** event. A **District Withdraw** event will be shaded in orange.

**School Year Type** – Choose from Regular or Summer School; will filter admission events.

**Year** – School Year of the admission event.

**Date** – Date that admission event took place. Dates are not applicable admission events generated by Progression Tracks.

**Event** – Type of admission event. Examples are: District Admission, Building Admission, Intrabuilding Progression, Summer Withdraw, Building Withdraw and District Withdraw.

**School** – School Name where the admission event took place.

**Calendar** – Attendance calendar for this admission event.

**Code** – Description of admission event.

✗ – Delete admission event. Only the latest admission or withdrawal event in each school year can be deleted.



**Important:** Deleting the first admission event for a school year for a student completely removes the student’s record from StudentInformation for the selected school year only, and archives all student records. If a student is completely removed by accident, all student data will have to be re-entered manually. As a safety feature, only delete/edit buttons display for those records where the school building and school year match the school building and school year in the current context to prevent a student accidentally getting whacked.

 – Edit admission event. Only building admission events can be edited. When editing a building withdrawal, only withdrawal codes that are linked to the EMIS withdrawal code of \*\* will display in the withdrawal code drop-down list.

### Delete Admission Event

**Navigation: Home – SIS – Student – Admission History – Edit History Details**

The Edit History Details screen allows the user to edit and delete the selected student’s admission events. **IMPORTANT!** Make sure you have the correct building and year in context. If you are completely removing a student from a building in a particular school year, you must have that building and school year in context. As a safety feature, only delete/edit buttons display for those records where the school building and school year match the school building and school year in the current context to prevent a student accidentally getting whacked.

Home » SIS » Student » Admission History » Edit History Details <span style="float: right;">Advanced Search   Feedback   Mgmt</span>						
<b>Admission/Calendar History Details</b>						
Click on the edit and delete icons to manage the student’s admission events.						
School Year Type: <input type="text" value="Regular"/>						
Year	Date	Event	School	Calendar	Code	
2002 - 2003	Aug 01, 2002	District Admission	Ottawa-Glandorf Local SD			
2002 - 2003	Aug 01, 2002	Building Admission	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	Only school district attended	
2003 - 2004		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT		
2004 - 2005		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT		
2005 - 2006		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT		
2005 - 2006	May 25, 2006	Building Withdraw	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	Completed Grad Requirements (course and grad tests)	
2005 - 2006	May 25, 2006	District Withdraw	Ottawa-Glandorf Local SD			
2006 - 2007		District Admission	Ottawa-Glandorf Local SD			
2006 - 2007	Aug 28, 2006	Interbuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT		
2007 - 2008		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT		
	2008 - 2009	Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT		
	2009 - 2010	Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT		

### Deleting an Admission Event

Click  to delete a specific admission event. Only the last building admission or withdrawal event in each year can be deleted.

Home » SIS » Student » Admission History » Edit History Details

### Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

---

Are you sure you want to delete the following admission event?  
Building Withdraw on 5/10/2004

---

Ok Cancel

#### Admission Event Deletion Confirmation Message

**Ok** – Delete the admission event. Returns to Edit History Details and you will receive the message below.

**The admission event was successfully deleted**

**Cancel** – Will not delete the admission event and will return to Edit History Details.



**IMPORTANT:** If you delete the first admission event for a school year for a student, this action will completely remove the student's record from StudentInformation, and archive all student records. If a student is completely removed by accident, all student data will have to be re-entered manually. Students can only be completely removed from a selected school year when the building the student is being removed from is also the building in context.

As a safety feature, only delete/edit buttons display for those records where the school building and school year match the school building and school year in the current context to prevent a student accidentally getting whacked.

Home » SIS » Student » Admission History » Edit History Details

### Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

---

**Deleting this admission record will completely remove the student for the selected school year. This includes all records associated with the student, course history, fees, grades, etc.**

---

Are you sure you want to delete the following admission event?  
Intrabuilding Progression on 8/29/2007

- Student Profile
  - Student Annual: 1
  - Student Admission: 1

---

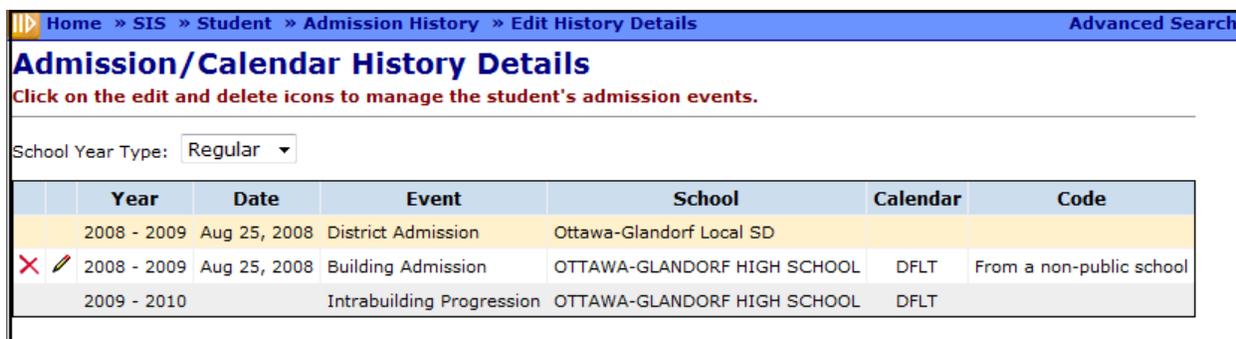
Ok Cancel

#### Admission/Calendar History Details Deletion Warning Message

## Edit Admission Event

Navigation: Home – SIS – Student – Admission History – Edit History Details

The Edit History Details screen allows the user to edit and delete the selected student's admission events.



Home » SIS » Student » Admission History » Edit History Details Advanced Search

### Admission/Calendar History Details

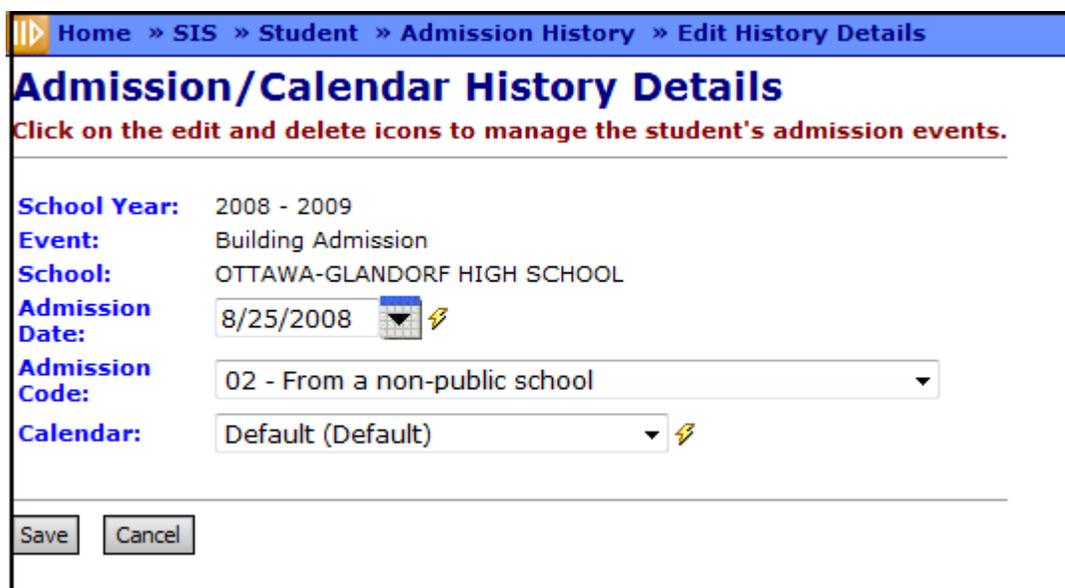
Click on the edit and delete icons to manage the student's admission events.

School Year Type: Regular

	Year	Date	Event	School	Calendar	Code
	2008 - 2009	Aug 25, 2008	District Admission	Ottawa-Glandorf Local SD		
 	2008 - 2009	Aug 25, 2008	Building Admission	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	From a non-public school
	2009 - 2010		Intrabuilding Progression	OTTAWA-GLANDORF HIGH SCHOOL	DFLT	

### Editing an Admission Event

Click  to edit a specific admission event. Only the last building admission or withdrawal event in each school year can be edited.



Home » SIS » Student » Admission History » Edit History Details

### Admission/Calendar History Details

Click on the edit and delete icons to manage the student's admission events.

**School Year:** 2008 - 2009  
**Event:** Building Admission  
**School:** OTTAWA-GLANDORF HIGH SCHOOL  
**Admission Date:** 8/25/2008    
**Admission Code:** 02 - From a non-public school  
**Calendar:** Default (Default) 

### Editing History Details Screen

**School year** – School year of admission.

**Event** – Type of admission.

**School** – School name where admission event occurred.

**Admission Date** – Enter the date for the admission event.

**Admission Code** – Choose the code from the drop-down list for the admission event.

**Calendar** – Choose the attendance calendar for this admission event from drop-down list.

Withdraw comments display on the following pages:

**Admission/Calendar History Details**  
 Click on the edit and delete icons to manage the student's admission events.

School Year: 2007 - 2008  
 Event: Building Withdraw  
 School: Arcadia Middle School  
 Withdrawal Date: 9/28/2007  
 Withdrawal Code: 43 - Trans. to a home schooling (Supt. approval on file)  
 Withdrawal to School Comments: Withdraw to go to Findlay

Withdraw comments are now editable.

Save Cancel

#### Editing Withdraw Comments on the Edit History Details Screen

**Admission/Calendar History**  
 This page displays admission and withdrawal history as well as calendar changes

Calendar: DNAC

School Year	Event	School	Comments
2007-2008	Intrabuilding Progression	Arcadia Middle School	
9/28/2007	Building Withdraw	Arcadia Middle School	43 - Trans. to a home schooling (Supt. approval on file) <b>Comments: Withdraw to go to Findlay</b>
9/28/2007	District Withdraw	Arcadia Local SD	

#### Admission and Withdraw History

**School Year** – School Year of withdrawal event.

**Event** – Type of withdrawal event.

**School** – School Name where the withdrawal event took place.

**Withdrawal Date** – Enter the date for the admission or withdrawal event.

**Withdrawal Code** – Choose the code for the withdrawal event from the drop-down list. When editing a building withdrawal, only withdrawal codes that are linked to the EMIS withdrawal code of \*\* will display in the withdrawal code drop-down list. When editing a district withdrawal, only withdrawal codes that are linked to EMIS district withdrawal codes display in the withdrawal code drop-down list.

**Withdrawal to School Comments** – Enter an additional comment concerning the withdrawal.

**Save** – Will save current updates to admission event and return to Edit History Details. A confirmation message will appear along with a reminder to manually change the student's FS record.

**The admission event was saved successfully. The student's FS record will need to be updated manually.**

**Cancel** – Will not save updates to admission event and will return to Edit History Details.

## Withdraw Student

### Navigation: Home – SIS – Student – Withdraw Student

The Withdraw Student screen is used to withdraw the student from the building or district.

The Withdraw Student process functions as follows:

- Updates latest FS record with effective end date and withdraw code on district withdrawals.
- Sets effective end date on FD record.
- Deletes any FS or FD records in the current year with an effective start date after the withdrawal date.
- Updates Grade Level Next Year on FN record effective as of the withdraw date.
- Building withdrawal leaves current open date records alone until student is admitted into new building within district.
- Removes assigned course sections that not yet started (sets stop date equal to start date).
- Whack the student functionality will delete FS, FD, and FN records only when:
  - Student admission date on current FS record is in current fiscal year.
  - EMIS attending building IRN on the record is the same as school in context.
  - Only current fiscal year FS, FD and FN records are deleted.

### Withdraw Student Screen

Withdraw the student from the building or entire district by selecting the Building or District (default) tab respectively.

Note for students enrolled in multiple buildings: If a student is enrolled in two buildings, the District tab will be disabled. You must building withdraw the student from one building. Then once the student is only actively enrolled in one building in the district you can then district withdraw them, thus completing the district withdraw for the student.

**Admission Date** (non-modifiable) – Most recent date that the student was admitted to school.

**Withdraw Date** (required) – Date that the selected student is withdrawing from the school or district. If you set this date in the future, it will create a Pending Withdrawal Enrollment Alert for that date, allowing users to continue entering data for this student until that Withdrawal is processed. For more information, refer to *ProgressBook StudentInformation Portal Guide*.

**Withdraw Reason** (required) – Select the withdraw reason from the drop-down menu that describes why the student is withdrawing from school. If the District tab is chosen, the withdraw reason of \*\* will not appear in the drop-down – only district withdraw reasons will appear. If the Building tab is chosen, only withdraw reasons mapped to the EMIS withdrawal code of \*\* will appear in the drop-down. Additional building withdrawal codes can be set up and linked to the EMIS withdrawal code of \*\* if desired.

**Withdraw to School/District IRN** (optional) – IRN of the school that the withdrawing student will be attending. Clicking the  will take you to the Ohio Department of Education’s Search Organization page. This field is required when withdraw reason 41, 42 or 45 is selected. This field is disabled and given a value of \*\*\*\*\* when the school or district in context is a Joint Vocational School District (JVSD) or Educational Service Center (ESC).

**Withdraw to School/District Comments** (optional) – Open text for additional comments regarding the student’s withdrawal from school. This field only displays for a building withdraw.

**Student Status** (required) – Select the student’s new student status at the current school from the pull-down menu.

**Remove Locker Assignment** – Yes or No; check this box if you want to remove the student’s current locker assignment, leaving the locker free. Defaults to checked.

**Remove Homeroom Assignment** – Yes or No; check this box if you want to remove the student’s current homeroom assignment. Defaults to checked.

**Submit** – Will save current student withdrawal information and display the student’s Admission/Calendar History screen.

**Cancel** – Will clear out data already entered and return user to their previous screen.



**Note: When a student is withdrawn, their Grade Level Next Year assignment is set to \*\* in the student’s General and EMIS profile information, unless they are withdrawn with a Withdrawal Code of 71-75 (in which case their Grade Level Next Year is set to “DR”) or 99 (in which case their Grade Level Next Year is set to “GR”).**



**Note: When a student is withdrawn, StudentInformation will not prevent them from receiving Marks through an Import process. See *ProgressBook StudentInformation Import Export Guide* for more detail.**

## Student Transfers

### Navigation: Home – SIS – Student – Student Transfer

The Transfer Student screens are used to move student profile data from the current school building to another school building or district. The data included in this process updates at the time of enrollment in the destination school. The fields updated are:

#### General tab:

- First Name
- Middle Name
- Last Name
- Called Name
- Last Name Suffix
- Gender
- Birthdate
- Age
- Native Language
- Home Language
- Birthplace City
- Residence Address
- Mailing Address
- Phone Number
- EMIS Ethnicity Value logic for school year 2010-2011 and beyond
  - If the EMIS ethnicity values (Hispanic/Latino, Summative Race and Racial Groups) have not been collected, the user will be forced to provide the EMIS ethnicity values at the time of the student transfer.
  - If the EMIS ethnicity values (Hispanic/Latino, Summative Race and Racial Groups) have been collected and a student is transferred, the EMIS ethnicity values will be moved with the student when using Student Transfer.

#### Additional tab:

- Country of Origin

#### Private tab:

- Legal First Name
- Legal Middle Name
- Legal Last Name
- Mother's Maiden Name
- Social Security

#### FS-Standing tab:

- EMIS ID
- SSID
- If the receiving school is a JVS school, the following rules apply:
  - EMIS situation at JVS should be “Regular student attending JVS F/T or P/T.”
  - EMIS status at JVS should be “0 – Resident Student.”
  - District of Residence IRN at JVS should be initialized to the sending district’s IRN.
  - Attending/Home IRN at JVS should be initialized to the sending district’s IRN.
  - Attending/Home IRN Indicator at JVS should be “0 – Resident District of Student.”

**FN-Attributes tab:**

- Accountability IRN will be set to a default of \*\*\*\*\* during registration.

**Transportation tab:**

- Vehicle Description
- License Plate
- Driver’s License Number
- Driver’s License State

The “Exclude from Fall Initialization” flags will be set to false when:

- A student is newly enrolled or re-enrolls in the district.
- A student is promoted/bulk enrolled into a new school year.
- A student transfers into a new school district.

**Student Transfer**

**Navigation: Home – SIS – Student – Transfer Student**

This screen requires a student in context, and is used to move the profile data for the student in context from the current school building in context to the selected school building or district.

If the student is moving within the district then the Graduate data fields should not be changed and should move along with the student.

If the student is moving between districts then the Graduate data should not move with the student.

**Note:** *This screen is used by the school or district sending the student.*

### Student Transfer Screen

**To Building** – Displays the name of the school building, if any, the student is being transferred to for all previous and pending transfers.

**To District** – Displays the name of the school district the student is being transferred to for all previous and pending transfers.

**JVS** – Yes or No: Displays whether the destination school is a JVS for all previous and pending transfers.

**Transfer Date** – Displays the date the Transfer was processed for all previous and pending transfers.

**Status** – Displays the status (Pending, Accepted or Rejected) of all previous and pending transfers.

**Make students available in** (required) – Select the school year in which the transferred student will be enrolled.

**Search for District** (required) – Enter the appropriate search text until the school district to receive the student is listed and then select that school district.

**Building** (optional) – Select the school building to receive the student. If you do not select a building, all buildings in the selected district will see the pending transfer until one of them accepts it.

**Transfer** – Process the student transfer.

**Cancel** – Do not process the student transfer and reset the drop-down menus.

Once you click Transfer, the Transfer displays in a data grid and the screen allows you to continue entering additional transfers if necessary.

Home » SIS » Student » Student Transfer Advanced

### Student Transfer

From this screen, you can transfer the selected student to a building within the ITC and view the status of the transfers that have taken place.

To Building	To District	JVS	Transfer Date	Status
ELIDA HIGH SCHOOL	Elida Local SD	no	10/12/2011 09:54 AM	Pending
XXXXXXXXX HIGH SCHOOL	XXXXXXXXX City Schools	no		

Make students available in: 2010-2011

Search For District:

Building:

**Transferred Information on the Student Transfer Screen**

## View Pending Transfers

**Navigation: Home – Management – School Administration – Student Transfer – Pending Students**

From this screen, a school district or building can view any incoming transfers, enroll all (or selected) pending students, or view an individual student's details and enroll or reject those students.

**Note:** This screen is used by the school or district receiving the student.

Home » Management » School Administration » Student Transfer » Pending Students

### View Pending Students

From this screen, you can view students that have been transferred from other schools and are pending registration in your school.

Transfer Job ID:  Transfer Date Range:  to

Transferred From:

**View Pending Students Screen**

The fields in the search box act as search criteria, limiting the results displayed to the selected criteria.

**Transfer Job ID** – Enter a job ID to only display transfers matching that job ID.

**Transfer Date Range** – Select a start date and an end date to only display transfers processed during that range of dates.

**Transferred From** – Enter the appropriate search text until the school or district sending the student is listed and then select that school or district.

**Search** – Display student transfers matching the selected criteria. The search results can be sorted by clicking the appropriate column heading.

**Note:** The message *REMOTE SERVICE ERROR* in the Student column indicates the Remote Transfer Service of the ITC sending that student is not active or malfunctioning.

Home » Management » School Administration » Student Transfer » Pending Students Advanced Search | Feedback | Mgmt | Help | Version | Print

### View Pending Students

From this screen, you can view students that have been transferred from other schools and are pending registration in your school.

Transfer Job ID:  Transfer Date Range:  to

Transferred From:  Search For Sending School

[ Hide Building List ]

Building Transfers

<input type="checkbox"/>	Student ^	From District	From Building	From Grade	To School	To District	Job ID	Transfer Date
<input type="checkbox"/>	<a href="#">Detail</a> Bbbbbb, Aaaaa	XxxxxxRiver Local	XXXXXX RIVER MIDDLE SCHOOL	08	XXXXXX RIVER HIGH SCHOOL	XxxxxxRiver Local	1022	12/23/2011 12:48 PM
<input type="checkbox"/>	<a href="#">Detail</a> Ccccccc, Llll	XxxxxxRiver Local	XXXXXX RIVER MIDDLE SCHOOL	07	XXXXXX RIVER HIGH SCHOOL	XxxxxxRiver Local	975	10/14/2011 08:48 AM

[ Hide District List ]

District Transfers

<input type="checkbox"/>	Status	Student ^	From District	From Building	From Grade	To School	To District	Job ID	Transfer Date
<input type="checkbox"/>	<a href="#">Detail</a> 	Aaaa, Llll	Ccccc Local Schools	CCCCC HIGH SCHOOL	11	XXXXXX RIVER HIGH SCHOOL	XxxxxxRiver Local	1023	12/23/2011 12:50 PM
<input type="checkbox"/>	<a href="#">Detail</a> 	Bbbbbbbbb, Mmmmm	Ccccc Local Schools	CCCCC HIGH SCHOOL	12	XXXXXX RIVER HIGH SCHOOL	XxxxxxRiver Local	976	10/14/2011 08:52 AM

### View Pending Students Screen

**Hide Building List** and **Hide District List** – Click to not show the building and/or district transfers list.

**Show Building List** and **Show District List** – Click to show the building and/or district transfers list.

Building transfers are transfers of students between buildings in the same district (determined by the building or district in context).

District transfers are transfers of students from outside the district (determined by the building or district in context).

**Bulk Enroll Building Transfers** – Enroll all (or selected) students awaiting building transfers using the same Grade, Student Status, Admission Date and Attendance Calendar. You can also use the same Admission Code, Building Prog Track or Program, if desired. See [“Bulk Enroll Pending Students”](#) for additional details.

**Delete Selected Transfers** – Delete the selected building or district student transfers.

**Bulk Enroll District Transfers** – Enroll all (or selected) students awaiting districts transfers using the same Grade, Student Status, Admission Date and Attendance Calendar. You can also use the same Admission Code, Building Prog Track, Program or additional EMIS fields. See [“Bulk Enroll Pending Students”](#) for additional details.



– Indicates that one or more years of course history cannot be transferred because a mapping for those specific combinations of sending school, receiving school and school year have not yet been saved or are inactive.



– Indicates that mappings for all available years of course history have been saved and are active.

**Detail** – Display a detail page for this student transfer. See [“Pending Student Detail”](#) for additional details.

## Pending Student Detail

Navigation: Home – Management – School Administration – Student Transfer – Pending Students

**Note:** This screen is used by the school or district receiving the student.

Home » Management » School Administration » Student Transfer » Pending Students Advanced Search | Feedback | Mgmt | Help | Version | Print

### View Pending Students

From this screen, you can view students that have been transferred from other schools and are pending registration in your school.

Transfer Job ID:  Transfer Date Range:  to   
 Transferred From:  Search For Sending School

[ Hide Building List ]

Building Transfers

<input type="checkbox"/>	Student ^	From District	From Building	From Grade	To School	To District	Job ID	Transfer Date
<input type="checkbox"/>	<a href="#">Detail</a> Bbbbb, Aaaaa	XxxxxRiver Local	XXXXXX RIVER MIDDLE SCHOOL	08	XXXXXX RIVER HIGH SCHOOL	XxxxxRiver Local	1022	12/23/2011 12:48 PM
<input type="checkbox"/>	<a href="#">Detail</a> Cccccc, Llll	XxxxxRiver Local	XXXXXX RIVER MIDDLE SCHOOL	07	XXXXXX RIVER HIGH SCHOOL	XxxxxRiver Local	975	10/14/2011 08:48 AM

[ Hide District List ]

District Transfers

<input type="checkbox"/>	Status	Student ^	From District	From Building	From Grade	To School	To District	Job ID	Transfer Date
<input type="checkbox"/>	<a href="#">Detail</a>	Aaaaa, Llll	Ccccc Local Schools	CCCCCC HIGH SCHOOL	11	XXXXXX RIVER HIGH SCHOOL	XxxxxRiver Local	1023	12/23/2011 12:50 PM
<input type="checkbox"/>	<a href="#">Detail</a>	Bbbbbbb, Mmmm	Ccccc Local Schools	CCCCCC HIGH SCHOOL	12	XXXXXX RIVER HIGH SCHOOL	XxxxxRiver Local	976	10/14/2011 08:52 AM

### Pending Students Screen

Click the **Detail** link to display a detail page for the building or district transfer of this student.

Home » Management » School Administration » Student Transfer » Pending Student Detail

## Pending Student Detail

From this screen, you can register or reject a student that has been sent to you from another school.

**Student Name:** Vwww, Rachel  
**Gender:** F  
**From District:** Zzzzz River Local  
**From Building:** Zzzzz RIVER MIDDLE SCHOOL  
**From Grade:** 08  
**Transfer Job ID:** 899

	To Building	To District	JVS	Transfer Date	Status
	Zzzzz RIVER HIGH SCHOOL	Zzzzz River Local	no	07/12/2011 09:22 AM	Pending
	Zzzzz RIVER MIDDLE SCHOOL	Zzzzz River Local	no		

### Pending Student Detail Screen – Building Transfer

Home » Management » School Administration » Student Transfer » Pending Student Detail

## Pending Student Detail

From this screen, you can register or reject a student that has been sent to you from another school.

**Student Name:** BAKER, ALANA  
**Gender:** F  
**From District:** Ashland City Schools  
**From Building:** ASHLAND HIGH SCHOOL  
**From Grade:** 09  
**Transfer Job ID:** 1233

**Warning: The Marking Patterns of the schools and school years need to be mapped in order to transfer course history. [Click Here](#) to map the marking patterns.**

	To Building	To District	JVS	Transfer Date	Status
	BLACK RIVER HIGH SCHOOL	Black River Local	no	01/10/2012 09:03 AM	Pending
	ASHLAND HIGH SCHOOL	Ashland City Schools	no		

[View Pending Students](#)

### Pending Student Detail Screen - District Transfer

**Transfer Job ID** – ID number assigned to transfers made between districts or schools within the same ITC.

If at least one year of course history cannot be transferred because a mapping for that specific combination of sending school, receiving school and school year has not yet been saved, a warning is displayed. Providing these mappings is not required for years of course history that are not being transferred. To provide these mappings:

1. Select the Click Here link to open the Marking Mapping Summary screen.

Home » Management » School Administration » Student Transfer » Marking Pattern Summary

## Marking Pattern Summary

From this screen, you can edit and create new marking pattern mappings for the following schools/years.

[Return](#)

		Sending School	School Year
		Aaaaaaaa HIGH SCHOOL	2010-2011
		Aaaaaaaa HIGH SCHOOL	2011-2012
		Aaaaaaaa MIDDLE SCHOOL	2009-2010

### Marking Pattern Summary Screen

This screen lists all the years of course history that can be transferred and indicates the status of the mapping for each sending school, receiving school and school year combination.  indicates that this combination has not yet been mapped and saved or is inactive.  indicates that this combination has been mapped and saved and is active.

2. Click  for the combination that needs mapped and saved.
3. Complete and save the mapping in the Marking Pattern Mapping Detail screen. You will be returned to the Marking Pattern Summary screen. Refer to *“Registration Wizard – Course History Tab”* for more detailed information about mapping marks.

 – Register the student into the building in context; this button takes you to the Registration Pre-requisites tab on the Student Registration Wizard screen from which steps you through the process of registering a student. If this student was transferred to a district, other schools in the district will no longer see this student on their Pending Students screen.

 – Reject the student transfer, returning the student to the sending school or district; you will receive no confirmation.

## Bulk Enroll Pending Students

**Navigation: Home – Management – School Administration – Student Transfer – Pending Students**

**Note:** This screen is used by the school or district receiving the student.

Home » Management » School Administration » Student Transfer » Pending Students Advanced Search | Feedback | Mgmt | Help | Version | Pr

### View Pending Students

From this screen, you can view students that have been transferred from other schools and are pending registration in your school.

Transfer Job ID:  Transfer Date Range:  to   
 Transferred From:  Search For Sending School

[ Hide Building List ]

Building Transfers

<input type="checkbox"/>	Student ^	From District	From Building	From Grade	To School	To District	Job ID	Transfer Date
<input type="checkbox"/>	<a href="#">Detail</a> TALLEY, BOBBY	Wooster City Schools	Wooster High School/BV program	10	WOOSTER HIGH SCHOOL	Wooster City Schools	1420	06/07/2012 03:10 PM

[ Hide District List ]

District Transfers

<input type="checkbox"/>	Status	Student ^	From District	From Building	From Grade	To School	To District	Job ID	Transfer Date
<input type="checkbox"/>		<a href="#">Detail</a> CHAPMAN, JEROME	Tri-County ESC District	TRI-COUNTY ESC	W2		Wooster City Schools	1395	03/28/2012 10:25 AM
<input type="checkbox"/>		<a href="#">Detail</a> GILLIAM, JANET	Southeast Local Schools	WAYNEDEALE HIGH SCHOOL	12	WOOSTER HIGH SCHOOL	Wooster City Schools	1350	03/08/2012 02:50 PM
<input type="checkbox"/>		<a href="#">Detail</a> MATHIS, NICHOLAS	Tri-County ESC District	TRI-COUNTY ESC	W4		Wooster City Schools	1262	01/20/2012 12:29 PM
<input type="checkbox"/>		<a href="#">Detail</a> NOBLE, ZACHARY	Tri-County ESC District	TRI-COUNTY ESC	W4		Wooster City Schools	1326	02/24/2012 02:03 PM
<input type="checkbox"/>		<a href="#">Detail</a> WATKINS, DEBORAH	Tri-County ESC District	TRI-COUNTY ESC	W3		Wooster City Schools	1394	03/27/2012 03:26 PM

## Bulk Enroll Pending Students

The “Exclude from Fall Initialization” flags will be unchecked:

- A student is newly enrolled or re-enrolls in the district.
- A student is promoted/bulk enrolled into a new school year.
- A student transfers into a new school district.

### Bulk Enroll Building Transfers

**Note:** This screen is used by the school or district receiving the student.

1. On the View Pending Students screen, select the students you want to enroll in the Building List area, or click the check box in the header for the check box column to select all of the students.
2. Click **Bulk Enroll Building Transfers** to enroll the selected students awaiting building transfers.

The Bulk Enroll Pending Students screen building transfers displays. The students you selected on the View Pending Students screen display in the grid.

#### Bulk Enroll Pending Student - Building Transfer

**Student Status** (required) – Select the Student Status with which to enroll all selected students.

**Admission Date** (required) – Enter the date all selected students were enrolled.

**Admission Code** (optional) – Select an Admission Code for all selected students. This is an optional field, so you can set different Codes later for individual students.

**Attendance Calendar** (required) – Select an Attendance Calendar for all selected students.

**Program** (optional) – Select a Program for all selected students. This is an optional field, so you can set different Programs later for individual students.

**Building Prog Track** (optional) – Select a Building Progression Track for all selected students. This is an optional field, so you can set different Building Progression Tracks later for individual students.

**Change Primary / EMIS Attending Building?** (optional) – Check Yes if the Primary Building on the Student Profile – Additional tab and the EMIS Attending Building on the Student Profile – FS-Standing tab should be updated.

**To Grade** (required) – Enter the Grade level in which to enroll each student. If the school year in context is equal or prior to the current school year, this field will default to the grade shown in the From Grade field for this student. If the school year in context is newer than the current school year, this field will default to the next valid grade level of the school in context based on the configured Grade Level Projections.

**View Pending Students** – Return to the View Pending Students screen.

**Building Register Selected Students** – Register the listed students in the specified building. You will see the following confirmation screen.

Home » Management » School Administration » Student Transfer  
» Bulk Enroll Pending Students Advanced Search

## Bulk Enroll Pending Students

**From this screen, you can register or reject a student that has been sent to you from another school.**

You selected **1** students for bulk enrollment.  
The students will be registered with the following values:

**Grade:** 09  
**Student Status:** A - ACTIVE RES  
**Admission Date:** 9/16/2008  
**Admission Calendar:** Default (Default)  
**Admission Code:**  
**Admission Reason:** 7 - Not newly enrolled in this school district  
**Progression Track:**  
**Program:**

The Bulk Enrollment process may take several minutes to complete. After clicking the 'Continue with Registration' button, please be patient while DASL registers the students.

### Bulk Enroll Pending Students Confirmation Screen

**Cancel** – Cancel the transfer and return to the View Pending Students screen.

**Continue with Registration**– Process the transfer and register selected students.

**The students were successfully enrolled.**

If a student was already enrolled in the destination school, you will see a warning page, listing the students that were not enrolled, and why:

Home » Management » School Administration » Student Transfer » Bulk Enroll Pending Students Advanced Search | Feedback

### Bulk Enroll Pending Students

From this screen, you can register or reject a student that has been sent to you from another school.

DASL found the following matches for students you are attempting to register. The matching students either exist in the school without open admission records, or they exist in another school in the district with or without open admission records. Please review the students listed below for possible duplicate records.

	Transferred Student	Matching Student	M Student ID	M Gender	M Birthdate	M Address	M City	M State	M Zip
<input type="checkbox"/>	Vwww, Rachel - Zzzzz RIVER MIDDLE SCHOOL	Vwww, Rachel	372203	F	04/12/1996	999 County Road 111	Stuvwxzy	OH	4X8S0

### Duplicate Student Found Message

#### **Bulk Enroll District Transfers**

**Note:** This screen is used by the school or district receiving the student.

1. On the View Pending Students screen, select the students you want to enroll in the Building List area, or click the check box in the header for the check box column to select all of the students.
2. Click **Bulk Enroll District Transfers** to enroll the selected students awaiting district transfers.

The Bulk Enroll Pending Students screen for district transfers displays. The students you selected on the View Pending Students screen display in the grid.

## Bulk Enroll Pending Students

From this screen, you can register or reject a student that has been sent to you from another school.

**Student Status:**

**Admission Date:**

**Admission Code:**

**Attendance Calendar:**

**Program:**

**Building Prog Track:**

---

**EMIS Situation:**

**Admission Reason:**

---

**District Relationship:**

**District of Residence:**

**How Received:**

**How Received IRN:**

**Percent of Time:**

**Tuition Type:**

**Attending Building IRN:**

**Assigned Building IRN:**

---

**Sent To 1:**

**Reason:**

**Reason:**

**IRN:**

**IRN:**

**Percent of Time:**

**Percent of Time:**

---

**Transfer Attendance:**

**Transfer Assessments:**

**Transfer Course History:**  (Currently not available for ITC to ITC transfer)

Status	Student ^	From District	From Building	From Grade	To Grade	Job ID	Transfer Date
	BOWERS, REBECCA	Chippewa Local Schools	CHIPPEWA HIGH SCHOOL	11	12	1417	05/29/2012 12:15 PM
	CHASE, CLAUDIA	Chippewa Local Schools	CHIPPEWA HIGH SCHOOL	11	12	1417	05/29/2012 12:15 PM
	GATES, ISAAC	Chippewa Local Schools	CHIPPEWA HIGH SCHOOL	11	12	1417	05/29/2012 12:15 PM
	HERNANDEZ, PENNY	Chippewa Local Schools	CHIPPEWA HIGH SCHOOL	11	12	1417	05/29/2012 12:15 PM
	KING, HEIDI	Chippewa Local Schools	CHIPPEWA HIGH SCHOOL	11	12	1417	05/29/2012 12:15 PM
	Student113804, Jane	Chippewa Local Schools	CHIPPEWA HIGH SCHOOL	11	12	1417	05/29/2012 12:15 PM

### Bulk Enroll Pending Students – District Transfer

**Student Status** (required) – Select the Student Status with which to enroll all selected students.

**Admission Date** (required) – Enter the date all selected students were enrolled.

**Admission Code** (optional) – Select an Admission Code for all selected students. This is an optional field, so you can set different Codes later for individual students.

**Attendance Calendar** (required) – Select an Attendance Calendar for all selected students.

**Program** (optional) – Select a Program for all selected students. This is an optional field, so you can set different Programs later for individual students.

**Building Prog Track** (optional) – Select a Building Progression Track for all selected students. This is an optional field, so you can set different Building Progression Tracks later for individual students.\

**EMIS Situation** (required) – Choose from a drop-down list (or use the EMIS Situation Wizard) validated against EMIS options file of all valid EMIS situations. Refer to *ProgressBook StudentInformation EMIS Guide* for more details on reporting this element.

**Admission Reason** (required) – Select from drop-down list of valid Admission Reasons.

**District Relationship** (optional) – Select the appropriate educational relationship between the student and the district.

**District of Residence** (optional) – Enter the district of the student’s legal residence. Click  to go to the Ohio Department of Education Search Organization Web page.

**How Received** (optional) – Select how the student arrived at the district.

**How Received IRN** (optional) – Enter the district from which a student is received. Click  to go to the Ohio Department of Education Search Organization Web page.

**Percent of Time** (optional) – Enter the average percent of time, for the week, that the student participates in any instruction provided by a certified/licensed employee.

**Tuition Type** (optional) – Select the appropriate manner in which the student is paying tuition to the reporting district.

**Attending Building IRN** (optional) – Enter the IRN of the building within the district that the student attends. Click  to go to the Ohio Department of Education Search Organization Web page. The Attending Building IRN can be a District IRN only when the value of “How Received” is one of the following:

- 6 – Non-Public (Services Only)
- F – Career Assessment Only
- I – Non-instructional, Supplementary, or Related Services
- P – Court Placed Students, Excluding foster Care
- T – Students Placed in Institutions, Non-Court Ordered
- V – Pre-school, Evaluated Only, Found Ineligible

**Assigned Building IRN** (optional) – Enter the IRN of the building the student would normally attend according to the standard district attendance policy. Click  to go to the Ohio Department of Education Search Organization Web page.

**Sent to Reason 1** (optional) – Select the reason a student is sent to another district.

**Sent to Reason 2** (optional) – Select the reason the student is sent to another district if the student is sent to a second district.

**Sent to IRN 1** (optional) – Enter the district to which a student is sent. Click  to go to the Ohio Department of Education Search Organization Web page.

**Sent to IRN 2** (optional) – Enter the district to which a student is sent if the student is simultaneously being sent to a second district. Click  to go to the Ohio Department of Education Search Organization Web page.

**Percent of Time 1** (optional) – Enter the average percent of time, for the week that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

**Percent of Time 2** (optional) – Enter the average percent of time, for the week that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

**Transfer Attendance** (optional) – Select this option to transfer student attendance when enrolling students in bulk.

**Transfer Assessments** (optional) – Select this option to transfer student assessments when enrolling students in bulk. The assessments currently available for ITC to ITC transfers are ACT, OGT, PLAN, PSAT and SAT Reasoning.

**Transfer Course History** (optional) – Select this option to transfer student course history when enrolling students in bulk. This option is currently not available for ITC to ITC transfers.

**Status** – Displays the following information about the student you have selected to transfer:

-  Indicates that the marking pattern mapping is set up between the sending and receiving school.
-  Indicates that additional marking patterns need to be set up between the sending and receiving school.
-  Indicates that the student has transferred from a school in another ITC and no course history can be transferred.

**To Grade** (required) – Enter the Grade level in which to the student. If the school year in context is equal or prior to the current school year, this field will default to the grade shown in the From Grade field for this student. If the school year in context is newer than the current school year, this field will default to the next valid grade level of the school in context based on the configured Grade Level Projections.

**View Pending Students** – Return to the View Pending Students screen.

**District Register Selected Students** – Register the listed students in the specified district. You will see the following confirmation screen.

Home » Management » School Administration » Student Transfer » Bulk Enroll Pending Students

## Bulk Enroll Pending Students

From this screen, you can register or reject a student that has been sent to you from another school.

You selected 3 students for bulk enrollment.  
The students will be registered with the following values:

**Grade:**  
**Student Status:** A - ACTIVE RES  
**Admission Date:** 3/9/2012  
**Admission Calendar:** Default calendar (Default)  
**Admission Code:**  
**Admission Reason:** 6 - Transferred from other Ohio public district/community school  
**Progression Track:** BLRV - Black River KG - 12  
**Program:**  
**Emis Situation:** 5 - Resident attending Full Time  
**District Relationship:** 1 - Stud. rcvg instr. in whole/part from rep. dist  
**District Of Residence:** Black River Local SD  
**How Received:** \* - Not Applicable  
**How Received IRN:** \*\*\*\*\*  
**PercentOfTime:** 100  
**Tuition Type:** N - Non-tuition student (default)  
**AttendingBuildingIRN:** 002782 - Black River High School  
**Assigned Building IRN:** \*\*\*\*\*  
**Sent to 1 Reason:** NA - Not sent to another district  
**Sent to 1 IRN:** \*\*\*\*\*  
**Sent to 1 Percent of time:** 0  
**Sent to 2 Reason:** NA - Not sent to another district (default)  
**Sent to 2 IRN:** \*\*\*\*\*  
**Sent to 2 Percent of time:** 0  
**Transfer Attendance:**   
**Transfer Assessments:**   
**Transfer Course History:**  (Currently not available for ITC to ITC transfer)

The Bulk Enrollment process may take several minutes to complete. After clicking the 'Continue with Registration' button, please be patient while DASL registers the students.

### Bulk Enroll Pending Students Confirmation Screen

**Cancel** – Cancel the transfer and return to the View Pending Students screen.

**Continue with Registration** – Process the transfer and register selected students.

**The students were successfully enrolled.**

If a student was already enrolled in the destination school, you will see a warning page, listing the students that were not enrolled, and why they were not enrolled.

Home » Management » School Administration » Student Transfer » Bulk Enroll Pending Students Advanced Search | Feedback

## Bulk Enroll Pending Students

From this screen, you can register or reject a student that has been sent to you from another school.

DASL found the following matches for students you are attempting to register. The matching students either exist in the school without open admission records, or they exist in another school in the district with or without open admission records. Please review the students listed below for possible duplicate records.

	Transferred Student	Matching Student	M Student ID	M Gender	M Birthdate	M Address	M City	M State	M Zip
<input type="checkbox"/>	Vwww, Rachel - ZzzzzRIVER MIDDLE SCHOOL	Vwww, Rachel	372203	F	04/12/1996	.999 County Road 111	Stuwxyz	OH	4X8S0

### Duplicate Student Found Message

## Transfer History

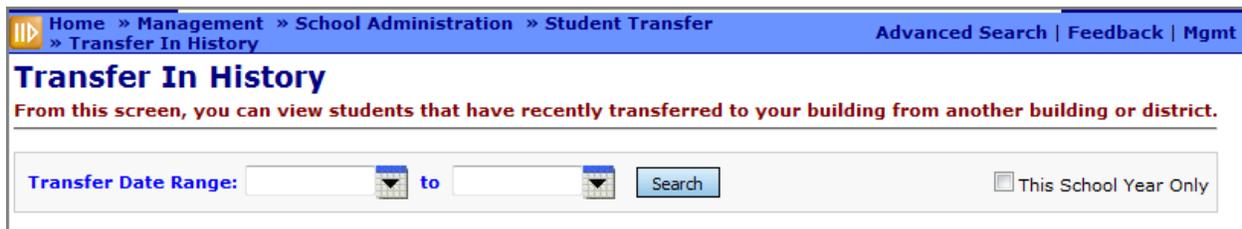
StudentInformation provides two screens for viewing the transfer history for students who have transferred into or out of the building in context:

- Transfer In History – Displays the information for students who have transferred into the building from another building or district.
- Transfer Out History – Displays the information for students who have transferred from the building to another building or district.

### *Transfer In History*

**Navigation: Home – Management – School Administration – Student Transfer – Transfer In History**

From the Transfer In History screen, you can view the history of all students who transferred into the building in context.



The screenshot shows the 'Transfer In History' screen. At the top, there is a blue navigation bar with the breadcrumb 'Home » Management » School Administration » Student Transfer » Transfer In History' and links for 'Advanced Search', 'Feedback', and 'Mgmt'. Below the navigation bar, the title 'Transfer In History' is displayed in large blue font. Underneath the title, a red text line reads: 'From this screen, you can view students that have recently transferred to your building from another building or district.' Below this is a search area with the label 'Transfer Date Range:' followed by two date pickers, a 'to' separator, and a 'Search' button. To the right of the search area is a checkbox labeled 'This School Year Only'.

#### **Search Fields on Transfer In History Screen**

Enter a range of dates for the transfer history, and click **Search**. Clicking Search without entering any dates will display all transfer records.

Select **This School Year Only** to view all of the transfers that have occurred within the current school year. StudentInformation will automatically complete the Transfer Date Range fields with the start and end dates for the current fiscal year

Home » Management » School Administration » Student Transfer » Transfer In History Advanced Search | Feedback | Mgmt

## Transfer In History

From this screen, you can view students that have recently transferred to your building from another building or district.

Transfer Date Range: 1/1/2012 to 5/31/2012   This School Year Only

	Student	Grade	From District	From School	Transfer Date	User Id	From Year
<a href="#">Detail</a>	ATKINS, JOAN	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	BARKER, DOUGLAS	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	BARNETT, DALE	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	BARRERA, EUGENE	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	DILLARD, STEVEN	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	DILLON, ANA	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ESPINOZA, NEIL	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	FERRELL, WILLIE	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	FOLEY, LYDIA	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ALVARADO, ALLAN	08	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/14/2012 09:03 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ANDERSON, JIMMIE	07	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/14/2012 09:03 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ALBERT, HOLLY	07	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/04/2012 11:27 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ADKINS, ENRIQUE	07	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/04/2012 11:26 AM	Hewson, Paul	2011-2012

### Transfer In History Screen

Click the **Detail** link to view the attendance, course history and assessments that have been transferred into StudentInformation for the student from the sending school district.

Transfer In History

From this screen, you can view students that have recently transferred to your building from another building or district.

Transfer Date Range: 7/1/2011 to 6/30/2012   This School Year Only

	Student	Grade	From District	From School	Transfer Date	User Id	From Year
<a href="#">Detail</a>	ATKINS, JOAN	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	BARKER, DOUGLAS	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	BARNETT, DALE	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	BARRERA, EUGENE	11	Black River Local	BLACK RIVER HIGH SCHOOL	05/29/2012 11:57 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ALVARADO, ALLAN	08	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/14/2012 09:03 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ANDERSON, JIMMIE	07	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/14/2012 09:03 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ALBERT, HOLLY	07	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/04/2012 11:27 AM	Hewson, Paul	2011-2012
<a href="#">Detail</a>	ADKINS, ENRIQUE	07	Ashland City Schools	ASHLAND MIDDLE SCHOOL	05/04/2012 11:26 AM	Hewson, Paul	2011-2012

**Transfer In History Detail**

From this screen, you can view the detail of the data that was transferred in with this student.

**Accepted Attendance:**

Year	Attendance
2006	<input checked="" type="checkbox"/>
2007	<input checked="" type="checkbox"/>
2008	<input checked="" type="checkbox"/>
2009	<input checked="" type="checkbox"/>
2010	<input checked="" type="checkbox"/>
2011	<input checked="" type="checkbox"/>
2012	<input checked="" type="checkbox"/>

**Accepted Course History:**

Year	Sending Marking Pattern	Pattern Rule
There are no records to display		

**Accepted Assessments:**

Test Type	Date Taken	Sending School IRN
OGT	03/01/2011 12:00 AM	002782

### Accessing Transfer In History Detail Screen

## Transfer Out History

**Navigation: Home – Management – School Administration – Student Transfer – Transfer Out History**

From the Transfer Out History screen, you can view the history of all students who transferred out of the building in context.

### Search Fields on the Transfer Out History Screen

Enter a range of dates for the transfer history and click **Search**. Clicking Search without entering any dates will display all transfer records.

	Student	Grade	To School	To District	To Year	Job ID	Transfer Date
<a href="#">Detail</a>	SANDERS, JACQUELINE	11	BLACK RIVER HIGH SCHOOL	Black River Local	2011-2012	1408	05/15/2012 09:29 AM
<a href="#">Detail</a>	SELLERS, JASON	12	BLACK RIVER HIGH SCHOOL	Black River Local	2011-2012	1407	05/14/2012 09:36 AM
<a href="#">Detail</a>	SOLOMON, WADE	10	SMITHVILLE HIGH SCHOOL	Green Local Schools	2011-2012	1386	03/23/2012 07:05 AM
<a href="#">Detail</a>	POTTS, RYAN	09	SMITHVILLE HIGH SCHOOL	Green Local Schools	2011-2012	1385	03/23/2012 07:04 AM
<a href="#">Detail</a>	RUSH, KIM	10	Wadsworth High School	Wadsworth City Schools	2011-2012	1378	03/20/2012 07:31 AM
<a href="#">Detail</a>	MCBRIDE, GREGORY	11	NORWAYNE HIGH SCHOOL	Norwayne Local Schools	2011-2012	1370	03/16/2012 09:38 AM
<a href="#">Detail</a>	HANCOCK, WALTER	12	TRIWAY HIGH SCHOOL	Triway Local Schools	2011-2012	1365	03/14/2012 01:30 PM
<a href="#">Detail</a>	KLEIN, ERIKA	12	NORTHWESTERN HIGH SCHOOL	Northwestern Local Schools	2011-2012	1351	03/08/2012 03:17 PM
<a href="#">Detail</a>	RUSH, KIM	10	NORWAYNE HIGH SCHOOL	Norwayne Local Schools	2011-2012	1290	02/03/2012 07:49 AM
<a href="#">Detail</a>	MCCALL, BETH	10	SMITHVILLE HIGH SCHOOL	Green Local Schools	2011-2012	1257	01/11/2012 09:40 AM
<a href="#">Detail</a>	RICE, KATRINA	11	TRIWAY HIGH SCHOOL	Triway Local Schools	2011-2012	1256	01/10/2012 03:25 PM
<a href="#">Detail</a>	BALL, VICKI	09	NORTHWESTERN HIGH SCHOOL	Northwestern Local Schools	2011-2012	1241	01/03/2012 10:28 AM

### Transfer Out History Screen

## Bulk Student Transfer

**Navigation: Home – Management – School Administration – Student Transfer – Bulk Student Transfer**

This screen is used to move the profile data for all students in an Ad-Hoc Membership from the current school building in context to the selected school building or district.

If the student is moving within the district then the Graduate data fields should not be changed and should move along with the student.

If the student is moving between districts then the Graduate data should not move with the student.

During the transfer of students from a regular school into a JVS, the following EMIS fields now hold onto their values coming from the sending school:

- How Received
- District of Residence
- How Received IRN



**Note:** This screen is used by the school or district sending the students.

Home > Management > School Administration > Student Transfer > Bulk Student Transfer

### Bulk Student Transfer

From this screen, you can view students that have been transferred from other schools and are pending registration in your school.

**Ad-Hoc Membership:** Flight Dynamics ...

Public And Private

**Make students available in:** 2011-2012 ⚡

**District:** 654321 - Dxxxxx River Local

**Building:** DXHS - DXXXXX RIVER LOCAL

Bulk Transfer Cancel View Transfer History

#### Bulk Student Transfer

**Ad-Hoc Membership** (required) – Select an Ad-Hoc Membership from the drop-down menu, or click the ... button to view the Ad-Hoc Membership Maintenance page and create or view existing Ad-Hoc Memberships. Click Public and Private to display both public and private ad-hoc memberships.

**Make students available in** (required) – Select the school year in which the transferred students will be enrolled.

**District** (required) – Select the school district to receive the students.

**Building** (optional) – Select the school building to receive the students. If you do not select a building, all buildings in the selected district will see the pending transfers until one of them accepts each one, or processes a Bulk Enroll.

**Bulk Transfer** – Process the bulk student transfer. You will see the following confirmation message:

**8 students were transferred successfully and now have pending status.**

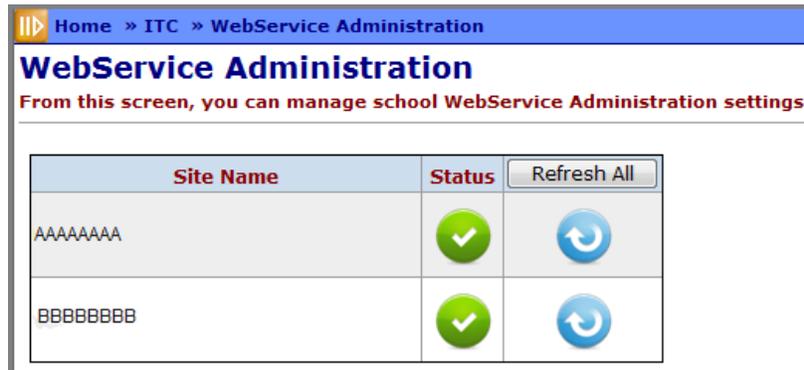
**Cancel** – Do not process the bulk student transfer and reset the drop-down menus.

**View Transfer History** – Go to the Home – Management – School Administration – Student Transfer – Transfer History screen.

## WebService Administration

### Navigation: Home – ITC – WebService Administration

This screen is used to check the status of ITCs connected to this ITC by a Web service called Remote Transfer Service. This service handles ITC to ITC student transfers. If you are experiencing ITC to ITC student transfer problems, consult your ITC for assistance.



Site Name	Status	Refresh All
AAAAAAA	✓	
BBBBBBBB	✓	

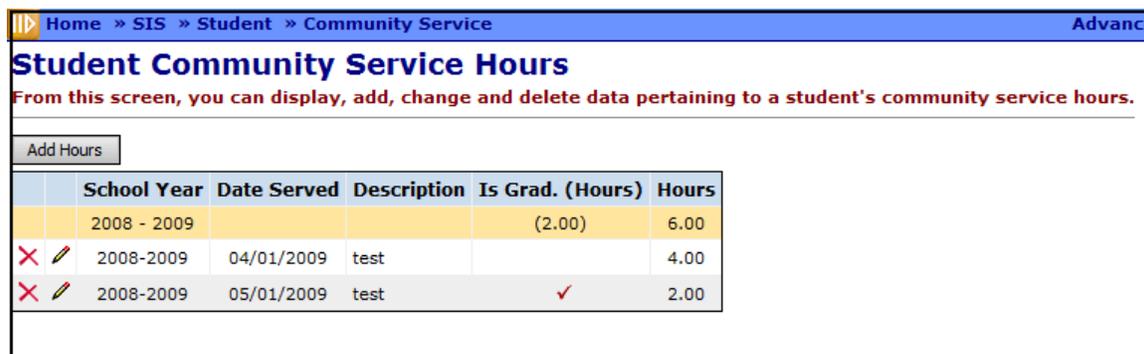
WebService Administration Screen

Click  to verify the connection to an individual ITC site. Click **Refresh All** to verify the connection to all ITC sites. A green status indicates an active connection while a red status indicates a broken or inactive connection.

## Student Community Service Hours

### Navigation: Home – SIS – Student – Community Service

Community Service Hours may be entered for individual students as needed. This functionality can be used in conjunction with Graduation Eligibility.



	School Year	Date Served	Description	Is Grad. (Hours)	Hours
	2008 - 2009			(2.00)	6.00
 	2008-2009	04/01/2009	test		4.00
 	2008-2009	05/01/2009	test	✓	2.00

Student Community Services Hours

 – Delete this Community Service Hours record.

 – Edit this Community Service Hours record.

**Add Hours** – Add a Community Service record.

## Add/Edit/Delete Community Service Hours

Navigation: Home – SIS – Student – Community Service

Home » SIS » Student » Community Service Advanced

### Student Community Service Hours

From this screen, you can display, add, change and delete data pertaining to a student's community service hours.

	School Year	Date Served	Description	Is Grad. (Hours)	Hours
	2008 - 2009			(2.00)	6.00
✕ ✎	2008-2009	04/01/2009	test		4.00
✕ ✎	2008-2009	05/01/2009	test	✓	2.00

### Editing Student Community Services Hours

Do one of the following:

- Click **Add Hours** to add a new Community Service record.
- Click ✎ to edit a specific Community Service record.
- Click ✕ to delete a specific Community Service record.

Home » SIS » Student » Community Service Advanced

### Student Community Service Hours

From this screen, you can display, add, change and delete data pertaining to a student's community service hours.

**Date Served:**  

**Hours:**  

Include in Graduation / Eligibility

**Description:**

### Add/Edit Student Community Service Hours Screen

**Date Served** (required) – Date the Community Service task was performed.

**Hours** (required) – Time spent on the Community Service task. The value defaults to 1. Using the spin-box, this value can be from .25 to 999.00 hours. The spin-box interval is .25 (1/4) hours.

**Include in Graduation/Eligibility** (optional) – The Community Service task may be marked to be included/counted towards Graduation Eligibility requirements.

**Description** (required) – Open text area for a description of the Community Service task.

**Save** – Will save Community Service record and return to Community Service listing where you will see the updated information.

**Save and New** – Will save new Community Service record and return to Student Community Service Hours - Add New Community Service task.

**Cancel** – Will clear out data already entered and return to Community Service listing.

**Ok** – Delete the Community Service record.

**Cancel** – Do Not Delete the Community Service record.

## Student Contact Information

### Navigation: Home – SIS – Student – Contacts Summary

Add personal and professional contacts to students on the **Student Contacts Summary** screen. A student can have only one primary contact. The primary contact is listed first and displays the 🌟 icon.

**Student Contacts Summary**  
From this screen, you can display, add, change and delete student contact information.

Home » SIS » Student » Contacts Summary    Advanced Search | Feedback | Mgmt | Help | Version | Print

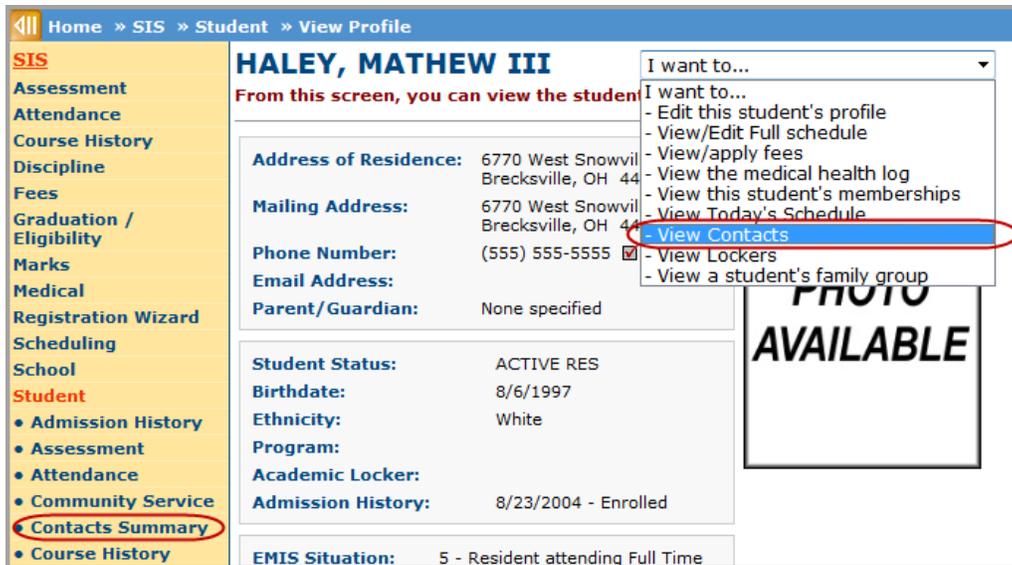
**Primary Contact Icon**    Edit Icon    Delete Icon

Add Contact    Search Professional Contacts    Tip: Search Last Name    Add

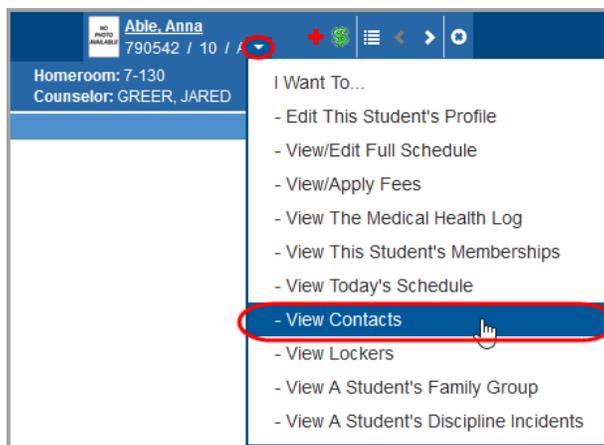
- Mother, natural/adoptive** (Primary Contact Icon)
  - Ms. Leia Solo  
12 Main Street  
Ashland, OH 44805
  - Emergency Contact
  - Living with Student
  - Same as Student Address
  - Medical Contact
  - Authorized to Pickup
- Father, natural/adoptive**
  - Han Solo  
12 Main Street  
Ashland, OH 44805
  - Legal Guardian
  - Emergency Contact
  - Same as Student Address
  - Medical Contact
  - Authorized to Pickup
- Uncle**
  - Luke Skywalker  
1333 Coruscant Drive  
Ashland, OH 44805
  - Emergency Contact
  - Willing to Volunteer

### Student Contacts Summary Screen

**Note:** You can also access this screen by selecting “View Contacts” in the **I want to...** drop-down list on either the **View Profile** screen or in the student in context area of the masthead.



**View Student Contacts from the View Profile Screen**



**View Student Contacts from Masthead**

## Add Contact

**Note:** This procedure adds a contact to an individual student. To add a contact to a family group, see [“Add Contacts to a Family Group.”](#)

You can add personal and professional contacts, such as a day care provider, doctor or dentist, to a student in one of the following ways:

- To search for a professional contact that already exists in the system for another student:
  - a. With a student in context, on the **Student Contacts Summary** screen, in the **Search Professional Contacts** area, enter all or part of an existing contact’s name. (Do not press Enter.)

If a contact record is found, it displays in a drop-down list.

- b. In the drop-down list, click the contact's name.
- c. Click **Add**.

The contact is added to the student.

- To add a new personal or professional contact:
  - a. With a student in context, on the **Student Contacts Summary** screen, click **Add Contact**.

The **Add Student Contact** window displays.

**Add Student Contact Window**

- b. Complete the required contact information in the following fields.

**Note:** The fields that display vary based on the contact type you select at the top of the window.

- Contact type – Drop-down list populated by the Contact Type Code table
- Title – Salutation title, such as Mr., Mrs., Ms. or Dr.
- **First Name** – First name of this contact
- **Middle Name** – Middle name of this contact
- **Last Name** (required) – Last name of this contact
- **Suffix** – Any suffix, such as Jr. or III

- **Phone Number** section – Phone number information for the contact, including the type of phone number (home, work, cell, pager, etc.), the number and any extension
  - **Unlisted** – Mark the number as unlisted for privacy purposes.
  - **Available** start time and end time fields – Time period during which the contact can be reached at this phone number

***Note:** To add another phone number, click the plus icon. To delete a phone number, click the x icon.*
- **Address** section – Address information for the contact, including the type of address (mailing, other home, employer, etc.)
 

***Note:** If you choose to enter an address, you must enter it completely, including street, city, state and zip code. The system does not let you save a partial address.*

  - **Same As Student Address** – Automatically populate a home address from the student’s home address on record.

***Note:** To add another address, click the plus icon. To delete an address, click the x icon.*

***Note:** You can designate only one primary “Home” address, but you can add additional homes as “Other home.”*
- **Email Address** section – Email address information for the contact, including the type of email address (primary, work, home, etc.)
 

***Note:** To add another email address, click the plus icon. To delete an email address, click the x icon.*
- **Place of Employment** – Contact’s place of employment
- **Occupation** – Occupation of this contact
- **Custody Code** – Drop-down list populated by the Custody Code type table
- **Language** – Language spoken by the contact
- **Legal District of Residence Change Date** (community schools only) – Effective date when a legal guardian’s district of residence changed
- **Contact Comments** – Additional comments for this contact, such as work schedule or any other comments that would be helpful when trying to contact this person
- **Relationship Comments** – Additional comments related to this contact’s relationship with the student
- **Contact Flags** – Check box categories that display based on the contact type

- **Legal Guardian** – If you select this option, the contact displays on the Student’s View-Only Profile.
- **Emergency Contact** – Informational only
- **Living with Student** – Informational only
- **Copied on Correspondence** – If you select this option and also select the **Include Copied on Correspondence** check box on student reports and labels (including report cards), extra copies are printed specifically for this contact.
- **Willing to Volunteer** – Informational only
- **Medical Contact** – If you select this option, the contact’s information also appears as the student’s medical contact on the **Medical Contacts** screen.
- **Available at Work** – Informational only
- **Migrant Worker** – Informational only
- **Authorized to Pickup** – Informational only

c. Click **Save**.

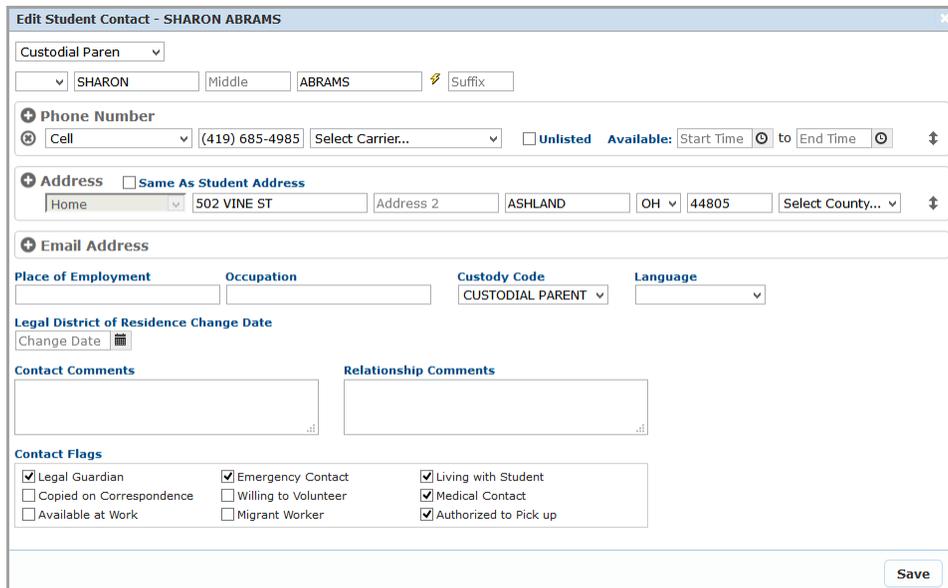
The new contact appears on the **Student Contact Summary** screen.

**Note:** *The first contact you enter for a student becomes the student’s primary contact. To change the primary contact, see “Change Primary Contact.”*

## Edit Contact

1. On the contact you want to edit, click .

The **Edit Student Contact** window displays.



**Edit Student Contact Window**

2. Edit the contact information. For field descriptions, see [“Add Contact.”](#)

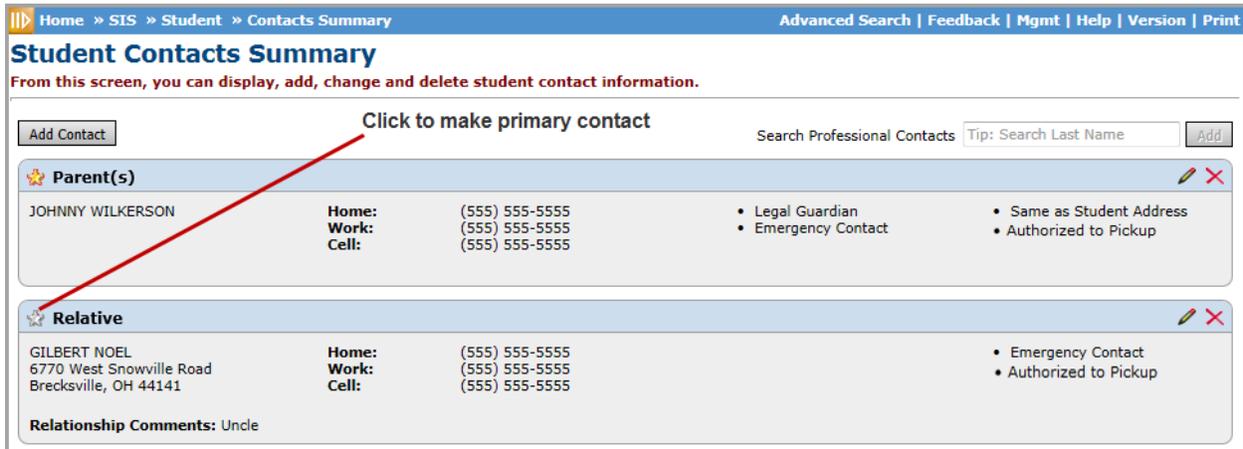
**Note:** The fields that display vary based on the contact type you select at the top of the window.

3. Click **Save**.

The updated contact appears on the **Student Contact Summary** screen.

## Change Primary Contact

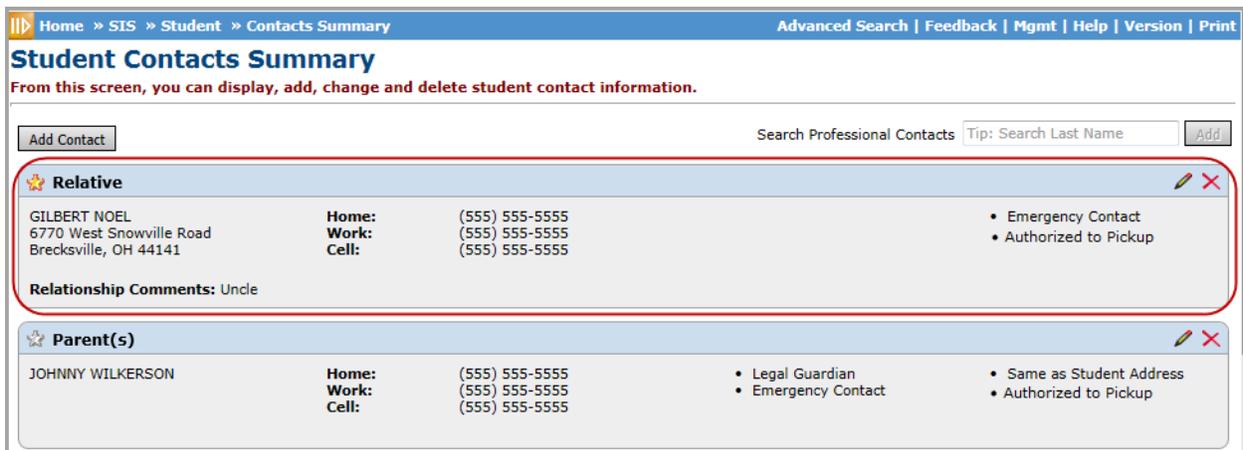
To make a different contact the student’s primary contact, click the  icon to change it to .



The screenshot shows the 'Student Contacts Summary' interface. At the top, there is a navigation bar with 'Home > SIS > Student > Contacts Summary' and utility links like 'Advanced Search', 'Feedback', 'Mgmt', 'Help', 'Version', and 'Print'. Below the title, a sub-header reads 'From this screen, you can display, add, change and delete student contact information.' There is an 'Add Contact' button and a search field for professional contacts. Two contact cards are visible: 'Parent(s)' for Johnny Wilkerson and 'Relative' for Gilbert Noel. A red arrow points from the text 'Click to make primary contact' to the star icon on the Johnny Wilkerson card.

Contact Type	Name	Home	Work	Cell	Roles
Parent(s)	JOHNNY WILKERSON	(555) 555-5555	(555) 555-5555	(555) 555-5555	Legal Guardian, Same as Student Address, Authorized to Pickup
Relative	GILBERT NOEL 6770 West Snowville Road Brecksville, OH 44141	(555) 555-5555	(555) 555-5555	(555) 555-5555	Emergency Contact, Authorized to Pickup

## Change Primary Contact



The screenshot shows the same 'Student Contacts Summary' interface, but now the 'Relative' contact card for Gilbert Noel is highlighted with a red border, indicating it is the primary contact. The 'Parent(s)' card for Johnny Wilkerson is now below it.

Contact Type	Name	Home	Work	Cell	Roles
Relative	GILBERT NOEL 6770 West Snowville Road Brecksville, OH 44141	(555) 555-5555	(555) 555-5555	(555) 555-5555	Emergency Contact, Authorized to Pickup
Parent(s)	JOHNNY WILKERSON	(555) 555-5555	(555) 555-5555	(555) 555-5555	Legal Guardian, Same as Student Address, Authorized to Pickup

## New Primary Contact

**Note:** You can also drag and drop a contact to the top position to make it the primary contact. See [“Reorder Contacts”](#) for details.

## Reorder Contacts

Drag and drop contacts to reorder how they display on screen.

Home » SIS » Student » Contacts Summary Advanced Search | Feedback | Mgmt | Help | Version | Print

### Student Contacts Summary

From this screen, you can display, add, change and delete student contact information.

Contact saved successfully.

Add Contact Search Professional Contacts

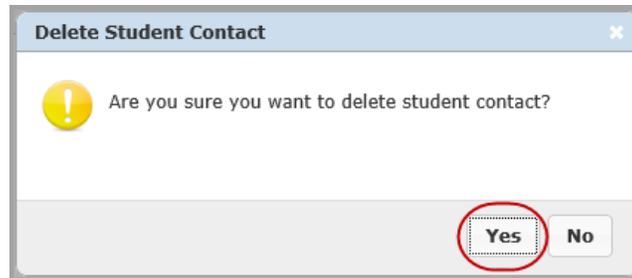
 <b>Mother, natural/adoptive</b>  		
Ms. Leia Solo 12 Main Street Ashland, OH 44805	<ul style="list-style-type: none"><li>Emergency Contact</li><li>Living with Student</li></ul>	<ul style="list-style-type: none"><li>Same as Student Address</li><li>Medical Contact</li><li>Authorized to Pickup</li></ul>
 <b>Father, natural/adoptive</b>  		
Han Solo 12 Main Street Ashland, OH 44805	<ul style="list-style-type: none"><li>Legal Guardian</li><li>Emergency Contact</li></ul>	<ul style="list-style-type: none"><li>Living with Student</li><li>Same as Student Address</li><li>Authorized to Pickup</li></ul>
 <b>Uncle</b>  		
Luke Skywalker 1333 Coruscant Drive Ashland, OH 44805	<ul style="list-style-type: none"><li>Emergency Contact</li></ul>	<ul style="list-style-type: none"><li>Willing to Volunteer</li></ul>
 <b>Aunt</b>  		
Mara Jade 120 Rebels Run Road Sacramento, CA 95628	<ul style="list-style-type: none"><li>Emergency Contact</li></ul>	
 <b>Mother, natural/adoptive</b>  		
Ms. Leia Solo 12 Main Street Ashland, OH 44805	<ul style="list-style-type: none"><li>Emergency Contact</li><li>Living with Student</li></ul>	<ul style="list-style-type: none"><li>Same as Student Address</li><li>Medical Contact</li><li>Authorized to Pickup</li></ul>
 <b>Father, natural/adoptive</b>  		
Han Solo 12 Main Street Ashland, OH 44805	<ul style="list-style-type: none"><li>Legal Guardian</li><li>Emergency Contact</li></ul>	<ul style="list-style-type: none"><li>Living with Student</li><li>Same as Student Address</li><li>Authorized to Pickup</li></ul>
 <b>Aunt</b>  		
Mara Jade 120 Rebels Run Road Sacramento, CA 95628	<ul style="list-style-type: none"><li>Emergency Contact</li></ul>	
 <b>Uncle</b>  		
Luke Skywalker 1333 Coruscant Drive Ashland, OH 44805	<ul style="list-style-type: none"><li>Emergency Contact</li></ul>	<ul style="list-style-type: none"><li>Willing to Volunteer</li></ul>

### Reorder Student Contacts

**Note:** The primary contact (denoted by ) is always listed first. If you drag and drop a contact to the top of the list, it becomes the new primary contact.

## Delete Contact

1. On the contact you want to delete, click **X**.
2. On the **Delete Student Contact** confirmation window, click **Yes**.



**Delete Student Contact Confirmation**

The contact is inactivated and no longer appears on the **Student Contacts Summary** screen.

Records on this page are not deleted but are inactivated. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

## Student Memberships

**Navigation: Home – SIS – Maintenance – School – Student Memberships**

Student Memberships Codes are used to designate that a student is part of common affiliation or activity, such as athletic team members, band members, special education program, etc.

Membership codes may be associated with a state defined Program code for EMIS reporting purposes, but not all Membership Codes are required to be EMIS reportable.

A student's inclusion in a membership will be tracked by date so that inclusion in a membership can be determined at any point during the school year.

## View Student Memberships

### Navigation: SIS – Student – Student Memberships

The screenshot displays the DASL system interface for a student profile. At the top, the student's name is **CONTRARY, MARY M.** with ID: 00005001, Gender: F, Grade: 11, Counselor: A107, and Status: A. The navigation bar on the left includes links for SIS, Student, and View Profile. The 'View Profile' screen shows a dropdown menu with options: 'I want to...', 'Edit this student's profile', 'View/Edit Full schedule', 'View/apply fees', 'View the medical health log', 'View this student's memberships' (circled in red), 'View Today's Schedule', 'View Contacts', 'View Lockers', and 'View a student's family group'. The 'Student Memberships' link in the navigation bar is also circled in red. The student's contact information includes Address: 90 ELM STREET, LIMA, OH 45801, Phone Number: (419) 228-7417, and Email Address. The student's status is ACTIVE RES, Birthdate: 11/17/1987, Ethnicity: WHITE, Program: Academic Locker, and Admission History: 8/1/1992 - Enrolled. The EMIS Situation is Resident attending full time, Percent of Time: 100%, and Report to EMIS: .

#### Viewing Student's Memberships from the View Profile Screen

Selected student's Memberships may be viewed by clicking on the "View this student's memberships" link in the "I want to..." drop-down menu, or selecting Student Memberships from the navigation bar or SIS – Student menu.

Either link will take you to the following Student Memberships screen to view the selected student's current memberships.

<b>DASL</b>	<b>EYE, MAGNUM P.</b>	<b>ID:</b> 004001	<b>Counselor:</b>	<b>DASL HIGH SCHOOL</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 5/27/2005)	<b>Gender:</b> M	<b>Homeroom:</b> A109	<b>[Find Students]</b> <b>Find</b>
		<b>Grade:</b> 12	<b>Status:</b> A	

Home » SIS » Student » Student Memberships

### Student Memberships

From this screen, you can view the memberships associated with a student.

Membership Code	Membership Name	School Year ^	Start Date	Stop Date	EMIS Program Code
105001	Public school program	2004	Aug 24, 2004	Dec 31, 2004	105001
115004	Mentor program	2004	Aug 24, 2004	Dec 31, 2004	115004
205001	Acc. Educ. Experienc	2004	Mar 22, 2005		205001
205002	Special Experiences	2004	Mar 22, 2005		205002
205003	Guidance Services	2004	Mar 22, 2005		205003
205011	SCA/Cluster classroo	2004	Mar 22, 2005		205011
205012	SCA resource room	2004	Mar 22, 2005		205012
205013	SCA self-cont. class	2004	Mar 22, 2005		205013
205014	SAA/clusered classr	2004	Mar 22, 2005		205014
205015	SAA resource room	2004	Mar 22, 2005		205015
205016	SAA self-cont. class	2004	Mar 22, 2005		205016
205017	CTA clusterd classr	2004	Mar 22, 2005		205017
205018	CTA resource room	2004	Mar 22, 2005		205018
205019	CTA self-cont. class	2004	Mar 22, 2005		205019
205020	VPAA clusterd class	2004	Mar 22, 2005		205020
305003	Career Assessment - requires employee ID	2004	Mar 22, 2005		305003
405001	National Honor Society	2004	Aug 24, 2004	Dec 31, 2004	405001
405010	Future Career Clubs	2004	Aug 24, 2004	Dec 31, 2004	405010
405011	Other	2004	Aug 24, 2004	Dec 31, 2004	405011
405012	National Vocational Technical Honor Society	2004	Aug 24, 2004	Dec 31, 2004	405012
420002	Football	2004	Aug 24, 2004	Dec 31, 2004	420002

Current Assignments Only
  All Assignments This Year
  All Assignments All Years

21 Records Displayed [Back To Top](#)

[Back to Student Profile](#)

### Student Memberships

Click **Back to Student Profile** to go back to the Student Profile page.

### Edit Student Memberships

#### Navigation: Home – SIS – Student – Edit Memberships

To view Membership details for a student, use the Edit Memberships link on the Student menu. This screen lists memberships that have been associated with the selected student.

For FY09 and beyond, the start and ending dates on Student Memberships will be used to determine which student memberships to report to EMIS. The EMIS reporting period on the membership definitions will give MEMBEMIS control over which membership codes to transfer to EMIS.

As of FY13, Special Education services (215xxx codes) are no longer assigned as memberships on the Edit Student Memberships screen. You must enter any Special Education services assigned to this student on the Services tab on the Special Education screen. For more information about the Special Education screen, refer to *ProgressBook StudentInformation EMIS Guide*.

Home » SIS » Student » Edit Memberships Advanced Search

## Edit Student Memberships

From this screen, you can edit and delete student memberships for the working school and school year.

Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

	Membership Code	Membership Name	Start Date	Stop Date	Staff Member	Prog Prov IRN
 	120010	Early College high School	Sep 01, 2012	May 31, 2013		*****
 	405003	Drama Club/Thespians	Sep 01, 2012	May 31, 2013		*****

### Edit Student Memberships Screen

 – Remove this student from this membership.

 – Edit this student's membership details.

**Add Membership** – Add membership to the student in context.

**Back to Student Profile** – Return to the Student Profile page.

### Delete Student Membership

Navigation: Home – SIS – Student – Edit Memberships

Home » SIS » Student » Edit Memberships Advanced Search

## Edit Student Memberships

From this screen, you can edit and delete student memberships for the working school and school year.

Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

	Membership Code	Membership Name	Start Date	Stop Date	Staff Member	Prog Prov IRN
 	120010	Early College high School	Sep 01, 2012	May 31, 2013		*****
 	405003	Drama Club/Thespians	Sep 01, 2012	May 31, 2013		*****

### Deleting a Student Memberships

Click  to remove the student in context from the membership.

You can either end the student's membership as of an effective date, or completely remove the student's membership

CONTRARY, MARY M. will be removed from > Cheerleading program code

End Membership as of: 8/1/2008  

Completely Remove Student's Membership

---

### End Membership or Remove Membership Options

**End Membership as of** – The current date will be listed, and can be changed. Selecting this option will enter the listed date as the Stop Date for the student's association with this membership.

**Completely Remove Student’s Membership** – Selecting this option will delete the student’s association with this membership completely, removing all records relating to the association.

**Ok** – Remove the Membership from the student’s record using the method selected.

**Cancel** – Cancels the removal of the Membership from the student’s record and returns you to the Edit Student Memberships page.

### Edit Student Membership Details

Navigation: Home – SIS – Student – Edit Memberships

Home » SIS » Student » Edit Memberships Advanced Search

## Edit Student Memberships

From this screen, you can edit and delete student memberships for the working school and school year.

Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

	Membership Code	Membership Name	Start Date	Stop Date	Staff Member	Prog Prov IRN
	120010	Early College high School	Sep 01, 2012	May 31, 2013		*****
	405003	Drama Club/Thespians	Sep 01, 2012	May 31, 2013		*****

### Editing Student Memberships

Click to edit the membership details for the student in context.

Home » SIS » Student » Edit Memberships Advanced Search

## Edit Student Memberships

From this screen, you can edit and delete student memberships for the working school and school year.

Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

**Membership Name:** 120010 - Early College high School

**Start Date:** 9/1/2012

**Stop Date:** 5/31/2013

**Staff Member:** [ Select Staff ]

**Program Provider IRN:** \*\*\*\*\*

### Edit Student Memberships Screen

**Membership Name** (non-modifiable) – Lists the name of the membership.

**Start Date** (required) – The date the student became associated with the membership.

**Stop Date** (optional) – The date the student stopped being associated with the membership.

**Staff Member** (optional) – Select a staff member to be associated with this membership, if applicable.

**Program Provider IRN** – Used by EMIS processing. Clicking the  will take you to the Ohio Department of Education’s Organization Search page.

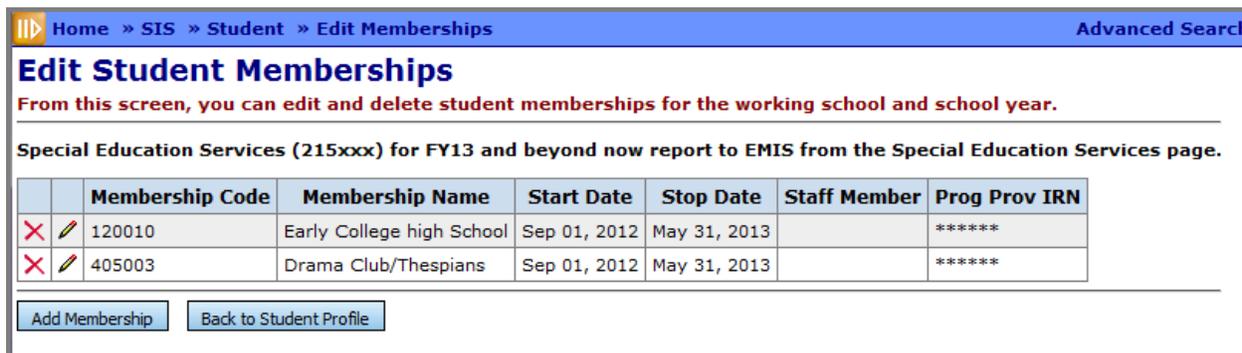
**Save** – Save changes and return to the Edit Student Memberships page. You will receive the following message:

**The student membership was saved successfully**

**Cancel** – Do not save changes, and return to the Edit Student Memberships page.

### Add Student Membership

Navigation: Home – SIS – Student – Edit Memberships



Home » SIS » Student » Edit Memberships Advanced Search

### Edit Student Memberships

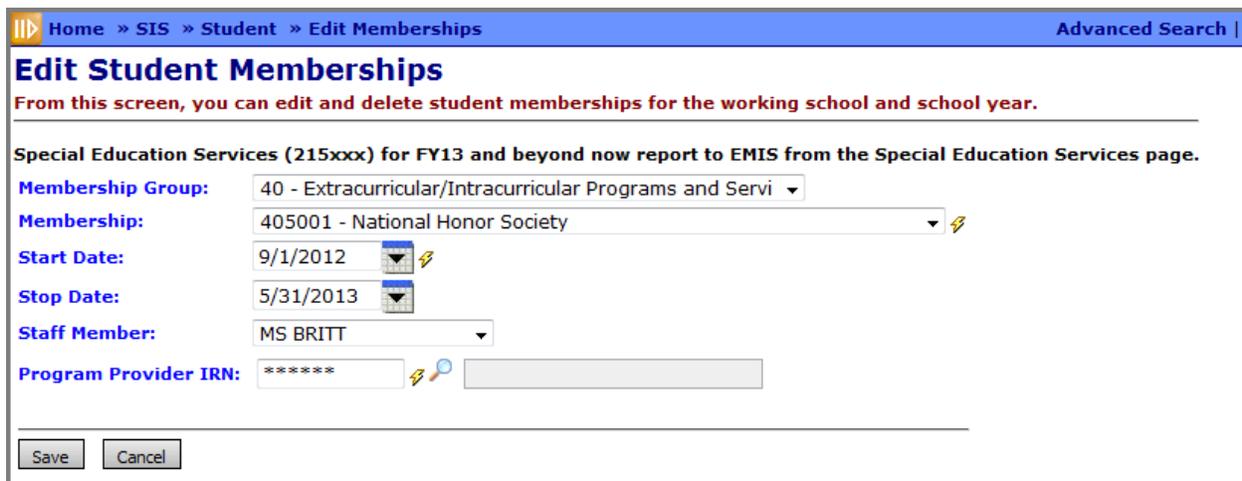
From this screen, you can edit and delete student memberships for the working school and school year.

Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

	Membership Code	Membership Name	Start Date	Stop Date	Staff Member	Prog Prov IRN
 	120010	Early College high School	Sep 01, 2012	May 31, 2013		*****
 	405003	Drama Club/Thespians	Sep 01, 2012	May 31, 2013		*****

### Adding Student Memberships

Click **Add Membership** to add a Student Membership.



Home » SIS » Student » Edit Memberships Advanced Search

### Edit Student Memberships

From this screen, you can edit and delete student memberships for the working school and school year.

Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

**Membership Group:** 40 - Extracurricular/Intracurricular Programs and Servi

**Membership:** 405001 - National Honor Society

**Start Date:** 9/1/2012

**Stop Date:** 5/31/2013

**Staff Member:** MS BRITT

**Program Provider IRN:** \*\*\*\*\*

### Entering Student Memberships on Edit Student Memberships Screen

**Membership Group** (required) – Select the Membership Group.

**Membership** (required) – Select the Membership. This drop-down will populate based on the Membership Group selected.

**Note:** When FY13 and after is in context, you must enter Special Education services (215xxx codes) on the Services tab on the Special Education screen. For more information, refer to ProgressBook StudentInformation EMIS Guide.

**Start Date** (required) – The date the student became associated with the membership.

**Stop Date** (optional) – The date the student stopped being associated with the membership.

**Staff Member** (optional) – Select a staff member to be associated with this membership, if applicable.

**Program Provider IRN** – Used by EMIS processing. Clicking the  will take you to the Ohio Department of Education's Organization Search page.

**Save** – Save changes and return to the Edit Student Memberships page. You will receive the following message:

**The student membership was saved successfully**

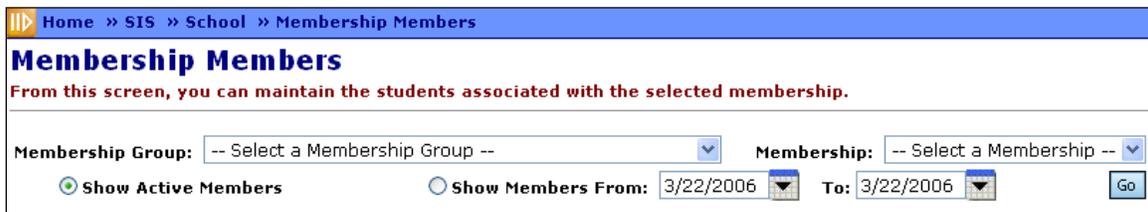
Your newly added student membership will now appear on the student membership grid.

**Cancel** – Do not save changes, and return to the Edit Student Memberships page.

## Membership Members Screen

### Navigation: Home – SIS – School – Membership Members

The Membership Members screen is used to display all students associated with a specific membership code. It is also used to add to memberships either by searching by various criterion, or typing student ID and Bulk adding the students to the selected membership.



### Membership Members Screen

**Show Active Members** – This option displays students who are currently associated with the selected membership (have no Stop Date).

**Show Members From** – This option displays students who were associated with the selected membership for the entire duration between the two dates selected.

**Go** – Refresh the List of students.

### View Membership Members

### Navigation: Home – SIS – School – Membership Members

To view members of a Membership, first select a Membership Group from the drop-down list. This will populate the Membership drop-down with applicable membership codes, from which a selection may be made.

The screenshot shows the 'Membership Members' interface. At the top, there is a breadcrumb trail: Home > SIS > School > Membership Members. Below this, the title 'Membership Members' is displayed, followed by a sub-header: 'From this screen, you can maintain the students associated with the selected membership.' The interface includes two dropdown menus: 'Membership Group' set to '41 - Academic Intracurricular Descriptions (Vocational)' and 'Membership' set to '415004 - Student Council'. There are radio buttons for 'Show Active Members' (selected) and 'Show Members From: 7/9/2008 To: 7/9/2008'. Below these are two buttons: 'Add Students to Membership' and 'Bulk Addition of Students'. A table lists three students with columns for ID, Name, Homeroom, Staff Member, Start, End, Grade, and Prog Prov IRN.

ID	Name ^	Homeroom	Staff Member	Start	End	Grade	Prog Prov IRN
X 00000236	GREEN, FOREST			Jul 09, 2008		09	
X 00008003	MAY, ELLIE			Jul 09, 2008		09	
X 00000021	PAZSON, PAXSTON			Jul 09, 2008		09	

### Viewing Membership Members

**Sorting** – You may sort by any column (ID, Name, Homeroom, Staff Member, Start, End, Grade) in ascending or descending order by clicking on the column header.

By clicking on the student name, you can view the individual student’s associated memberships.

**Add Students to Membership** – Search for individual students and add to (or remove from) a selected membership code.

**Bulk Addition of Students** – Bulk addition of several students by Student ID.

**X** – Delete this student from the Membership.

**Green, Forest** – Clicking on a student’s name takes you to that student’s View Student Memberships page.

### Add Students to Membership

Navigation: Home – SIS – School – Membership Members

This screenshot is identical to the one above, but the 'Add Students to Membership' button is circled in red to highlight it.

### Add Students to Membership on Membership Members Screen

Click **Add Students to Membership** to search for students and add to selected membership code.

Home » SIS » School » Membership Members

## Membership Members

From this screen, you can maintain the students associated with the selected membership.

**Membership Group:** 41 - Academic Intracurricular Descriptions (Vocational)
 **Membership:** 415004 - Student Council

**First Name:**  
**Last Name:**

**Grade Level:**  
**Last Initial:**

**Available Students Found**

**Students to Add to Membership**

**Effective Start Date:** 7/9/2008

**Effective End Date:**

**Staff Member:**

**Program Provider IRN:**

### Add/Edit Membership Members Screen

**Membership Group** (non-modifiable) – Membership Group Name.

**Membership** (non-modifiable) – Membership Name.

**First Name** – Input first name to use as search criterion or input part of first name and check box to perform a wild card search.

**Last Name** – Input last name to use as search criterion or input part of last name and check box to perform a wild card search.

**Grade Level** – Select grade level from drop-down for search criterion.

**Last Initial** – Select an initial from the drop-down list to search by first initial of students' last name.

**Search** – After making selection criterion for search, click button to perform a search.

**Available Students Found** – Results of search will be listed in this list box. Select from the list the students you wish to be added to the Membership and click the single arrow button to move them to the Students to Add to Membership box.

**Students to Add to Membership** – Students selected from Available Students found, that will be given the membership code.

**Effective Start Date** (required) – Start date that the membership should be added to the students' records.

**Effective End Date** (optional) – End date that the membership will be removed from students' record. Only include if the membership has a specific ending date.

**Staff Member** (optional) – Select a staff member to be associated with this membership, if applicable.

**Title I Public School Choice IRN (Transfer from IRN)** (optional) – This field is only available prior to FY09 (08-09). Select a school IRN from the drop-down list. This designates the IRN that this student membership is transferring from. This field can be selected here, or later selected separately for each student.

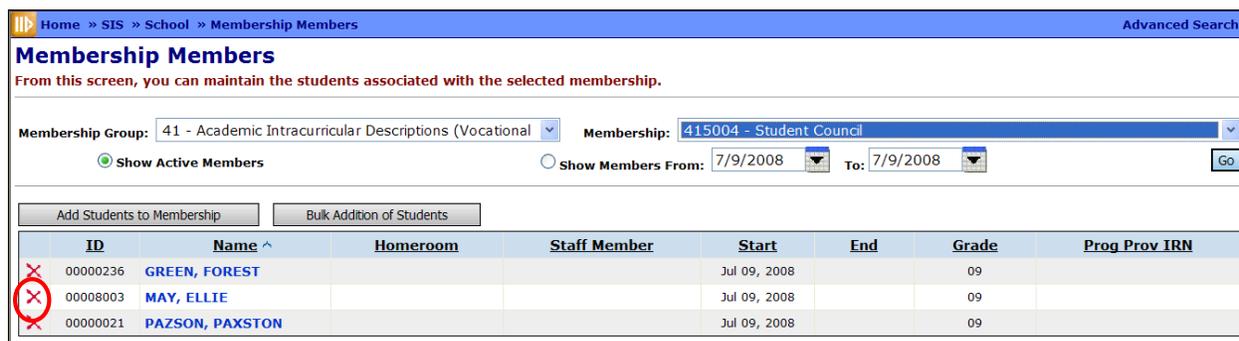
**Program Provider IRN** (optional) – Used by EMIS processing. Clicking the  will take you to the Ohio Department of Education’s Organization Search page. This field can be selected here, or later selected separately for each student.

**Add Students to Membership** – Will add the selected students to the Membership.

**Cancel** – Will cancel the membership assignment for the selected students.

### Delete Students from Membership

Navigation: Home – SIS – School – Membership Members



Home » SIS » School » Membership Members Advanced Search

#### Membership Members

From this screen, you can maintain the students associated with the selected membership.

Membership Group: 41 - Academic Intracurricular Descriptions (Vocational)    Membership: 415004 - Student Council

Show Active Members     Show Members From: 7/9/2008    To: 7/9/2008   

ID	Name ^	Homeroom	Staff Member	Start	End	Grade	Prog Prov IRN
 00000236	GREEN, FOREST			Jul 09, 2008		09	
 00008003	MAY, ELLIE			Jul 09, 2008		09	
 00000021	PAZSON, PAXSTON			Jul 09, 2008		09	

### Deleting a Membership Member

Click  to delete a student from the selected membership code.



Home » SIS » School » Membership Members

#### Membership Members

From this screen, you can maintain the students associated with the selected membership.

You can either end the student's membership as of an effective date, or completely remove the student's membership

MAY, ELLIE will be removed from > Student Council

End Membership as of: 7/9/2008  

Completely Remove Student's Membership

### End Membership and Remove Membership Options

**End Membership as of** – The current date will be listed, and can be changed. Selecting this option will enter the listed date as the Stop Date for the student’s association with this membership.

**Completely Remove Student’s Membership** – Selecting this option will delete the student’s association with this membership completely, removing all records relating to the association.

**Ok** – Remove the Membership from the student’s record using the method selected.

**Cancel** – Cancels the removal of the Membership from the student’s record and returns you to the Membership Members page.

If you selected “End Membership as of” and entered a Stop Date, you will see this date reflected on the Membership Members page.

Home » SIS » School » Membership Members Advanced Search

**Membership Members**  
From this screen, you can maintain the students associated with the selected membership.

Membership Group: 41 - Academic Intracurricular Descriptions (Vocational) Membership: 415004 - Student Council

Show Active Members  Show Members From: 7/9/2008 To: 7/9/2008

ID	Name ^	Homerroom	Staff Member	Start	End	Grade	Prog Prov IRN
00000236	GREEN, FOREST			Jul 09, 2008	Jul 09, 2008	09	
00008003	MAY, ELLIE			Jul 09, 2008		09	
00000021	PAZSON, PAXSTON			Jul 09, 2008		09	

### End Student Membership

If you selected “Completely Remove Student’s Membership,” the student will no longer appear on the Membership list at all.

Home » SIS » School » Membership Members Advanced Search

**Membership Members**  
From this screen, you can maintain the students associated with the selected membership.

Membership Group: 41 - Academic Intracurricular Descriptions (Vocational) Membership: 415004 - Student Council

Show Active Members  Show Members From: 7/9/2008 To: 7/9/2008

ID	Name ^	Homerroom	Staff Member	Start	End	Grade	Prog Prov IRN
00000236	GREEN, FOREST			Jul 09, 2008		09	
00000021	PAZSON, PAXSTON			Jul 09, 2008		09	

### Student Removed from Membership

### Bulk Addition of Students

#### Navigation: Home – SIS – School – Membership Members

Several students may be added at once to a Membership code using the Bulk Addition of Students option. You must know Student IDs for all students to be added to the membership.

ID	Name ^	Homeroom	Staff Member	Start	End	Grade	Prog Prov IRN
00000236	GREEN, FOREST			Jul 09, 2008		09	
00000021	PAZSON, PAXSTON			Jul 09, 2008		09	

### Bulk Addition of Students on Membership Members Screen

Click **Bulk Addition of Students** to add several students at once to the selected membership code.

### Bulk Addition of Students Screen

**Student ID** (required) – Input Student ID numbers separated by commas for all students that you wish to add to the selected membership code.

**Effective Date** (required) – Start date that the membership should be added to the students' records.

**End Date** (optional) – End date that the membership will be removed from students' record. Only include if the membership has a specific ending date.

**Staff Member** (optional) – Select a staff member to be associated with this membership.

**Title I Public School Choice IRN (Transfer from IRN)** (optional) – This field is only available prior to FY09 (08-09). Select a school IRN from the drop-down list. This designates the IRN that this student membership is transferring from. This field can be selected here, or later selected separately for each student.

**Program Provider IRN** (optional) – Used by EMIS processing. Clicking the  will take you to the Ohio Department of Education’s Organization Search page. This field can be selected here, or later selected separately for each student.

**View Students** – Will display a in a new popup window, a list of students’ names that will be added (or removed) from the membership code. If invalid student ID’s have been used, those will display as well.

**Membership Members - Bulk Addition (415004) - Student Council**

The following page displays the valid and invalid **student id's** entered on the previous page.

**Valid Student ID's**

<u>Student ID</u> ^	<u>Name</u>	<u>Grade Level</u>	<u>Gender</u>
00000040	DIAZ, KEISHA	KG	F
00000056	GARZA, ELLEN	KG	F
00001007	BREWER, SEAN CONORY	05	M

**Invalid Student ID's**

<u>Student Number</u>
There are no records to display

[Close Window](#)

**Students on Bulk Addition of Students Screen**

**Save** – Will save Students with the selected membership code, or remove the membership code from selected students, as per the selected options and give the user the following confirmation message.

**The Student(s) were successfully added to the membership**

If any listed student IDs are invalid, you will receive the following error message when you try to click **Save**.

**The following StudentIDs are invalid and must be corrected before memberships can be saved: 9994**

**Cancel** – Will cancel the membership assignment for the selected students and return to the Membership Members screen.

## Copy Ad-Hoc Membership to Membership

Navigation: Home – Management – School Administration – School Building Administration – Ad Hoc Copy

This page allows you to copy students who are in an ad-hoc membership to a “regular” membership within a membership group.

### Select Ad Hoc Membership Tab

Home » Management » School Administration » School Building Administration » Ad Hoc Copy

### Copy Ad-Hoc Membership to Membership

From this page, you can promote Ad-Hoc Memberships to regular Memberships.

Select Ad Hoc Membership **Copy**

Ad-Hoc Membership: -- Select an Ad-Hoc Membership -- ...

Public And Private

Next

#### Copy Ad-Hoc Membership to Membership Screen

**Ad-Hoc Membership** (required) – Choose an ad-hoc membership from the drop-down list. By default, the Ad-Hoc Membership drop-down list is populated with private ad-hoc memberships assigned to the logged in user. Click **Public and Private** to display both public (assigned to others and marked as public) and private (assigned to the user) ad-hoc memberships in the Ad-Hoc Membership drop-down list.

Click ... to find or build an ad-hoc membership. See *ProgressBook StudentInformation Getting Started Guide* for details on creating or editing an ad-hoc membership.

After selecting an Ad-Hoc Membership from the drop-down list, click **Next** to proceed to the Copy tab.

## Copy Tab

Home > Management > School Administration > School Building Administration > Ad Hoc Copy

### Copy Ad-Hoc Membership to Membership

From this page, you can promote Ad-Hoc Memberships to regular Memberships.

Select Ad Hoc Membership Copy

Membership Name: CVEL Test

Start Date: 1/5/2010

Stop Date:

Staff Member:

Program Provider IRN: \*\*\*\*\*

Membership Group: -- Select a Membership Group --

Membership:

School Year: 2009-2010

Back Copy

### Copy Ad-Hoc Membership to Membership Screen

**Membership Name** (required) – The ad hoc membership that you selected and are using to copy students from is displayed.

**Start Date** (optional) – Enter the start date for new memberships that are created. Date must be within current School Year. This field will be available in FY09 (08-09) and beyond.

**End Date** (optional) – Enter the end date for new memberships that are created. Date must be within current School Year. This field will be available in FY09 (08-09) and beyond.

**Staff Member** (optional) – Choose the Staff Member associated with this membership. This field will be available in FY09 (08-09) and beyond.

**Program Provider IRN** (optional) – Used by EMIS processing. Clicking the  will take you to the Ohio Department of Education’s Organization Search page. This field will be available in FY09 (08-09) and beyond.

**Membership Group** (required) – Choosing a membership group will populate the membership drop-down list with memberships belonging to the chosen group.

**Membership** (required) – Choose the membership that you are copying students to.

**School Year** (required) – Will default to the school year in context.

Click **Back** to return to the Select Ad Hoc Membership tab.

Click **Copy** to copy these students from the selected ad hoc membership to the selected “regular” membership. This banner will display for a successful ad hoc copy.

The students from the Ad Hoc Membership have been successfully copied to the selected membership.  
Total Affected Students : 20

This banner will display for an unsuccessful ad hoc copy – where students being copied are already in the chosen membership.

**No students were copied.**  
**Total Students Already in Membership : 20**

### Family Groups

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

The **Family Groups** screen lets you select students who reside in the same household so that when the district or school needs to notify the parents of an event, such as by phone or mail, only one notification is sent per household. You can set up family groups by school or district.

You can designate one of the students in the family group as the courier. The courier is the student through whom all correspondence from the school or district is sent. On the **Family Groups** screen, a blue check displays next to the student selected as the courier.

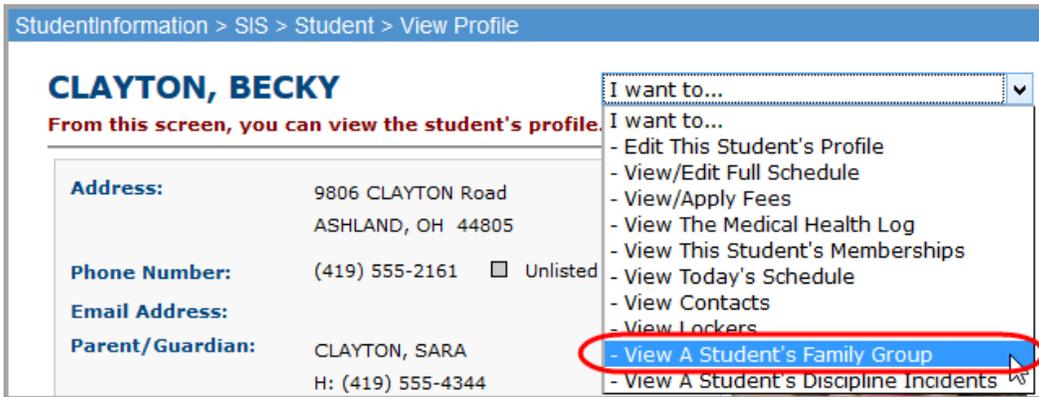
The screenshot shows the 'Family Groups' interface. At the top, there is a breadcrumb trail: 'StudentInformation > Management > District Administration > Family Groups'. Below this is the title 'Family Groups' and a sub-header: 'From this screen you can display or change information regarding family groups'. A search bar contains 'clayton' and a 'Search' button. An 'Add Family Group' button is also present. A checkbox labeled 'Student is courier for family group' is checked. Below this is a 'Number of Family Groups Per Page' dropdown set to '10'. A red message states '2 Family Groups Found'. A table lists the family groups:

	Family Group ^	Description	Students In Group
✕ ✎	CLAYTON	CLAYTON Family Group	CLAYTON, BECKY CLAYTON, TRACEY

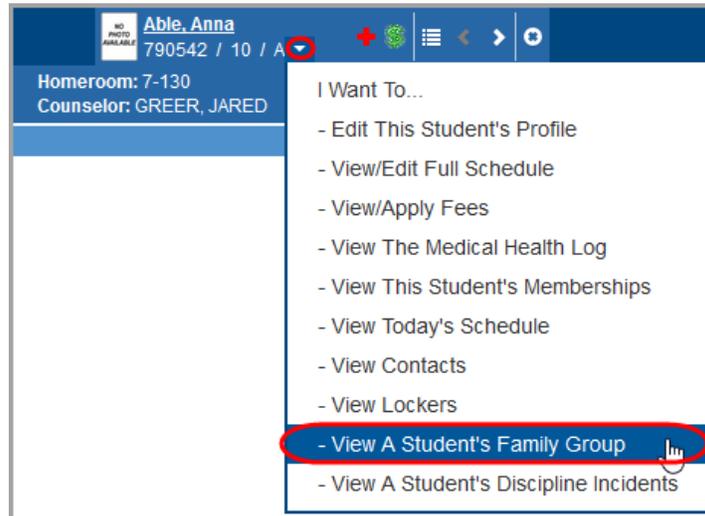
An arrow points from a text box to a blue checkmark in the 'Students In Group' column for the 'CLAYTON, TRACEY' row.

**Family Courier on Family Groups Screen**

You can also access this screen by selecting “View a Student’s Family Group” in the **I want to...** drop-down list on either the **View Profile** screen or in the student in context area of the masthead.



**View a Student's Family Group from the View Profile Screen**



**View a Student's Family Group from the Masthead**

Once a student has been assigned to a family group, it displays on the student's profile.

StudentInformation > SIS > Student > View Profile

**CLAYTON, BECKY** I want to... ▾

**From this screen, you can view the student's profile.**

**Address:** 9806 CLAYTON Road  
ASHLAND, OH 44805

**Phone Number:** (419) 555-2161  Unlisted

**Email Address:**

**Parent/Guardian:** CLAYTON, SARA  
H: (419) 555-4344

**Student Status:** RES A/ELSE

**Birthdate:** 2/14/1998

**Ethnicity:** White

**Program:**

**Academic Locker:**

**Admission History:** 10/18/2006 - Enrolled

**EMIS Situation:** 147 - Resident foster placed elsewhere F/T

**Percent of Time:** 0%

**Report to EMIS:**

**Effective Date:** 7/1/2013

**Reporting Period:** (K)

Student is courier for family group

Family Group	Description	Students In Group	
CLAYTON	CLAYTON Family Group	CLAYTON, BECKY	ASHLAND HIGH SCHOOL
		<input checked="" type="checkbox"/> CLAYTON, TRACEY	ASHLAND HIGH SCHOOL

**Family Group on Student Profile**

### Create a Family Group

1. On the **Family Groups** screen, click **Add Family Group**.

The add/edit screen displays.

2. On the **Group** tab, in the **Name** field, enter a short description for the group.
3. Optional: In the **Description** field, enter a long description for the group.
4. Click **Save**.

StudentInformation > Management > District Administration > Family Groups

## Family Groups

From this screen you can display or change information regarding family groups

Group Students Contacts

Name: Clayton ⚡

Description: Clayton Family at 6770 W. Snowville Rd., Brecksville

Save Back

### Defining the Group on Add/Edit Family Groups Maintenance Screen

A confirmation message displays.

5. Click the **Students** tab.
6. Search for a student you want to add to this group by entering any of the following values, and then click **Search**:
  - In the **Student Name** field , enter all of the student's last name. If you want to search using part of the student's name, type "\*" to indicate a wildcard search. For example, to return all the students with a last name that starts with s, type **s\***.
  - In the **Phone Number** field , enter the student's phone number. You must type all 10 digits (dashes and parentheses are not required).
  - In the **Street Address** field , enter all or part of the student's street address.

The search results display at the bottom of the screen.

StudentInformation > Management > District Administration > Family Groups

### Family Groups

From this screen you can display or change information regarding family groups

Group | Students | Contacts

Family Group	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender
Name: Clayton	There are no records to display							

Student Name:  Phone Number:

Street Address:

<input type="checkbox"/>	FirstName ^	LastName	MiddleName	Grade	Student Number	Phone Number	Address	BirthDate	Gender	Family Groups
<input type="checkbox"/>	BECKY	CLAYTON		10	593056	(419) 555-2161	9806 CLAYTON Road	02/14/1998	F	
<input type="checkbox"/>	CHARLES	CLAYTON		08	190494	(419) 555-1094	9806 CLAYTON Road	01/04/2000	M	

#### Search Results on Students Tab

- Select the check box in the row of the student(s) you want to add to the family group. To select all of the students, select the check box in the heading row of the grid
- When you have selected all of the applicable students, click **Add Selected Students**.

The students you selected display in the grid on the **Students** tab.

**Note:** Your changes on the **Students** tab are saved automatically.

StudentInformation > Management > District Administration > Family Groups

### Family Groups

From this screen you can display or change information regarding family groups

Group | Students | Contacts

Family Group	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender
Name: Clayton	<input checked="" type="checkbox"/>	CLAYTON, BECKY	10	ASHLAND HIGH SCHOOL	593056	(419) 555-2161	9806 CLAYTON Road	F
	<input checked="" type="checkbox"/>	CLAYTON, CHARLES	08	ASHLAND MIDDLE SCHOOL	190494	(419) 555-1094	9806 CLAYTON Road	M

Student Name:  Phone Number:

Street Address:

#### Selected Students on Students Tab

- To assign a student as the courier for the family, click the check box in the **Is Courier** column next to the student.

The check icon becomes blue to indicate that the student is selected.

**Note:** Only one student can be selected as the courier at a time. When you click the check icon in the **Is Courier** column for another student, the previous student is deselected as the courier.

Family Group	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender
Name: Clayton	<input type="checkbox"/>	CLAYTON, BECKY	10	ASHLAND HIGH SCHOOL	593056	(419) 555-2161	9806 CLAYTON Road	F
	<input checked="" type="checkbox"/>	CLAYTON, CHARLES	08	ASHLAND MIDDLE SCHOOL	190494	(419) 555-1094	9806 CLAYTON Road	M

### Assigning a Student as Courier

10. Optional: To add contacts to a family group, see [“Add Contacts to a Family Group.”](#)

### Modify a Family Group

1. On the **Family Groups** screen, in the **Family Group Name** field, search for the family group you want to modify by entering all or part of the family group name, and then click **Search**.

The family groups meeting the search criteria you entered display in the grid at the bottom of the screen.

StudentInformation > Management > District Administration > Family Groups

## Family Groups

From this screen you can display or change information regarding family groups

Family Group Name:

Student is courier for family group

Number of Family Groups Per Page:

**Edit Icon** **1 FamilyGroup Found**

	Family Group	Description	Students In Group
<input checked="" type="checkbox"/> 	ALBERT	ALBERT Family Group on 5281 ALBERT Road	ALBERT, DENNIS ALBERT, ROGER Anders, Holmvik

### Search Results on Family Groups Maintenance Screen

2. Click the edit icon in the row of the family group you want to modify.  
The **Students** tab on the **Family Groups** maintenance screen displays.

3. Perform one of the following actions to change the students assigned to the family group:
  - Click  in the row of a student to remove that student from the family group.
  - Click  in the row of a student to assign or remove that student as the courier for the family group. The check box for the student who is assigned as the courier displays blue.
  - To add a student to the group, refer to steps [6](#) through [8](#) in *“Create a Family Group.”*
4. Click the **Group** tab, and then perform one of the following actions to change the basic information for the family group:
  - In the **Name** field , change the short name for the family group.
  - In the **Description** field , change the long description for the family group.
5. When you are done modifying the family group, click **Save**.

### **Add Contacts to a Family Group**

You can add personal and professional contacts, such as a day care provider, doctor or dentist, to more than one student in a family group. Your system administrator determines whether or not you have access to update contacts for students in the family group who are outside the building in context. See *“Set Page Level Security for Family Groups Contacts.”*

1. With a building in context, on the **Family Groups** screen, in the **Family Group Name** field, search for the family group to which you want to add contacts by entering all or part of the family group name, and then click **Search**.

The family groups meeting the search criteria you entered display in the grid at the bottom of the screen.

StudentInformation > Management > District Administration > Family Groups

## Family Groups

From this screen you can display or change information regarding family groups

Family Group Name:

Student is courier for family group

Number of Family Groups Per Page:

1 FamilyGroup Found

	Family Group	Description	Students In Group
	ALBERT	ALBERT Family Group on 5281 ALBERT Road	ALBERT, DENNIS ALBERT, ROGER Anders, Holmvik

### Search Results on Family Groups Maintenance Screen

- Click the edit icon in the row of the family group.  
The **Students** tab on the **Family Groups** maintenance screen displays.
- Click the **Contacts** tab.

StudentInformation > Management > District Administration > Family Groups

## Family Groups

From this screen you can display or change information regarding family groups

Group **Students** Contacts

Students' contacts can only be modified if the student is in the building in context.

 ALBERT Family Group

Tip: Search Last Name

[\[Collapse All\]](#)

	DENNIS ALBERT Grade: 06 ASOS	ROGER ALBERT Grade: K ASTA	Holmvik Anders Grade: 11 ASHS
<b>FATHER</b>			<input checked="" type="checkbox"/>  
PHILIP ALBERT	<input type="checkbox"/>	<input type="checkbox"/>	
<b>MOTHER</b>		<input checked="" type="checkbox"/> 	<input type="checkbox"/>
JOE ALBERT	<input type="checkbox"/>		
AURORA ALBERT	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>  
<b>PARENT(S)</b>			
MARILYN ALBERT	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>

### Add Contact to Family Group

4. Add a contact in one of the following ways:

- To search for a professional contact that already exists in the system for another student:

a. In the **Search Professional Contacts** area, enter all or part of an existing contact's name. (Do not press <Enter>.)

If a contact record is found, it displays in a drop-down list.

b. In the drop-down list, click the contact's name.

c. Click **Add To Group**.

The contact is added to all students in the family group who are within the building in context.

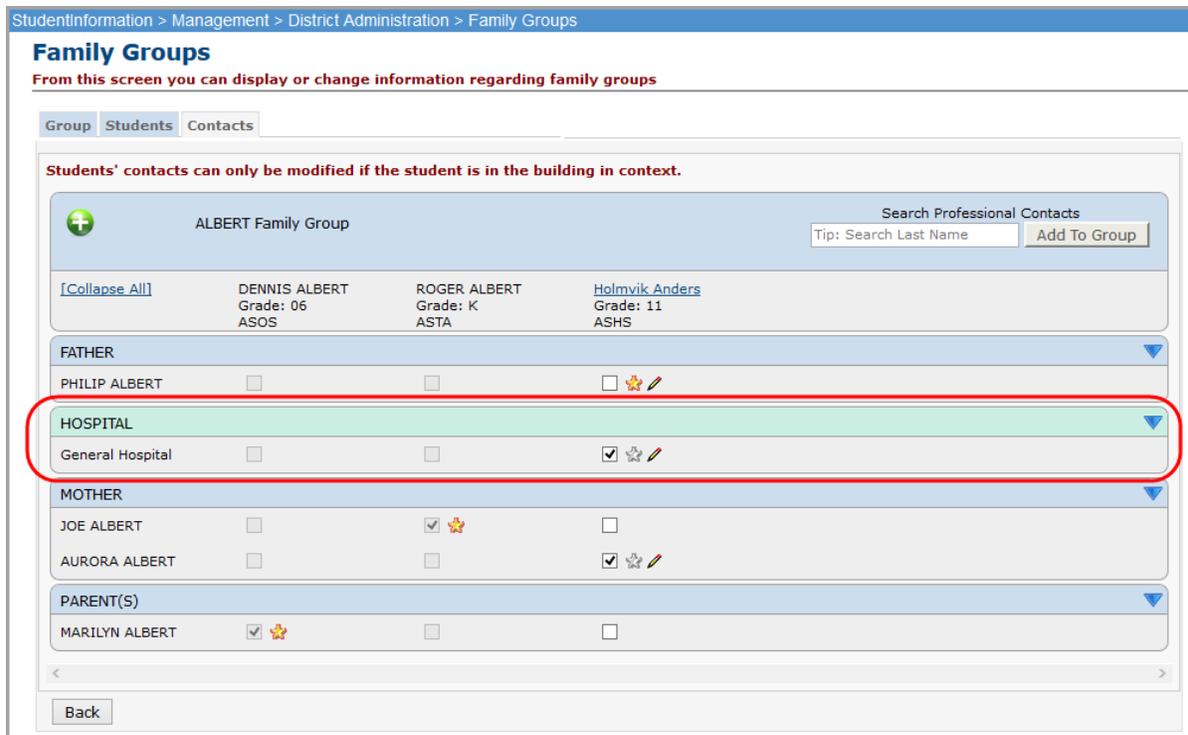
- To add a new personal or professional contact:

a. Click .

The **Add Student Contact** window displays.

b. Add the contact. For information on adding contacts, see [“Add Contact.”](#)

The contact is added to all students in the family group for whom you have access to add contacts (based on your security). See [“Set Page Level Security for Family Groups Contacts.”](#)



StudentInformation > Management > District Administration > Family Groups

### Family Groups

From this screen you can display or change information regarding family groups

Group | Students | **Contacts**

Students' contacts can only be modified if the student is in the building in context.

 ALBERT Family Group Search Professional Contacts  
Tip: Search Last Name

[\[Collapse All\]](#)

DENNIS ALBERT Grade: 06 ASOS	ROGER ALBERT Grade: K ASTA	<a href="#">Holmvik Anders</a> Grade: 11 ASHS
<b>FATHER</b>		
PHILIP ALBERT	<input type="checkbox"/>	<input type="checkbox"/>  
<b>HOSPITAL</b>		
General Hospital	<input type="checkbox"/>	<input checked="" type="checkbox"/>  
<b>MOTHER</b>		
JOE ALBERT	<input type="checkbox"/>	<input checked="" type="checkbox"/> 
AURORA ALBERT	<input type="checkbox"/>	<input checked="" type="checkbox"/>  
<b>PARENT(S)</b>		
MARILYN ALBERT	<input checked="" type="checkbox"/> 	<input type="checkbox"/>

**Contact Added on Contacts Tab**

**Note:** The following fields on the contact record are tied to the contact itself. Therefore, they apply to all students having this contact:

- Phone Number
- Address
- Email Address
- Contact Comments
- Available at Work
- Migrant Worker
- Authorized to Pickup

The following fields on the contact record are tied to the student. Therefore, if more than one student has this contact, you need to set these field values individually for each student:

- Relationship Comments
- Legal Guardian
- Emergency Contact
- Living with Student
- Copied on Correspondence
- Willing to Volunteer
- Medical Contact

5. Optional: To remove the contact from a specific student who is within the building in context, in the row of the contact, deselect the check box for the student.

**Note:** Your changes are saved automatically. You can safely navigate away from this screen.

## Delete a Family Group

When you delete a family group, it no longer displays.

1. On the **Family Groups** screen, search for the family group you want to delete by entering all or part of the family group name in the **Family Group Name** field, and then click **Search**.
2. Click the delete icon in the row of the family group you want to delete.  
A confirmation message displays, and the family group is deleted.

## Set District Courier Policy

### StudentInformation – Management – District Administration – District Options

The **District Options** screen lets you 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.

1. In the **Select a method to assign a Family Courier** section, select one of the following options:
  - **No Family Courier assignment** – Does not assign a family courier to the family group.
  - **Assign Family Courier to youngest family member** – Assigns the youngest student in the family group as the family courier.
  - **Assign Family Courier to oldest family member** – Assigns the oldest student in the family group as the family courier.

StudentInformation > Management > District Administration > District Options

### District Options

From this screen, you can display and change District Options.

Select a method to assign a Family Courier

No Family Courier assignment

Assign Family Courier to youngest family member

Assign Family Courier to oldest family member

Select grade levels that will be excluded from being a family group courier

Grade

01 - 01

02 - 02

03 - 03

04 - 04

Select a method to edit Family Group Contacts

Allow edits per school

Allow edits per district

Save

#### Set District Courier Policy on District Options Screen

2. Optional: To exclude students in certain grade levels (for example, preschool) from being selected as the courier for family groups, in the **Grade** multiselect list, select the grade(s) to exclude by moving them from the left side to the right side.
3. Click **Save**.

**Note:** To reassign couriers based on your updated district policy, see [“Set Page Level Security for Family Groups Contacts.”](#)

## Set Page Level Security for Family Groups Contacts

### StudentInformation – Management – District Administration – District Options

The **District Options** screen lets you control page level security on the **Family Groups Contacts** tab.

1. In the **Select a method to edit Family Group Contacts** section, select one of the following options:
  - **Allow edits per school** – Users can only add or remove contacts for students in the family group who are within the building in context. Contacts check boxes for students in other buildings are disabled.
  - **Allow edits per district** – All contacts check boxes are enabled, and users can add or edit contacts for all students in the family group in the district.
2. Click **Save**.

The screenshot shows the 'District Options' screen. At the top, a breadcrumb trail reads 'StudentInformation > Management > District Administration > District Options'. Below this is the title 'District Options' and a subtitle 'From this screen, you can display and change District Options.' The main content area is divided into three sections:

- Select a method to assign a Family Courier:** This section contains three radio buttons: 'No Family Courier assignment' (selected), 'Assign Family Courier to youngest family member', and 'Assign Family Courier to oldest family member'.
- Select grade levels that will be excluded from being a family group courier:** This section features a 'Grade' label and two list boxes. The left list box contains '01 - 01', '02 - 02', '03 - 03', and '04 - 04'. The right list box is empty. Blue arrows indicate the ability to move items between the two boxes.
- Select a method to edit Family Group Contacts:** This section contains two radio buttons: 'Allow edits per school' (selected) and 'Allow edits per district'.

At the bottom left of the form is a 'Save' button.

Set Page Level Security on for Family Groups Contacts

## Family Groups Wizard

### Home – Management – District Administration – Family Groups Wizard

The **Family Groups Wizard** guides you 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.

#### **Create Family Groups with the Family Groups Wizard**

**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.)

1. On the **Family Groups Wizard** screen, in the **Matching Criteria** area, select the criteria by which you want StudentInformation to match the students to create a family group.
2. Select one of the following options:
  - **Build groups with single and multiple students** – Creates a family group for a single student if StudentInformation does not find another with matching information.
  - **Build only groups with multiple students** – Creates only groups where two or more students have matching information.
  - **Add Students to existing groups** – Searches existing family groups based on your chosen criteria and attempts to match students who are not yet included in the group.
  - **Reassign Courier based on Family Courier District Policy** – Reassigns the courier in all family groups based on the school district's courier policy. See "[Set District Courier Policy.](#)"
3. If you want to delete all of the existing groups in the district, select **Remove existing groups in the district**.

**Note:** This option is only available for users with delete access to this screen.



**IMPORTANT:** If you select this option, all of the currently existing family groups in the district are deleted. Ensure that you do not have any existing family groups that you want to keep before selecting this option.

**Selecting Matching Criteria**

4. Click **Next**.

**Selection Summary on the Family Groups Wizard**

5. On the **Selection Summary** tab, review the criteria you selected, and then click **Next**.

StudentInformation matches students based on the criteria you selected and creates the family groups. Once the process is complete, the created family groups display on the **Display Groups** tab.

StudentInformation > Management > District Administration > Family Groups Wizard

### Family Groups Wizard

From this screen, you can run a Wizard to assist in the creation of Family Groups for your district.

General Selection Summary Display Groups

Save

Family Group Name:  Search

Student is courier for family group

Number of Family Groups Per Page: 10

<< First < Previous 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 ... Next > Last >> 473 FamilyGroups Found

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family Group	Description	Students In Group
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ABBOTT	ABBOTT Family Group on 3005 ABBOTT Road	ABBOTT CLINTON ABBOTT FERNANDO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ACEVEDO	ACEVEDO Family Group on 6770 W Snowville Rd	ACEVEDO VANESSA
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ACEVEDO	ACEVEDO Family Group on 256 ACEVEDO Road	ACEVEDO MICHAEL
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ACEVEDO	ACEVEDO Family Group on 256 ACEVEDO Road	ACEVEDO KRISTEN
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ADKINS	ADKINS Family Group on 1297 ADKINS Road	ADKINS HENRY
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ADKINS	ADKINS Family Group on 1297 ADKINS Road	ADKINS DORA
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AGUILAR	AGUILAR Family Group on 4194 AGUILAR Road	AGUILAR DOLORES AGUILAR NELLIE
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ALEXANDER	ALEXANDER Family Group on 6659 ALEXANDER Road	ALEXANDER TIFFANY
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ALEXANDER	ALEXANDER Family Group on 6659 ALEXANDER Road	ALEXANDER MAE ALEXANDER SHANE ALEXANDER SHELLY
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ANDERSON	ANDERSON Family Group on 7741 ANDERSON Road	ANDERSON BENJAMIN

< Back Save

#### Created Family Groups on the Family Groups Wizard

6. From the **Display Groups** tab, you can perform the following tasks:

- Delete a family group by clicking .
- Edit a family group as described in [“Modify Groups in Family Groups Wizard.”](#)

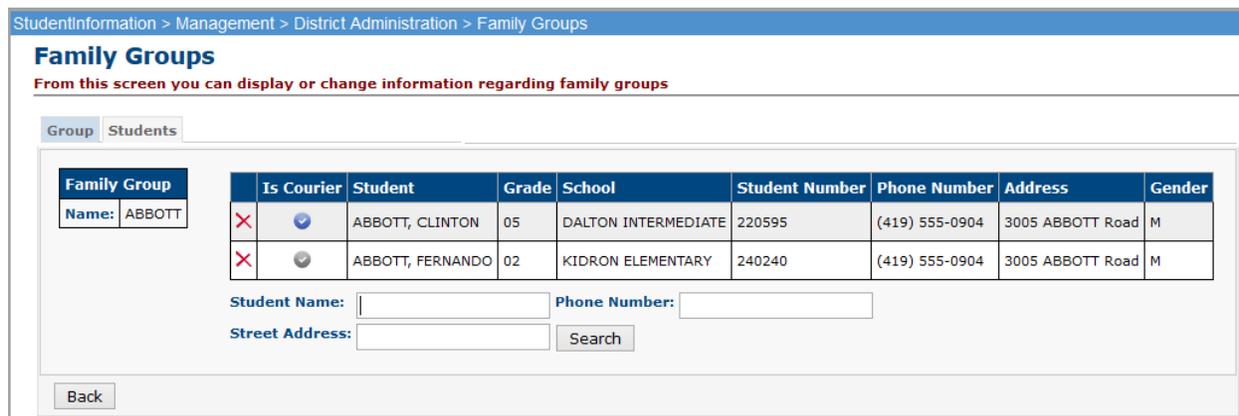
7. Save the family group(s) you want to keep:

- To save one or more of the family groups, click the check box next to the family group(s) you want to save, and then click **Save**.
- To save all of the family groups on the current page, click the check box in the table heading to select all of the family groups, and then click **Save**.

## Modify Groups in Family Groups Wizard

1. On the **Family Groups Wizard** screen, click  next to the family group you want to modify.

On the **Family Groups** maintenance screen, the **Students** tab displays.



StudentInformation > Management > District Administration > Family Groups

### Family Groups

From this screen you can display or change information regarding family groups

Group: **Students**

Family Group	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender
Name: ABBOTT	<input type="checkbox"/>	ABBOTT, CLINTON	05	DALTON INTERMEDIATE	220595	(419) 555-0904	3005 ABBOTT Road	M
	<input checked="" type="checkbox"/>	ABBOTT, FERNANDO	02	KIDRON ELEMENTARY	240240	(419) 555-0904	3005 ABBOTT Road	M

Student Name:  Phone Number:

Street Address:

### Editing a Family Group

2. Perform one of the following actions to change the students assigned to the family group:
  - Click  in the row of a student to remove that student from the family group.
  - Click  in the row of a student to assign or remove that student as the courier for the family group. The check box for the student who is assigned as the courier displays blue.
3. To add additional students to the group:
  - a. Search for a student you want to add to this group by entering any of the following values, and then click **Search**:
    - Enter all of the student's last name in the **Student Name** field. If you want to search using part of the student's name, type "\*" to indicate a wildcard search. For example, to return all the students with a last name that starts with s, type **s\***.
    - Enter the student's phone number in the **Phone Number** field. You must type all 10 digits (dashes and parentheses are not required).
    - Enter all or part of the student's street address in the **Street Address** field.

The search results display at the bottom of the screen.

StudentInformation > Management > District Administration > Family Groups

### Family Groups

From this screen you can display or change information regarding family groups

Group | Students

Family Group	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender
Name: ABBOTT	<input checked="" type="checkbox"/>	ABBOTT, CLINTON	05	DALTON INTERMEDIATE	220595	(419) 555-0904	3005 ABBOTT Road	M
	<input checked="" type="checkbox"/>	ABBOTT, FERNANDO	02	KIDRON ELEMENTARY	240240	(419) 555-0904	3005 ABBOTT Road	M

Student Name:  Phone Number:

Street Address:

Add Selected Students

<input type="checkbox"/>	FirstName ^	LastName	MiddleName	Grade	Student Number	Phone Number	Address	BirthDate	Gender	Family Groups
<input type="checkbox"/>	KRISTEN	ACEVEDO		03	230340	(419) 555-0182	256 ACEVEDO Road	05/28/2004	F	
<input type="checkbox"/>	MICHAEL	ACEVEDO		KG	260240	(419) 555-0284	256 ACEVEDO Road	05/09/2008	M	
<input type="checkbox"/>	VANESSA	ACEVEDO		12	140580	(419) 555-5132	6770 W Snowville Rd	08/12/1995	F	

#### Search Results on the Family Groups Screen

- b. Click the check box in the row of the student(s) you want to add to the family group, or click the box in the heading row of the grid to select all of the students.
- c. When you have selected all of the applicable students, click **Add Selected Students**.

The students you selected display in the grid on the **Students** tab.

StudentInformation > Management > District Administration > Family Groups

### Family Groups

From this screen you can display or change information regarding family groups

Group | Students

Family Group	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender
Name: ABBOTT	<input checked="" type="checkbox"/>	ABBOTT, CLINTON	05	DALTON INTERMEDIATE	220595	(419) 555-0904	3005 ABBOTT Road	M
	<input checked="" type="checkbox"/>	ABBOTT, FERNANDO	02	KIDRON ELEMENTARY	240240	(419) 555-0904	3005 ABBOTT Road	M
	<input checked="" type="checkbox"/>	ACEVEDO, KRISTEN	03	DALTON ELEMENTARY	230340	(419) 555-0182	256 ACEVEDO Road	F

Student Name:  Phone Number:

Street Address:

#### Selected Student on the Family Groups Screen

4. To change the name of the family group, click the **Group** tab, and then perform one of the following actions to change the basic information for the family group:
  - Change the short name for the family group in the **Name** field.
  - Change the long description for the family group in the **Description** field.
5. When you are done modifying the family group, click **Save**.

The **Family Groups Wizard** screen displays with the changes you made to the family group.

## Student Alert Screens

StudentInformation has several Alert capabilities that allow the appropriate school personnel to view at a glance if there is a “situation” that they need to be alerted to, for the selected student. When alerts have been added for the selected student, an applicable icon will display in the context area as shown below.

The screenshot shows the Student Information system interface. At the top, there are navigation tabs for Home, EZ Query, SIS, and EMIS. Below this is a header for the student profile: SPRAT, JACK JOSEPH. The profile includes fields for ID (00005004), Gender (M), Grade (11), Counselor, Homeroom (A108), and Status (A). A red circle highlights a set of alert icons: a plus sign, a wheelchair, a dollar sign, and a clock. Below the header, there is a section for student details, including name, birthdate, parent/guardian information, street address, city, state, zip, phone number, and academic locker information. A large box on the right side of the profile states "NO PHOTO AVAILABLE". At the bottom, there are three buttons: View Student Schedule, View All Contact Information, and View Locker Information.

### Student Alert Icons

Available Alerts in StudentInformation include:

-  – Custody
-  – Medical
-  – Disability
-  – Miscellaneous
-  – Outstanding Fees

### Student Alerts and Student Promotion/Bulk Enrollment

Custody, Medical, Disability and Miscellaneous Alerts will copy to the new school year as part of Student Promotion and Bulk Enrollment shown in the following table.

Alert	No Ending Date	End Date in prev school yr	End Date in future school year
<b>Custody</b>	Yes, will copy	Yes, will copy	Yes, will copy

<b>Disability</b>	Yes, will copy	Yes, will copy	Yes, will copy
<b>Medical</b>	Yes, will copy	Yes, will copy	Yes, will copy
<b>Miscellaneous</b>	Yes, will copy	No, does not copy	Yes, will copy

## Custody Alert

### Navigation: Home – SIS – Student – Custody Alert

Custody Alerts may be designated for individual students as needed.

<b>DASL</b>	SPRAT, JACK JOSEPH	ID: 00005004	Counselor:	DASL HIGH SC
<b>DASL User</b>	DASL HIGH SCHOOL	Gender: M	Homeroom: A108	[Find Students]
	2004-2005 (8/24/2004 - 6/1/2005)	Grade: 11	Status: A	

Home » SIS » Student » Custody Alert

### Custody Alert

From this screen, you can display, add, change and delete custody alerts for a students.

Add Custody Alert

	Date	Alert Description	Priority	Starting Date	Ending Date	Author	Critical	Active
	Oct 24, 2004	Jack may not leave school with anyone except his mother.	1	Oct 01, 2004	Nov 05, 2004	DASL.User		

Show Active Only

**Sorting** – You may sort by any column (Date, Alert Description, Priority, Starting Date, Ending Date, Author, Critical, Active) in ascending or descending order by clicking on the column header

– Delete this Custody Alert.

– Edit this Custody Alert.

– This identifies the Custody Alert as a critical alert.

– Active Custody Alert.

– Inactive Custody Alert.

**Show Active Only** – If checked, will show only active Custody Alerts; if not checked, will show both active and inactive Custody Alerts.

**Add Custody Alert** – Add a new Custody Alert.

## Add/Edit/Delete Custody Alert

Navigation: Home – SIS – Student – Custody Alert

<b>DASL</b>		<a href="#">SPRAT, JACK JOSEPH</a>	ID: 00005004	Counselor:	DASL HIGH SC	
<b>DASL User</b>		DASL HIGH SCHOOL	Gender: M	Homeroom: A108	[Find Students]	
		2004-2005 (8/24/2004 - 6/1/2005)	Grade: 11	Status: A	+ ♿ 🗳️ 🌐	

Home » SIS » Student » Custody Alert

### Custody Alert

From this screen, you can display, add, change and delete custody alerts for a students.

	Date	Alert Description	Priority	Starting Date	Ending Date	Author	Critical	Active
✕ ✎	Oct 24, 2004	Jack may not leave school with anyone except his mother.	1	Oct 01, 2004	Nov 05, 2004	DASL.User	⚠️	💡

Show Active Only

### Editing a Custody Alert

Do one of the following:

- Click **Add Custody Alert** to add a new Custody Alert.
- Click ✎ to edit a specific Custody Alert.
- Click ✕ to delete a specific Custody Alert.

<b>DASL</b>		<a href="#">SPRAT, JACK JOSEPH</a>	ID: 00005004	Counselor:	DASL HIGH SC	
<b>DASL User</b>		DASL HIGH SCHOOL	Gender: M	Homeroom: A108	[Find Students]	
		2004-2005 (8/24/2004 - 6/1/2005)	Grade: 11	Status: A	+ ♿ 🗳️ 🌐	

Home » SIS » Student » Custody Alert

### Custody Alert

From this screen, you can display, add, change and delete custody alerts for a students.

**Date:**

**Priority:**  ✎

**Starting Date:**  ▼

**Ending Date:**  ▼

**Custody Alert Description:**

**Critical:**

**Is Active:**

### Add/Edit Custody Alert Screen

**Date** – Non-modifiable current date will be used.

**Priority** (required) – Priority will be used when more than one alert exists. Highest priority will be listed first on the screen. Valid range of 1-10 with 10 being the highest priority.

**Starting Date** (optional) – Date this custody alert will begin.

**Ending Date** (optional) – Date alert will end if applicable.

**Custody Alert Description** (required) – Open text area for a description of the custody alert.

**Critical** (optional) – Custody may be marked as critical so that the applicable icon is displayed.

**Is Active** – By default custody alerts are set to active. If ending dates are specified, alerts become inactive when that date passes.

**Save**– Will save Custody Alert information and return to Custody Alert listing where you will see the updated information.

**Save and New** – Will save new Custody Alert information and return to Custody Alert Maintenance – Add New Custody Alert.

**Cancel**– Will clear out data already entered and return to Custody Alert listing.

**Ok** – Delete the Custody Alert.

**Cancel** – Do Not Delete the Custody Alert.

**Please Note:** A Custody Alert is not actually deleted – it is made Inactive as notated by the “dim” Active code. Show both Active and Inactive Custody Alert by using Show Active Only.

To activate an Inactive Custody Alert, see “

Add/Edit/Delete Custody Alert.”

## Disability Alert

Navigation: Home – SIS – Student – Disability Alert

Disability Alerts may be designated for individual students as needed.

Home	SIS	Teacher Menu	EZ Query	Management	EMIS	My Account
<b>DASL</b>	<a href="#">Student46142, BRITTANY (BRITTANY)</a>	ID: 00010839	Counselor:	[X]		
Amy Recker	OTTAWA-GLANDORF HIGH SCHOOL 2008-2009	Gender: F	Homeroom: IN19	[Accessibility Icon]		
	Calendar: DFLT	Grade: 11	Status: A			

Home » SIS » Student » Disability Alert

### Disability Alert

From this screen, you can display, add, change and delete Disability alerts for a student.

	Date	Alert Description	Priority	Starting Date	Ending Date	Author	Active
<input type="checkbox"/>	May 28, 2009	Loss of Hearing in right ear	1	Aug 20, 2007		Amy	

Show Active Only

### Disability Alert Screen

**Sorting** – You may sort by any column (Date, Alert Description, Priority, Starting Date, Ending Date, Author, Active) in ascending or descending order by clicking on the column header.

 – Delete this Disability Alert.

 – Active Disability Alert.

 – Edit this Disability Alert.

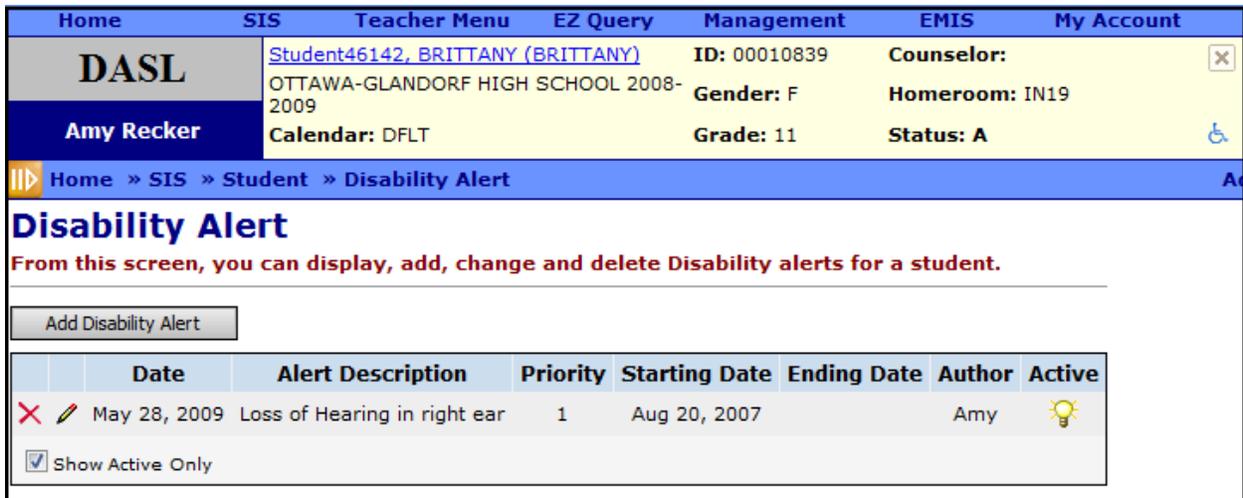
 – Inactive Disability Alert.

**Show Active Only** – If checked, will show only active Disability Alerts; if not checked, will show both active and inactive Disability Alerts.

**Add Disability Alert** – Add a new Disability Alert.

### **Add/Edit/Delete Disability Alert**

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



The screenshot shows the DASL (Disability Alert System) interface. At the top, there are navigation tabs: Home, SIS, Teacher Menu, EZ Query, Management, EMIS, and My Account. Below these, the student's name is displayed as **DASL** and **Amy Recker**. The student's information includes: **Student46142, BRITTANY (BRITTANY)**, **ID: 00010839**, **Counselor:**, **OTTAWA-GLANDORF HIGH SCHOOL 2008-2009**, **Gender: F**, **Homeroom: IN19**, **Calendar: DFLT**, **Grade: 11**, and **Status: A**. Below the navigation tabs, there is a breadcrumb trail: **Home » SIS » Student » Disability Alert**. The main heading is **Disability Alert**, followed by the instruction: **From this screen, you can display, add, change and delete Disability alerts for a student.** There is an **Add Disability Alert** button. Below this is a table with the following columns: **Date**, **Alert Description**, **Priority**, **Starting Date**, **Ending Date**, **Author**, and **Active**. The table contains one row: **May 28, 2009**, **Loss of Hearing in right ear**, **1**, **Aug 20, 2007**, **Amy**, and **Active** (indicated by a lightbulb icon). Below the table, there is a checkbox labeled **Show Active Only** which is checked.

### **Editing a Disability Alert**

**Do one of the following:**

- Click **Add Disability Alert** to add a new Disability Alert
- Click  to edit a specific Disability Alert.
- Click  to delete a specific Disability Alert.

Home	SIS	Teacher Menu	EZ Query	Management	EMIS	My Account
<b>DASL</b>		Student46142, BRITTANY (BRITTANY)		ID: 00010839	Counselor: [X]	
Amy Recker		OTTAWA-GLANDORF HIGH SCHOOL 2008-2009		Gender: F	Homeroom: IN19	
		Calendar: DFLT		Grade: 11	Status: A	
Home » SIS » Student » Disability Alert						
<b>Disability Alert</b>						
From this screen, you can display, add, change and delete Disability alerts for a student.						
Date:	6/9/2009					
Priority:	1 [v] [lightning bolt]					
Starting Date:	[ ] [v]					
Ending Date:	[ ] [v]					
Disability Alert Description:	[ ] [lightning bolt]					
Is Active:	<input checked="" type="checkbox"/>					
<input type="button" value="Save"/> <input type="button" value="Save and New"/> <input type="button" value="Cancel"/>						

#### Add/Edit Disability Alert Screen

**Date** – Non-modifiable current date will be used.

**Priority** (required) – Priority will be used when more than one alert exists. Highest priority will be listed first on the screen. Valid range of 1-10 with 10 being the highest priority.

**Starting Date** (optional) – Date this Disability alert will begin.

**Ending Date** (optional) – Date the Disability alert will end if applicable.

**Disability Alert Description** (required) – Open text area for description of the alert.

**Is Active** – By default alerts are set to active. If ending dates are specified, alerts become inactive when that date passes.

**Save** – Will save Disability Alert information and return to Disability Alert listing where you will see the updated information.

**Save and New** – Will save new Disability Alert information and return to Disability Alert Maintenance – Add New Disability Alert.

**Cancel** – Will clear out data already entered and return to Disability Alert listing.

**Please Note:** A Disability Alert is not actually deleted – it is made Inactive as notated by the “dim” Active code. Show both Active and Inactive Disability alerts by using **Show Active Only**.

## Miscellaneous Alert

### Navigation: Home – SIS – Student – Miscellaneous Alert

Miscellaneous Alerts may be designated for individual students as needed.

<b>DASL</b>	<a href="#">SPRAT, JACK JOSEPH</a>	ID: 00005004	Counselor:	<b>DASL HIGH SCHOOL</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: M Grade: 11	Homeroom: A108 Status: A	[Find Students] Find

Home » SIS » Student » Miscellaneous Alerts Advanced

### Miscellaneous Alerts

From this screen, you can display, add, change and delete data pertaining to the miscellaneous alerts of students.

	Date	Alert Description	Priority	Starting Date	Ending Date	Author	Active
 	Sep 10, 2004	Jack sprained his ankle and will need help carrying his books to class for two weeks.	1	Sep 10, 2004		noacsc.christine	

Show Active Only

### Miscellaneous Alerts

**Sorting** – You may sort by any column (Date, Alert Description, Priority, Starting Date, Ending Date, Author, Active) in ascending or descending order by clicking on the column header.

 – Delete this Miscellaneous Alert	 – Edit this Miscellaneous Alert
 – Active Miscellaneous Alert	 – Inactive Miscellaneous Alert

**Show Active Only**– If checked, will show only active Miscellaneous Alerts; if not checked, will show both active and inactive Miscellaneous Alerts.

**Add Miscellaneous Alert** – Add a new Miscellaneous Alert.

### Add/Edit/Delete Miscellaneous Alert

### Navigation: Home – SIS – Student – Miscellaneous Alert

<b>DASL</b>	<a href="#">SPRAT, JACK JOSEPH</a>	ID: 00005004	Counselor:	<b>DASL HIGH SCHOOL</b>
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: M Grade: 11	Homeroom: A108 Status: A	[Find Students] Find

Home » SIS » Student » Miscellaneous Alerts Advanced

### Miscellaneous Alerts

From this screen, you can display, add, change and delete data pertaining to the miscellaneous alerts of students.

	Date	Alert Description	Priority	Starting Date	Ending Date	Author	Active
 	Sep 10, 2004	Jack sprained his ankle and will need help carrying his books to class for two weeks.	1	Sep 10, 2004		noacsc.christine	

Show Active Only

### Miscellaneous Alerts Maintenance Screen

Do one of the following:

- Click **Add Miscellaneous Alert** to add a new Miscellaneous Alert.
- Click  to edit a specific Miscellaneous Alert.
- Click  to delete a specific Miscellaneous Alert.

<b>DASL</b>	<a href="#">SPRAT, JACK JOSEPH</a>	ID: 00005004	Counselor:
<b>DASL User</b>	DASL HIGH SCHOOL 2004-2005 (8/24/2004 - 6/1/2005)	Gender: M Grade: 11	Homeroom: A108 Status: A

Home » SIS » Student » Miscellaneous Alerts

### Miscellaneous Alerts

From this screen, you can display, add, change and delete data pertaining to the miscellaneous alerts of students.

Date:

Priority:  ⚡

Starting Date:

Ending Date:

Miscellaneous Alert Description:

Is Active:

Save Save and New Cancel

#### Add/Edit Miscellaneous Alerts Screen

**Date** – Non-modifiable current date will be used.

**Priority** (required) – Priority will be used when more than one alert exists. Highest priority will be listed first on the screen. Valid range of 1-10 with 10 being the highest priority.

**Starting Date** (optional) – Date this Miscellaneous Alert will begin.

**Ending Date** (optional) – Date the Miscellaneous Alert will end if applicable.

**Miscellaneous Alert Description** (required) – Open text area for description of the alert.

**Is Active** – By default alerts are set to active. If ending dates are specified, alert becomes inactive when those dates pass.

**Save** – Will save new Miscellaneous Alert information and return to Miscellaneous Alert listing where you will see the updated information.

**Save and New** – Will save new Miscellaneous Alert information and return to Miscellaneous Alert Maintenance – Add New Miscellaneous Alert.

**Cancel** – Will clear out data already entered and return to Miscellaneous Alert listing.

**Note:** A Miscellaneous Alert is not actually deleted – it is made Inactive as notated by the “dim” Active code. Show both Active and Inactive Miscellaneous Alerts by using Show Active Only.

To activate an Inactive Miscellaneous Alert, see [“Add/Edit/Delete Miscellaneous Alert.”](#)

## Medical Alert

Navigation: Home – SIS – Student – Medical – Medical Alert

Medical Alerts may be designated for individual students as needed.

**DASL** SPRAT, JACK JOSEPH ID: 00005004 Counselor: DASL HIGH SCHOOL  
 DASL User: DASL HIGH SCHOOL Gender: M Homeroom: A108  
 2004-2005 (8/24/2004 - 6/1/2005) Grade: 11 Status: A

Home » SIS » Student » Medical » Medical Alerts

**Medical Alerts**  
 From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Add Medical Alert

Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
Oct 24, 2004	Jack needs his asthma medicine twice a day during the month of October	1	Oct 01, 2004	Nov 04, 2004	DASL User	⚠	💡

Show Active Only

### Medical Alerts

**Note:** See *ProgressBook StudentInformation Student Medical Guide* for details on setting up a medical alert.

## Outstanding Fees Alert

Navigation: Home – SIS – Student – Fees

**DASL** EYE, CORY ROBERT ID: 006001 Counselor: DASL HIGH SCHOOL  
 DASL User: DASL HIGH SCHOOL Gender: M Homeroom: A105  
 2004-2005 (8/24/2004 - 5/27/2005) Grade: 10 Status: A

Home » SIS » Student » Fees

**Student Open Fees** I want to...  
 This page lists all of the student's fees that have a balance or credit due

Total of Fees Owed: \$235.00

Fee Type	Fee Code	Date	Course	Section	Description	Amount	School Code
Misc Fee	park	Mar 15, 2005			parking fee	\$5.00	DAHS
Misc Fee	23	Mar 15, 2005			HM EC BK	\$5.00	DAHS
Misc Fee	39	Mar 15, 2005			VICA FINE	\$5.00	DAHS
Misc Fee	26	Mar 15, 2005			CONS I FEE	\$5.00	DAHS
Misc Fee	99	Mar 15, 2005			PY FEE	\$5.00	DAHS
Misc Fee	34	Mar 15, 2005			TRANS CAREER EX	\$5.00	DAHS
Misc Fee	27	Mar 15, 2005			CONS I VICA	\$5.00	DAHS
Misc Fee	38	Mar 15, 2005			FUNDRAISER FINE	\$5.00	DAHS

### Outstanding Fees Alerts

Clicking the 💰 icon will take the user to the Student Open Fees Screen.

You can also access this screen by selecting “View/apply fees” in the “I want to...” drop-down list on either the **View Profile** screen or in the student in context area of the masthead.

Home » SIS » Student » View Profile

**EMIS**

**EZ Query**

**ITC**

**Local**

**Management**

**My Account**

**SIS**

**Assessment**

**Attendance**

**Course History**

**Discipline**

**Fees**

**Graduation / Eligibility**

**Marks**

**Medical**

**Registration Wizard**

**Scheduling**

**School**

**Student**

- Admission History
- Assessment
- Attendance
- Community Service
- Contacts Summary
- Course History
- Custody Alert
- Disability Alert
- Discipline
- Edit Memberships
- Edit Student Profile
- EMIS Situation History
- **Fees**

**Aguirre, Heather**

From this screen, you can view the student's p

**Address:** 6770 W. Snowville Rd., Brecksville, OH 44141

**Phone Number:**  Unlisted

**Email Address:**

**Parent/Guardian:** None specified

**Student Status:** ACTIVE RES

**Birthdate:** 1/20/1997

**Ethnicity:**

**Program:**

**Academic Locker:**

**Admission History:** 3/21/2013 - Enrolled

**EMIS Situation:** 96 - non-res foster placed at your district

**Percent of Time:** 100%

**Report to EMIS:**

**Effective Date:** 3/21/2013

**Reporting Period:** (K)

Student is courier for family group

Family Group	Description	Students In Group
Aguirre Family	Aguirre Family at 6770 W. Snowville Rd., Brecksville.	AGUIRRE, BETH DALTON INTERMEDIATE Aguirre, Heather DALTON HIGH SCHOOL <input checked="" type="checkbox"/> AGUIRRE, RAUL KIDRON ELEMENTARY

### View a Student's Fees from the View Profile Screen

NO PHOTO AVAILABLE **Able, Anna**  
790542 / 10 / A

Homeroom: 7-130  
Counselor: GREER, JARED

I Want To...

- Edit This Student's Profile
- View/Edit Full Schedule
- **View/Apply Fees**
- View The Medical Health Log
- View This Student's Memberships
- View Today's Schedule
- View Contacts
- View Lockers
- View A Student's Family Group
- View A Student's Discipline Incidents

### View a Student's Fees from the Masthead

**Note:** For more information about Student Open Fees, see *ProgressBook StudentInformation Fees Guide*.

## Student Note Maintenance

### Navigation: Home – SIS – Student – Notes

Student Notes screen will be used to add modify or delete notes pertaining to an individual student.

### Student Alerts and Student Promotion/Bulk Enrollment

Student Notes will copy to the new school year as part of Student Promotion and Bulk Enrollment.

<b>DASL</b>	<a href="#">DIAZ, KEISHA</a>	<b>ID:</b> 00000040	<b>Counselor:</b>
<b>DASL User</b>	DASL ELEMENTARY SCHOOL 2005-2006 (8/23/2005 - 5/25/2006)	<b>Gender:</b> F	<b>Homeroom:</b>
		<b>Grade:</b> 01	<b>Status:</b> A

Home » SIS » Student » Notes

### Student Notes Maintenance

From this screen, you can display, add, change and delete student notes.

Add Student Note

	Date ▾	Author	Note	Private
 	03/22/2006 09:54 AM	User, DASL	Keisha will be on vacation with her parents from 3/31/06 through 4/4/06.	<input type="checkbox"/>

#### Student Notes Maintenance Screen

**Sorting** – You may sort by any column (Date, Author, Note, Private) in ascending or descending order by clicking on the column header.

 – Delete this Student Note.

 – Edit this Student Note.

**Add Student Note** – Add a new Student Note.

### Add/Edit/Delete Student Note

### Navigation: Home – SIS – Student – Notes

<b>DASL</b>	<a href="#">DIAZ, KEISHA</a>	<b>ID:</b> 00000040	<b>Counselor:</b>
<b>DASL User</b>	DASL ELEMENTARY SCHOOL 2005-2006 (8/23/2005 - 5/25/2006)	<b>Gender:</b> F	<b>Homeroom:</b>
		<b>Grade:</b> 01	<b>Status:</b> A

Home » SIS » Student » Notes

### Student Notes Maintenance

From this screen, you can display, add, change and delete student notes.

Add Student Note

	Date ▾	Author	Note	Private
 	03/22/2006 09:54 AM	User, DASL	Keisha will be on vacation with her parents from 3/31/06 through 4/4/06.	<input type="checkbox"/>

Do one of the following:

- Click **Add Student Note** to add a new Student Note.
- Click  to edit a specific Student Note.
- Click  to delete a specific Student Note.

<b>DASL</b>	<a href="#">DIAZ, KEISHA</a>	ID: 00000040	Counselor:
<b>DASL User</b>	DASL ELEMENTARY SCHOOL	Gender: F	Homeroom:
	2005-2006 (8/23/2005 - 5/25/2006)	Grade: 01	Status: A

Home » SIS » Student » Notes

### Student Notes Maintenance

From this screen, you can display, add, change and delete student notes.

Note:

Private:

Save Save and New Cancel

**Note** (required) – Up to 1,000 characters of open text may be entered for a Student Note.

**Private** (optional) – Yes or No; Check box if you wish the note to be viewable only by the author of the note.

**Save** – Will save new note and return to Student Note listing where you will see the updated information.

**Save and New** – Will save the new student note and return to Notes Maintenance – Add New Note.

**Cancel** – Will clear out data already entered.

## Student Miscellaneous Data

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

Miscellaneous data is used to track any other ad hoc student miscellaneous data. It can be configured as needed.

### Filter by Group

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

**Filter By Group** – Select a Miscellaneous Group from the drop-down menu.

<b>DASL</b>	<u>CONTRARY, MARY M.</u>	<b>ID:</b> 00005001	<b>Counselor:</b>	<input type="button" value="X"/>
<b>DASL User</b>	DASL HIGH SCHOOL	<b>Gender:</b> F	<b>Homeroom:</b> A107	
	2004-2005 (8/24/2004 - 6/1/2005)	<b>Grade:</b> 11	<b>Status:</b> A	\$

Home » SIS » Student » Misc. Data

### Student Miscellaneous Data

From this screen, you can display and change miscellaneous data for a students.

Filter By Groups:

- select a group --
- ACHIEVEMENT TEST scores
- ACHIEVEMENT TEST SCORES -2ND
- Achievement tst - 2nd attempt
- ACHIEVENENT TEST scores
- ACT SCORES
- ACT SCORES - 2nd attempt
- ACT SCORES - 3rd attempt
- ACT SCORES - 4th attempt
- ADDITIONAL STUDENT INFORMATION
- ADD-ON GPA SCREEN

### Student Miscellaneous Data Screen

The screen for the selected Miscellaneous Group with all the Miscellaneous Data Definitions will then display for input. See the following example.

Home	SIS	Teacher Menu	EZ Query	Management	EMIS	My
<b>DASL</b>	XX High School 2007-2008	<b>ID:</b> 0000	<b>Counselor:</b>	<input type="button" value="X"/>		
<b>Jennifer Simon</b>	Calendar: 1	<b>Gender:</b> F	<b>Homeroom:</b> H1			
		<b>Grade:</b> 12	<b>Status:</b> A			<input type="button" value="+"/>

Home » SIS » Student » Misc. Data

### Student Miscellaneous Data

From this screen, you can display and change miscellaneous data for a students.

Filter By Groups:

Definition	Last Modified
<b>Item:</b> Writing Date MM/YY	
<b>Value:</b> <input type="text" value="5"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Writing Score	
<b>Value:</b> <input type="text" value="4"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Reading Date MM/YY	
<b>Value:</b> <input type="text" value="9"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Reading Score	
<b>Value:</b> <input type="text" value="6"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Math Date MM/YY	
<b>Value:</b> <input type="text" value="12"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Math Score	
<b>Value:</b> <input type="text" value="8"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Citznship Date MM/YY	
<b>Value:</b> <input type="text" value="7"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Citznship Score	
<b>Value:</b> <input type="text" value="5"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Science Date MM/YY	
<b>Value:</b> <input type="text" value="7"/>	Jennifer Simon On 10/22/2007 2:13:00 PM
<b>Item:</b> Science Score	
<b>Value:</b> <input type="text" value="10"/>	Jennifer Simon On 10/22/2007 2:13:00 PM

### Display Selected Student Miscellaneous Data

**Filter By Groups** – Select the Miscellaneous group from the drop-down list that you wish to add information to, for the selected student.

**Save** – Will save current Miscellaneous Data and return to Student Miscellaneous Data filter by group screen.

**Cancel** – Will clear out data already entered and return to Student Miscellaneous Data filter by group screen.

### Add/Edit Student Miscellaneous Data

#### Navigation: Home – SIS – Student – Misc. Data

Select a Miscellaneous Group from drop-down menu, to add student Miscellaneous Data.

<b>DASL</b>	<u>CONTRARY, MARY M.</u>	ID: 00005001	Counselor:
DASL User	DASL HIGH SCHOOL	Gender: F	Homeroom: A107
	2004-2005 (8/24/2004 - 6/1/2005)	Grade: 11	Status: A

Home » SIS » Student » Misc. Data

### Student Miscellaneous Data

From this screen, you can display and change miscellaneous data for a students.

Filter By Groups: -- select a group --

- select a group --
- ACHIEVEMENT TEST scores
- ACHIEVEMENT TEST SCORES -2ND
- Achievement tst - 2nd attempt
- ACHIEVENENT TEST scores
- ACT SCORES
- ACT SCORES - 2nd attempt
- ACT SCORES - 3rd attempt
- ACT SCORES - 4th attempt
- ADDITIONAL STUDENT INFORMATION
- ADD-ON GPA SCREEN

#### Select to the Group to Display on the Student Miscellaneous Data Screen

The screen for the selected Miscellaneous Group with all the Miscellaneous Data Definitions will then display for input. See example below.

Input the applicable data into each field.

**Filter By Groups** – Select the Miscellaneous group from the drop-down list that you wish to add information to, for the selected student.

**Save** – Will save current Miscellaneous Data and return to same Student Miscellaneous Data filter by group screen where you may select another group if desired.

**Cancel** – Will clear out data already entered and return to Student Miscellaneous Data filter by group screen.

## Student Counselor Assignment

**Navigation: Home – SIS – School – Counselors**

The Student Counselor Assignment screen will display students assigned to the selected counselor.



Home » SIS » School » Counselors

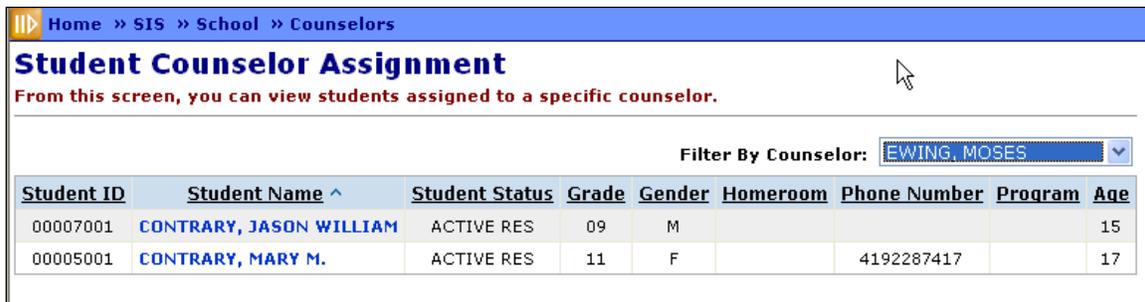
### Student Counselor Assignment

From this screen, you can view students assigned to a specific counselor.

Filter By Counselor: -- Select a Counselor --

**Student Counselor Assignment Screen**

**Filter by Counselor** (required) – Choose a counselor from the drop-down list. Counselors are identified with Job Function “counselor” on their Staff Member Schools record. Management – Security – View Staff Members – View/Edit Staff Member Schools tab. Job functions are School/School Year specific.



Home » SIS » School » Counselors

### Student Counselor Assignment

From this screen, you can view students assigned to a specific counselor.

Filter By Counselor: EWING, MOSES

Student ID	Student Name ^	Student Status	Grade	Gender	Homeroom	Phone Number	Program	Age
00007001	<a href="#">CONTRARY, JASON WILLIAM</a>	ACTIVE RES	09	M				15
00005001	<a href="#">CONTRARY, MARY M.</a>	ACTIVE RES	11	F		4192287417		17

**Students Assigned to Selected Counselor**

**Sorting** – You may sort by any column (Student ID, Student Name, Student Status, Grade, Gender, Homeroom, Phone Number, Program, Age) in ascending or descending order by clicking on the column header.

**Student Name** – You may click on the hyperlinked student name to go to the Student Profile.

---

## View-Only Student Profile

**Navigation: Home – SIS – Student – View Profile**

The view-only student profile displays basic student information and a photo (if available) of the selected student. From this screen there are several links to other areas within the StudentInformation application such as the student’s schedule, contact information, etc.

## ALBERT, JASON

I want to...

From this screen, you can view the student's profile.

**Address:** 6770 West Snowville Road  
Brecksville, OH 44141

**Phone Number:** (555) 555-5555  Unlisted

**Email Address:**

**Parent/Guardian:** CLEMENTS, JACOB  
H: (555) 555-5555  
W: (555) 555-5555  
M: (555) 555-5555



**Student Status:** ACTIVE RES

**Birthdate:** 3/24/2004

**Ethnicity:** White

**Program:**

**Academic Locker:**

**Admission History:** 8/1/2010 - Enrolled

**EMIS Situation:** 5 - Resident attending Full Time

**Percent of Time:** 100%

**Report to EMIS:**

**Effective Date:** 7/1/2012

**Reporting Period:** (K)

Student is courier for family group

Family Group	Description	Students In Group
Albert Family	6770 West Snowville Rd. Brecksville, OH 44141	ALBERT, CHARLENE KIDRON ELEMENTARY <input checked="" type="checkbox"/> ALBERT, JASON KIDRON ELEMENTARY

View Profile Screen

## Student Photographs

You can load student pictures into StudentInformation. Contact your ITC for more information. Use the following guidelines to determine the optimal photograph size for your application:

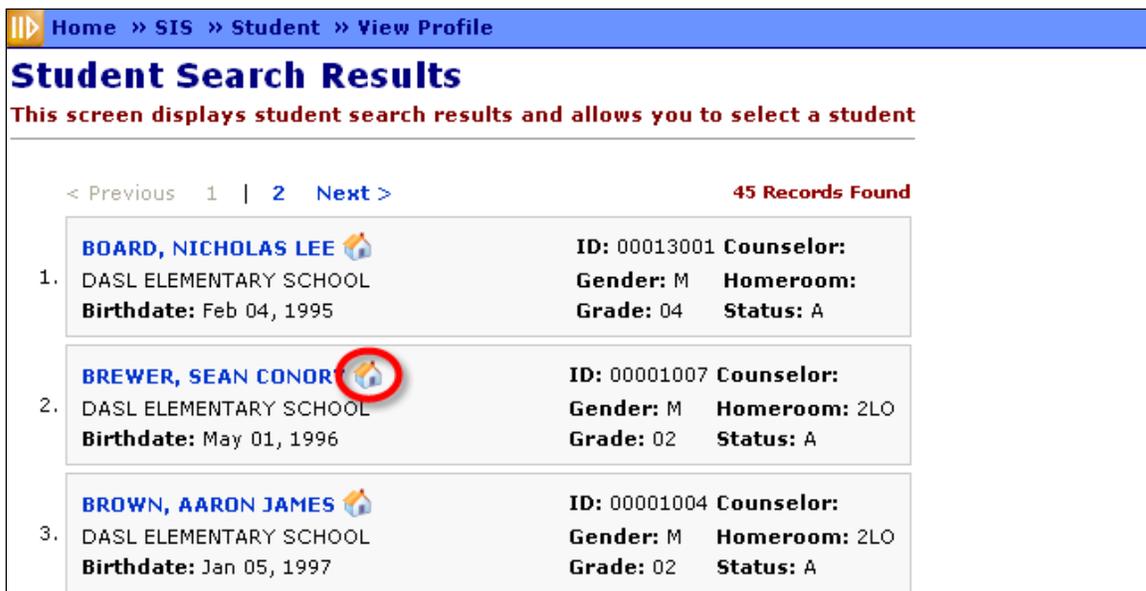
- The standard U.S. passport size photograph works well with StudentInformation.
- The second best photograph size is 200x200 pixels with a file size of 10 kilobytes or less. If you require rectangular photographs, the first dimension (width) can be less than the second (height).
- The maximum photograph size should not exceed 225x225 pixels with a maximum file size of 10 kilobytes.
- The minimum useful photograph size is 128x165 pixels with a file size of about 6 kilobytes.

## View Student Profile

### Navigation: Home – SIS – Student – View Profile

To get to the view-only student profile a student must first be selected. How to search for a student and select a student is explained in detail in the *ProgressBook StudentInformation Getting Started Guide*.

If you have performed a search and you have several students listed as shown in the example below, you need only click on the  icon to take you to that student's profile.



The screenshot shows a web interface for viewing student profiles. At the top, there is a navigation breadcrumb: Home >> SIS >> Student >> View Profile. Below this is a blue header with the text "Student Search Results" and a red sub-header: "This screen displays student search results and allows you to select a student".

Navigation controls include "< Previous 1 | 2 Next >" and "45 Records Found". The main content area displays a list of three students, each with a row of information:

Rank	Name	Address	Birthdate	ID	Gender	Grade	Counselor	Homeroom	Status
1.	BOARD, NICHOLAS LEE	DASL ELEMENTARY SCHOOL	Feb 04, 1995	00013001	M	04			A
2.	BREWER, SEAN CONOR	DASL ELEMENTARY SCHOOL	May 01, 1996	00001007	M	02		2LO	A
3.	BROWN, AARON JAMES	DASL ELEMENTARY SCHOOL	Jan 05, 1997	00001004	M	02		2LO	A

In the second row, the name "BREWER, SEAN CONOR" and the house icon next to it are circled in red, indicating the selected student.

### Student Search Results

Or if you already have a selected student in the context area of your StudentInformation screen, click on the student's name as shown below.

<a href="#">EYE, MAGNUM P.</a>	ID: 00004001	Counselor:	
DASL HIGH SCHOOL 2007-2008	Gender: M	Homeroom: A105	
Calendar: DFLT	Grade: 10	Status: A	

### Student Name Link in the Context Area

Either link will take you to the student's view-only profile.

## Student Context Information

### Navigation: Home – SIS – Student

The Context Area is the area in the StudentInformation header that will display when you have a student selected and you are on a student specific page, such as Student Attendance, Student Memberships, Student Profile, etc.

<a href="#">EYE, MAGNUM P.</a>	ID: 00004001	Counselor:	
DASL HIGH SCHOOL 2007-2008	Gender: M	Homeroom: A105	
Calendar: DFLT	Grade: 10	Status: A	

### Context Area in the StudentInformation Header – Newly Selected Student

The context area will display the student's name as a link, which can be clicked on to access that student's view-only profile. Other information such as gender, grade, homeroom, and any Alerts that the student may have been given, will all show in the context area.

When a NEW student is selected, the text in the context area will display as red text, as shown in the previous figure. If you continue accessing screens for the same student the text displays as black text, as shown in the following figure.

<a href="#">EYE, MAGNUM P.</a>	ID: 00004001	Counselor:	
DASL HIGH SCHOOL 2007-2008	Gender: M	Homeroom: A105	
Calendar: DFLT	Grade: 10	Status: A	

### Context Area in the StudentInformation Header – After Accessing Screens for Student

If there are alert icons in the context area the detailed information may be accessed by clicking on the appropriate icon. Each of these alerts has been explained earlier in this documentation. See the applicable section for each.

At any time, if you wish to clear the context area of any student data you may click the  icon. All information will be cleared from context area and the message "No Student is Currently Selected" will replace the student information. See the following image.

No Student is Currently Selected

### No Student in Context

## I want to... Drop-down List

Navigation: Home – SIS – Student – View Profile

Home » SIS » Student » View Profile

**AGUIRRE, BETH**

From this screen, you can view the student's profile, schedule, and other information.

**Address:** 6770 West Snowville Rd, Brecksville, OH 44130

**Phone Number:** (555) 555-5555

**Email Address:**

**Parent/Guardian:** VELAZQUEZ, JOHN  
H: (555) 555-5555  
W: (555) 555-5555  
M: (555) 555-5555

**Student Status:** ACTIVE RES

**Birthdate:** 1/16/2002

**Ethnicity:** White

**Program:**

**Academic Locker:**

**Admission History:** 8/13/2007 - Enrolled

**EMIS Situation:** 5 - Resident attending Full Time

**Percent of Time:** 100%

**Report to EMIS:**

**Effective Date:** 7/1/2012

**Reporting Period:** (K)

**I want to...**

- Edit this student's profile
- View/Edit Full schedule
- View/apply fees
- View the medical health log
- View this student's memberships
- View Today's Schedule
- View Contacts
- View Lockers
- View a student's family group

**PHOTO AVAILABLE**

### I want to... Drop-Down List on View Student Profile Screen

The student view-only profile has a drop-down list titled **I want to...** On this drop-down list, you can select several options. Each of these options is explained in the appropriate documentation for that particular StudentInformation application.

## Student Reports

Please see the Batch/Report Management documentation for more detailed information about running and viewing reports.

### Student Lunch Free/Reduced (LUNCH)

Navigation: Home – SIS – School – Student Reports – Student Lunch Free/Reduced (LUNCH)

The Student Lunch Free/Reduced (LUNCH) report lists students and total students on the free and reduced lunch program.

Home » SIS » School » Student Reports » Student Lunch Free/Reduced (LUNCH)

## Student Lunch Free/Reduced (LUNCH)

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

Selection Criteria   Selection Summary   Load Settings

Homeroom Date: 11/29/2010

Effective Date: 11/29/2010

**School**

OGGE - Glandorf Elementary School  
 OGEO - OTTAWA ELEMENTARY SCHOOL  
 OGPS - OTTAWA-GLANDORF COMPLEX  
 OGHS - OTTAWA-GLANDORF HIGH SCHOOL

**Lunch Status**

None  
 Reduced  
 Free  
 Applied-Denied

**Grade**

P1 - P1  
 P2 - P2  
 KG - KG  
 01 - 01

**Student Status**

A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 N - NON-RES

**Gender**

M  
 F

Group By: Grade

**Sorting Options**

Grade (ASC)  
 Grade (DESC)  
 Homeroom (ASC)  
 Homeroom (DESC)

Student Name (ASC)

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address  
 Use custom address text

**Include Copied On Correspondence:**  Yes  No

**Delivery Method:** Pickup

**Email Address:** amy@noacsc.org

**Report Format:** Adobe PDF

**Description:**

### Student Lunch Free/Reduced Report Parameters Screen

**Homeroom Date** (required) – Enter the date for which the report will use to select the proper homeroom for the student. Defaults to today's date.

**Effective Date** (required) – Enter the date for which the report will use to select students with free lunches as of the effective date selected. Defaults to today’s date.

**School** (required) – Select which Schools you wish to include in the report. Defaults to all available schools.

**Lunch Status** (required) – Select which Lunch Statuses you wish to include in the report. At least one Lunch Status must be selected.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no Grades are selected, all Grades will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no Student Statuses are selected, all Student Statuses will be included in the report.

**Gender** (optional) – Choose one or more Genders you wish to include in the report. If no Genders are selected, all Genders will be included in the report.

**Group By** (required) – Choose a Group By option. The default is grade. The selected Group By option will be the secondary sort.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection. Labels for this report have a default sort by Grade Level, then alphabetically by Name. If a different sort is selected for the report, labels will sort in the same order that the report is sorted.

**Address** – Select the address to use for labels. If you check “Use custom address text,” the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; Select whether to include copies of the report listing addresses for contacts marked “Copied on Correspondence.”

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

<i>Report: Lunch</i>								2009-2010	
<i>Printed Mon, Jul 13, 2009, 1:57 PM</i>								DASL - LUNCH	
ID	STUDENT NAME	GN	GR	STATUS	ETHNICITY	LUNCH STATUS	SCHOOL CODE	HOMEROOM	
58	Student47415, MADISON	F	01	A	W	Reduced	EL	109	
58	Student47420, CORY	M	01	A	W	None	EL	110	
58	Student47407, JACOB	M	01	A	W	None	EL	110	
58	Student47424, NICHOLAS	M	01	A	W	None	EL	109	
58	Student47438, LEONA	F	01	A	W	Free	EL	110	

**Student Lunch Free/Reduced Report**

## Student Alerts (STD\_ALERT)

**Navigation: Home – SIS – School – Student Reports – Student Alerts (STD\_ALERT)**

The Student Alerts (STD\_ALERT) report displays all student alerts for students meeting the specified criteria and having the selected alerts – medical, custody, miscellaneous, disability, fees, pending enrollment, and/or pending withdraw alerts.

## Student Alerts (STD\_ALERT)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Date Range: 8/21/2012 9/18/2012

Homeroom Date: 9/18/2012

### Alert Type:

Custody    Fee    Medical    Pending Enrollment  
 Disability    Fee Negative    Miscellaneous    Pending Withdraw

### Grade

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

### Student Status

A - ACTIVE RES  
 ACCA - ASHLAND ACADEMY  
 AE - ACTIVE ELSEWHERE  
 D - DELETED

### Administrative Homeroom

2-108 - MAYNARD (Full Year Term)  
 2-124A - WELCH (Full Year Term)  
 2-124B - BRAY (Full Year Term)  
 2-125 - GILL (Full Year Term)

### Membership Group

11 - Intervention  
 12 - Post-secondary Enrollment Options  
 15 - 15  
 16 - 16

### Membership

15 - Student received intervention provi  
 15 - Student received intervention provi  
 16 - Student placement by a district in a  
 50 - Prev. reported as a dropout in repo

### Special Education Services

215001 - Adapted Physical Education Se  
 215002 - Aide Services  
 215003 - Attendant Services  
 215004 - Audiological Services

### Sorting Options

Grade (ASC)  
 Grade (DESC)  
 Student Name (DESC)  
 Homeroom (ASC)

Student Name (ASC)

Delivery Method: Pickup   Set As Default

Email Address: EmhoffH@software-answers.com

Report Format: Adobe PDF

Description:

Submit

Student Alerts Report Parameters Screen

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**Date Range** (required) – Specify the date range to use to retrieve date specific alerts. The beginning date will default to the first day of school for the active school for the active school year. The ending date will default to the first day of school for the active school for the active school year.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom. This field will default to the current date or the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Alert Type** (required) – Choose one or more alert types for this report.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no grades are selected, all grades will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Administrative Homeroom** (optional) – Choose one or more Administrative Homerooms which you wish to include in the report. If no administrative homerooms are selected, all administrative homerooms will be included in the report.

**Membership Group** (optional) – Choose one or more Membership Groups which you wish to include in the report. If no membership groups are selected, all membership groups will be included in the report.

**Membership** (optional) – Choose one or more Memberships you wish to include in the report. If no memberships are selected, all memberships are included in the report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

ID	STUDENT NAME TYPE	GR	GR	COUNSELOR START DATE	STOP DATE	ENRN ENRN TEACHER ALERT DETAIL INFORMATION
REPORT: DMSL - RRPD STD_ALERT SCHOOLYEAR: 2004-2005 FROM: 06/24/2004 TO: 12/04/2007 DMSL HIGH SCHOOL STUDENT ALERT REPORT RUN AT 12:00 PM 12/4/2007 PAGE 1 OF 1						
48452258	Kanana, Hannah Medical Custody Medical	F	11	02/09/2005 02/09/2005 02/09/2005		Diabetes Father has sole custody. Mother is to have no contact with Hannah Asthma (inhaler)
48452281	Contrary, Jesse Miscellaneous	M	10	04/12/2007		Sprained ankle - will be on crutches for two weeks.
5004	SPRAT, JACK JUSKPE Miscellaneous Medical Custody Miscellaneous Miscellaneous Miscellaneous Miscellaneous Handicap	M	11	04/12/2007 02/14/2005		Jack Sprained his ankle and will be on crutches for two weeks, he will need assistance to and from class student is allergic to bee stings, carries an Epi-pen Father: John Sprat, is not permitted to pick up Jack from School without prior consent from mother Jack Sprained his ankle and will be on crutches for two weeks, he will need assistance to and from class Jack Sprained his ankle and will be on crutches for two weeks, he will need assistance to and from class Jack Sprained his ankle and will be on crutches for two weeks, he will need assistance to and from class Jack Sprained his ankle and will be on crutches for two weeks, he will need assistance to and from class jack has a reading disability and needs special attention when assignments are written on the board

### Student Alerts Report

## Student with No SSID (SSID)

**Navigation: Home – SIS – School – Student Reports – Student With No SSID (SSID)**

The Student with No SSID (SSID) report lists all students meeting the specified criteria with no State Student ID (SSID) recorded in their FS record. The report can also display a listing of students meeting the specified criteria and the SSID record in their FS record.

Home » SIS » School » Student Reports » Student With No SSID (SSID)

## Student With No SSID (SSID)

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

Selection Criteria   Selection Summary   Load Settings

Homeroom Date: 3/17/2009

**Grade**

PS - PS  
 KG - KG  
 01 - 01  
 02 - 02

**Student Status**

A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 N - NON-RES

**Administrative Homeroom**

100 - Teacher1472 (Full Year Term)  
 102 - Teacher1487 (Full Year Term)  
 103 - Teacher1491 (Full Year Term)  
 104 - Teacher1564 (Full Year Term)

Only show students missing the SSID on one or more of their FS records:

Group By: Grade

**Sorting Options**

Counselor (ASC)  
 Counselor (DESC)  
 Grade (DESC)  
 Homeroom (ASC)

Grade (ASC)  
 Student Name (ASC)

Delivery Method: Pickup   Set As Default

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

Submit

### Student With No SSID Report Parameters Screen

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. The date will default to the current date, or the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no grades are selected, all grades will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Administrative Homeroom** (optional) – Choose one or more Administrative Homerooms which you wish to include in the report. If no administrative homerooms are selected, all administrative homerooms will be included in the report.

**Only show students missing the SSID on one or more of their FS records** (optional) – If checked, the report will display only those students without a SSID on one or more of their FS records. If not checked, the report will display students with an SSID. Defaults to checked.

**Group By** (required) – Choose to group by grade, homeroom or counselor. Defaults to Grade.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Report: SSID		#2 High School	
Printed Tue, Mar 17, 2009, 8:51 PM		2008-2009	
		Students with no SSID	
<b>Id</b>	<b>Last *</b>	<b>First *</b>	<b>Middle *</b>
12519	Student62700	BRIANNA	JANAE
<b>Gender *</b>	<b>Native Language *</b>	<b>Ethnicity *</b>	<b>Birthdate * Birth Place *</b>
F	ENG	B	12/14/93 LIMA
<b>Grade</b>	<b>Homeroom</b>	<b>Homeroom Teacher</b>	<b>Counselor</b>
09			
	<b>Student FS records</b>	<b>Effective Start Date</b>	<b>Admission Reason</b>
		09/26/2008	6
		09/30/2008	6
			<b>State Student Id</b>
			87617
			!88879
<b>Id</b>	<b>Last *</b>	<b>First *</b>	<b>Middle *</b>
12518	Student62702	ZACHAIRA	TYREE
<b>Gender *</b>	<b>Native Language *</b>	<b>Ethnicity *</b>	<b>Birthdate * Birth Place *</b>
M	ENG	M	02/06/92 BELLEFONTAINE
<b>Grade</b>	<b>Homeroom</b>	<b>Homeroom Teacher</b>	<b>Counselor</b>
09			
	<b>Student FS records</b>	<b>Effective Start Date</b>	<b>Admission Reason</b>
		09/05/2008	6
			<b>State Student Id</b>
			75502

**Students With No SSID Report**

## Student with No SSNO (SSNO)

**Navigation: Home – SIS – School – Student Reports – Student With No SSNO (SSNO)**

The Student With No SSNO (SSNO) report lists students meeting the specified criteria with no Social Security Number (SSN) record in their demographic record. The report can also display a listing of students meeting the specified criteria and the SSN recorded in their demographic record.

Home » SIS » School » Student Reports » Student With No SSNO (SSNO)

### Student With No SSNO (SSNO)

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

Selection Criteria   Selection Summary   Load Settings

Homeroom Date: 7/29/2008

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
JVS - Student Attending JVS

**Administrative Homeroom**

A103 - BERRY (Full Year Term)  
A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)  
A106 - CASTLE (Full Year Term)

Show Students With No Social Security Number Only:

**Sorting Options**

Student Number (ASC)  
Student Number (DESC)  
Student Name (DESC)  
Grade (ASC)

Student Name (ASC)

Delivery Method: Pickup   Set As Default

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

Submit

**Student With No SSNO Report Parameters Screen**

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. The date will default to the current date, or the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no grades are selected, all grades will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Administrative Homeroom** (optional) – Choose one or more Administrative Homerooms which you wish to include in the report. If no administrative homerooms are selected, all administrative homerooms will be included in the report.

**Show Students With No Social Security Number Only** (optional) – If checked, the report will display only those students without a SSN. If not checked, the report will also display students with an SSN. Defaults to checked.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

ID	STUDENT NAME	GN	GR	COUNSELLOR	ENRN	ENRN TEACHER	SSN
48452281	COTEACAY, JESSIE	N	10				

**Students With No SSNO Report**

## Student Contact List (CONT)

**Navigation: Home – SIS – School – Student Reports – Student Contact List (CONT)**

The Student Contact List (CONT) report displays contact information for contact of specified types and students meeting specified criteria.

Home » SIS » School » Student Reports » Student Contact List (CONT)

## Student Contact List (CONT)

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

Selection Criteria   Selection Summary   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

Homeroom Date: 9/18/2012  

**Contact Type**

A1 - AUNT EXTRA 1  
A2 - AUNT EXTRA 2  
A3 - AUNT EXTRA 3  
A4 - AUNT EXTRA 4

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Student Status**

A - ACTIVE RES  
ACCA - ASHLAND ACADEMY  
AE - ACTIVE ELSEWHERE  
D - DELETED

**Administrative Homeroom**

2-108 - MAYNARD (Full Year Term)  
2-124A - WELCH (Full Year Term)  
2-124B - BRAY (Full Year Term)  
2-125 - GILL (Full Year Term)

**Membership Group**

11 - Intervention  
12 - Post-secondary Enrollment Options  
15 - 15  
16 - 16

**Membership**

15 - Student received intervention provi  
15 - Student received intervention provi  
16 - Student placement by a district in a  
50 - Prev. reported as a dropout in repo

**Special Education Services**

215001 - Adapted Physical Education Se  
215002 - Aide Services  
215003 - Attendant Services  
215004 - Audiological Services

**Sorting Options**

Student Number (ASC)  
Student Number (DESC)  
Student Name (DESC)  
Grade (ASC)

Student Name (ASC)

**Delivery Method:** Pickup

**Email Address:** EmhoffH@software-answers.com

**Report Format:** Adobe PDF

**Description:**

Student Contact List Report Parameters Screen

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom. The date will default to the current date or to the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Contact Type** (optional) – Choose one or more Contact Types you wish to include in the report. If no contact types are selected, all contact types will be included in the report.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no grades are selected, all grades will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Administrative Homeroom** (optional) – Choose one or more Administrative Homerooms which you wish to include in the report. If no administrative homerooms are selected, all administrative homerooms will be included in the report.

**Membership Group** (optional) – Choose one or more Membership Groups which you wish to include in the report. If no membership groups are selected, all membership groups will be included in the report.

**Membership** (optional) – Choose one or more Memberships you wish to include in the report. If no memberships are selected, all memberships are included in the report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

ID	STUDENT NAME	GN	GR	CONTACT TYPE	CONTACT NAME	TELEPHONE NUMBER		
40452258	Ramona, Esteban	F	11	One	Belinda Ramona	HOME: (419) 229-0907	GUARDIAN:	N
					894 W. Perry Street	CELL:	EMERGENCY CONTACT:	N
					Lima OR 45801	WORK:	LIVING WITH STUDENT:	N
					PLACE OF EMPLOYMENT:		WILLING TO VOLUNTEER:	N
				Aunt	Elizabeth Ellemann	HOME: (419) 991-1782	GUARDIAN:	N
					4421 S Pear Street	CELL: (419) 303-6765	EMERGENCY CONTACT:	Y
					Lima OR 45805	WORK: (419) 229-2299	LIVING WITH STUDENT:	N
					PLACE OF EMPLOYMENT:		WILLING TO VOLUNTEER:	Y
				One	Barry Ramona	HOME: (419) 229-6416	GUARDIAN:	Y
					2117 Cherry Street	CELL: (419) 303-9812	EMERGENCY CONTACT:	Y
					Lima OR 45804	WORK: (419) 329-8954	LIVING WITH STUDENT:	Y
					PLACE OF EMPLOYMENT: Lazarus		WILLING TO VOLUNTEER:	N
				DR	Martha Dolittle	HOME:	GUARDIAN:	N
					250 Elm Street	CELL:	EMERGENCY CONTACT:	N
					Lima OR 45801	WORK: (419) 224-7780	LIVING WITH STUDENT:	N
					PLACE OF EMPLOYMENT: Physicians INC		WILLING TO VOLUNTEER:	N
7001	CONYART, JASON WILLIAM	N	09	DR	CONNIE ENGALLER	HOME: (419) 225-8900	GUARDIAN:	N
						CELL:	EMERGENCY CONTACT:	N
						WORK:	LIVING WITH STUDENT:	N
							WILLING TO VOLUNTEER:	N
					PLACE OF EMPLOYMENT:			

**Student Contact List Report**

## Student Locker Allocation (LOCK)

**Navigation: Home – SIS – School – Student Reports – Student Locker Allocation (LOCK)**

The Student Locker Allocation (LOCK) report displays all lockers of specified type and status when assigned to students meeting the user specified student selection criteria. Additional options permit printing of unassigned lockers as well, and locker combinations may be optionally displayed on the report.

Home » SIS » School » Student Reports » Student Locker Allocation (LOCK)

## Student Locker Allocation (LOCK)

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

Selection Criteria   Selection Summary   Load Settings

Homeroom Date: 7/29/2008

**Locker Status**

Active  
Repair  
Unavailable

**Locker Grade Level**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
JVS - Student Attending JVS

**Student Grade Level**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Administrative Homeroom**

A103 - BERRY (Full Year Term)  
A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)  
A106 - CASTLE (Full Year Term)

**Academic Lockers Only:**

**Include Unassigned Lockers:**

**Sorting Options**

Student Number (ASC)  
Student Number (DESC)  
Student Name (DESC)  
Grade (ASC)

Student Name (ASC)

**Delivery Method:** Pickup   Set As Default

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Submit

### Student Locker Allocation Parameters Report

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. The date will default to the current date, or the most recent valid school day for the active school and active school year if the current date is not a valid school day.

**Locker Status** (optional) – Choose one or more Locker Statuses you wish to include in the report. If no locker statuses are selected, all locker statuses will be included in the report.

**Locker Grade Level** (optional) – Choose one or more Locker Grade Levels you wish to include in the report. If no locker grade levels are selected, all locker grade levels will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Student Grade Level** (optional) – Choose one or more Student Grade Levels you wish to include in the report. If no student grade levels are selected, all student grade levels will be included in the report.

**Administrative Homeroom** (optional) – Choose one or more Administrative Homerooms which you wish to include in the report. If no administrative homerooms are selected, all administrative homerooms will be included in the report.

**Academic Locker Only** (optional) – If checked, report will only show academic lockers. If unchecked, report will show all locker types. Defaults to checked.

**Include Unassigned Lockers** (optional) – If checked, report will show lockers not assigned to students. If unchecked, the report will not display unassigned lockers. Defaults to checked.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: NAME - REPORT CODE		DASH HIGH SCHOOL				RUN AT: 11:14 AM 12/4/2007					
SCHOOLYEAR: 2004-2005		STUDENT LOCKER ALLOCATION REPORT				PAGE 6 OF 6					
ID	STUDENT NAME	GN	GR	HNRM	LOCKER #	LOCKER SECT	LOCKER STATUS	CAPACITY	OCCUPANTS	LOCKER GRADE LEVEL	COMBINATION
					A371		A	1			351323
					A372		A	1			113109
					A373		A	1			254519
					A374		A	1			453501
					R001		A	1			61412
					R074		A	1			200226
					C001		A	1			212919
					C074		A	1			194329
					D001		A	1			32139
					D304		A	1			490919
					R007		A	1			424
					K352		A	1			154341
					F000		A	1			411727
					F404		A	1			11903
					R001		A	1			312929
					R350		A	1			231325
					J001		A	1			440822
					J100		A	1			384230
					R001		A	1			411343
					R194		A	1			481502
					N101		A	1			341434
					N210		A	1			411335
49452250	RANAK, RANAH	F	11	A100	003		A	1		09	146822
49452250	RANAK, RANAH	F	11	A100	013		A	1		09	234717
5004	SPRAT, JACK JONKFF	M	11	A107	001		A	1		09	172923
5004	SPRAT, JACK JONKFF	M	11	A107	020		A	1		09	414311

Student Locker Allocation Report

## Student Location Report (Report Builder)

### Navigation: Home – Local – Report Builder Links – Report Builder Reports

The Student Location report lists the rooms in which students are located each period of the day based on their scheduled classes. This report also includes the students' homeroom, gender, ethnicity, and status.

Home » Local » Report Builder Advanced Search | Feedback

### Report Builder

From this screen, you can manage Regular and User Reports created in ProgressBook Report Builder

[ Hide Regular Reports ]

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.
	Period G Student Core Summary Report	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	Period K NonGraduate Core Summary Report	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	Course Fee Analysis	Fee report that shows the outstanding balance, if any, of a student's course fees in each course fees were assessed.
	Discipline Action	Discipline Action report that filters on selected discipline actions and when the punishment is to be served.
	Locker Combinations	Locker report listing all lockers and the all combinations assigned to each one.
	Payments Posted by User	Fee reporting listing payments posted by username for balancing receipts.
	<b>Student Location</b>	Student report that shows where a student is at in the building each period of the day.

[ Hide User Reports ]

View Report	Name	Description
	<del>X</del> Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.
	<del>X</del> My Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.

Run Icon

Student Location Report on the Report Builder Reports Screen

1. With the school or district for which you want to run the report in context, on the **Report Builder** screen, click the run icon in the **View Report** column for the Student Location report.

The StudentInformation **Report Viewer** screen displays.

The screenshot shows the 'Report Viewer' interface for the 'Student Location Report'. It features a top navigation bar with the 'ProgressBook StudentInformation' logo and a 'Report Viewer' title. Below the navigation bar are menu options: 'Hide Setup', 'Save Setup As...', and 'View Report'. The main content area is divided into several sections:

- Update Report Headers:** A text input field labeled 'Report Header' containing the text 'Student Location'.
- Select Required Parameters:** Two dropdown menus. The first is labeled 'Grade' and shows '09 - 09, 10 - 10'. The second is labeled 'Student Status' and shows 'A - ACTIVE RES, FS - Foreign Exchange Student, Q - Resident'. Below these is a radio button group for 'Expand All Details' with 'Yes' selected.
- Set Optional Filters:** A table with three columns: 'Field Name', 'Operation', and 'Value'. The table is currently empty.
- Add & Remove Columns:** A section with the text 'No columns are available to add or remove.'

A 'View Report' button is located at the bottom center of the interface.

#### Student Location Report on the Report Viewer Screen

2. In the **Report Header** field, modify the heading as you want it to display at the top of the report, if desired.
3. In the **Select Required Parameters** area, in the **Grade** drop-down list, select the grade(s) you want to display on report.
4. In the **Student Status** drop-down list, select the status(es) of the students you want to display on the report.
5. For the **Expand All Details** options, select one of the following:
  - **Yes** – Displays the details for each student by grade level in the generated report by default.
  - **No** – Displays only the grade level in the generated report by default.

*Note: You can expand and collapse the details in the generated report as desired by clicking the plus and minus signs next to the grade level. This option sets the default state of the report when it is run.*
6. If you would like to apply an additional filter to the report results, in the **Set Optional Filters** area, perform the following steps:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the Field Name drop-down list. For more information about the filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.

c. In the **Value** field, enter or select the appropriate value, if applicable.

**Note:** The available options and acceptable values vary depending on the option you selected in the **Field Name** drop-down list. If you selected an option that requires a date, a calendar is available in the **Value** field. If you selected *Has a Value* or *Does Not Have a Value* in the **Operation** drop-down list, then the **Value** field is unavailable.

d. To add an additional filter, repeat [step 6\(a\)](#) through [step 6\(c\)](#) in the line below the previous filter.

7. Click **View Report**.

The report displays at the bottom of the window.

Student Location																
Grade Level	Student Number	Student Name	Homeroom	Gender	Ethnicity	Status	1	2	3	4	5	6	7	8	9	
09	242848	ASHLEY, IRMA	HR19	F	W	A	7	24	15	25	10	10	CAFE	22	17	
	287877	ASHLEY, JUANITA	HR23	F	W	A	30	25	14	10	CAFE	8	8	15	17	
	253062	ASHLEY, PERRY	HR23	M	W	A	GYM	7	10	15	CAFE	28	28	22	23	
	265112	BARROW, GREGORY	HR19	M	W	A	GYM	25	15	10	22	CAFE	22	14	17	
	260113	BARRY, GAIL	HR19	F	W	A	15	10	18	24	CAFE	28	28	CAFE	7	
	257005	BATES, JOHN	HR19	M	W	A	GYM	15	10	22	CAFE	28	28	14	17	
	280641	BLAIR, WALTER	HR19	M	W	A	23	7	15	25	6	CAFE	6	24	10	
	227662	BOWMAN, CHARLES	HR14	M	W	A	19	24	15	10	CAFE	8	8	25	14	
	380193	BRADY, JUDY	HR19	F	W	A	GYM	7	10	15	CAFE	25	25	22	29	
	276869	BROCK, JOE	HR23	M	W	A	7	30	15	23	CAFE	25	25	GYM	10	
	266643	CANNOH, PETER	HR27	M	W	A	CAFE	7	15	25	6	CAFE	6	20	10	
	242866	CASE, SAMANTHA	HR14	F	W	A	30	15	25	7	CAFE	8	8	17	10	
	247153	CASH, BRYAN	HR27	M	W	A	23	10	25	7	CAFE	9	9	24	29	
	262266	CASTRO, JAIME	HR23	M	W	A	15	25	CAFE	GYM	10	10	CAFE	17	14	
	379954	CHAMBERS, TERRY	HR21	M	W	A	23	24	15	25	10	10	CAFE	22	7	
	379865	CHANEY, PEDRO	HR27	M	W	A	15	30	25	7	CAFE	8	8	GYM	10	
260123	COHEN, CHARLES	HR23	M	W	A	15	20	CAFE	7	CAFE	25	25	24	10		

**Student Location Report**

8. To save the report with your selected parameters and filters, perform the following steps:

- Click **Save Setup As**.
- Enter a unique report name in the **New report name** field.
- Enter a description of the report in the **New description** field.
- Click **Save**.

The following message displays at the bottom of the screen: "Report setup saved successfully."

The report is saved. You can now run it directly from the **User Reports** area on the **Report Builder Reports** screen.

9. To close the StudentInformation **Report Viewer** screen and return to the **Report Builder Reports** screen, click the close button.

## Withdrawal List (WITH)

**Navigation: Home – SIS – School – Student Reports – Withdrawal List (WITH)**

The Withdrawal List (WITH) report displays all students who have withdrawn within a specified date range.

Home » SIS » School » Student Reports » Withdrawal List (WITH)

### Withdrawal List (WITH)

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

Selection Criteria | Selection Summary | Load Settings

**Withdrawal Date Range:** 8/25/2008 to 7/29/2008

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
JVS - Student Attending JVS

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Withdrawal Code**

\*\* - Not Applicable  
40 - Transferred to another school outside  
41 - Trans. to Ohio Local, ex. village or cit  
42 - Trans. to a private (transcript reques

**Sorting Options**

Student Number (ASC)  
Student Number (DESC)  
Student Name (DESC)  
Grade (ASC)

Student Name (ASC)

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

**Withdrawal List Report Parameters Screen**

**Withdrawal Date Range** (required) – Specify the date range to use to retrieve student withdrawals. The beginning date will default to the first day of school for the active school for the active school year. The ending date will default to the last day of school for the active school for the active school year.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no grades are selected, all grades will be included in the report.

**Withdrawal Code** (optional) – Choose one or more Withdrawal Codes which you wish to include in the report. If no withdrawal codes are selected, all withdrawal codes will be included in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

ID	STUDENT NAME	GN	GR	WITHDRAWAL DATE	WITHDRAWAL CODE	WITHDRAWAL DESCRIPTION
48452258	KANADA, KATASH	F	11	02/10/2005	41	Trans. to Ohio local, ex. village or city school
48452281	CONTRARY, JESSE	M	10	04/14/2005	40	Transferred to another school outside of Ohio

**Withdrawal List Report**

## Student Status/Attendance Code (STAT)

**Navigation: Home – SIS – School – Student Reports – Student Status / Attendance Code (STAT)**

The Student Status/Attendance Code (STAT) report displays students' EMIS situations. The students reported can be limited by EMIS handicap situation and other student properties.

Home » SIS » School » Student Reports » Student Status/Attendance Code (STAT)

## Student Status/Attendance Code (STAT)

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

Selection Criteria   Selection Summary   Load Settings

**Grade**

09 - 09  
10 - 10  
11 - 11  
12 - 12

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
JVS - Student Attending JVS

**Disability Condition**

**Sorting Options**

Student Number (ASC)  
Student Number (DESC)  
Student Name (DESC)  
Grade (ASC)

Student Name (ASC)

**Delivery Method:** Pickup   Set As Default

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

Submit

### Student Status/Attendance Code Report Parameters Screen

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no grades are selected, all grades will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Disability Condition** (optional) – Choose one or more EMIS Disability Conditions which you wish to include in the report. If no disability conditions are selected, all disability conditions will be included in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

ID	STUDENT NAME	GN	GR	EMIS SITUATION DESCRIPTION	DISABILITY CONDITION
82006	Student40670, MIRACLE	F	12	S - Resident attending Full Time	**
12846	Student45761, KATHRYN	F	09	S - Resident attending Full Time	**
12845	Student45762, BROOKE	F	09	S - Resident attending Full Time	**
12844	Student45763, TRAVIS	M	09	S - Resident attending Full Time	**
12843	Student45764, CODY	M	09	S - Resident attending Full Time	**
12842	Student45765, MATTHEW	M	09	S - Resident attending Full Time	**
12841	Student45766, SCOTT	M	09	S - Resident attending Full Time	**
12840	Student45767, MICHELLE	F	09	S - Resident attending Full Time	**
12839	Student45768, KYLIE	F	09	S - Resident attending Full Time	**
12838	Student45769, CRAIG	M	09	S - Resident attending Full Time	**
12837	Student45771, ALYSSA	F	09	S - Resident attending Full Time	**
12836	Student45772, JEREMY	M	09	S - Resident attending Full Time	**
12835	Student45773, KOREY	M	09	S - Resident attending Full Time	**
12834	Student45775, JACLYN	F	09	S - Resident attending Full Time	**
12833	Student45776, HEIDI	F	09	S - Resident attending Full Time	**
12832	Student45777, ELLEN	F	09	S - Resident attending Full Time	**
12831	Student45778, BRANDON	M	09	S - Resident attending Full Time	**
12830	Student45779, AMBER	F	09	S - Resident attending Full Time	**
12829	Student45780, LAUREN	F	09	S - Resident attending Full Time	**
12828	Student45781, SHELBY	F	09	S - Resident attending Full Time	**
12827	Student45782, BROOKE	F	09	S - Resident attending Full Time	**
12826	Student45783, VANESSA	F	09	S - Resident attending Full Time	**
12825	Student45785, AARON	M	09	S - Resident attending Full Time	**
12824	Student45786, TAYLOR	F	09	S - Resident attending Full Time	**
12823	Student45787, WINSTON	M	09	S - Resident attending Full Time	**

### Student Status/Attendance Code Report

## Admission/Withdrawals (AWEX)

**Navigation: Home – SIS – School – Student Reports – Admission/Withdrawals (AWEX)**

This report displays school admission and withdrawal events for specified date ranges and specified admission and withdrawal types.

Home » SIS » School » Student Reports » Admission/Withdrawals (AWEX)

## Admission/Withdrawals (AWEX)

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

Selection Criteria | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**Admission Date Range:** 8/21/2012 to 9/18/2012  
**Date Match Method:** And  
**Withdrawal Date Range:** 8/21/2012 to 9/18/2012

**Admission Code**

01 - Only school dist attended, inc tranfe		
02 - From a non-public school		
04 - From another public school dist in O		
05 - From another public school dist in a		

**Withdrawal Code**

** - Not applicable, includes transfer wit		
40 - Transfer to another district outside		
41 - Transfer to another Ohio Public Sch		
42 - Transfer to private school		

**Grade**

09 - 09		
10 - 10		
11 - 11		
12 - 12		

**Student Status**

A - ACTIVE RES		
ACCA - ASHLAND ACADEMY		
AE - ACTIVE ELSEWHERE		
D - DELETED		

**Membership Group**

11 - Intervention		
12 - Post-secondary Enrollment Options		
15 - 15		
16 - 16		

**Membership**

15 - Student received intervention provi		
15 - Student received intervention provi		
16 - Student placement by a district in a		
50 - Prev. reported as a dropout in repo		

**Special Education Services**

215001 - Adapted Physical Education Se		
215002 - Aide Services		
215003 - Attendant Services		
215004 - Audiological Services		

**Show Building or District Admission Date:**  Building  District  
**Show Earliest or Latest Admission Date:**  Earliest  Latest  
**Show Building or District Withdrawal Date:**  Building  District

**Sorting Options**

Student Number (ASC)		Student Name (ASC)	
Student Number (DESC)			
Student Name (DESC)			
Grade (ASC)			

**Delivery Method:** Pickup   
**Email Address:** EmhoffH@software-answers.com  
**Report Format:** Adobe PDF  
**Description:**

Admission/Withdrawals Report Parameters Screen

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**Date Match Method** (required) – Choose And or Or.

The And option indicates that the report will display only admission records with an admission date within the Admission Date Range specified AND a withdrawal date within the Withdrawal Date Range specified.

The Or option indicates that the report will display admission records with an admission date within the Admission Date Range specified OR a withdrawal date within the Withdrawal Date Range specified.

**Admission Date Range** (required) – Specify the date range to use to retrieve student admission records. The beginning date will default to the first day for the active school for the active school year. The ending date will default to the first day of school for the active school for the active school year.

**Withdrawal Date Range** (required) – Specify the date range to use to retrieve student withdrawal records. The beginning date will default to the first day for the active school for the active school year. The ending date will default to the first day of school for the active school for the active school year.

**Admission Code** (optional) – Choose one or more Admission Codes you wish to include in the report. If no admission codes are selected, all admission codes will be included in the report.

**Withdrawal Code** (optional) – Choose one or more Withdrawal Codes you wish to include in the report. If no withdrawal codes are selected, all withdrawal codes will be included in the report.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no grades are selected, all grades will be included in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no student statuses are selected, all student statuses will be included in the report.

**Membership Group** (optional) – Choose one or more Membership Groups which you wish to include in the report. If no membership groups are selected, all membership groups will be included in the report.

**Membership** (optional) – Choose one or more Memberships you wish to include in the report. If no memberships are selected, all memberships are included in the report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services.

This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

**Note:** *The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Show Building or District Admission Date** (required) – Choose the admission date types (building or district) to include in this report.

**Show Earliest or Latest Admission Date** (required) – Choose to include the earliest or latest admission date when multiple dates exist within the date range.

**Show Building or District Withdrawal Date** (required) – Choose the withdrawal date types (building or district) to include in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

ID	STUDENT NAME	GN	GR	HOME SCHOOL I#N	ADMISSION CODE	ADMISSION DATE	SCHOOL CODE OF ADMISSION	WITHDRAWAL CODE	WITHDRAWAL DATE	WITHDRAW TO I#N	WITHDRAWAL COMMENTS	SCHOOL CODE OF WITHDRAWAL
200800172	chucktest, chucktest	M	10		01	10/28/2011	ELMS					
200800171	Jones, Dave	M	12		03	10/27/2011	ELMS					
200800170	Student11692, Bill (Bill)	M	10		01	08/21/2011	ELMS					
14452	Student12705, JOEAN	M	10					40	09/01/2011			ELMS

### Admission/Withdrawals Report

## Ethnicity Summary Report

**Navigation: Home – SIS – School – Student Reports – Ethnicity Summary Report**

This screen will display students by ethnical origin classification. The report will display ethnicity code specific to the schools context as well as EMIS standard ethnicity codes.

Home » SIS » School » Student Reports » Ethnicity Summary Report

## Ethnicity Summary Report

Select the type of report to execute

Report Type:

Active Only:

### Ethnicity Summary Report - Report Type Selection

**Report Type** (required) – Specify which Ethnicity Summary Report type you wish to generate – Detail, Summary or District.

**Active Only** – If checked, will show only active students; if unchecked, will show both active and inactive students.

**Show Results** – Submit report using the selected type and show results on screen.

Home » SIS » School » Student Reports » Ethnicity Summary Report

### Ethnicity Summary Report

Select the type of report to execute

Report Type:

Grade Level	Asian or Pacific Islander		Black, Non-Hispanic		Data Not Provided by Community School		Hispanic		American Indian or Alaskan Native		Multiracial		White, Non-Hispanic		Total Enrollment	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
09			0	1									3	2		6
10			0	1									2	2	1	6
11													4	4		8
12							1	0					2	2		5

### Ethnicity Summary Report - Detail Report

Home » SIS » School » Student Reports » Ethnicity Summary Report

### Ethnicity Summary Report

Select the type of report to execute

Report Type:

School	Asian or Pacific Islander		Black, Non-Hispanic		Data Not Provided by Community School		Hispanic		American Indian or Alaskan Native		Multiracial		White, Non-Hispanic		Total Enrollment	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
DASL HIGH SCHOOL			0	2				1	0				11	10	1	25

### Ethnicity Summary Report - Summary Report

Home » SIS » School » Student Reports » Ethnicity Summary Report

### Ethnicity Summary Report

Select the type of report to execute

Report Type:

School	Asian or Pacific Islander		Black, Non-Hispanic		Data Not Provided by Community School		Hispanic		American Indian or Alaskan Native		Multiracial		White, Non-Hispanic		Total Enrollment	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
DASL HIGH SCHOOL			0	2				1	0				11	10	1	25
DASL MIDDLE SCHOOL	3	2	7	3			1	3	2		2	7	4	30	23	87
DASL ELEMENTARY SCHOOL	4	0	2	4			2	4	1	1		1	0	15	16	50

### Ethnicity Summary Report - District Report

# Student Roster Detail (R101-A)

**Navigation: Home – SIS – School – Student Reports – Student Roster Detail**

The Student Roster Detail (R101-A) report is used to generate a detailed listing of all students, as well as create address labels if desired. This report can be used to generate student rosters for specific groups of students by grade, age, program, previous school, etc.

Home » SIS » School » Student Reports » Student Roster Detail (R101-A)

## Student Roster Detail (R101-A)

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

---

Selection Criteria

Selection Summary

Load Settings

**Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.**

**Ad-Hoc Membership:** -- Select an Ad-Hoc Membership -- v

Public And Private

---

**Entering one or more Student Numbers will limit the report to those students. All other criteria will be ignored.**

**Student Numbers:**

---

**Using Family Group Couriers will limit the report to those students. All other criteria will be ignored.**

**Use Family Group Couriers:**

---

**If not limiting to an Ad-Hoc Membership Group, list of Student Numbers or use family group couriers, you may select as many other criteria as desired. Each selection will limit your results further.**

---

**School**

← →
↔

DADA - DALTON ELEMENTARY

DAHS - DALTON HIGH SCHOOL

DAJH - DALTON INTERMEDIATE

DAKI - KIDRON ELEMENTARY

---

**Grade**

PS - PS

KG - KG

01 - 01

02 - 02

↑
↔
↓

---

**Student Status**

A - ACTIVE RES

C - CENTRAL STUDENTS

D - DELETED

I - INACTIVE

↑
↔
↓

---

**Disability Condition**

\*\* - Not Applicable

01 - Multiple Disabilities (other than Deaf-Blind)

02 - Deaf-Blindness

03 - Deafness (Hearing Impairments)

↑
↔
↓

<b>Program</b>	
<input type="checkbox"/> ** - NOT APPLICABLE <input type="checkbox"/> 01 - Multiple Disabilities <input type="checkbox"/> 02 - Deaf-Blindness <input type="checkbox"/> 03 - Hearing Impairments	<input type="text"/> <input type="text"/>
<b>Home School</b>	
<input type="text"/>	<input type="text"/>
<b>Homeroom Date:</b>	12/20/2012 <input type="button" value="v"/> <input type="button" value="p"/>
<b>Age Range:</b>	<input type="text"/> To <input type="text"/>
<b>Gender:</b>	<input type="text"/>
<b>Print Each School Separately:</b>	<input checked="" type="checkbox"/>
<b>Include Middle Names (Report Only):</b>	<input type="checkbox"/>
<b>Include Demographic Data:</b>	<input type="checkbox"/>
<b>Include SSN In Demographic Data:</b>	<input type="checkbox"/>
<b>Use Unlisted Phone Numbers:</b>	<input type="checkbox"/>
<b>Print Copied On Correspondence Contacts On Report:</b>	<input type="checkbox"/>
<b>Include Summary Counts:</b>	<input type="checkbox"/>
<b>Page Break on First Sort:</b>	<input type="checkbox"/>
<b>Print Names Only on Labels:</b>	<input type="checkbox"/>
<b>Sorting Options</b>	
<input type="checkbox"/> Student Number (ASC) <input type="checkbox"/> Student Number (DESC) <input type="checkbox"/> Student Name (DESC) <input type="checkbox"/> Grade (ASC)	<input type="text" value="Student Name (ASC)"/> <input type="text"/>
<b>Output:</b>	<input checked="" type="radio"/> Report <input type="radio"/> Labels <input type="radio"/> Both Report and Labels
<b>Label Type:</b>	Avery Label 5160 - 1" X 2 5/8" 3-columns
<b>Address:</b>	<input checked="" type="radio"/> Use Student Address <input type="radio"/> Use Parent Address
	<input type="checkbox"/> Use custom address text <input type="text"/>
<b>Include Copied On Correspondence:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Delivery Method:</b>	Pickup <input type="button" value="Set As Default"/>
<b>Email Address:</b>	EmhoffH@software-answers.com
<b>Report Format:</b>	Adobe PDF
<b>Description:</b>	<input type="text"/>
<input type="button" value="Submit"/>	

### Student Roster Detail Report Parameters Screen

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**Student Numbers** (optional) – If the R101-A is needed for specific students, the Student Numbers may be input here (separated by a comma) and the R101-A will run only for these specified students. Inputting Student Numbers will limit the report to these students and all other criteria will be ignored.

**Use Family Group Couriers** – Select this check box if you want to print address labels by family courier. If you select this option, labels only print for family groups that have an assigned courier.

**School** (required) – Select which school(s) you wish to include in the report. Defaults to all available schools.

**Grade** (optional) – Choose one or more Grades you wish to include in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report.

**Disability Condition** (optional) – Choose one or more Disability Conditions you wish to include in the report.

**Program** (optional) – Choose one or more Programs which you wish to include in the report.

**Home School** (optional) – Choose one or more Home Schools which you wish to include in the report. The Home School filter is controlled by the Home School on the Student Profile – General tab.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. Please note that this does not determine anything else on this report; all students included in the report will display with current information, not information as of the date selected.

**Age Range** (optional) – Specify an age range that you wish to include in the report.

**Gender** (optional) – Specify a gender that you wish to include in the report.

**Print Each School Separately** (optional) – If checked, each school on the report will print separately. If unchecked, the report will sort all students according to the sort options and not subtotal or break by school.

**Include Middle Names** (optional) – If checked, middle names will appear as part of the student name. If unchecked, the middle name will not appear. Labels will continue to be printed without the middle name.

**Include Demographic Data** – Yes or No; Check if you wish to include demographic data (mailing address) on the report. Choosing demographic data will also print the Parent/Guardian name from the Primary Contact on the Student Contact Record.

**Include SSN In Demographic Data** (optional) – This option only takes effect if “Include Demographic Data” is checked. If demographic data is included, checking this option will cause the SSN to display. If demographic data is included, unchecking this option will cause the SSN not to display.

**Use Unlisted Phone Numbers** – Yes or No; Check if you wish to include unlisted phone numbers on the report.

**Print Copied On Correspondence Contacts on Report** (optional) – If checked, the report will print the name and address of the contacts for which “Copied on Correspondence” is checked.

**Include Summary Counts** – Yes or No; Check if you wish to include summary counts on the report.

**Page Break on First Sort** – If checked, the report will insert a page break based on each unique value of the first sorting option selected.

**Print Names Only on Labels** – If checked, labels printed with this option will have the student name and no other text. To use this option, you must request the labels with “Use Student Address” checked and “Include Copied on Correspondence” unchecked.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels or Both Report and Labels. If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** (optional) – Choose one label type from the drop-down selection of commonly used (preformatted) labels, if choosing to print labels at this time. The report containing labels will then be formatted to match the selection. Labels for this report have a default sort by Grade Level, then alphabetically by Name. If a different sort is selected for the report, labels will sort in the same order that the report is sorted.

**Address** – Select the address to use for labels. If you check “Use custom address text,” the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; Select whether to include copies of the report listing addresses for contacts marked “Copied on Correspondence.”

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

## Without Demographics

Report: R101A		DASL ELEMENTARY				
Printed Thu, Aug 06, 2009, 9:53 AM		2009-2010				
		Student Roster Detail				
		AGE RANGE: ALL AGES				
ID	STUDENT NAME	STATUS	GR	GN	HMRM	HOME SCHOOL PROGRAM
SCH CD	HOME SCHOOL NAME		DISAB	AGE	BIRTHDATE	TELEPHONE
5891 AVEL	Student47351, BRANT WALKER (BRANT)	R	01	M	**	6 08/15/2002 (555) 555-5555
5889 AVEL	Student47352, JONATHAN CARL	R	KG	M	**	5 11/19/2003 (555) 555-5555 Autism
5886 AVEL	Student47355, SAMANTHA ELIZABETH	A	KG	F	**	5 11/25/2003 (555) 555-5555
5885 AVEL	Student47356, BLADEN MATTHEW DEAN LEE	A	01	M	**	118 6 03/17/2003 (555) 555-5555
5884 AVEL	Student47357, SHAUN AUSTIN	A	02	M	**	123 6 09/07/2002 (555) 555-5555 Not applicable
5882 AVEL	Student47359, MARIA ELIZABETH	A	05	F	**	103 10 04/28/1999 (555) 555-5555 Not applicable
5881 AVEL	Student47360, LELA SIMONE	A	02	F	**	123 7 11/07/2001 (555) 555-5555 Not applicable

### Student Roster Detail Report without Demographics

## With Demographics

Report: R101A		DASL ELEMENTARY				
Printed Thu, Aug 06, 2009, 9:51 AM		2009-2010				
		Student Roster Detail				
		AGE RANGE: ALL AGES				
ID	STUDENT NAME	STATUS	GR	GN	HMRM	HOME SCHOOL PARENT/GUARDIAN NAME
SCH CD	STUDENT ADDRESS		DISAB	AGE	BIRTHDATE	TELEPHONE
	HOME SCHOOL NAME		SSN			ETHNICITY - ETHNICITY CODE
		EMIS SITUATION				PROGRAM - PROGRAM CODE
5911 AVEL	Student47332, TREVOR DYLAN 645 S Main St Lima, OH 45804-1241	R	05	M	**	10 01/07/1999 (555) 555-5555 CRYSTAL Student47332 WHITE - W
		151 - Resident open enrolled elsewhere F/T				
5909 AVEL	Student47334, KALEIGH SUE 645 S Main St Lima, OH 45804-1241	A	03	F	**	131 9 04/28/2000 (555) 555-5555 ASHLEIGH Student47334 WHITE - W
		5 - Resident attending Full Time				
5908 AVEL	Student47335, REBECCA LYNN 645 S Main St Lima, OH 45804-1241	A	06	F	**	107 12 03/04/1997 (555) 555-5555 NICOLE Student47335 WHITE - W
		5 - Resident attending Full Time				
5907 AVEL	Student47336, BRANDON MICHAEL 645 S Main St Lima, OH 45804-1241	A	03	M	15	9 03/23/2000 (555) 555-5555 NICOLE Student47336 WHITE - W
		5 - Resident attending Full Time				
		Other Health Imped. Minor - - 15				

### Student Roster Detail Report with Demographics

# Student Roster Summary (R101-B)

**Navigation: Home – SIS – School – Student Reports – Student Roster Summary**

The Student Roster Summary report is used to generate a summary listing of information about all students attending the school for the criterion selected. The report can also produce address labels if desired.

Home » SIS » School » Student Reports » Student Roster Summary (R101-B) Advanced Search | Feedback | Mg

## Student Roster Summary (R101-B)

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

Selection Criteria    Selection Summary    Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**School**

↔

**Grade**

PS - PS  
KG - KG  
KG A - KG am  
KG P - KG PM

↔

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
JVS - Student Attending JVS

↔

**Disability Condition**

\*\* - Not applicable  
01 - Multiple disabilities (Other than Deaf-Blind)  
02 - Deaf-Blindness  
03 - Deafness (Hearing Impairments)

↔

**Program**

JAB - Jr Auto Body  
JAG - Jr AG Mechanics  
JCOS - Jr Cosmetology  
SAB - Sr Auto Body

↔

**Homeroom**

A103 - BERRY (Full Year Term)  
A104 - AUSTIN (Full Year Term)  
A105 - COUSINS (Full Year Term)  
A106 - CASTLE (Full Year Term)

↔

**Home School**

010199 - Elida High School (Sch)  
018606 - Kalida High School (Sch)

↔

**Homeroom Date:** 7/29/2008

**Age Range:**  To

**Gender:**

**Delivery Method:** Pickup

**Email Address:**

**Report Format:** Adobe PDF

**Description:**

**Student Roster Summary Report Parameters Screen**

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**School** (required) – Select which school(s) you wish to include in the report. Defaults to all available schools.

**Grade** (optional) – Choose one or more Grades you wish to include in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report.

**Disability Condition** (optional) – Choose one or more Disability Conditions to be included in the report.

**Program** (optional) – Choose one or more Programs which you wish to include in the report.

**Homeroom** (optional) – Choose one or more student Homerooms which you wish to include in the report.

**Home School** (optional) – Choose one or more Home Schools you wish to include in the report. The Home School filter is controlled by the Home School on the Student Profile – General tab.

**Homeroom Date** (required) – Specify the date to use to retrieve students’ homeroom

**Age Range** (optional) – Specify an age range that you wish to include in the report.

**Gender** (optional) – Specify an gender that you wish to include in the report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Student Roster Summary**

AGE RANGE: ALL AGES

<b>Gender</b>				
<b>Grade</b>	<b>Male</b>	<b>Female</b>	<b>Unknown</b>	<b>Total</b>
01	2	4	0	6
02	3	1	0	4
03	3	2	0	5
04	2	8	0	10
<b>Total, School</b>	<b>10</b>	<b>15</b>	<b>0</b>	<b>25</b>

**Student Roster Summary Report by School**

<b>Gender Summary Counts</b>				
<b>Grade</b>	<b>Male</b>	<b>Female</b>	<b>Unknown</b>	<b>Total</b>
01	2	4	0	6
02	3	1	0	4
03	3	2	0	5
04	2	8	0	10
05	5	4	0	9
06	2	0	0	2
07	5	3	0	8
08	30	19	0	49
09	8	10	0	18
10	2	3	0	5
11	4	5	0	9
12	10	8	0	18
	<b>76</b>	<b>67</b>	<b>0</b>	<b>143</b>

**Student Roster Summary Report by School District**

**Student Roster Summary by Home School (R101-B By Home School)**

**Navigation: Home – SIS – School – Student Reports – Student Roster Summary by Home School**

The Student Roster Summary by Home School (R101-B By Home School) report is similar to the Student Roster Summary (R101-B), but for each school selected, this report breaks out students by grade, gender and home school. Summary section breaks out students by grade, gender and home school across all selected schools.

Home » SIS » School » Student Reports » Student Roster Summary By Home School | Advanced Search | Feedback | Mg

## Student Roster Summary By Home School (R101-B By Home School)

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

Selection Criteria | Selection Summary | Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**School**

↔ DAEL - DASL ELEMENTARY SCHOOL  
 ↔ DAHS - DASL HIGH SCHOOL  
 ↔ DAMS - DASL MIDDLE SCHOOL

**Grade**

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

**Student Status**

A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 JVS - Student Attending JVS

**Disability Condition**

\*\* - Not applicable  
 01 - Multiple disabilities (Other than Deaf-Blind)  
 02 - Deaf-Blindness  
 03 - Deafness (Hearing Impairments)

**Program**

JAB - Jr Auto Body  
 JAG - Jr AG Mechanics  
 JCOS - Jr Cosmetology  
 SAB - Sr Auto Body

**Homeroom**

A103 - BERRY (Full Year Term)  
 A104 - AUSTIN (Full Year Term)  
 A105 - COUSINS (Full Year Term)  
 A106 - CASTLE (Full Year Term)

**Home School**

↔

Homeroom Date: 9/24/2008

Age Range:  To

Gender:

Delivery Method: Pickup

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

### Student Roster Summary by Home School Report Parameters Screen

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc

Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**School** (required) – Select which school(s) you wish to include in the report. Defaults to all available schools.

**Grade** (optional) – Choose one or more Grades you wish to include in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report.

**Disability Condition** (optional) – Choose one or more Disability Conditions to be included in the report.

**Program** (optional) – Choose one or more Programs which you wish to include in the report.

**Homeroom** (optional) – Choose one or more student Homerooms which you wish to include in the report.

**Home School** (optional) – Choose one or more Home Schools you wish to include in the report. The Home School filter is controlled by the Home School on the Student Profile – General tab.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom.

**Age Range** (optional) – Specify an age range that you wish to include in the report

**Gender** (optional) – Specify a gender that you wish to include in the report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Student Roster Summary By Home School**

Home School	Grade	Gender			Total
		Male	Female	Unknown	
AGE RANGE: ALL AGES					
-	09	19	26	0	45
	10	18	10	0	28
	11	15	8	0	23
	12	8	2	0	10
		<hr/>			
		60	46	0	106
<b>East High School</b>	11	16	5	0	21
	12	6	5	0	11
		<hr/>			
<b>East High School</b>		22	10	0	32
<b>High School</b>	10	8	23	0	31
	11	46	41	0	87
	12	33	41	0	74
		<hr/>			
<b>High School</b>		87	105	0	192

**Student Roster Summary by Home School Report**

**Student Roster Summary by Homeroom (R101-B By Homeroom)**

**Navigation: Home – SIS – School – Student Reports – Student Roster Summary by Homeroom**

This report is similar to the Student Roster Summary (R101-B), but for each school, breaks out students by grade, gender, and homeroom. Also has summary section that breaks out students from all schools by grade, gender and homeroom.

Home » SIS » School » Student Reports » Student Roster Summary By Homeroom [Advanced Search](#) | [Feedback](#) | [My](#)

## Student Roster Summary By Homeroom (R101-B By Homeroom)

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

Selection Criteria   **Selection Summary**   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

Ad-Hoc Membership:    
 Public And Private

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**School**

↔

**Grade**

↔

**Student Status**

↔

**Disability Condition**

↔

**Program**

↔

**Homeroom**

↔

**Home School**

↔

Homeroom Date:

Age Range:  To

Gender:

Delivery Method:

Email Address:

Report Format:

Description:

### Student Roster Summary by Homeroom Report Parameters Screen

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc

Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**School** (required) – Select which school(s) you wish to include in the report. Defaults to all available schools.

**Grade** (optional) – Choose one or more Grades you wish to include in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report.

**Disability Condition** (optional) – Choose one or more Disability Conditions to be included in the report.

**Program** (optional) – Choose one or more Programs which you wish to include in the report.

**Homeroom** (optional) – Choose one or more student Homerooms which you wish to include in the report.

**Home School** (optional) – Choose one or more Home Schools which you wish to include in the report. The Home School filter is controlled by the Home School on the Student Profile – General tab.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom.

**Age Range** (optional) – Specify an age range that you wish to include in the report.

**Gender** (optional) – Specify a gender that you wish to include in the report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Student Roster Summary By Homeroom

Homeroom	Grade	Gender		Unknown	Total
		Male	Female		
AGE RANGE: ALL AGES					
	09	2	3	0	5
	10	3	2	0	5
	11	4	6	0	10
	12	7	5	0	12
		16	16	0	32
<b>Total, School</b>		16	16	0	32

Student Roster Summary by Homeroom Report

### Student Roster Summary by Program (R101-B By Program)

Navigation: Home – SIS – School – Student Reports – Student Roster Summary by Program

This report is similar to the Student Roster Summary (R101-B By Program), but for each school, breaks out grades and genders by program. Also has summary section that breaks out grade and gender by program for all schools on report.

Home » SIS » School » Student Reports » Student Roster Summary By Program Advanced Search | Feedback | M

## Student Roster Summary By Program (R101-B By Program)

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

---

Selection Criteria   **Selection Summary**   Load Settings

Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that membership group. All other criteria will be ignored.

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

If not limiting to an Ad-Hoc Membership Group, you may select as many other criteria as desired. Each selection will limit your results further.

**School**

DAEL - DASL ELEMENTARY SCHOOL  
 DAHS - DASL HIGH SCHOOL  
 DAMS - DASL MIDDLE SCHOOL

**Grade**

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

**Student Status**

A - ACTIVE RES  
 D - DELETED  
 I - INACTIVE  
 JVS - Student Attending JVS

**Disability Condition**

\*\* - Not applicable  
 01 - Multiple disabilities (Other than Deaf-Blind)  
 02 - Deaf-Blindness  
 03 - Deafness (Hearing Impairments)

**Program**

JAB - Jr Auto Body  
 JAG - Jr AG Mechanics  
 JCOS - Jr Cosmetology  
 SAB - Sr Auto Body

**Homeroom**

A103 - BERRY (Full Year Term)  
 A104 - AUSTIN (Full Year Term)  
 A105 - COUSINS (Full Year Term)  
 A106 - CASTLE (Full Year Term)

**Home School**

**Homeroom Date:** 9/24/2008

**Age Range:**  To

**Gender:**

**Delivery Method:** Pickup

**Email Address:**

**Report Format:** Adobe PDF

**Description:**

### Student Roster Summary by Program Report Parameters Screen

**Ad Hoc Membership** (optional) – Select an Ad-Hoc Membership from drop-down menu if you wish to only include students associated with the membership for this run of the report. Check “Public and Private” if you want to list both public ad-hoc memberships created by others in addition to your own ad-hoc memberships. Selecting an Ad-Hoc Membership Group will limit the report to the students associated with that ad-hoc memberships group. All other criteria will be ignored.

**School** (required) – Select which school(s) you wish to include in the report. Defaults to all available schools.

**Grade** (optional) – Choose one or more Grades you wish to include in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report.

**Disability Condition** (optional) – Choose one or more Disability Conditions to be included in the report.

**Program** (optional) – Choose one or more Programs which you wish to include in the report.

**Homeroom** (optional) – Choose one or more student Homerooms which you wish to include in the report.

**Home School** (optional) – Choose one or more Home Schools which you wish to include in the report. The Home School filter is controlled by the Home School on the Student Profile – General tab.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom.

**Age Range** (optional) – Specify an age range that you wish to include in the report.

**Gender** (optional) – Specify the gender that you wish to include in the report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

Program	Grade	Gender		Unknown	Total
		Male	Female		
AGE RANGE: ALL AGES					
-	KG	2	4	0	6
	01	3	1	0	4
	02	3	2	0	5
	03	2	8	0	10
	04	3	3	0	6
-		13	18	0	31
05 - Speech handicapped	04	1	1	0	2
05 - Speech handicapped		1	1	0	2
10 - Specific learning disable	04	1	0	0	1
10 - Specific learning disable		1	0	0	1
<b>Total, School</b>		<b>15</b>	<b>19</b>	<b>0</b>	<b>34</b>

**Student Roster Summary by Program Report**

## Administrative Homeroom List Summary (R201B)

**Navigation: Home – SIS – School – Student Reports – Administrative Homeroom List Summary (R201-B)**

This report will show student summary information by homeroom.

Home » SIS » School » Student Reports » Administrative Homeroom Summary (R201-B)

## Administrative Homeroom List Summary (R201-B)

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

Selection Criteria   Selection Summary   Load Settings

**Homeroom Term:**

**Homeroom Date:** 7/15/2009  

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Administrative Homeroom**

100 - Teacher1494 (Full Year Term)  
102 - Teacher1514 (Full Year Term)  
103 - Teacher1518 (Full Year Term)  
104 - Teacher1591 (Full Year Term)

**Grade Level**

PS - PS  
KG - KG  
01 - 01  
02 - 02

**Sorting Options**

Teacher Name (DESC)  
Homeroom (ASC)  
Homeroom (DESC)  
Grade (ASC)

Teacher Name (ASC)

**Delivery Method:** Pickup

**Email Address:**

**Report Format:** Adobe PDF

**Description:**

### Administrative Homeroom List Summary Report Parameters Screen

**Homeroom Term** (optional) – Choose the Homeroom Term from the drop-down list.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. Defaults to today's date

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no Student Statuses are selected, all Student Statuses will be included in the report.

**Administrative Homeroom** (optional) – Choose one or more Administrative Homerooms which you wish to include in the report. If no Administrative Homerooms are selected, all Administrative Homerooms will be included in the report.

**Grade Level** (optional) – Choose on or more Grade Levels which you wish to include in the report. If no Grade Levels are selected, all Grade Levels will be included in the report.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

<i>Report: R201B</i>		<b>DASL HIGH SCHOOL</b>			
<i>Printed Mon, Dec 17, 2007, 12:36 PM</i>		<b>2007-2008</b>			
<b>Administrative Homeroom List Summary</b>					
HOMEROOM	TEACHER NAME	ID	ROOM	GRADE	No Of Students
A103	DONALD BERRY	BERR	103	09	1
A105	DAVID COUSINS	COUS	105	10	5
A107	LINDA WALTERS	WALT	107	11	6
A109	MICHAEL WEBBER	WEBB	109	12	13
A110	LAURA LAYMAN	LAYM	110	12	4

**Administrative Homeroom List Summary Screen**

## **Administrative Homeroom List Detail (R201-A)**

**Navigation: Home – SIS – School – Student Reports – Administrative Homeroom List Detail (R201-A)**

The Administrative Homeroom List Detail (R201-A) report will display selected student details by homeroom.

Home » SIS » School » Student Reports » Administrative Homeroom Detail (R201-A)

## Administrative Homeroom List Detail (R201-A)

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

Selection Criteria   Selection Summary   Load Settings

**Homeroom Term:**

**Homeroom Date:** 7/15/2009

**Student Status**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Administrative Homeroom**

100 - Teacher1494 (Full Year Term)  
102 - Teacher1514 (Full Year Term)  
103 - Teacher1518 (Full Year Term)  
104 - Teacher1591 (Full Year Term)

**Grade Level**

PS - PS  
KG - KG  
01 - 01  
02 - 02

**Printable Columns**

Telephone  
Program Code  
Locker Number  
Combination

Student Number  
Student Name  
Birthdate  
Grade

(A limited number of Printable Columns should be selected, or truncation may result)

**Omit Unlisted Phone Numbers:**

**Sorting Options**

Student Name (DESC)  
ProgramCode (ASC)  
ProgramCode (DESC)  
Home School (ASC)

Student Name (ASC)

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address

Use custom address text

**Include Copied On Correspondence:**  Yes  No

**Delivery Method:** Pickup

**Email Address:** chris@noacsc.org

**Report Format:** Adobe PDF

**Description:**

### Administrative Homeroom List Detail Report Parameters Screen

**Homeroom Term** (optional) – Choose the Homeroom Term from the drop-down list.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. Defaults to the current date.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no Student Statuses are selected, all Student Statuses will be included in the report.

**Administrative Homeroom** (optional) – Choose one or more Administrative Homerooms which you wish to include in the report. If no Administrative Homerooms are selected, all Administrative Homerooms will be included in the report.

**Grade Level** (optional) – Choose one or more Grade Levels which you wish to include in the report. If no Grade Levels are selected, all Grade Levels will be included in the report.

**Printable Columns** (required) – Choose one or more fields to print for each student by homeroom. Must choose at least one field.

**Omit Unlisted Phone Numbers** (optional) – If checked, unlisted phone numbers will not be printed. If unchecked, unlisted phone numbers will be printed.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the drop-down list.

**Address** – If you have selected to print labels, choose an option to print Student Address, Parent Address or a custom address on the labels. If you check “Use custom address text,” the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; select whether to include copies of the report listing addresses for contacts marked “Copied on Correspondence.”

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

<i>Report: R201A</i>		<b>DASL HIGH SCHOOL</b>				
<i>Printed Thu, Aug 06, 2009, 9:59 AM</i>		2008-2009				
<b>Administrative Homeroom List Detail</b>						
HOMEROOM 202B		TEACHER: MRS. E. Teacher1453			LOCATION: MRS. VOGT	
Stud ID	Student Name	GR	GN	Address	Counselor	DSE
5167	Student47655, NICOLE	07	F	645 S Main St, Lima, OH 45804-1241		01
4008	Student48351, SEAN	07	M	645 S Main St, Lima, OH 45804-1241		01
2608	Student48856, GENE	07	M	645 S Main St, Lima, OH 45804-1241		01
NUMBER OF STUDENTS: 3		(Males: 2, Females: 1)				

**Administrative Homeroom List Detail Report**

## Student Roster by Membership (R102)

**Navigation: Home – SIS – School – Student Reports – Student Roster by Membership (R102)**

The Student Roster by Membership report is used to generate a list of students that all belong to the selected group/groups or membership/memberships.

Home » SIS » School » Student Reports » Student Roster By Membership (R102)

## Student Roster By Membership (R102)

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

Selection Criteria | Selection Summary | Load Settings

**Membership Date Range:** [ ] to [ ]

**Membership Group**

11 - Intervention  
 12 - Post-secondary Enrollment Options Program  
 15 - 15  
 16 - 16

**Membership**

15 - Student received intervention provided during regular s  
 15 - Student received intervention provided in the summer  
 16 - Student placement by a district in a chartered non-pub  
 50 - Prev. reported as a dropout in reporting district gradua

**Special Education Services**

215001 - Adapted Physical Education Services  
 215002 - Aide Services  
 215003 - Attendant Services  
 215004 - Audiological Services

**Grade**

09 - 09  
 10 - 10  
 11 - 11  
 12 - 12

**Student Status**

A - ACTIVE RES  
 ACCA - ASHLAND ACADEMY  
 AE - ACTIVE ELSEWHERE  
 D - DELETED

**Homeroom Date:** 9/18/2012

Display Address In Report

**Sorting Options**

Student Number (ASC)  
 Student Number (DESC)  
 Student name (ASC)  
 Student name (DESC)

**Output:**  Report  Labels  Both Report and Labels

**Label Type:** Avery Label 5160 - 1" X 2 5/8" 3-columns

**Address:**  Use Student Address  Use Parent Address  
 Use custom address text [ ]

**Include Copied On Correspondence:**  Yes  No

**Delivery Method:** Pickup [Set As Default]

**Email Address:** EmhoffH@software-answers.com

**Report Format:** Adobe PDF

**Description:** [ ]

[Submit]

### Student Roster by Membership Report Parameters Screen

**Note:** For selection criterion, if optional and no criterion are selected from the available options, all is assumed.

**Membership Date Range** (optional) – Specify from/to Membership Date Range to include on report. If a Date Range is specified, then students with a membership with Start and Stop Dates that fall within that Date Range will display. If the Date Range is left blank, then all students with a membership will display based on the other filters.

**Membership Group** (optional) – Choose one or more Membership Groups you wish to include in the report.

**Membership** (optional) – Choose one or more Memberships you wish to include in the report.

**Special Education Services** (optional) – Select the Special Education services to return the students on the report who are assigned those services. If no Special Education services are selected, the report will return students assigned to all services. This list box contains the 215xxx codes and refers to the records entered for a student on the Services tab on the Special Education screen.

***Note:** The Special Education Services list only displays if FY13 and later is in context. In prior years, the Special Education services are entered on the Edit Student Memberships screen and are selected for this report in the Membership Code list.*

**Grade** (optional) – Choose one or more Grades you wish to include in the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report.

**Homeroom Date** (required) – Specify the date to use to retrieve students' homeroom. Defaults to the current date.

**Display Address In Report** (optional) – If checked, the student address will be displayed on the report output. If unchecked, the student address will not be displayed on the report output.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Output** – Select Report, Labels or Both Report and Labels.

If labels are chosen, use the following Adobe page settings when printing the labels to ensure that the labels print correctly on the page.

For Adobe 9:

- Page Scaling = None
- Auto Rotate and Center = Unchecked.

For Adobe 10:

- Size Options = Actual Size
- Orientation = Portrait.

***Note:** If you are using Firefox, you must change a setting before printing labels. In Firefox, go to Options. On the Applications window under Content Type, locate Portable Document Format (PDF). In the Action column of that row, change the selection from Preview in Firefox to an Adobe option (such as Use Adobe Acrobat).*

**Label Type** – If choosing Labels, specify the size of the labels in the Label Type by selecting the appropriate label format from the drop-down list.

**Address** – Select the address to use for labels. If you check “Use custom address text,” the text you enter in the field will be added at the top of each label.

**Include Copied On Correspondence** – Yes or No; Select whether to include copies of the report listing addresses for contacts marked “Copied on Correspondence.”

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**With Address**

<i>Report: R102</i>		<b>DASL HIGH SCHOOL</b>							
<i>Printed Thu, Aug 06, 2009, 10:16 AM</i>		2008-2009							
<b>Student Roster By Membership</b>									
STUDENT CONTROL GROUP: 20 Specialized Instructions		Membership Date Range:						ALL DATES	
ID	STUDENT NAME AND ADDRESS	TELEPHONE	AGE	ST	GR	GD	HMRM	STUDENT MEMBERSHIP CODE	EFFECTIVE DATE
3490	Student48607, ETHAN 645 S Main St Lima, OH 45804-1241	(555) 555-5555	17	A	10	M	230	205062 Regular Classroom with Cluster Grouping	Start Date: 8/27/2008 Stop Date:
Count of Membership Group 20: 1									
STUDENT CONTROL GROUP: 21 Placement Options		Membership Date Range:						ALL DATES	
ID	STUDENT NAME AND ADDRESS	TELEPHONE	AGE	ST	GR	GD	HMRM	STUDENT MEMBERSHIP CODE	EFFECTIVE DATE
5167	Student47655, NICOLE 645 S Main St Lima, OH 45804-1241	(555) 555-5555	14	A	07	F	202B	210015 Special education outside the regular class more than 60% of	Start Date: 8/27/2008 Stop Date:
5167	Student47655, NICOLE 645 S Main St Lima, OH 45804-1241	(555) 555-5555	14	A	07	F	202B	215019 Adaptive Equipment and Services	Start Date: 8/27/2008 Stop Date:

**Student Roster by Membership Report with Addresses**

## Without Address

Report: R102		DASL HIGH SCHOOL	
Printed Thu, Aug 06, 2009, 10:18 AM		2008-2009	
Student Roster By Membership			
STUDENT CONTROL GROUP: 20 Specialized Instructions		Membership Date Range: ALL DATES	
ID	STUDENT NAME	TELEPHONE	AGE ST GR GD HMRM STUDENT MEMBERSHIP CODE EFFECTIVE DATE
3490	Student48607, ETHAN	(555) 555-5555	17 A 10 M 230 205062 Regular Classroom with Cluster Grouping Start Date: 8/27/2008 Stop Date:
Count of Membership Group 20: 1			
STUDENT CONTROL GROUP: 21 Placement Options		Membership Date Range: ALL DATES	
ID	STUDENT NAME	TELEPHONE	AGE ST GR GD HMRM STUDENT MEMBERSHIP CODE EFFECTIVE DATE
5167	Student47655, NICOLE	(555) 555-5555	14 A 07 F 202B 210015 Special education outside the regular class more than 60% of Start Date: 8/27/2008 Stop Date:
5167	Student47655, NICOLE	(555) 555-5555	14 A 07 F 202B 215019 Adaptive Equipment and Services Start Date: 8/27/2008 Stop Date:

### Student Roster by Membership Report without Addresses

## Principals Report of Enrollment (R305)

**Navigation: Home – SIS – School – Year End Reports – Principals Report of Enrollment (R305)**

This report will show student enrollment by age, grade, and gender and show totals by grade level and gender.

Home » SIS » School » Year End Reports » Principals Report of Enrollment (R305)

## Principals Report of Enrollment (R305)

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

Selection Criteria   Selection Summary   Load Settings

Date for Age Calculation: 7/15/2009

**StudentStatus**

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

**Grade**

PS - PS  
KG - KG  
01 - 01  
02 - 02

**Gender**

M  
F

**Ethnicity**

A - ASIAN  
B - BLACK  
H - HISPANIC  
I - INDIAN

**Sorting Options**

Age (ASC)  
Age (DESC)  
Grade (DESC)

Delivery Method: Pickup   Set As Default

Email Address: chris@noacsc.org

Report Format: Adobe PDF

Description:

Submit

### Principal's Report of Enrollment Report Parameters Screen

**Date for Age Calculation** (required) – Enter the date to be used when calculating student ages. Defaults to the current date.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report. If no Student Statuses are chosen, all Student Statuses will be selected.

**Grade** (optional) – Choose one or more Grades you wish to include in the report. If no Grades are chosen, all Grades will be selected.

**Gender** (optional) – Choose one or more Genders you wish to include in the report. If no Genders are chosen, all Genders will be selected.

**Ethnicity** (optional) – Choose one or more Ethnicities you wish to include in the report. If no Ethnicities are chosen, all Ethnicities will be selected.

**Sorting Options** (optional) – Choose one or more sort options for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

REPORT: DASL - R305		DASL ELEMENTARY		RUN AT 1:12 PM 7/15/2009	
SCHOOLYEAR: 2009-2010		PRINCIPAL'S REPORT OF ENROLLMENT		PAGE 1 OF 2	
GRADE	AGE	GENDER	ENROLLMENT		
01	5	F	1		
01	5	M	1		
01	6	F	23		
01	6	M	33		
01	7	F	4		
01	7	M	1		
TOTAL GRADE	01	F	28		
TOTAL GRADE	01	M	35		
02	6	F	4		
02	6	M	3		
02	7	F	36		
02	7	M	29		
02	8	F	3		
02	8	M	7		
02	9	M	2		
TOTAL GRADE	02	F	43		
TOTAL GRADE	02	M	41		

**Principal's Report of Enrollment Report**

## Year-End Enrollment Summary (R306-B)

**Navigation: Home – SIS – School – Year-End Enrollment Summary (R306B)**

This interactive report will show student enrollment by grade and admission/withdrawal code.

**Year-End Enrollment Summary Report Parameters Screen**

**Date From/Date To** (required) – Enter the date range for student enrollment.

**Grade** (optional) – Select one or more student grades. If no grade is selected, all grades will be used for the report.

**Gender** (optional) – Select one or more genders. If no gender is selected, all genders will be used for the report.

**Ethnicity** (optional) – Select one or more ethnicities. If no ethnicity is selected, all ethnicities will be used for the report.

**Student Status** (optional) – Choose one or more Student Statuses you wish to include in the report.

**Show Results** – Show the enrollment summary report on-line.

Grade	Beginning Enrollment
07	M: 0 F: 0
08	M: 0 F: 0
09	M: 55 F: 70
10	M: 78 F: 74
11	M: 73 F: 82
12	M: 98 F: 75
23	M: 2 F: 6
GR	M: 0 F: 0

Admission Code	Admission Code Name	07	08	09	10	11	12	23	GR
02	From a non-public school	M:0 F:0	M:0 F:0	M:12 F:17	M:0 F:0				
03	From another public school district - same county	M:0 F:0	M:0 F:0	M:3 F:0	M:3 F:2	M:1 F:2	M:0 F:4	M:0 F:0	M:0 F:0
04	From another School district-in Ohio (diff county)	M:0 F:0	M:0 F:0	M:1 F:0	M:0 F:0	M:0 F:0	M:0 F:0	M:0 F:0	M:0 F:0
05	From another public school district out of state	M:0 F:0	M:0 F:0	M:0 F:1	M:1 F:1	M:1 F:1	M:0 F:1	M:0 F:0	M:0 F:0
06	From another Country	M:0 F:0	M:0 F:0	M:0 F:0	M:0 F:0	M:0 F:0	M:0 F:1	M:0 F:0	M:0 F:0
<b>Total Admissions By Grade</b>		<b>0</b>	<b>0</b>	<b>34</b>	<b>7</b>	<b>5</b>	<b>6</b>	<b>0</b>	<b>0</b>

[Show All Admissions](#)

Withdrawal Code	Withdrawal Code Name	07	08	09	10	11	12	23	GR
40	Transferred to another school outside of Ohio	M:0 F:0	M:0 F:0	M:0 F:0	M:2 F:0	M:1 F:0	M:0 F:0	M:0 F:0	M:0 F:0
41	Trans. to Ohio Local, ex. village or city school	M:0 F:0	M:0 F:0	M:3 F:4	M:1 F:0	M:2 F:3	M:4 F:5	M:0 F:0	M:0 F:0
52	Death	M:0 F:0	M:1 F:0	M:0 F:0	M:0 F:0				
73	Over 18 years of age	M:0 F:0	M:0 F:2	M:0 F:0	M:0 F:0				
99	Completed Grad Requirements (course and grad tests)	M:0 F:0	M:2 F:3	M:0 F:0					
<b>Total Withdrawals By Grade</b>		<b>0</b>	<b>0</b>	<b>7</b>	<b>3</b>	<b>6</b>	<b>12</b>	<b>5</b>	<b>0</b>

[Show All Withdrawals](#)

Grade	End Enrollment
07	M: 0 F: 0
08	M: 0 F: 0
09	M: 67 F: 84
10	M: 79 F: 77
11	M: 72 F: 81
12	M: 93 F: 71
23	M: 0 F: 3
GR	M: 0 F: 0

## Year-End Enrollment Summary Report

### Grade and Beginning Enrollment Grid

Shows the enrollment by grade and gender on the beginning date selected.

### Admission Grid

**Admission Code** – Shows grade enrollment by Admission Code (including blank Admission Code). You may click on any Admission Code to see the students included.

**Admission Code Name** – Description of Admission Code. You may click on any Admission Code Name to see the students included.

**Grade Levels** – Shows the enrollment by gender and admission code for each grade level including Total Admissions by Grade. You may click on any grade level to see the students included in that Admission Code/Grade Level – OR – click on any gender total to see the students included.

**Show All Admissions** – You may click on the Show All Admissions link to view all admissions.

## Withdrawal Grid

**Withdrawal Code** – Shows grade enrollment by Withdrawal Code (including blank Withdrawal Code). Click on any Withdrawal Code to see the students included.

**Withdrawal Code Name** – Description of Withdrawal Code. You may click on any Withdrawal Code Name to see the students included in that Withdrawal Code.

**Grade Levels** – Shows the enrollment by gender and withdrawal code for each grade level including Total Withdrawals by Grade. You may click on any grade level to see the students included in that Withdrawal Code/Grade Level – OR – click on any gender total to see the students included.

**Show All Withdrawals** – You may click on the Show All Withdrawals link to view all withdrawals.

## Grade and End Enrollment Grid

Shows the enrollment by grade and gender on the end date selected.

---

## Civil Rights Reporting

The U.S. Department of Education’s Office for Civil Rights (OCR) requires public schools to complete a Civil Rights Data Collection (CRDC) survey every other year. The survey collects data at the building level about student enrollment; school characteristics; and education programs, services and outcomes disaggregated by race/ethnicity, sex, limited English proficiency and disability. The survey is organized into two parts:

- Part 1 School Form – Fall Snapshot Data (enrollment and placement data)
- Part 2 School Form – Cumulative and End-of-Year Data

**Note:** For additional information about the CRDC survey and for definitions and rules concerning student calculations and ethnicity determination, see <https://crdc.grads360.org>.

Following is the process for gathering data to complete the survey:

1. Complete the information on the **Additional Civil Rights Data Collection** screen. (See [“Complete Civil Rights Data Collection.”](#))
2. Run the **Civil Rights Report** (part 1). (See [“Run Civil Rights Report – Part 1.”](#))
3. Run the **Civil Rights Report** (part 2). (See [“Run Civil Rights Report – Part 2.”](#))

The part 1 and part 2 reports calculate based on:

- Data in StudentInformation, including student profiles, courses, course sections, etc.
  - Additional information you entered on the **Additional Civil Rights Data Collection** screen
4. Use the part 1 and part 2 reports to complete the CRDC survey.

## Understand Civil Rights Report Calculations

This section explains how students are included in the Civil Rights Report for both part 1 and part 2.

### Student Calculations

For all survey items, students are counted at their attending school. This is the school where the student actually for more than 50% of the school day. If a student attends two schools, each for exactly 50% of the day, the student is counted in the school designated as his or her primary building. Students attending elsewhere full time for any reason are excluded from the counts.

All counts are calculated as of the end of the school year.

Counts by race/ethnicity by gender are unduplicated counts, meaning a student is counted only one time in the race/ethnicity columns. Counts in the columns for **Students With Disabilities (IDEA), Section 504 Only** and **LEP** status students are unduplicated within the column, but are duplicate counts with other columns, except that a student cannot be counted under both **Students With Disabilities (IDEA)** and **Section 504 Only**. In the rare situation where a student in StudentInformation has both a non "\*\*\*" value specified for his or her disability condition and has a value of "Y" for **Section 504 Plan** on the FD record in effect for the time period selected, the student is counted under the counts for **Students With Disabilities (IDEA)** and not under the **Section 504 Plan** counts. A student who is LEP and is a student with disabilities (IDEA) is counted three times: once under race/ethnicity by gender, once under **Students with Disabilities (IDEA)**, and once under **LEP**.

Grade level for each student is determined based on the value of the student's **State Equivalent Grade** specified on the FD record in effect as of the last day of student enrollment or last day of school. Students in grade level 13 with percent equal to 0% are excluded from the calculations. Grade level 23 students are only included if their percent of time is greater than 0% and they are 21 years of age or younger. Any student over 21 is excluded.

**Attending Building IRN** for each student is determined by using the value of the **Attending Building IRN** on the FS record in effect for the last record for the student in the school year.

### Ethnicity Determination

While StudentInformation classifies ethnicity into seven categories, not all students have been re-evaluated and assigned to an ethnicity under the seven category method. For the purposes of this report, the elements **Hispanic/Latino, Racial Groups** and **Summative** race are used to determine under which ethnic group a student is included as described in the following bullet points:

- If **Hispanic/Latino** is equal to “Y,” the student is counted under the **Hispanic or Latino of any Race** ethnic group.
- If **Hispanic/Latino** is equal to “N,” and the student has one racial group checked, the student is counted under the CRDC ethnic group that corresponds to the racial group checked on the student profile.
- If **Hispanic/Latino** is equal to “N,” and the student has more than one racial group checked, the student is counted in the **Two or More Races** category.

Unduplicated counts are provided based on male and female students by ethnicity for each section of the report where required.

## Complete Civil Rights Data Collection

### Navigation: StudentInformation – SIS – School – Civil Rights Reporting – Additional Civil Rights Data Collection

Use this screen to enter data required for the CRDC survey that cannot be calculated from other areas in StudentInformation.

1. On the **Additional Civil Rights Data Collection** screen, in the **Select a school** drop-down list, select the school for which you want to complete information for civil rights reporting.

**Note:** *If you access this screen at the building level, the school is already selected.*

#### Select School for Civil Rights Data Collection

2. Expanding or collapsing each section of the screen as necessary, select or enter a response to each question on the screen.
3. Click **Save**.

### Additional Civil Rights Data Collection

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

Select a school:  WARNING: Data loss will occur if a new school is selected without saving.

#### ▼ Civil Rights Part 1

Ungraded Detail	No	Yes
School has mainly elementary school age students?	<input type="radio"/>	<input checked="" type="radio"/>
School has mainly middle school age students?	<input type="radio"/>	<input checked="" type="radio"/>
School has mainly high school age students?	<input type="radio"/>	<input checked="" type="radio"/>

School Characteristics	No	Yes
Is this school a special education school?	<input type="radio"/>	<input checked="" type="radio"/>
Is this school either a magnet school or a school operating a magnet program within the school?	<input checked="" type="radio"/>	<input type="radio"/>
Is this a charter school?	<input checked="" type="radio"/>	<input type="radio"/>
Is this school an alternative school?	<input type="radio"/>	<input checked="" type="radio"/>

Magnet School	No	Yes
Does the entire school population participate in the magnet school program?	<input checked="" type="radio"/>	<input type="radio"/>

Alternative School Detail	No	Yes
This alternative school is designed to meet the needs of students with academic difficulties?	<input type="radio"/>	<input checked="" type="radio"/>
This alternative school is designed to meet the needs of students with discipline problems?	<input type="radio"/>	<input checked="" type="radio"/>
This alternative school is designed to meet the needs of students with academic difficulties and discipline problems?	<input type="radio"/>	<input checked="" type="radio"/>

Advanced Placement	No	Yes
Is enrollment via self-selection by students permitted for all AP courses offered by the school?	<input checked="" type="radio"/>	<input type="radio"/>

Dual Enrollment Program	No	Yes
Does this school have any students enrolled in a dual enrollment/dual credit program?	<input type="radio"/>	<input checked="" type="radio"/>

### Additional Data Collection – Civil Rights Part 1 Section

### Additional Civil Rights Data Collection

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

Select a school:  WARNING: Data loss will occur if a new school is selected without saving.

> **Civil Rights Part 1**

∨ **Civil Rights Part 2 Non-Demographics**

Credit Recovery Program	No	Yes
Does this school have any students who participate in at least one credit recovery program that allows them to earn missed credit in order to graduate from high school?	<input type="radio"/>	<input checked="" type="radio"/>

Single-Sex Interscholastic Athletics	Males Only	Females Only
Number of single-sex interscholastic athletics teams	<input type="text" value="12"/>	<input type="text" value="9"/>

Corporal Punishment	No	Yes
Does this school use corporal punishment to discipline students?	<input checked="" type="radio"/>	<input type="radio"/>

Allegations of Harassment or Bullying	Number of Allegations
Allegations of harassment or bullying on the basis of sex	<input type="text" value="2"/>
Allegations of harassment or bullying on the basis of race, color, or national origin	<input type="text" value="20"/>
Allegations of harassment or bullying on the basis of disability	<input type="text" value="5"/>

Instances of Restraint or Seclusion	Students W/O Disabilities	Students with Disabilities (IDEA)	Students with Disabilities (504)
Number of instances of mechanical restraint	<input type="text" value="6"/>	<input type="text" value="7"/>	<input type="text" value="8"/>
Number of instances of physical restraint	<input type="text" value="9"/>	<input type="text" value="10"/>	<input type="text" value="11"/>
Number of instances of seclusion	<input type="text" value="12"/>	<input type="text" value="13"/>	<input type="text" value="14"/>

Justice Facility Type	No	Yes
Pre-adjudication/Pre-conviction facility	<input checked="" type="radio"/>	<input type="radio"/>
Post-adjudication/Post-conviction facility	<input type="radio"/>	<input checked="" type="radio"/>
Pre- and post-adjudication/conviction facility	<input checked="" type="radio"/>	<input type="radio"/>

Days in Regular School Year at Justice Facility	Number of Days
Days in the regular school year	<input type="text" value="15"/>

Justice Facility Educational Program Hours per Week	Number of Hours
Hours per week that the educational program is offered during the regular school year	<input type="text" value="16"/>

### Additional Data Collection – Civil Rights Part 2 Non-Demographics Section

### Additional Civil Rights Data Collection

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

Select a school:  WARNING: Data loss will occur if a new school is selected without saving.

➤ **Civil Rights Part 1**

➤ **Civil Rights Part 2 Non-Demographics**

▼ **Civil Rights Part 2 Demographics**

Students Reported as Harassed or Bullied											
Category	Sex	Race/Ethnicity							LEP	Students with Disabilities (IDEA)	Section 504 Only
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students reported as harassed or bullied on the basis of sex	M	0	0	0	0	0	0	0	0	0	0
	F	2	0	0	0	0	0	0	0	0	0
Students reported as harassed or bullied on the basis of race, color, or national origin	M	5	3	0	0	12	2	0	9	0	0
	F	0	0	0	0	0	0	0	0	0	0
Students reported as harassed or bullied on the basis of disability	M	0	0	0	0	0	2	0	0	0	0
	F	0	0	0	0	3	0	0	0	0	0

Students Disciplined for harassment or bullying											
Category	Sex	Race/Ethnicity							LEP	Students with Disabilities (IDEA)	Section 504 Only
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students disciplined for harassment or bullying on the basis of sex	M	0	0	0	0	5	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
Students disciplined for harassment or bullying on the basis of race, color, or national origin	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	12	8	0	0	0	0
Students disciplined for harassment or bullying on the basis of disability	M	0	0	0	0	0	0	0	0	0	0
	F	3	0	0	0	0	0	0	0	0	0

Non-IDEA Students Subjected to Restraint or Seclusion											
Category	Sex	Race/Ethnicity							LEP	Section 504 Only	
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Non-IDEA students subjected to mechanical restraint	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
Non-IDEA students subjected to physical restraint	M	0	0	0	0	2	2	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
Non-IDEA students subjected to seclusion	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0

IDEA Students Subjected to Restraint or Seclusion									
Category	Sex	Race/Ethnicity							LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	
Students with disabilities (IDEA) subjected to mechanical restraint	M	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0
Students with disabilities (IDEA) subjected to physical restraint	M	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0
Students with disabilities (IDEA) subjected to seclusion	M	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0

Discipline of Students without Disabilities									
Category	Sex	Race/Ethnicity							LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	
Students without disabilities who received an expulsion under zero tolerance policies	M	0	0	0	0	1	0	0	0
	F	0	0	0	0	0	0	0	0
Students without disabilities who were referred to a law enforcement agency or official	M	4	0	0	0	0	3	0	0
	F	0	0	0	0	0	0	0	0
Students without disabilities who received a school-related arrest	M	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	1	0	0

Discipline of Students with Disabilities										
Category	Sex	Race/Ethnicity							LEP	Section 504 Only
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races		
Students with disabilities who received an expulsion under zero tolerance policies	M	0	0	0	0	0	0	0	0	
	F	0	0	0	0	0	0	0	0	
Students with disabilities who were referred to a law enforcement agency or official	M	2	0	0	0	0	1	0	0	
	F	0	0	0	0	0	0	0	0	
Students with disabilities who received a school-related arrest	M	0	0	0	0	0	0	0	0	
	F	0	0	0	0	0	0	0	0	

**Additional Data Collection – Civil Rights Part 2 Demographics Section**

## Run Civil Rights Report – Part 1

### Navigation: StudentInformation – SIS – School – Civil Rights Reporting – Civil Rights Report

1. On the Civil Rights Report screen, in the **Select a Civil Rights Report** drop-down list, select “Civil Rights Report Part 1.”
2. In the **Include Buildings** section, select the school(s) to include in the report.  
*Note: If you select multiple schools, the data for each building prints separately.*
3. For each building you selected, if the building’s master schedule uses block scheduling, select the check box under **Is Block Scheduling used on Master Schedule?**
4. In the **Effective Date** field, enter or select a single date (between September 27 and December 31) for which you want to run the part 1 report.
5. If any building you selected uses block scheduling, in the **If Block Scheduling, Specify Single date for Second Block Before March 1st** field, enter or select a second semester effective date (between December 2 and March 1) to use as the second block enrollment calculation date.
6. In the remaining fields, select your desired report output options.  
*Note: If you plan to upload your survey data, select a **Report Format** of “Adobe PDF & CSV.”)The remaining options are common to all reports. (For details, see *ProgressBook StudentInformation Getting Started Guide*).*
7. Click **Submit**.

StudentInformation > SIS > School > Civil Rights Reporting > Civil Rights Report

## Civil Rights Report

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

Select a Civil Rights Report: Civil Rights Report Part 1

Selection Criteria | Selection Summary | Load Settings

IRN - Name	Is Block Scheduling used on Master Schedule?
<input checked="" type="checkbox"/> [Redacted]	<input checked="" type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>

Effective Date: 12/1/2013

If Block Scheduling, Specify Single date for Second Block Before March 1st: 03/01/2014

Sorting: IRN (ASC)

Delivery Method: Pickup Set As Default

Email Address:

Report Format: Adobe PDF & CSV

Description: Civil Rights - Part 1

### Civil Rights Report Part 1

The report contains a series of tables or subreports you can use to complete the Part 1 School Form of the survey. Students are included in the part 1 report based on the following criteria:

- Enrolled with the following percent of time on the FS record in effect for the specified effective date:
  - Preschool or kindergarten – any percent of time
  - Other than preschool or kindergarten – percent of time greater than 50%

**Note:** For additional criteria specific to each of the following sections, see the bullet points following the screen.

#### Additional notes:

- If no value exists for the **EMIS Subject Code** field on the **EMIS Override** tab for course section, StudentInformation uses the value in the **EMIS Subject Code** field on the **EMIS** tab for the corresponding course.
- If block scheduling is not used, only students in course sections based on the effective date specified are counted. Student course section assignments for classes that start in a future course term are excluded.

- If block scheduling is used, the following two dates are used for the counts:
  - Effective date specified (between September 27 and December 31)
  - Second semester block scheduling effective date

<b>Grades with Students Enrolled</b>	
Grades	Answer
Preschool	No
Kindergarten	No
Grade 1	Yes
Grade 2	No
Grade 3	No
Grade 4	No
Grade 5	No
Grade 6	No
Grade 7	No
Grade 8	No
Grade 9	Yes
Grade 10	Yes
Grade 11	Yes
Grade 12	Yes
Ungraded	No

- **State Equivalent Grade**

<b>Preschool Age for Non-IDEA Children</b>	
Ages	Answer
Children age 3 years	No
Children age 4 years	No
Children age 5 years	No

- **State Equivalent Grade** of “PS - Preschool (Ages 3-5)”
- Age calculated based on **Birthdate**

### Ungraded Detail

Question	Answer
School has mainly elementary school age students?	Yes
School has mainly middle school age students?	Yes
School has mainly high school age students?	Yes
School has mainly elementary and middle school age students?	Yes
School has mainly middle and high school age students?	Yes
School has elementary, middle, and high school age students?	Yes

- From **Additional Civil Rights Data Collection** screen

### School Characteristics

Question	Answer
Is this school a special education school?	Yes
Is this school either a magnet school or a school operating a magnet program within the school?	No
Is this school a charter school?	No
Is this school an alternative school?	Yes

- From **Additional Civil Rights Data Collection** screen

### Magnet School Detail

Question	Answer
Does the entire school population participate in the magnet school program?	No

- From **Additional Civil Rights Data Collection** screen

### Alternative School Detail

School Focus	Answer
This alternative school is designed to meet the needs of students with academic difficulties	Yes
This alternative school is designed to meet the needs of students with discipline problems	Yes
This alternative school is designed to meet the needs of students with academic difficulties and discipline problems	Yes

- From **Additional Civil Rights Data Collection** screen

### Overall Enrollment

Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	Section 504 Only	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity			
Overall Enrollment	M	6	2	2	3	10	425	21	469	57	11	1
	F	7	3	12	0	2	474	23	521	38	9	3
	Total	13	5	14	3	12	899	44	990	95	20	4

### Preschool Enrollment (Only for schools offering preschool)

Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	LEP	
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity			
Enrollment of children in preschool programs or services	M	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0

- **State Equivalent Grade** of “PS - Preschool (Ages 3-5)” or “IN - Infant/Toddler (Ages 0-2)”

### Enrollment of Limited English Proficient Students

Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity	
Students who are LEP	M	0	0	1	0	0	0	0	1	0
	F	0	0	1	0	0	1	1	3	1
	Total	0	0	2	0	0	1	1	4	1
Students enrolled in LEP Programs	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0

- Students with at least one **Student Memberships** record with a **Start Date** within the current school year where the **EMIS Program Code** = 235012 or 235013

### Enrollment of Students with Disabilities Served Under IDEA and Students with Disabilities Served Under Section 504 Only

Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	Section 504 Only
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Students with disabilities served under IDEA	M	2	0	0	0	0	51	4	57	57	0
	F	0	0	1	0	0	37	0	38	38	0
	Total	2	0	1	0	0	88	4	95	95	0
Students with disabilities served under Section 504 of the Rehabilitation Act of 1973, but not served under IDEA	M	0	0	0	0	0	11	0	11	0	11
	F	0	0	0	0	0	8	1	9	0	9
	Total	0	0	0	0	0	19	1	20	0	20

Gifted and Talented Education Programs	
Question	Answer
Does this school have any students enrolled in gifted/talented programs?	No

- Derived from information in the **Students Enrolled in gifted and talented Programs** table

Students Enrolled in gifted and talented Programs											
Category	Sex	Race / Ethnicity							Students with Disabilities (IDEA)	LEP	
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			Total Race / Ethnicity
Students enrolled in gifted and talented programs	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- Served field on **Student Gifted Record** in the current school year

**Note:** In order for this sub-report to return the correct data, you must run the **Gifted Mass Update** prior to running the **Civil Rights Report**. The **Gifted Mass Update** creates a default gifted record for each student who does not already have one.

Classes in Algebra I	
Subject	Number of Classes
Algebra I	16

- Derived from information in the **Middle School Student Enrollment in Algebra I** and **High School Student Enrollment in Algebra I** tables

Middle School Student Enrollment in Algebra I											
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Students enrolled in Algebra I in grade 7 or 8 or ungraded	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- **State Equivalent Grade** of “07 - Seventh Grade” or “08 - Eighth Grade”
- Course section record (**EMIS Override** tab) values of:
  - **Curriculum** not “AP - Advanced Placement”
  - **EMIS Subject Code** = “110301 - Algebra I”
  - **Delivery Method** other than “IS - Independent Study”

Classes in Geometry	
Subject	Number of Classes
Geometry	15

- Derived from information in the **Student enrollment in Geometry** table

### Student enrollment in Geometry

Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students enrolled in Geometry	M	1	0	0	2	0	122	6	131	12	0
	F	2	1	2	0	1	129	5	140	8	1
	Total	3	1	2	2	1	251	11	271	20	1

- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
- **EMIS Subject Code** = “111200 - Geometry” or “110490 - Applied Geometry or Applied Mathematics II”
- **Delivery Method** other than “IS - Independent Study”

### High School Student Enrollment in Algebra I

Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students enrolled in Algebra I in grade 9 or 10	M	2	0	0	1	2	101	7	113	22	0
	F	3	0	0	0	1	111	8	123	12	1
	Total	5	0	0	1	3	212	15	236	34	1
Students enrolled in Algebra I in grade 11 or 12 or ungraded	M	0	0	0	0	0	3	0	3	1	0
	F	0	0	0	0	0	1	0	1	0	0
	Total	0	0	0	0	0	4	0	4	1	0

- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
- **EMIS Subject Code** = “110301 - Algebra I”
- **Delivery Method** other than “IS - Independent Study”

Classes in Mathematics Courses in High School	
Mathematics Courses	Number of Classes
Algebra II	13
Advanced Mathematics	10
Calculus	0

- o Derived from information in the **Student Enrollment in Mathematics Courses in High School** table

Student Enrollment in Mathematics Courses in High School											
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Students enrolled in Algebra II	M	0	0	1	0	5	86	4	96	7	1
	F	1	0	1	0	0	115	5	122	9	0
	Total	1	0	2	0	5	201	9	218	16	1
Students enrolled in Advanced Mathematics	M	2	0	0	0	0	65	1	68	0	0
	F	0	0	0	0	0	74	4	78	0	1
	Total	2	0	0	0	0	139	5	146	0	1
Students enrolled in Calculus	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- o **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
  - o **EMIS Subject Code** of:
    - o 119999 - Other Mathematics Course
- or

- **Curriculum** not “AP - Advanced Placement” and **EMIS Subject Code** of:
  - 110302 - Algebra II
  - 110020 - Mathematics II
  - 110030 - Mathematics III
  - 110040 - Mathematics IV (Pre-calculus)
  - 110099 - Advanced Mathematics (Pre-Calculus)
  - 111300 - Discrete Mathematics
  - 111500 - Probability and Statistics
  - 111600 - Trigonometry
  - 111850 - Transition to College Mathematics
  - 110600 - Calculus
- **Delivery Method** other than “IS - Independent Study”

<b>Classes in Science Courses</b>	
Science Courses	Number of Classes
Biology	19
Chemistry	9
Physics	3

- Derived from information in the **Student Enrollment in Science Courses** table

Student Enrollment in Science Courses											
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Students enrolled in Biology	M	2	0	1	2	2	172	9	188	14	1
	F	3	1	1	0	1	250	10	266	9	1
	Total	5	1	2	2	3	422	19	454	23	2
Students enrolled in Chemistry	M	2	0	0	0	3	67	4	76	1	0
	F	1	0	1	0	0	94	4	100	2	0
	Total	3	0	1	0	3	161	8	176	3	0
Students enrolled in Physics	M	1	0	0	0	0	31	0	32	0	0
	F	0	0	0	0	0	25	0	25	0	0
	Total	1	0	0	0	0	56	0	57	0	0

- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
- Course section record (**EMIS Override** tab) values of:
  - **EMIS Subject Code** of:
    - 132330 - Advanced Biology
    - 132326 - Advanced Chemistry
    - 132325 - Advanced Physics
  - or
  - **Curriculum not** “AP - Advanced Placement” and **EMIS Subject Code** of:
    - 132230 - Biological Sciences
    - 130301 - Chemistry
    - 130302 - Physics
  - **Delivery Method other than** “IS - Independent Study”

International Baccalaureate Diploma Programme	
Question	Answer
Does this school have any students enrolled in the International Baccalaureate Diploma Programme?	No

- Derived from information in the **Student Enrollment in International Baccalaureate (IB) Diploma Program** table

### Student Enrollment in International Baccalaureate (IB) Diploma Program

Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Students enrolled in the International Baccalaureate (IB) Diploma Programme	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
- Course section record (**EMIS Override** tab) values of:
  - **EMIS Subject Code** of:
    - 320050 - IB Mathematics
    - 320150 - IB Mathematical Studies
    - 320200 - IB First Language
    - 320250 - IB Second Language - Arabic
    - 320300 - IB Second Language - Chinese
    - 320350 - IB Second Language - Czech
    - 320400 - IB Second Language - French
    - 320450 - IB Second Language - German
    - 320500 - IB Second Language - Hebrew
    - 320550 - IB Second Language - Italian
    - 320600 - IB Second Language - Japanese
    - 320650 - IB Second Language - Polish
    - 320700 - IB Second Language - Russian
    - 320750 - IB Second Language - Swahili
    - 320800 - IB Second Language - Spanish
    - 320850 - IB Classical Languages (Latin or Classical Greek)
    - 320900 - IB Business and Management
    - 320950 - IB Economics

- 321000 - IB Geography
- 321050 - IB History
- 321100 - IB Islamic History
- 321150 - IB Information Technology in a Global Society (ITGS)
- 321200 - IB Philosophy
- 321250 - IB Psychology
- 321300 - IB Social and Cultural Anthropology
- 321350 - IB Biology
- 321400 - IB Chemistry
- 321450 - IB Physics
- 321500 - IB Design Technology
- 321550 - IB Environmental Systems
- 321600 - IB Computer Science
- 321650 - IB Visual Arts
- 321700 - IB Music
- 321750 - IB Theatre Arts
- 321775 - IB Theory of Knowledge

Advanced Placement Program Indicator	
Question	Answer
Does this school have any students enrolled in Advanced Placement (AP) courses?	Yes

- Derived from information in the **Advanced Placement Student Enrollment** table

Different Advanced Placement (AP) Courses	
Question	Number of Classes
How many different AP courses does the school provide?	3

- Each course counted separately; course sections not counted
- Courses in which one or more students enrolled in the corresponding course sections (See **Advanced Placement Student Enrollment** table.)

### Advanced Placement (AP) Course Self-Selection

Question	Answer
Is enrollment via self-selection by students permitted for all AP courses offered by the school?	No

- From **Additional Civil Rights Data Collection** screen

### Advanced Placement Student Enrollment

Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students enrolled in at least one AP course	M	1	0	0	0	0	25	0	26	0	0
	F	0	0	1	0	0	20	1	22	0	0
	Total	1	0	1	0	0	45	1	48	0	0

- Derived from information in the **Student Enrollment in Advanced Placement (AP) Mathematics**, **Student Enrollment in Advanced Placement (AP) Science**, and **Student Enrollment in Other Advanced Placement (AP) Subjects** tables

### Advanced Placement (AP) Mathematics Enrollment Indicator

Question	Answer
Are any students at this school enrolled in AP mathematics?	Yes

- Derived from information in the **Student Enrollment in Advanced Placement (AP) Mathematics** table

Student Enrollment in Advanced Placement (AP) Mathematics											
Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students enrolled in at least one AP course in mathematics	M	1	0	0	0	0	15	0	16	0	0
	F	0	0	0	0	0	10	1	11	0	0
	Total	1	0	0	0	0	25	1	27	0	0

- **Curriculum** value of “AP - Advanced Placement” and **EMIS Subject Code** of:
  - 119930 - Calculus AB
  - 119960 - Calculus BC
  - 119550 - Statistics

Advanced Placement (AP) Science Enrollment Indicator	
Question	Answer
Are any students at this school enrolled in AP science?	No

- Derived from information in the **Student Enrollment in Advanced Placement (AP) Science** table

Student Enrollment in Advanced Placement (AP) Science											
Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students enrolled in at least one AP course in science	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- **Curriculum** value of “AP - Advanced Placement” and **EMIS Subject Code** of:
  - 139903 - Biology
  - 139906 - Chemistry
  - 139930 - Environmental Science
  - 139940 - Physics C - Electricity & Magnetism
  - 139950 - Physics C - Mechanics

Advanced Placement (AP) Other Subject Indicator	
Question	Answer
Are any students at this school enrolled in AP subjects other than science and mathematics?	Yes

- Derived from information in the **Student Enrollment in Other Advanced Placement (AP) Subjects** table

Student Enrollment in Other Advanced Placement (AP) Subjects											
Category	Sex	Race / Ethnicity							Students with Disabilities (IDEA)	LEP	
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			Total Race / Ethnicity
Students enrolled in at least one AP course in subjects other than science and mathematics	M	1	0	0	0	0	16	0	17	0	0
	F	0	0	1	0	0	13	0	14	0	0
	Total	1	0	1	0	0	29	0	31	0	0

- **Curriculum** value of “AP - Advanced Placement” and **EMIS Subject Code** of:
  - 029130 - Art History
  - 029100 - Studio Art - Drawing
  - 029110 - Studio Art - 2D Design
  - 029120 - Studio Art - 3D Design
  - 059920 - English Language & Composition
  - 059930 - English Literature & Composition
  - 129926 - Music Theory
  - 152500 - Psychology
  - 152700 - World History
  - 152810 - European History
  - 152600 - U.S. History
  - 152820 - Human Geography
  - 159930 - Macroeconomics
  - 159940 - Microeconomics
  - 159950 - Government & Politics (United States)
  - 159960 - Government & Politics (Comparative)
  - 290310 - Computer Science A

Dual Enrollment Program	
Question	Answer
Does this school have any students enrolled in a dual enrollment/dual credit program?	Yes

- From **Additional Civil Rights Data Collection** screen

### Single-Sex Academic Classes

Question	Answer
Does this school have any students enrolled in one or more single sex academic classes?	Yes

- Derived from information in the **Single-Sex Academic Classes in the School** table

### Single-Sex Academic Classes in the School

Subject Areas	Classes		
	Males Only	Females Only	Total
Algebra I, Geometry, Algebra II	0	0	0
Other mathematics	0	1	1
Science	0	0	0
English/reading/language arts	0	0	0
Other academic subjects	0	0	0

**Note:** Please make sure the **Gender Directive** field is correct for all courses before running the report.

- Include:
  - Course records with **Gender Directive** value (**Miscellaneous** tab) of “Restrict to Females” or “Restrict to Males”
  - Course sections with the following EMIS subject codes:

Category	EMIS Subject Code
Algebra or Geometry	110301, 110302, 110480, 110490, 111200
Other Mathematics	110010, 110020, 110030, 110040, 110099, 110500, 110600, 111300, 111500, 111600, 111850, 119550, 119930, 110060, 119999
Science	All 13xxxx EXCEPT 132110, 132120, 132130
English/Reading/Language Arts	050014, 050119, 050160, 050170, 050180, 050190, 050220, 050300, 050400, 050403, 050500, 050545, 051905, 059999
Other Academic Subjects	All 06xxxx All 15xxxx All 29xxxx

- Exclude:
  - Physical education classes
  - Independent student classes
  - Course sections with **Curriculum** value (**EMIS Override** tab) of:
    - IS - International Baccalaureate Standard Level
    - IA - International Baccalaureate AB INITO
    - IH - International Baccalaureate Higher Level
    - OC - Expert Contracted from Outside Company/Org for Credit Flex
    - PI - Postsecondary Instructor, not PSEO funding
    - PS - Postsecondary Enrollment Options (PSEO)

## Run Civil Rights Report – Part 2

### Navigation: StudentInformation – SIS – School – Civil Rights Reporting – Civil Rights Report

1. On the **Civil Rights Report** screen, in the **Select a Civil Rights Report** drop-down list, select “Civil Rights Report Part 2.”
2. In the **Include Buildings** section, select the school(s) to include in the report.  
*Note: If you select multiple schools, the data for each building prints separately.*
3. For each building you selected, if the building’s master schedule uses block scheduling, select the check box under **Is Block Scheduling used on Master Schedule?**
4. In the remaining fields, select your desired report output options.  
*Note: If you plan to upload your survey data, select a **Report Format** of “Adobe PDF & CSV.” The remaining options are common to all reports. (For details, see *ProgressBook StudentInformation Getting Started Guide*).*
5. Click **Submit**.

StudentInformation > SIS > School > Civil Rights Reporting > Civil Rights Report

## Civil Rights Report

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

Select a Civil Rights Report: Civil Rights Report Part 2 ▾

Selection Criteria **Selection Summary** Load Settings

IRN - Name	Is Block Scheduling used on Master Schedule?
<input checked="" type="checkbox"/> [Redacted]	<input checked="" type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]	<input type="checkbox"/>

Include Buildings:

Sorting: IRN (ASC) ▾

Delivery Method: Pickup ▾ Set As Default

Email Address:

Report Format: Adobe PDF & CSV ▾

Description: Civil Rights - Part 2

Submit

### Civil Rights Report Part 2

The report contains a series of tables or subreports you can use to complete the Part 2 School Form of the survey. Students are included in the part 2 report based on the following criteria:

- Enrolled with the following percent of time on the FS record in effect for the specified effective date:
  - Preschool or kindergarten – any percent of time
  - Other than preschool or kindergarten – percent of time greater than 50%
- Effective date is the last day of the school year
- Students count only once in total counts regardless of whether they took a class multiple times and received a passing final mark.
- Final mark received in course section must have **Is Credit Earned** selected on **Marks Maintenance**.

- Final reporting terms are determined by the reporting period in the marking pattern assigned to the course section.
  - Reporting period with a significance value of “Earned” determines the final reporting period for a marking pattern.
  - In the case where a marking pattern has multiple reporting terms included where significance is “Earned,” a passing mark must be received in at least one of the final reporting terms.

**Note:** For additional criteria specific to each of the following sections, see the bullet points following the screen.

Middle School Students who Passed Algebra I											
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Students who passed Algebra I in grade 7 or 8 or ungraded	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- **State Equivalent Grade** of “07 - Seventh Grade” or “08 - Eighth Grade”
- **EMIS Subject Code** = “110301 - Algebra I”
- **Delivery Method** other than “IS - Independent Study”

### High School Students who Passed Algebra I

Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students who passed Algebra I in grade 9 or 10	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students who passed Algebra I in grade 11 or 12 or ungraded	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
- **EMIS Subject Code** = “110301 - Algebra I”
- **Delivery Method** other than “IS - Independent Study”

### Credit Recovery Program

Question	Answer
Does this school have any students who participate in at least one credit recovery program that allows them to earn missed credit in order to graduate from high school?	Yes

- From **Additional Civil Rights Data Collection** screen

Student Participation in the SAT Reasoning Test or ACT											
Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students who participated in the SAT Reasoning Test or ACT	M	1	1	0	0	1	0	1	4	0	0
	F	0	1	0	0	0	2	0	3	0	0
	Total	1	2	0	0	1	2	1	7	0	0

- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
- ACT or SAT results for test dates between 7/1 and 6/30 for the school year in context
- Students counted only once regardless of whether they took the ACT or SAT and if they took the test multiple times during the school year
- Totals by gender and race are unduplicated.
- Totals for IDEA and LEP are duplicated.

### Student Participation in Advanced Placement (AP) Exams

Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Students who took one or more AP exams for one or more AP courses enrolled in	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students who were enrolled in one or more AP courses but who did not take any AP exams	M	1	0	0	0	0	25	0	26	0	0
	F	0	0	1	0	0	22	1	24	0	0
	Total	1	0	1	0	0	47	1	50	0	0

- Course sections with the following EMIS subject codes:

Category	EMIS Subject Code	EMIS Subject Code where Curriculum is "AP"
Mathematics	119550	119930, 119960
Science	139905, 139940, 139950	132230, 130301, 132350
Other AP Courses	029100, 029110, 029120, 059920, 059930, 152810, 159930, 159940, 159950, 159960, 290310	020101, 120300, 150890, 150810, 151121, 150700

### Students who Received a Qualifying Score on Advanced Placement (AP) Exams

Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students who received a qualifying score on one or more AP exams for one or more AP courses enrolled in	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students who did not receive a qualifying score on any AP exams for the one or more AP courses enrolled in	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- Score of 3 or higher

### Chronic Student Absenteeism

Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students absent 15 or more school days during school year	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- Total of all absence fields on **FS-Attendance** tab of profile  $\geq$  15 school days during the school year

Student Retention Indicator	
Grades	Answer
Kindergarten	No
Grade 1	No
Grade 2	No
Grade 3	No
Grade 4	No
Grade 5	No
Grade 6	No
Grade 7	No
Grade 8	No
Grade 9	No
Grade 10	No
Grade 11	No
Grade 12	No

- Derived from information in the **Retention of Students K-5**, **Retention of Students 6-8**, and **Retention of Students 9-12** tables

Retention of Students K-5												
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	Section 504 Only	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity			
Students who were retained in Kindergarten	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Students who were retained in Grade 1	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Students who were retained in Grade 2	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Students who were retained in Grade 3	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Students who were retained in Grade 4	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Students who were retained in Grade 5	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

- **State Equivalent Grade** of “KG - Kindergarten,” “01 - First Grade,” “02 - Second Grade,” “03 - Third Grade,” “04 - Fourth Grade,” or “05 - Fifth Grade”
- Reported at the end of the school year as retained in their current grade level and remain retained at the start of the next school year as follows:
  - **EMIS Grade Next Year** on FN record in prior school year = **State Equivalent Grade** value on latest FD record in current school year
  - **Retained Status** value for FN record = “1 - Student was retained at end of the previous school year, still retained”

**Note:** Student may or may not be in the same building in the current school year as in the prior school year.

Retention of Students 6-8												
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	Section 504 Only	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity			
Students who were retained in Grade 6	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Students who were retained in Grade 7	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Students who were retained in Grade 8	M	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	F	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

- **State Equivalent Grade** of “06 - Sixth Grade” “07 - Seventh Grade,” or “08 - Eighth Grade”
- Reported at the end of the school year as retained in their current grade level and remain retained at the start of the next school year as follows:
  - **EMIS Grade Next Year** on FN record in prior school year = **State Equivalent Grade** value on latest FD record in current school year
  - **Retained Status** value for FN record = “1 - Student was retained at end of the previous school year, still retained”

**Note:** Student may or may not be in the same building in the current school year as in the prior school year.

### Retention of Students 9-12

Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	Section 504 Only	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity			
Students who were retained in Grade 9	M	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0
Students who were retained in Grade 10	M	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0
Students who were retained in Grade 11	M	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0
Students who were retained in Grade 12	M	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0

- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”
- Reported at the end of the school year as retained in their current grade level and remain retained at the start of the next school year as follows:
  - **EMIS Grade Next Year** on FN record in prior school year = **State Equivalent Grade** value on latest FD record in current school year
  - **Retained Status** value for FN record = “1 - Student was retained at end of the previous school year, still retained”

**Note:** Student may or may not be in the same building in the current school year as in the prior school year.

### Single-Sex Interscholastic Athletics Indicator

Question	Answer
Does this school have any students who participate in single-sex interscholastic athletics?	Yes

- Derived from third line in the **Single-Sex interscholastic Athletics Sports, Teams and Participants** table

### Single-Sex Interscholastic Athletics Sports, Teams and Participants

Number Of	Males Only	Females Only	Total
Number of single-sex interscholastic athletics sports	0	1	1
Number of single-sex interscholastic athletics teams	12	9	21
Number of student participants on single-sex interscholastic athletics sports teams	0	1	1

- First line – from **Student Memberships** (with start date between 7/1 and 6/30 of the current school year)
- Second line – from **Additional Civil Rights Data Collection** screen
- Third line – from **Student Memberships** (with start date between 7/1 and 6/30 of the current school year)
- **State Equivalent Grade** of “09 - Ninth Grade,” “10 - Tenth Grade,” “11 - Eleventh Grade” or “12 - Twelfth Grade”

**Note:** StudentInformation does not track whether student memberships are single-sexed memberships but does provide male and female counts in each program. It is up to the district to decide whether or not the counts in each team or sport are considered gender exclusive.

### Preschool Suspensions and Expulsions

Category	Sex	Race / Ethnicity							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Preschool children who received only one out-of-school suspension	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Preschool children who received more than one out-of-school suspension	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Preschool children who received an expulsion	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- **State Equivalent Grade** of “PS - Preschool (Ages 3-5)” on latest FD record for the current school year
- Received a disciplinary action of “Expulsion” or “Out of School Suspension”

## Corporal Punishment

Question	Answer
Does this school use corporal punishment to discipline students?	No

- From **Additional Civil Rights Data Collection** screen

Discipline of Students without Disabilities										
Category	Sex	Race / Ethnicity								LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity	
Students without disabilities who received corporal punishment	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students without disabilities who received one or more in-school suspensions	M	0	0	0	0	0	0	0	0	0
	F	0	1	0	0	0	1	0	2	0
	Total	0	1	0	0	0	1	0	2	0
Students without disabilities who received only one out-of-school suspension	M	0	0	0	0	0	0	0	0	0
	F	0	1	0	0	0	0	0	1	0
	Total	0	1	0	0	0	0	0	1	0
Students without disabilities who received more than one out-of-school suspensions	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students without disabilities who received an expulsion with educational services	M	0	1	0	0	0	0	0	1	0
	F	0	0	0	0	0	1	1	2	0
	Total	0	1	0	0	0	1	1	3	0
Students without disabilities who received an expulsion without educational services	M	0	0	0	0	0	1	0	1	0
	F	0	0	0	0	0	1	1	2	0
	Total	0	0	0	0	0	2	1	3	0

- Received a disciplinary action of “Expulsion,” “Out of School Suspension,” or “In School Suspension”
- **Disability Condition** = “\*\* - Not Applicable” on latest FD record for the current school year
- **Section 504 Plan** = “N”
- If **Alt Education Assigned** = “Y - Yes,” student is counted in the row of “Students without disabilities who received an expulsion with educational services”

### Discipline of Students without Disabilities

Category	Sex	Race / Ethnicity								LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity	
Students without disabilities who received an expulsion under zero tolerance policies	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students without disabilities who were referred to a law enforcement agency or official	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students without disabilities who received a school-related arrest	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0

- From **Additional Civil Rights Data Collection** screen

## Discipline of Students with Disabilities

Category	Sex	Race / Ethnicity for Students with Disabilities (IDEA)							Total Race / Ethnicity	Students with Disabilities (IDEA)	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races			
Students with disabilities who received corporal punishment	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students with disabilities who received one or more in-school suspensions	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students with disabilities who received only one out-of-school suspension	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students with disabilities who received more than one out-of-school suspension	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students with disabilities who received an expulsion with educational services	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Students with disabilities who received an expulsion without educational services	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- Received a disciplinary action of “Expulsion,” “Out of School Suspension,” or “In School Suspension”
- **Disability Condition** is other than “\*\* - Not Applicable” on latest FD record for the current school year
- If **Alt Education Assigned** = “Y - Yes,” student is counted in the row of “Students with disabilities who received an expulsion with educational services”

### Discipline of Students with Disabilities

Category	Sex	Race / Ethnicity for Students with Disabilities (IDEA)								LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity	
Students with disabilities who received an expulsion under zero tolerance policies	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students with disabilities who were referred to a law enforcement agency or official	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students with disabilities who received a school-related arrest	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0

- From **Additional Civil Rights Data Collection** screen

### Allegations of Harassment or Bullying

Allegations	Number Of Allegations
Allegations of harassment or bullying on the basis of sex	2
Allegations of harassment or bullying on the basis of race, color, or national origin	20
Allegations of harassment or bullying on the basis of disability	5

- From **Additional Civil Rights Data Collection** screen

Students Reported as Harassed or Bullied													
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	Section 504 Only	LEP	
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity				
Students reported as harassed or bullied on the basis of sex	M	0	0	0	0	0	0	0	0	0	0	0	0
	F	2	0	0	0	0	0	0	0	2	0	0	0
	Total	2	0	0	0	0	0	0	0	2	0	0	0
Students reported as harassed or bullied on the basis of race, color or national origin	M	5	3	0	0	12	2	0	22	0	0	9	0
	F	0	0	0	0	0	0	0	0	0	0	0	0
	Total	5	3	0	0	12	2	0	22	0	0	9	0
Students reported as harassed or bullied on the basis of disability	M	0	0	0	0	0	2	0	2	0	0	0	0
	F	0	0	0	0	3	0	0	3	0	0	0	0
	Total	0	0	0	0	3	2	0	5	0	0	0	0

- From **Additional Civil Rights Data Collection** screen

Students Disciplined for Harassment or Bullying													
Category	Sex	Race / Ethnicity								Students with Disabilities (IDEA)	Section 504 Only	LEP	
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity				
Students disciplined for bullying or harassment on the basis of sex	M	0	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0	0
Students disciplined for bullying or harassment on the basis of race, color or national origin	M	0	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0	0
Students disciplined for bullying or harassment on the basis of disability	M	0	0	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0	0

- From **Additional Civil Rights Data Collection** screen

### Non-IDEA Students Subjected to Restraint or Seclusion

Category	Sex	Race / Ethnicity								Section 504 Only	LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity		
Non-IDEA students subjected to mechanical restraint	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Non-IDEA students subjected to physical restraint	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0
Non-IDEA students subjected to seclusion	M	0	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

- From **Additional Civil Rights Data Collection** screen

### IDEA Students Subjected to Restraint or Seclusion

Category	Sex	Race / Ethnicity for Students with Disabilities (IDEA)								LEP
		Hispanic or Latino of any Race	American Indian or Alaskan Native	Asian	Native Hawaiian or Other Pacific Islander	Black or African American	White	Two or More Races	Total Race / Ethnicity	
Students with disabilities (IDEA) subjected to mechanical restraint	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students with disabilities (IDEA) subjected to physical restraint	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0
Students with disabilities (IDEA) subjected to seclusion	M	0	0	0	0	0	0	0	0	0
	F	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0

- From **Additional Civil Rights Data Collection** screen

### Instances of Restraint or Seclusion

Number Of	W/O Disabilities	With Disabilities IDEA	With Disabilities 504
Number of instances of mechanical restraint	6	7	8
Number of instances of physical restraint	9	10	11
Number of instances of seclusion	12	13	14

- From **Additional Civil Rights Data Collection** screen

### Justice Facility Type

Type	Answer
Pre-adjudication/Pre-conviction facility	No
Post-adjudication/Post-conviction facility	Yes
Pre- and post-adjudication/conviction facility	No

- From **Additional Civil Rights Data Collection** screen

### Days in Regular School Year at Justice Facility

Element	Number
Days in the regular school year	15

- From **Additional Civil Rights Data Collection** screen

### Justice Facility Education Program Hours per Week

Element	Number
Hours per week that the educational program is offered during the regular school year	16

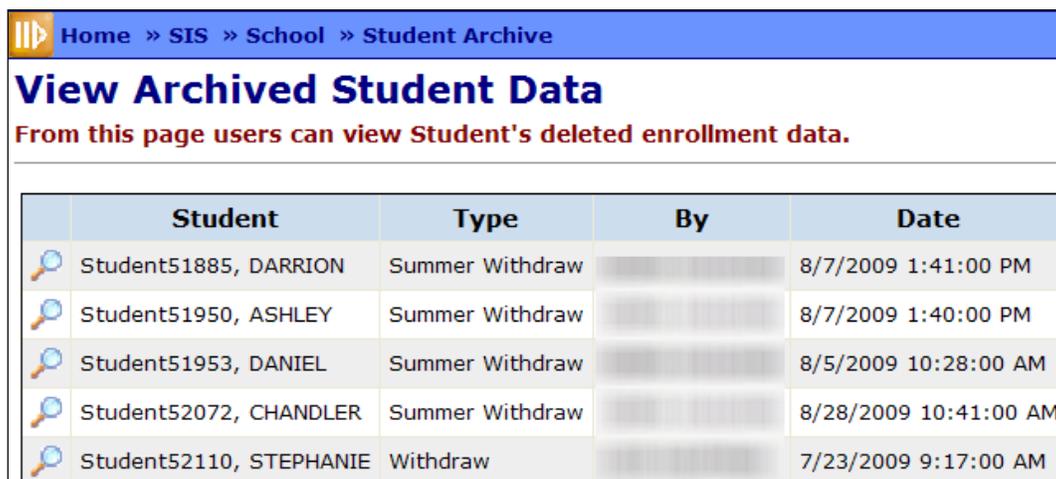
- From **Additional Civil Rights Data Collection** screen

---

## View Archived Student Data

### Navigation: Home – SIS – School – Student Archive

The View Archived Student Data screen displays student's deleted enrollment data by building. Additional details can be accessed for each student.



	Student	Type	By	Date
	Student51885, DARRION	Summer Withdraw		8/7/2009 1:41:00 PM
	Student51950, ASHLEY	Summer Withdraw		8/7/2009 1:40:00 PM
	Student51953, DANIEL	Summer Withdraw		8/5/2009 10:28:00 AM
	Student52072, CHANDLER	Summer Withdraw		8/28/2009 10:41:00 AM
	Student52110, STEPHANIE	Withdraw		7/23/2009 9:17:00 AM

#### View Archived Student Data Screen

All student withdrawals for the school year and school in context are displayed.

**Student** – Name of the student withdrawn.

**Type** - Indicates either Summer Withdraw, Withdraw, or Bulk Enroll Withdraw.

**By** – The name of the user who processed the withdrawal in StudentInformation.

**Date** – The date and time of the withdrawal process in StudentInformation.

 - Click the magnifying glass to view the student details. The type of details will vary by student as they depend on when the student was withdrawn, what type of activity the student had at the time of withdrawal and the type of withdrawal.

## Archived Student Details – Student Profile Tab

Home » SIS » School » Student Archive Advanced Search | Feedback | Mgmt | Help | Version | Print

**View Archived Student Data**  
From this page users can view Student's deleted enrollment data.

Student Profile **Scheduling** Fees

**Student Annual:**

Grade Level	Next Grade Level	Graduation Year	Team	Counselor Name	Special Education	Program	Student Status	Schedule Priority	Student Free Lunch Status	Attendance	New School	Include in Honor Roll	Is Primary	Flag1	Flag2	Flag3	Flag4	Flag5	Flags	Include In Ranking	
11	11				0		M	5	None			True	True							0	False

**Student Admission:**

Calendar	Admission	Admission Date	Admitted From	Withdrawal	Withdrawal Date	Withdraw To	Admitted from IRN	Withdraw To IRN
HDCA	03	7/1/2009 12:00:00 AM						

**Homeroom Assignments:**

Homeroom	Homeroom Name	Term Code	Term Name
FRAH	FRAH	FullYear	Full Year Term

[Back to Archive List](#)

### Archived Student Details on the Student Profile Tab

The Archived Student Details – Student Profile tab shows the Student Annual, Student Admission and Homeroom Assignment information for the student at the time of their withdrawal.

## Archived Student Details – Scheduling Tab

Home » SIS » School » Student Archive Advanced Search | Feedback |

**View Archived Student Data**  
From this page users can view Student's deleted enrollment data.

Scheduling

**Course Section Assignments:**

Course Section	Student Type	Course Section Status	Course	Course Name	Schedule Result	Schedule Job	Start Date	Stop Date	Section Number
		Assigned	044	COMPUTER APPLICATIONS	Default Schedule Result	09/10 All Grades	8/23/2010 12:00:00 AM		31
		Assigned	074	SPORTS/GAMES	Default Schedule Result	09/10 All Grades	8/23/2010 12:00:00 AM		11
		Assigned	132	MATH II	Default Schedule Result	09/10 All Grades	8/23/2010 12:00:00 AM		8
		Assigned	166	MIXED CHORUS	Default Schedule Result	09/10 All Grades	8/23/2010 12:00:00 AM		4
		Assigned	185	GENERAL BIOLOGY	Default Schedule Result	09/10 All Grades	8/23/2010 12:00:00 AM		5
		Assigned	206	AMERICAN HISTORY	Default Schedule Result	09/10 All Grades	8/23/2010 12:00:00 AM		9
		Assigned	401	PRACTICAL ENGLISH 10	Default Schedule Result	09/10 All Grades	8/23/2010 12:00:00 AM		2
		Assigned	LUNCH	LUNCH	Default Schedule Result		8/23/2010 12:00:00 AM		7
		Assigned	SH 1	STUDY FIRST	Default Schedule Result	Study Hall	1/18/2011 12:00:00 AM		3
		Assigned	SH 3	STUDY THIRD	Default Schedule Result	Study Hall	1/18/2011 12:00:00 AM		3
		Assigned	SH 6	STUDY SIXTH	Default Schedule Result	Study Hall	8/23/2010 12:00:00 AM		1

**Course Requests:**

Course	Course Name	Alt Course	Alt Course Name	Calendar Period	Is Calendar Period Include	Staff Name	Is Staff Include	Course Request Status	Priority
044	COMPUTER APPLICATIONS				True				9
074	SPORTS/GAMES				False				9
132	MATH II				True				9
166	MIXED CHORUS				True				7
185	GENERAL BIOLOGY				False				9
206	AMERICAN HISTORY				False				9
401	PRACTICAL ENGLISH 10				False				9

[Back to Archive List](#)

### Archived Student Details on the Scheduling Tab

The Archived Student Details – Scheduling tab shows the Course Section Assignment and Course Request information for the student at the time of their withdrawal.

## Archived Student Details – Marks Tab

Home » SIS » School » Student Archive Advanced Search | Feedback | Mgmt | Help | Version | Print

**View Archived Student Data**  
From this page users can view Student's deleted enrollment data.

Scheduling **Marks**

GPA Set Student:

GPA Set	GPA Set Name	Grade Level	Rank	Total Ranked	Points	Credits Earned	Credits Attempted	GPA	Mark Count	Missing Mark Count	Course Count	Sum Credits Earned Full	Sum Credits Attempted Full	Sum Credits Earned Adjusted	Sum Credits Attempted Adjusted	Credits GPA
CUM	Cumulative GPA	10	139	145	12.000000	6.000000	6.000000	2.000000	6	0	6	6.000000	6.000000			6.000000

[Back to Archive List](#)

### Archived Student Details on the Marks Tab

The Archived Student Details – Marks tab shows the GPA Set information for the student at the time of their withdrawal.

## Archived Student Details – Fees Tab

Home » SIS » School » Student Archive

**View Archived Student Data**  
From this page users can view Student's deleted enrollment data.

Student Profile **Scheduling** **Fees**

Student Fees:

Fee	Fee Type	Fee Status	Fee Date	Fee Amount	Total Paid
99	General Fee		8/4/2009 12:00:00 AM	9.0000	0

[Back to Archive List](#)

### Archived Student Details on the Fees Tab

The Archived Student Details – Fees tab shows the Student Fees information for the student at the time of their withdrawal.

## Marking Pattern Mapping

**Navigation: Home – Management – School Administration – Marks Administration Mapping – Marking Pattern Mapping**

The Marking Pattern Mapping screen is used to create and save the mappings of marking patterns from one school to another school for a specific year. These mappings can be defined at any time and will be used when transferring student course history between schools in the same ITC (available in StudentInformation version 12.3.0) and between ITCs (available in a future StudentInformation release).

Home » Management » School Administration » Marks Administration Menu » Marking Pattern Mapping Advanced Search | Feedback | Mgmt | Help | Version | Pr

### Marking Pattern Mapping

From this screen, you can display, add, change and delete data pertaining to marking pattern mapping.

Search Options

**Sending District:**

**Sending School:** -- Select a Building (optional) --

**Receiving School:** -- Select a Building (optional) --

**School Year:** -- Select a School Year (optional) --

**Show Active Only:**

	<u>Sending District</u> ^	<u>Sending School</u>	<u>Receiving District</u>	<u>Receiving School</u>	<u>School Year</u>	<u>Last Update By</u>	<u>Active</u>
There are no records to display							

### Marking Pattern Mapping Screen

With the receiving school district in context, enter search criteria, or click **Search** to display a listing of the previously defined mappings for the district.

**Sending District** (optional) – School district sending the course history.

**Sending School** (optional) – School sending the course history.

**Receiving School** (optional) – School receiving the course history.

**School Year** (optional) – School year to which the mapping applies.

**Is Active** (optional) – Yes or No.

Home » Management » School Administration » Marks Administration Menu » Marking Pattern Mapping Advanced Search | Feedback | Mgmt | Help | Version | Pr

### Marking Pattern Mapping

From this screen, you can display, add, change and delete data pertaining to marking pattern mapping.

Search Options

**Sending District:**

**Sending School:** -- Select a Building (optional) --

**Receiving School:** -- Select a Building (optional) --

**School Year:** -- Select a School Year (optional) --

**Show Active Only:**

	<u>Sending District</u> ^	<u>Sending School</u>	<u>Receiving District</u>	<u>Receiving School</u>	<u>School Year</u>	<u>Last Update By</u>	<u>Active</u>	
		Ada Ex Vill SD	ADA HIGH SCHOOL	Elida Local SD	ELIDA HIGH SCHOOL	2010-2011	ABCDEFG	
		Ada Ex Vill SD	ADA HIGH SCHOOL	Elida Local SD	ELIDA HIGH SCHOOL	2009-2010	ABCDEFG	
		Ada Ex Vill SD	ADA HIGH SCHOOL	Elida Local SD	ELIDA HIGH SCHOOL	2009 Summer	ABCDEFG	
		Findlay City SD	FINDLAY HIGH SCHOOL	Elida Local SD	ELIDA HIGH SCHOOL	2010-2011	XXXXXXX	

### Marking Patterns on the Marking Pattern Mapping Screen

## Add Marking Pattern Mapping

Click **Add Marking Pattern Mapping** to add a new mapping.

**Add/Edit Marking Pattern Mapping Detail Screen**

**Sending District** (required) – School district sending the course history.

**Sending School** (required) – School sending the course history.

**Receiving School** (required) – School receiving the course history.

**Marks Available to Transfer From School Year** (required) – School year to which this mapping applies.

**Active** (optional) – Yes or No.

When the required fields are completed, several grids are displayed. Select the appropriate receiving marking pattern and receiving reporting term for each sending marking pattern listed in the first grid. Also, select the appropriate receiving school alpha or numeric grades in the remaining grids. Refer to [“Registration Wizard – Course History Tab”](#) for more detailed information about mapping marks.

Sending Marking Pattern	Sending Marking Pattern Rule	Receiving Marking Pattern	Receiving Reporting Term	Receiving Mark Type	Receiving Significance Level
1Sem	1st Quarter Mark	Sem1	Qtr1	Quarter Mark	Progress 1
1Sem	1st Semester Final	Sem1	Sem1	Average	Progress 2

**Defining Marking Pattern Mapping**

## Edit Marking Pattern Mapping

Click  next to an existing mapping to edit that mapping.

Home Advanced

### Marking Pattern Mapping Detail

From this screen, you can display, add, change and delete data pertaining to marking pattern mapping detail.

**Sending District:**

**Sending School:**  

**Receiving School:**  

**Marks Available to Transfer From School Year:**  

**Active:**

Sending Marking Pattern	Sending Marking Pattern Rule	Receiving Marking Pattern	Receiving Reporting Term	Receiving Mark Type	Receiving Significance Level
1Sem	1st Quarter Mark	<input type="text" value="Sem1"/>	<input type="text" value="Qtr1"/>	Quarter Mark	Progress 1
1Sem	1st Semester Final	<input type="text" value="Sem1"/>	<input type="text" value="Sem1"/>	Average	Progress 2

### Editing a Marking Pattern Mapping Definition

Refer to *“Registration Wizard – Course History Tab”* in this guide for more detailed information about mapping marks.

## Deactivate Marking Pattern Mapping

Click  next to an existing mapping to delete that mapping.

Click **OK** when asked if you want to deactivate this mapping.

Deactivated marking pattern mappings can be found (deselect the Is Active search option) and reactivated at any time. Trying to create a mapping that already exists but is currently deactivated causes the deactivated mapping to be displayed. Edit as required and reactivate the mapping.

This page intentionally left blank.

---

# ProgressBook StudentInformation Student Homeroom Guide



*ProgressBook*<sup>®</sup>  
*StudentInformation*



# **ProgressBook StudentInformation Student Homeroom Guide**

**(This document is current for ProgressBook StudentInformation v14.4.0 or later.)**

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Student Homeroom Guide* have been made.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.4.0	Global	N/A	Converted source files to FrameMaker. Updated formatting/structure to match ProgressBook Suite. Rewrote topics using procedural steps.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Overview</b>	<b>1</b>
<b>Set Up Homerooms</b>	<b>3</b>
Add Homerooms .....	3
Edit Homerooms .....	5
Delete Homerooms .....	6
Filter Homerooms by Term.....	8
<b>Assign Homerooms</b>	<b>9</b>
Assign Individual Students to Homerooms.....	9
Assign Students to Homerooms by Year .....	9
Assign Students to Homerooms by Term .....	10
Bulk Assign Students to Homerooms.....	11
Bulk Assign Students to Single Homeroom.....	12
Bulk Assign Students to Multiple Homerooms .....	15
Delete Homeroom Assignments .....	17
Remove All Students from a Homeroom .....	17
Remove Individual Students from a Homeroom.....	19
<b>Reports</b>	<b>23</b>
Run Administrative Homeroom Detail Report (R201-A).....	23
Run Administrative Homeroom Summary Report (R201-B) .....	24

---

This page intentionally left blank.

# Overview

Homerooms provide a consistent assigned meeting point for students and a way to group students for purposes of distributing school information and report cards, taking attendance and other functions. You can use homerooms in StudentInformation to select students to include on reports and to sort the reports.

Refer to the appropriate section as follows:

- For information on setting up homerooms in StudentInformation, see [“Set Up Homerooms.”](#)
- For information on assigning students to homerooms, see [“Assign Homerooms.”](#)
- For information on homeroom-related reports, see [“Reports.”](#)

This page intentionally left blank.

# Set Up Homerooms

You can maintain homerooms in StudentInformation in the following ways:

- To set up a new homeroom, see [“Add Homerooms.”](#)
- To edit an existing homeroom, see [“Edit Homerooms.”](#)
- To delete a homeroom, see [“Delete Homerooms.”](#)
- To view homerooms for a specific term, see [“Filter Homerooms by Term.”](#)

## Add Homerooms

*Note: You can only set up homerooms at the building level.*

**Navigation: Home – Management – School Administration – School Building Administration – Homerooms**

1. On the **Homeroom Maintenance** screen, click **Add Homeroom**.

The screenshot shows the 'Homeroom Maintenance' interface. At the top, there is a breadcrumb trail: Home >> Management >> School Administration >> School Building Administration >> Homerooms. Below this is the title 'Homeroom Maintenance' and a sub-header: 'From this screen, you can Edit, Delete or Add a Homeroom.' A button labeled 'Add Homeroom' is circled in red. To the right of the button is a dropdown menu labeled '-- Filter by HR Term --'. Below the button and filter is a table with the following columns: Homeroom, HR Term, Teacher, Room, Grades, Capacity, Remaining, Counselor, and Active. The table contains seven rows of data for homerooms A121 through A127. At the bottom left of the table area, there is a checkbox labeled 'Show Active Only' which is checked.

			Homeroom ^	HR Term	Teacher	Room	Grades	Capacity	Remaining	Counselor	Active
X	✎	✖	A121 - A121	FullYear	BOYER	121 - 121	09	35	35	WATKINS	💡
X	✎	✖	A122 - A122	FullYear	FOX	122 - 122	10	35	35	WATKINS	💡
X	✎	✖	A123 - A123	FullYear	CLARK	123 - 123	10	30	30	WATKINS	💡
X	✎	✖	A124 - A124	FullYear	HOWARD	124 - 124	11	35	35	WATKINS	💡
X	✎	✖	A125 - A125	FullYear	VEGA	125 - 125	11	35	35	WATKINS	💡
X	✎	✖	A126 - A126	FullYear	WOOTEN	126 - 126	12	40	40	WATKINS	💡
X	✎	✖	A127 - A127	FullYear	FRAZIER	127 - 127	12	35	35	WATKINS	💡

Show Active Only

### Add Homerooms

The add-edit version of the screen displays.

2. In the **Homeroom Term** drop-down list, select the term for this homeroom (full year, fall, spring, etc.)
3. In the **Code** field, enter a homeroom code of up to five alphanumeric characters.
4. In the **Name** field, enter a name for the new homeroom.
5. In the **Location** drop-down list, select the room/location of the homeroom.
6. In the **Teacher** drop-down list, select the teacher for this homeroom.
7. In the **Capacity** drop-down list, enter the number of students this homeroom can accommodate.

## Set Up Homerooms

- Optional: In the **Counselor** drop-down list, select the counselor you want to assign to the students in this homeroom.
- Optional: If you want to define which grade levels are valid for the new homeroom, in the **Grade Levels** option, select the grades by moving them from the **Available** list on the left to the **Selected** list on the right.
- Optional: If you do not want this homeroom to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive homerooms on new student homeroom records.

- Click **Save**. Or, to continue adding homerooms, click **Save and New**.

Home >> Management >> School Administration >> School Building Administration >> Homerooms

### Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

Homeroom Term: FullYear ⚡

Code: A120 ⚡

Name: A120 ⚡

Location: 120 ⚡

Teacher: SHELLY ADKINS

Capacity: 35 ⚡

Counselor: WATKINS, NAOMI

Grade Levels:

Available	Selected
08	09
10	
11	
12	
GR	
13	

Is Active:

**Save** **Save and New** **Cancel**

### Add Homeroom

A confirmation message displays, and the new homeroom displays in the list.

Home >> Management >> School Administration >> School Building Administration >> Homerooms

### Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

The Homeroom was successfully saved

Add Homeroom -- Filter by HR Term -- ▾

			Homeroom ^	HR Term	Teacher	Room	Grades	Capacity	Remaining	Counselor	Active
			A120 - A120	FullYear	ADKINS	120 - 120	09	35	35	WATKINS	
			A121 - A121	FullYear	BOYER	121 - 121	09	35	35	WATKINS	
			A122 - A122	FullYear	FOX	122 - 122	10	35	35	WATKINS	
			A123 - A123	FullYear	CLARK	123 - 123	10	30	30	WATKINS	
			A124 - A124	FullYear	HOWARD	124 - 124	11	35	35	WATKINS	
			A125 - A125	FullYear	VEGA	125 - 125	11	35	35	WATKINS	
			A126 - A126	FullYear	WOOTEN	126 - 126	12	40	40	WATKINS	
			A127 - A127	FullYear	FRAZIER	127 - 127	12	35	35	WATKINS	

Show Active Only

### Confirmation of Added Homeroom

**Note:** Inactive homerooms (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Homerooms

Navigation: Home – Management – School Administration – School Building Administration – Homerooms

1. On the **Homeroom Maintenance** screen, in the row of the homeroom you want to edit, click .

Home >> Management >> School Administration >> School Building Administration >> Homerooms

### 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
			A120 - A120	FullYear	ADKINS	120 - 120	09	35	35	WATKINS	
			A121 - A121	FullYear	BOYER	121 - 121	09	35	35	WATKINS	
			A122 - A122	FullYear	FOX	122 - 122	10	35	35	WATKINS	
			A123 - A123	FullYear	CLARK	123 - 123	10	30	30	WATKINS	
			A124 - A124	FullYear	HOWARD	124 - 124	11	35	35	WATKINS	
			A125 - A125	FullYear	VEGA	125 - 125	11	35	35	WATKINS	
			A126 - A126	FullYear	WOOTEN	126 - 126	12	40	40	WATKINS	
			A127 - A127	FullYear	FRAZIER	127 - 127	12	35	35	WATKINS	

Show Active Only

### Edit Homerooms

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Homerooms.”](#)

Home >> Management >> School Administration >> School Building Administration >> Homerooms

### Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

Homeroom Term: FullYear  
Code: A120  
Name: A120  
Location: 120  
Teacher: SHELLY ADKINS  
Capacity: 35  
Counselor: WATKINS, NAOMI

Grade Levels:

Available	Selected
08	09
10	
11	
12	
GR	
13	

Is Active:

**Save** **Cancel**

**Edit Homeroom**

## Delete Homerooms

Navigation: Home – Management – School Administration – School Building Administration – Homerooms

1. On the **Homeroom Maintenance** screen, in the row of the link you want to delete, click **X**.

Home >> Management >> School Administration >> School Building Administration >> Homerooms

### 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
			A120 - A120	FullYear	ADKINS	120 - 120	09	35	35	WATKINS	
			A121 - A121	FullYear	BOYER	121 - 121	09	35	35	WATKINS	
			A122 - A122	FullYear	FOX	122 - 122	10	35	35	WATKINS	
			A123 - A123	FullYear	CLARK	123 - 123	10	30	30	WATKINS	
			A124 - A124	FullYear	HOWARD	124 - 124	11	35	35	WATKINS	
			A125 - A125	FullYear	VEGA	125 - 125	11	35	35	WATKINS	
			A126 - A126	FullYear	WOOTEN	126 - 126	12	40	40	WATKINS	
			A127 - A127	FullYear	FRAZIER	127 - 127	12	35	35	WATKINS	

Show Active Only

### Delete Homerooms

A message displays, asking if you are sure you want to delete the homeroom.

2. Click **Ok**.

Home >> Management >> School Administration >> School Building Administration >> Homerooms

### Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

Are you sure you want to delete the following Homeroom:  
A120 - A120

### Confirm Delete

A confirmation message displays, and the homeroom no longer appears in the list.

Home >> Management >> School Administration >> School Building Administration >> Homerooms

### Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

The selected Homeroom was successfully deleted

Add Homeroom -- Filter by HR Term --

			Homeroom ^	HR Term	Teacher	Room	Grades	Capacity	Remaining	Counselor	Active
			A121 - A121	FullYear	BOYER	121 - 121	09	35	35	WATKINS	
			A122 - A122	FullYear	FOX	122 - 122	10	35	35	WATKINS	
			A123 - A123	FullYear	CLARK	123 - 123	10	30	30	WATKINS	
			A124 - A124	FullYear	HOWARD	124 - 124	11	35	35	WATKINS	
			A125 - A125	FullYear	VEGA	125 - 125	11	35	35	WATKINS	
			A126 - A126	FullYear	WOOTEN	126 - 126	12	40	40	WATKINS	
			A127 - A127	FullYear	FRAZIER	127 - 127	12	35	35	WATKINS	

Show Active Only

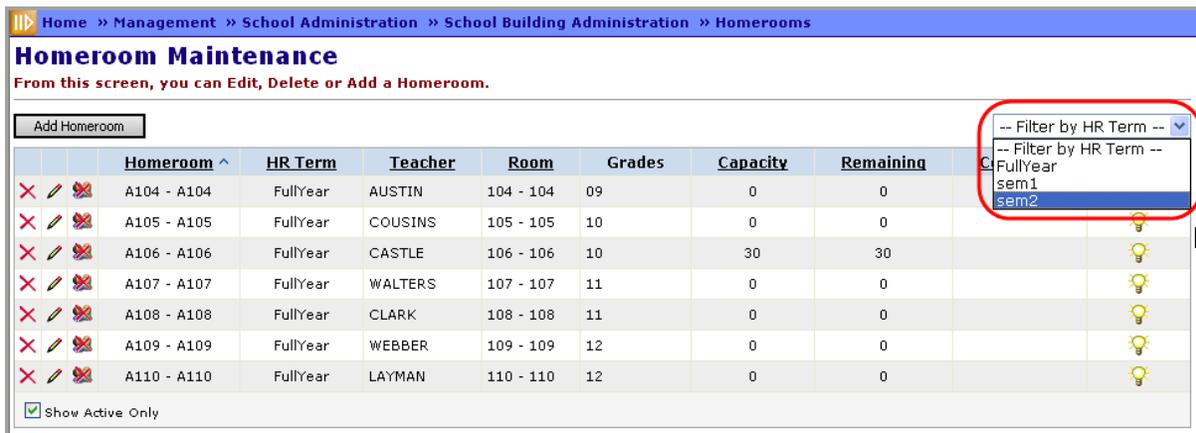
### Confirmation of Deleted Homeroom

## Filter Homerooms by Term

**Navigation: Home – Management – School Administration – School Building Administration – Homerooms**

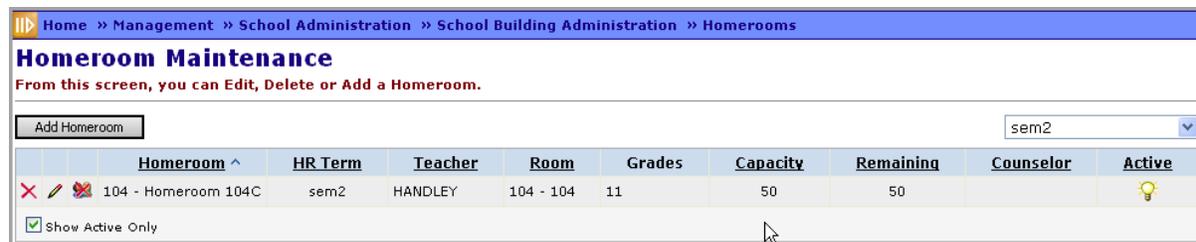
When you created your homerooms (see [“Add Homerooms.”](#)), you defined a term for each homeroom based on the school’s scheduling terms. In some cases, this allows students to have more than one homeroom per year.

To view homerooms for a specific term, on the **Homeroom Maintenance** screen, in the **Filter by HR Term** drop-down list, select the term.



### Filter Homerooms by Term

The screen refreshes to display only the homerooms for the selected term.



### Homerooms Filtered by Term

# Assign Homerooms

You can assign students to homerooms in the following ways:

- To assign one student to a homeroom, see [“Assign Individual Students to Homerooms.”](#)
- To bulk assign students to homerooms, see [“Bulk Assign Students to Homerooms.”](#)
- To delete homeroom assignments, see [“Delete Homeroom Assignments.”](#)

---

## Assign Individual Students to Homerooms

You can assign individual students to homerooms in the following ways:

- To assign a student to a homeroom for the whole school year, see [“Assign Students to Homerooms by Year.”](#)
- To assign a student to a homeroom for a particular term, see [“Assign Students to Homerooms by Term.”](#)

## Assign Students to Homerooms by Year

Navigation: Home – SIS – Student – Homeroom Assignment

**Note:** You can also perform this procedure on the **Additional** tab of the student profile.

1. On the **Student Homeroom Assignments** screen, choose a homeroom to which to assign this student as follows:
  - To select a particular homeroom:
    - i. Optional: If you do not want to limit your selection to homerooms that are grade-appropriate for the student, deselect the **Display grade appropriate homerooms only** check box.
    - ii. In the drop-down list, select the homeroom.
  - To have StudentInformation assign the homeroom randomly based on grade level and available capacity, click **Auto-Assign**.
2. Click **Save**.

Term	Homeroom
Full Year Term	4-103

OR  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

### Assign Student to Homeroom for Full School Year

## Assign Homerooms

A confirmation message displays, and the student's homeroom displays in the student context area of the banner.

- Optional: To open the student's profile in edit mode, click **Edit Student Profile**.

Home >> SIS >> Student >> Homeroom Assignment

### Student Homeroom Assignments

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

The Student Homeroom Assignment was successfully saved

Term	Homeroom
Full Year Term: 4-103	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**

### Student Homeroom Assignment Added

## Assign Students to Homerooms by Term

Navigation: Home – SIS – Student – Homeroom Assignment

**Note:** To assign students to homeroom by term, you must have homerooms set up by term. For information on setting up homerooms by term, see *ProgressBook StudentInformation Scheduling Guide*.

**Note:** You can also perform this procedure on the **Additional** tab of the student profile by clicking **View/Assign Homeroom**.

- Optional: If you do not want to limit your selection to homerooms that are grade-appropriate for the student, on the **Student Homeroom Assignments** screen, deselect the **Display grade appropriate homerooms only** check box.
- In the row of the term for which you want to assign the student to a homeroom, in the drop-down list, select the homeroom.
- Click **Save**.

Home >> SIS >> Student >> Homeroom Assignment

### Student Homeroom Assignments

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

Term	Homeroom
Full Year Term	- None - v
1st Quarter	- None - v
2nd Quarter	- None - v
3rd Quarter	A127 v
4th Quarter	- None - v

Display grade appropriate homerooms only

**Save** Cancel Edit Student Profile

#### Assign Student to Homeroom for by Term

A confirmation message displays, and the student's homeroom displays in the student context area of the banner.

- Optional: To open the student's profile in edit mode, click **Edit Student Profile**.

BETA - OH ACEVEDO, VANESSA ID: 00140580 Counselor: WATKINS, NAOMI DALTON HIGH SCHOOL 2013-2014 (K)  
 DALTON HIGH SCHOOL 2013-2014 Gender: F Homeroom: A127  
 Calendar: DFLT Grade: 12 Status: A

Home >> SIS >> Student >> Homeroom Assignment

### Student Homeroom Assignments

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

The Student Homeroom Assignment was successfully saved

Term	Homeroom
Full Year Term	- None - v
1st Quarter	- None - v
2nd Quarter	- None - v
3rd Quarter	A127 v
4th Quarter	- None - v

Display grade appropriate homerooms only

Save Cancel **Edit Student Profile**

#### Student Homeroom Assignment Added

## Bulk Assign Students to Homerooms

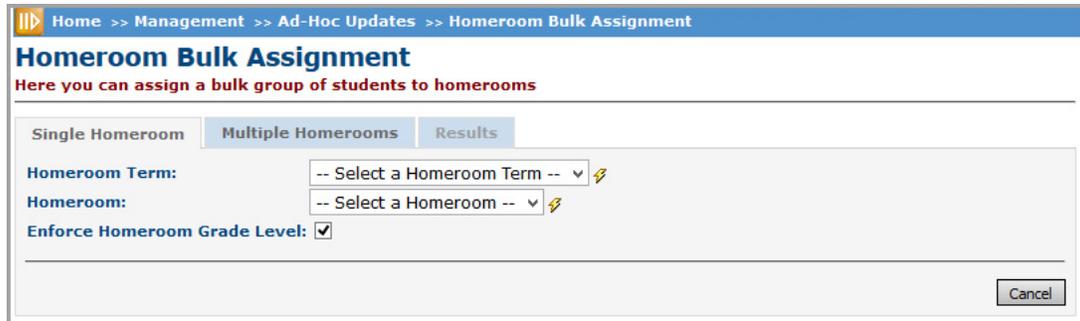
You can assign several students to homerooms at once (bulk assign) in the following ways:

- To bulk assign students to the same homeroom, see ["Bulk Assign Students to Single Homeroom."](#)
- To bulk assign students to different homerooms, see ["Bulk Assign Students to Multiple Homerooms."](#)

## Bulk Assign Students to Single Homeroom

Navigation: Home – Management – Ad-Hoc Updates – Homeroom Bulk Assignment – Single Homeroom tab

1. Optional: If you do not want to limit your selection to homerooms that are grade-appropriate for the student, on the **Single Homeroom** tab of the **Homeroom Bulk Assignment** screen, deselect the **Enforce Homeroom Grade Level** check box.
2. In the appropriate drop-down lists, select a **Homeroom Term** and **Homeroom** to assign to a group of students.



### Homeroom Bulk Assignment – Single Homeroom

The screen expands to include a student search area.

3. Search for students to include in this bulk assignment by selecting any or all of the following **Select Students By** options:
  - **Search Criteria** – Use as many fields as necessary to find students.

**Note:** Select the check box after the **Last Name** and/or **First Name** fields to perform a wildcard search on the contents of those fields. For example, enter “sa” in the **First Name** field and select the check box to find “sam,” “sally,” and “samantha.” If you do not select the check box, StudentInformation only performs a strict match and does not find these names based on the partial information you entered.

- **Student IDs** – Enter student ID numbers separated by a comma.
- **Homeroom** – In the **Homeroom Assignment** drop-down list, select all students assigned to an existing homeroom.

**Note:** You can use the select students by homeroom method to move students from one homeroom to another in the same term or to assign a second homeroom for a different term.

4. In the **Sort Students By** drop-down list, select the sort order for your search results – “Alphabetical,” by “Student Number” or “Random.”
5. Optional: If you do not want your search results to display grouped by grade level, deselect the **Group Students By Grade Level** check box.
6. Optional: To change whether students returned in the search are initially selected for inclusion in the homeroom bulk assignment, select or deselect the **Students Selected by Default** check box.

7. Click **Preview Students**.

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

Single Homeroom   **Multiple Homerooms**   Results

Homeroom Term: FullYear - Full Year Term ⚙

Homeroom: A126 - A126 (Remaining Capacity: 40) ⚙

Enforce Homeroom Grade Level:

---

Homeroom Capacity: 40   Currently Assigned: 0   Remaining Capacity: 40

[ Show Existing Students ]

[ Hide Student Search ]

Select Students By:  Search Criteria    Student IDs    Homeroom

This student selection option will allow you to assign students that match search criteria. You will be able to preview students that match your search, and select/deselect students for assignment to the homeroom chosen above.

**Note:** All students within the selected homeroom will be returned, allowing you to override homeroom assignments.

Last Name:     First Name:

Grade Level:    Team:

Gender:    Program:

Student Status   Selected Status

Student Status: A - ACTIVE RES   C - CENTRAL STUDENTS   D - DELETED   I - INACTIVE   J - JVS RES   JVHS - PT CAR CENT PT DHS

Sort Students By: Alphabetical   Group Students By Grade Level:

Students Selected by Default   **Preview Students**

[ Show Student Preview ]

Cancel

**Student Search – Single Homeroom**

A list of students matching your search criteria displays.

8. Review the matching students. If necessary, select the check box beside a student to include the student in the bulk homeroom assignment. Or deselect the check box to exclude the student. When selecting students for this homeroom, refer to the capacity information that displays above the search results.
9. Click **Assign Students**.

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

Single Homeroom | **Multiple Homerooms** | Results

Homeroom Term: FullYear - Full Year Term

Homeroom: A126 - A126 (Remaining Capacity: 40)

Enforce Homeroom Grade Level:

---

Homeroom Capacity: 40      Currently Assigned: 0      Remaining Capacity: 40

[ Show Existing Students ]

[ Show Student Search ]

[ Hide Student Preview ]

	<input type="checkbox"/>	Student Name	Student Number	Grade	Status	Current Homeroom
1	<input checked="" type="checkbox"/>	BAILEY, ANGELA	00140530	12	A	6A Lunch
2	<input checked="" type="checkbox"/>	BAILEY, CYNTHIA	00140130	12	A	6A Lunch
3	<input checked="" type="checkbox"/>	BARNETT, BETTY	00140215	12	A	6A Lunch
4	<input checked="" type="checkbox"/>	BEASLEY, JAMES	00140026	12	A	6A Lunch
5	<input checked="" type="checkbox"/>	BEST, BRAD	00140010	12	A	6A Lunch
6	<input checked="" type="checkbox"/>	BOWERS, DUSTIN	00140170	12	A	6A Lunch
7	<input checked="" type="checkbox"/>	BRIDGES, ARMANDO	00130535	12	J	
8	<input checked="" type="checkbox"/>	BRIDGES, HEIDI	00140051	12	J	
9	<input checked="" type="checkbox"/>	BRIDGES, MARY	00140162	12	JVHS	
10	<input checked="" type="checkbox"/>	BRIDGES, VIOLA	00140510	12	A	6A Lunch
11	<input checked="" type="checkbox"/>	BROCK, WARREN	00140506	12	A	6A Lunch
12	<input checked="" type="checkbox"/>	BYRD, SARA	00140007	12	R	

Return to Previous Page

### Student Matches

If the bulk assignment is successful, a confirmation message displays.

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

All selected students were successfully assigned to the homeroom

Single Homeroom | **Multiple Homerooms** | Results

Homeroom Term: FullYear - Full Year Term

Homeroom: -- Select a Homeroom --

Enforce Homeroom Grade Level:

### Bulk Assignment Successful

**Note:** If you attempt to overfill a homeroom by assigning enough students to surpass the homeroom's capacity, a warning message displays. If you truly do want to overfill the homeroom, click **Ok**. Otherwise, click **Cancel**, modify your search criteria and try again.

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

**This will cause the selected homeroom to be overfilled**

You have selected to overfill the selected homeroom. The homeroom's remaining capacity is 35, but you have selected to assign 89 students.

Click 'Ok' to continue with the homeroom assignments, overfilling the homeroom  
Click 'Cancel' to return and adjust your selections

Ok Cancel

#### Overflow Warning

**Note:** If there are homeroom conflicts, a message displays on the **Results** tab indicating the affected student(s).

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

Not all students were able to be assigned to the selected homeroom due to conflicts

Single Homeroom Multiple Homerooms Results

Student Name	Student Number
ACEVEDO, VANESSA	00140580

#### Conflict Message

## Bulk Assign Students to Multiple Homerooms

Navigation: Home – Management – Ad-Hoc Updates – Homeroom Bulk Assignment – Multiple Homeroom tab

1. On the **Multiple Homerooms** tab of the **Homeroom Bulk Assignment** screen, select the **Homeroom Term** for which you want to assign a group of students to homerooms.
2. Select the homerooms to which you want to assign students by moving them from the **Available Homerooms** multiselect list on the left to the **Selected Homerooms** list on the right.
3. Search for students to include in this bulk assignment by selecting any or all of the following **Select Students By** options:
  - **Search Criteria** – Use as many fields as necessary to find students.

**Note:** Select the check box after the **Last Name** and/or **First Name** fields to perform a wildcard search on the contents of those fields. For example, enter “sa” in the **First Name** field and select the check box to find “sam,” “sally,” and “samantha.” If you do not select the check box, StudentInformation only performs a strict match and does not find these names based on the partial information you entered.

## Assign Homerooms

- **Student IDs** – Enter student ID numbers separated by a comma.
  - **Class Period** – To find students in particular course sections/class periods, in the appropriate drop-down lists, select the **Course Term**, **Rotation Day** and **Period**.
4. In the **Sort Students By** drop-down list, select the sort order for your search results – “Alphabetical,” by “Student Number” or “Random.”
  5. Optional: If you do not want your search results to display grouped by grade level, deselect the **Group Students By Grade Level** check box.
  6. Click **Assign Students**.

**Note:** You cannot preview the students you are assigning to multiple homerooms. Once you click **Assign Students**, all students meeting your criteria are assigned to homerooms up to their capacity.

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

Single Homeroom | **Multiple Homerooms** | Results

Homeroom Term: FullYear - Full Year Term

**Available Homerooms**

- A122 - A122 (Remaining Capacity: 35)
- A124 - A124 (Remaining Capacity: 35)
- A125 - A125 (Remaining Capacity: 35)
- A123 - A123 (Remaining Capacity: 30)
- A121 - A121 (Overfilled by 53)

**Selected Homerooms**

- A126 - A126 (Remaining Capacity: 40)
- A120 - A120 (Remaining Capacity: 35)

[ Hide Student Search ]

Select Students By:  Search Criteria  Student IDs  Class Period

This student selection option will allow you to assign students that match search criteria. You will be able to preview students that match your search, and select/deselect students for assignment to the homeroom chosen above.

**Note:** All students within the selected homeroom will be returned, allowing you to override homeroom assignments.

Last Name: b  First Name:

Grade Level:  Team:

Gender:  Program:

**Student Status**

- A - ACTIVE RES
- C - CENTRAL STUDENTS
- D - DELETED
- I - INACTIVE
- J - JVS RES
- JVHS - PT CAR CENT PT DHS

**Selected Status**

Sort Students By: Alphabetical  Group Students By Grade Level:

**Assign Students**  Return to Previous Page

### Homeroom Bulk Assignment – Multiple Homeroom

The **Results** tab displays a confirmation message listing the newly assigned students and any conflicts.

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

45 students matched your search criteria; 24 students were assigned to homerooms, but 21 students were not assigned to a homeroom because there was no availability in the selected homerooms or there was a data conflict with the assignment

Single Homeroom   Multiple Homerooms   Results

Student Name	Student Number	Prior Homeroom	New Homeroom	Assigned
BAILEY, MELISSA	00160155		A120	<input type="checkbox"/>
BEASLEY, RICHARD	00170148		A120	<input type="checkbox"/>
BEASLEY, THOMAS	00170540		A120	<input type="checkbox"/>
BERG, JIMMY	00170200		A120	<input type="checkbox"/>
BERG, ROSE	00160582		A120	<input type="checkbox"/>
BEST, ELLEN	00170015		A120	<input type="checkbox"/>
BEST, FRANKLIN	00170010		A120	<input type="checkbox"/>
BOWERS, PEGGY	00170035		A120	<input type="checkbox"/>
BRADY, LOIS	00170244		A120	<input type="checkbox"/>
BAILEY, JUSTIN	00160112	5A Lunch	A122	<input checked="" type="checkbox"/>
BAILEY, WALTER	00160110	5A Lunch	A122	<input checked="" type="checkbox"/>
BARR, KRISTIN	00160052	5A Lunch	A122	<input checked="" type="checkbox"/>
BARR, PERRY	00160053	5A Lunch	A122	<input checked="" type="checkbox"/>
BARR, TRACY	00160054	5A Lunch	A122	<input checked="" type="checkbox"/>
BARRON, EDITH	00160503	5A Lunch	A122	<input checked="" type="checkbox"/>
BATTLE, CODY	00160575	5A Lunch	A122	<input checked="" type="checkbox"/>
BEASLEY, OLGA	00160124	5A Lunch	A122	<input checked="" type="checkbox"/>
BERG, MATTHEW	00160047	5A Lunch	A122	<input checked="" type="checkbox"/>
BOND, NATALIE	00160005	5A Lunch	A122	<input checked="" type="checkbox"/>
BRIDGES, CLAIRE	00160118	5A Lunch	A122	<input checked="" type="checkbox"/>
BRIDGES, FELIX	00160520	5A Lunch	A122	<input checked="" type="checkbox"/>
BRIDGES, GLENDA	00160510	5A Lunch	A122	<input checked="" type="checkbox"/>
BAILEY, PETER	00150155	5B Lunch	A124	<input checked="" type="checkbox"/>
BAILEY, RALPH	00140529	5B Lunch	A124	<input checked="" type="checkbox"/>

### Bulk Assignment Results

## Delete Homeroom Assignments

You can delete students from homerooms in the following ways:

- To remove all students from a homeroom, see ["Remove All Students from a Homeroom."](#)
- To remove some students from a homeroom, see ["Remove Individual Students from a Homeroom."](#)

### Remove All Students from a Homeroom

Navigation: Home – Management – School Administration – School Building Administration – Homerooms

- On the **Homeroom Maintenance** screen, in the row of the homeroom from which you want to delete all students, click .

Home » Management » School Administration » School Building Administration » Homerooms

### 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
<input type="checkbox"/>	104 - Homeroom 104C	sem2	HANDLEY	104 - 104	11	50	50		
<input type="checkbox"/>	A104 - A104	FullYear	AUSTIN	104 - 104	09	0	0		
<input type="checkbox"/>	A105 - A105	FullYear	COUSINS	105 - 105	10	0	0		
<input checked="" type="checkbox"/>	A106 - A106	FullYear	CASTLE	106 - 106	10	30	24		
<input type="checkbox"/>	A107 - A107	FullYear	WALTERS	107 - 107	11	0	0		
<input type="checkbox"/>	A108 - A108	FullYear	CLARK	108 - 108	11	0	0		
<input type="checkbox"/>	A109 - A109	FullYear	WEBBER	109 - 109	12	0	0		
<input type="checkbox"/>	A110 - A110	FullYear	LAYMAN	110 - 110	12	0	0		

Show Active Only

### Remove All Students from a Homeroom

A message displays, asking if you are sure you want to remove the students from this homeroom.

2. Click **Ok**.

Home » Management » School Administration » School Building Administration » Homerooms

### Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

Are you sure you want to remove all students from the following Homeroom:

A106 - A106

### Confirm Remove Students

A confirmation message displays, and the homeroom's spaces **Remaining** now equal its **Capacity**.

Home » Management » School Administration » School Building Administration » Homerooms

### Homeroom Maintenance

From this screen, you can Edit, Delete or Add a Homeroom.

All students were successfully removed from the homeroom

Add Homeroom -- Filter by HR Term --

	Homeroom ^	HR Term	Teacher	Room	Grades	Capacity	Remaining	Counselor	Active
<input type="checkbox"/>	104 - Homeroom 104C	sem2	HANDLEY	104 - 104	11	50	50		
<input type="checkbox"/>	A104 - A104	FullYear	AUSTIN	104 - 104	09	0	0		
<input type="checkbox"/>	A105 - A105	FullYear	COUSINS	105 - 105	10	0	0		
<input checked="" type="checkbox"/>	A106 - A106	FullYear	CASTLE	106 - 106	10	30	30		
<input type="checkbox"/>	A107 - A107	FullYear	WALTERS	107 - 107	11	0	0		
<input type="checkbox"/>	A108 - A108	FullYear	CLARK	108 - 108	11	0	0		
<input type="checkbox"/>	A109 - A109	FullYear	WEBBER	109 - 109	12	0	0		
<input type="checkbox"/>	A110 - A110	FullYear	LAYMAN	110 - 110	12	0	0		

Show Active Only

### Confirmation of Deleted Homeroom

## Remove Individual Students from a Homeroom

Navigation: Home – Management – Ad-Hoc Updates – Homeroom Bulk Assignment

1. Optional: If you do not want to limit your selection to homerooms that are grade-appropriate for the student, on the **Single Homeroom** tab of the **Homeroom Bulk Assignment** screen, deselect the **Enforce Homeroom Grade Level** check box.
2. In the appropriate drop-down lists, select the **Homeroom Term** and **Homeroom** from which you want to delete a student.

### Remove Student from a Homeroom

The screen expands to list the students currently assigned to the homeroom.

3. In the row of the student you want to remove from the homeroom, click **X**. (To remove all students in the list, click **Remove All Students**.)

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

Single Homeroom **Multiple Homerooms** Results

Homeroom Term: FullYear - Full Year Term ⚡

Homeroom: A126 - A126 (Remaining Capacity: 28) ⚡

Enforce Homeroom Grade Level:

---

Homeroom Capacity: **40**      Currently Assigned: **12**      Remaining Capacity: **28**

[ Hide Existing Students ]

	Student Number	Student Name	Grade	Status
<input checked="" type="checkbox"/>	00140530	BAILEY, ANGELA	12	A
<input checked="" type="checkbox"/>	00140130	BAILEY, CYNTHIA	12	A
<input checked="" type="checkbox"/>	00140215	BARNETT, BETTY	12	A
<input checked="" type="checkbox"/>	00140026	BEASLEY, JAMES	12	A
<input checked="" type="checkbox"/>	00140010	BEST, BRAD	12	A
<input checked="" type="checkbox"/>	00140170	BOWERS, DUSTIN	12	A
<input checked="" type="checkbox"/>	00130535	BRIDGES, ARMANDO	12	J
<input checked="" type="checkbox"/>	00140051	BRIDGES, HEIDI	12	J
<input checked="" type="checkbox"/>	00140162	BRIDGES, MARY	12	JVHS
<input checked="" type="checkbox"/>	00140510	BRIDGES, VIOLA	12	A
<input checked="" type="checkbox"/>	00140506	BROCK, WARREN	12	A
<input checked="" type="checkbox"/>	00140007	BYRD, SARA	12	R

12 Records Displayed [Back To Top](#)

### Remove Student

StudentInformation removes the student from the homeroom. The student no longer displays in the list, and the room capacity numbers reflect one less student in the homeroom.

Home >> Management >> Ad-Hoc Updates >> Homeroom Bulk Assignment

### Homeroom Bulk Assignment

Here you can assign a bulk group of students to homerooms

Single Homeroom **Multiple Homerooms** Results

Homeroom Term: FullYear - Full Year Term

Homeroom: A126 - A126 (Remaining Capacity: 29)

Enforce Homeroom Grade Level:

**Homeroom Capacity: 40    Currently Assigned: 11    Remaining Capacity: 29**

[ Hide Existing Students ]

	Student Number	Student Name	Grade	Status
X	00140130	BAILEY, CYNTHIA	12	A
X	00140215	BARNETT, BETTY	12	A
X	00140026	BEASLEY, JAMES	12	A
X	00140010	BEST, BRAD	12	A
X	00140170	BOWERS, DUSTIN	12	A
X	00130535	BRIDGES, ARMANDO	12	J
X	00140051	BRIDGES, HEIDI	12	J
X	00140162	BRIDGES, MARY	12	JVHS
X	00140510	BRIDGES, VIOLA	12	A
X	00140506	BROCK, WARREN	12	A
X	00140007	BYRD, SARA	12	R

11 Records Displayed [Back To Top](#)

Remove All Students



**Student Removed**

This page intentionally left blank.

# Reports

The following reports are available in StudentInformation to help you manage your student homeroom assignments:

- [“Run Administrative Homeroom Detail Report \(R201-A\)”](#)
- [“Run Administrative Homeroom Summary Report \(R201-B\)”](#)

For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

## Run Administrative Homeroom Detail Report (R201-A)

**Navigation: Home – SIS – School – Student Reports – Administrative Homeroom Detail (R201-A)**

This report generates a detailed listing of students in each homeroom. You can run this report for a single homeroom, multiple homerooms or all homerooms in a school. You choose which information to include, such as name, address, phone number, birth date and other student data. You can also print address labels using the data in this report.

Report: R201A		DALTON HIGH SCHOOL				
Printed Mon, Mar 17, 2014, 4:37 PM		2013-2014				
Administrative Homeroom List Detail						
HOMEROOM 5A		TEACHER: JEFFERY BRANCH			LOCATION: CAFE	
Stud ID	Student Name	Birth Date	GR	GN	Telephone	Address
160178	ALEXANDER, SHELLY	05/26/1998	10	F	(419) 555-3848	6659 ALEXANDER Road, Dalton, OH 44618
170047	ATKINS, ROSA	06/04/1999	09	F	(419) 555-3884	6392 ATKINS Road, Dalton, OH 44618
160560	CALLAHAN, VICTOR	04/03/1998	09	M	(419) 555-0720	5909 CALLAHAN Road, Dalton, OH 44618
160597	CAMACHO, FELICIA	04/30/1998	10	F	(419) 555-0117	8762 CAMACHO Road, Dalton, OH 44618
160060	CANNON, ANA	08/30/1997	10	F	(419) 555-6263	6951 CANNON Road, Orrville, OH 44667
170067	CARVER, JOANN	04/21/1999	09	F	(419) 555-6891	4170 CARVER Road, Apple Creek, OH 44606
300110095	CASEY, KURT	09/20/1997	10	M	(419) 555-0771	7582 CASEY Road, Orrville, OH 44667
170591	CHAVEZ, CAROLE	12/03/1998	09	F	(419) 555-2407	5923 CHAVEZ Road, Orrville, OH 44667
160170	CHRISTIAN, AMY	03/06/1998	10	F	(419) 555-1191	6683 CHRISTIAN Road, Dalton, OH 44618
170065	CLAY, ALMA	09/06/1998	09	F	(419) 555-0618	1326 CLAY Road, Dalton, OH 44618
170515	CLAY, STEVEN	08/26/1998	09	M	(419) 555-3699	1326 CLAY Road, Dalton, OH 44618
160505	COCHRAN, KENNETH	05/27/1998	10	M	(419) 555-9834	4681 COCHRAN Road, Dalton, OH 44618

**Administrative Homeroom Detail Report (R201-A)**

## Run Administrative Homeroom Summary Report (R201-B)

**Navigation: Home – SIS – School – Student Reports – Administrative Homeroom Summary (R201-B)**

This is a summary report that indicates the number of students in each homeroom and lists the teacher and grade level. You can run this report for a single homeroom, multiple homerooms or all homerooms in a school. You can also print address labels using the data in this report.

<i>Report: R201B</i>		<b>DALTON HIGH SCHOOL</b>			
<i>Printed Mon, Mar 17, 2014, 4:29 PM</i>		<b>2013-2014</b>			
<b>Administrative Homeroom List Summary</b>					
HOMEROOM	TEACHER NAME	ID	ROOM	GRADE	No Of Students
A120	SHELLY ADKINS	COLLEGE	120	09	9
A121	DOLORES BOYER	MDOT	121	09	76
5A	JEFFERY BRANCH	LCAS	CAFE	09,10,11,12	79
5B	JEFFERY BRANCH	LCAS	CAFE	09,10,11,12	91
6A	JEFFERY BRANCH	LCAS	CAFE	09,10,11,12	23
A122	ROBERTO FOX	BWEL	122	10	13
A127	TYRONE FRAZIER	TLAH	127	12	1
A124	KEN HOWARD	JPET	124	11	11
A126	ROBERTO WOOTEN	RKAS	126	12	11

**Administrative Homeroom Summary Report (R201-B)**

---

# ProgressBook StudentInformation Student Lockers Guide



*ProgressBook*<sup>®</sup>  
*StudentInformation*



# **ProgressBook StudentInformation Student Lockers Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Student Lockers Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.1.0	<i>"Maintain Lockers"</i>	12	Rewrote procedures in active voice and using procedural steps. Added description of new <b>Save and Next</b> button and replaced affected images. Incorporated Locker Combinations topics into these topics.

This page intentionally left blank.

---

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Student Lockers Guide Overview</b>	<b>1</b>
Student Lockers Overview .....	1
Understanding the Student Lockers Module .....	1
Student Lockers Outline and Flow .....	2
<b>Locker Maintenance</b>	<b>3</b>
Locker Size Codes Maintenance .....	3
Add/Edit Locker Size Code .....	4
Locker Location Assignment.....	4
Add Locker Location Range.....	6
Delete Locker Location Range.....	7
Locker Grade Level Assignment.....	8
Add Locker Grade Level Range.....	10
Delete Locker Grade Level Range.....	11
Maintain Lockers.....	12
View Lockers.....	12
Add Locker .....	13
Edit Locker .....	15
Delete Locker .....	16
<b>Student Locker Information</b>	<b>19</b>
View Free Lockers .....	19
Student Profile .....	20
Student Locker Assignment .....	22
Add Student Locker.....	23
Delete Student Locker.....	27
Change Primary Locker .....	28
Locker Selection Wizard .....	29
Locker Bulk Assignment .....	31
Students Tab .....	32
Assignment Method Tab .....	34
Options Tab.....	37
Confirmation Tab.....	39

---

Results Tab .....	41
<b>Reports</b>	<b>43</b>
Locker Combinations Report (Report Builder) .....	43

# Student Lockers Guide Overview

---

## Student Lockers Overview

Lockers are defined at the school level to be assigned to students. Multiple students may be assigned to the same locker. In addition, a student may be assigned multiple lockers. The student's locker/lockers will display on their profile for easy viewing, but locker details may be viewed by clicking a button located on the profile.

Lockers may be designated as Academic lockers. Other lockers may be used for sports or band purposes, and then would not be defined as academic, but could still be assigned to students and viewed. Lockers may also be designated as specific to a location and/or grade level for easier student assignment.

Lockers have built in locks in many instances. Typically each locker of this type will have multiple possible combinations supplied by the manufacturer. This series is referred to as the combination series and can be set individually for each locker. It is common that a school will use the same combination series for every locker simultaneously to ease maintenance and preparation for the school year.

Lockers may be assigned in multiple fashions. Lockers may be assigned manually by viewing the locker detail and assigning a student to the locker. It is possible to assign a student to multiple lockers from this view as well, while designating which locker will be used as the primary locker. The Locker Selection Wizard can also be used to assign lockers to students via the Edit Student Profile.

---

## Understanding the Student Lockers Module

The Locker module has two distinct parts – Locker Maintenance and Assigning Student Lockers.

Locker Maintenance consists of a maintenance table where each locker is added/updated or deleted before lockers are assigned to students. There is also a code table for defining locker size, if desired.

Lockers may also be assigned to a specific grade level for assignment as well as specific locations in the building. All these items are done through a series of locker maintenance screens.

After all locker maintenance has been handled, the lockers may then be assigned to students for their use.

**Note:** *The Locker Number field is an alpha-numeric field. The Locker Number column on the Locker Maintenance page is sorted numerically, however, Locker Location Assignment is done according to alpha characters. Recommendation: Use leading zeros on locker numbers.*

## **Student Lockers Outline and Flow**

1. Locker Maintenance — Defines valid lockers and their combinations, condition, size, etc.
  - a. Locker Size Codes
  - b. Locker Location Assignment
    - i. Add Locker Range
    - ii. Delete Locker Range
  - c. Locker Grade Level Assignments
    - i. Add Locker Range
    - ii. Delete Locker Range
  - d. View Lockers – View list of lockers and their assignments.
  - e. Add/Edit/Delete Locker – Add new lockers.
  - f. Locker Combinations
    - i. Add Locker Combination
    - ii. Delete Locker Combination
2. Student Locker Information
  - a. View Free Lockers – Displays the lockers in the school that are available to be assigned for the current school year.
  - b. Student Profile – View locker information on the student profile.
  - c. Student Locker Assignment – Current view of student’s locker information.
    - i. Add Student Locker
    - ii. Delete Student Locker
    - iii. Change Primary Locker
  - d. Locker Selection Wizard – Allows for quick selection of a primary locker for the selected student.
  - e. Locker Bulk Assignment – Allows lockers to be assigned to multiple students at once.
    - i. Students tab
    - ii. Assignment Method tab
    - iii. Options tab
    - iv. Confirmation tab
    - v. Results tab

# Locker Maintenance

Navigation: Home - Management - School Administration - School Building Administration - Locker Administration

Lockers are defined at the school level to be assigned to students. Lockers may be designated by specific location and grade level as well.

---

## Locker Size Codes Maintenance

Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Size Codes

Locker Size codes are codes used to describe the size of a locker, but are optional to the locker maintenance program.

Home SIS Teacher Menu EZ Query Management EMIS My Account ITC Local Develop Sitemap

**DASL Beta**

First Last

This Screen does not use a Selected Student  
Data on this screen applies to the current school as well as all child schools

ELIDA HIGH SCHOOL 2011-2012 (K)

[Find Students] Find [Go To] Go

Home » Management » School Administration » School Building Administration » Locker Administration » Locker Size Codes

Advanced Search | Feedback | Mgmt | Help | Version | Print

### Locker Size Maintenance

From this screen, you can display, add, change and delete Locker Size codes.

Add Locker Size Code

	Code	Name ^	Active
X	lg	Large locker	
X	med	Medium locker	
X	sm	Small locker	

Show Active Only

**Locker Size Maintenance Screen**

This page has standard add record, edit record and delete record controls.

**Note:** Records on this page are not deleted, but are inactivated instead. For information on reactivating records, see *ProgressBook StudentInformation Getting Started Guide*.

**Sorting** – You may sort by any column (Code, Name, Active) in ascending or descending order by clicking on the column header

– Indicates an active locker size code. This can be used on new Student Locker Records.

– Indicates an inactive locker size code. This can not be used on new Student Locker Records.

## Add/Edit Locker Size Code

Home » Management » School Administration » School Building Administration » Locker Administration » Locker Size Codes

### Locker Size Maintenance

From this screen, you can display, add, change and delete Locker Size codes.

Code:

Name:

Is Active:

**Add/Edit Locker Size Maintenance Screen**

**Code** (required) – Enter up to four alphanumeric characters to define the Locker Size. If you try to use an existing inactive Locker Size Code, you will be prompted to reactivate this inactive Locker Size Code if you wish.

Locker Size Codes must be defined at the school level only, as per the chart below.

	Visibility and Use	Editable
<b>Global Level</b>	School	School
<b>District Level</b>	School	School
<b>School Level</b>	School	School

**Name** (required) – Enter Name of Locker Size Code.

**Is Active** (optional) – Yes or No. The Locker Size Code must be Active to use on new Student Locker Records

---

## Locker Location Assignment

**Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Location Assignment**

Locker Location is a defined location in the school used to reference the locker’s location and may be used for automatic assignment of lockers, or for ease in viewing and manually assigning lockers to individual students.

Home » Management » School Administration » School Building Administration » Locker Administration » Locker Location Assignment

### Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

In order to view the current lockers by location or assign lockers to a location, you must first select a location from the dropdown. In addition, you must specify whether you are working with academic lockers.

Filter By Location: -- Select a Location --  Academic Lockers

- Select a Location --
- 000 - 000
- 001 - Soc. Stud - Kahle
- 002 - Spec. Ed. - Dally
- 004 - Soc. Stud.- Daniel
- 006 - Social Studies-Fersch
- 008 - Soc. Stud - Reiff
- 010 - Annual - Varland
- 012 - Alt. Learning -Weger
- 013 - Bulldog Inn
- 014 - Spec. Ed.-
- 015A - Computer - Evans
- 015B - Multi-Purpose Room

Locker Location Assignment Screen

From the Locker Location Assignment screen, you must first filter by location, from the available drop-down list.

By default, the filter will only list academic lockers, but if you wish to view all lockers (those specified as academic as well as those NOT marked as academic lockers) uncheck the box **Academic Lockers** and all lockers will be listed.

From this screen you can view the lockers already assigned to a location, assign additional lockers or ranges of lockers to the location, or delete lockers or ranges of lockers from the location. See the following example of the Locker Location Maintenance screen.

Home » Management » School Administration » School Building Administration » Locker Administration » Locker Location Assignment

### Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

Filter By Location: 309 - English-Williams  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
✕	1001	1500	329	329

Physical Capacity	Total Capacity
329	329

Starting Locker:  ⚡

Ending Locker:

Lockers Displayed for a Location on the Locker Location Assignment Screen

**Sorting** – You may sort by any column (Starting Locker, Ending Locker, Available Lockers, Capacity) in ascending or descending order by clicking on the column header.

**Filter by Location** (required) – Make a location selection from the drop-down list.

**Academic Lockers** – If you wish to view only academic lockers, leave this box checked. If you wish to view all lockers, then uncheck.

**Delete Icon** – Delete this Locker or Locker Range Location Assignment.

**Physical Capacity** – Total Physical Capacity (actual lockers) for this locker location.

**Total Capacity** – Total Capacity for this locker location (dependent on capacity of the individual lockers)

**Starting Locker** (required) – Enter a locker number or the starting locker number in a range of lockers, to be added to the selected location.

**Ending Locker** (optional) – If a range of lockers is being added, then the last locker in the range must be specified in this field.

**Add Range** – Add a new locker range for the specified location.

## Add Locker Location Range

Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Location Assignment

Home » Management » School Administration » School Building Administration » Locker Location Assignment

### Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

Filter By Location: 309 - English-Williams  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
X	1001	1500	329	329

Physical Capacity: 329    Total Capacity: 329

Starting Locker:

Ending Locker:

### Adding Locker Location Range

Input a starting locker and an ending locker number to add a range of lockers to the selected location. If only one locker is to be added to this location, no ending locker number is needed.

Home » Management » School Administration » School Building Administration » Locker Location Assignment

### Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

Filter By Location: 309 - English-Williams  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
X	1001	1500	329	329

Physical Capacity: 329    Total Capacity: 329

Starting Locker: 1501

Ending Locker: 1550

### Defining Starting Locker and Ending Locker

Click **Add Range** to add this locker range to the selected location.

**Starting Locker** (required) – Enter a locker number or the starting locker number in a range of lockers, to be added to the selected location.

**Ending Locker** (optional) – If a range of lockers is being added, then the last locker in the range must be specified in this field.

**Add Range** – Will add the current Locker or Locker Range to the selected location.

Home » Management » School Administration » School Building Administration » Locker Location Assignment

### Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

The Locker Location Range was saved successfully

Filter By Location: 309 - English-Williams  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
X	1001	1550	379	379
X	1600	1625	25	25

Physical Capacity Total Capacity  
404 404

Starting Locker:  ⚡

Ending Locker:

Locker Ranges on Locker Location Assignment Screen

## Delete Locker Location Range

Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Location Assignment

Home » Management » School Administration » School Building Administration » Locker Location Assignment

### Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school

The Locker Location Range was saved successfully

Filter By Location: 309 - English-Williams  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
X	1001	1550	379	379
X	1600	1625	25	25

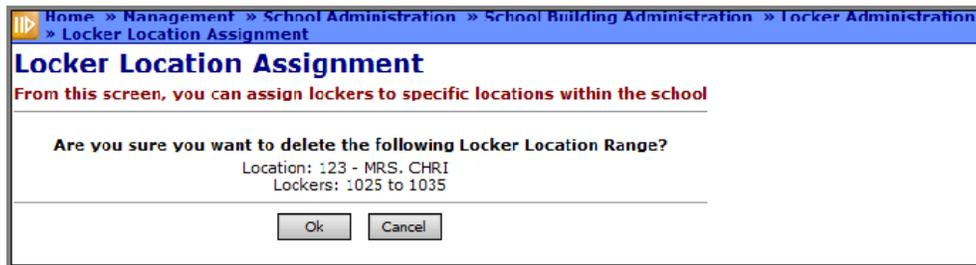
Physical Capacity Total Capacity  
404 404

Starting Locker:  ⚡

Ending Locker:

Deleting Locker Location Ranges

Click the **delete icon** to delete a specific Locker Location Range.

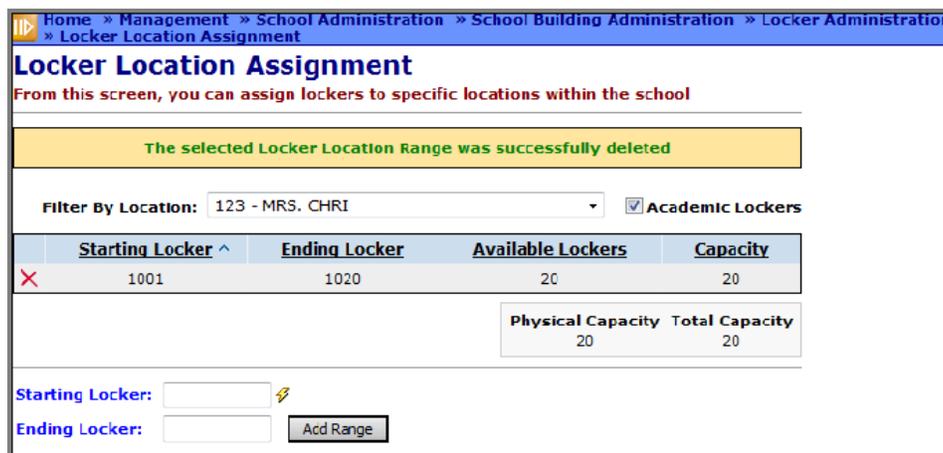


**Deletion Confirmation Message**

**OK** – Delete the Locker Location Range.

**Cancel** – Do Not Delete the Locker Location Range.

You will receive a confirmation that the Locker Location Range has been deleted successfully.



**Successful Deletion Message**

## Locker Grade Level Assignment

**Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Grade Level Assignment**

Locker Grade Level is a defined grade level in the school used to reference the locker's grade level and may be used for automatic assignment of lockers, or for ease in viewing and manually assigning lockers to individual students.

Home » Management » School Administration » School Building Administration » Locker Administration  
» Locker Grade Level Assignment

### Locker Grade Level Assignment

From this screen, you can assign grade levels to lockers within the school

In order to view the current lockers by grade level or assign lockers to a grade level, you must first select a grade level from the dropdown. In addition, you must specify whether you are working with academic lockers.

Filter By Grade Level: -- Select a Grade Level --  Academic Lockers

- Select a Grade Level --
- 09
- 10
- 11
- 12
- 13
- GR
- 23
- 31
- IN

#### Locker Grade Level Assignment Screen

By selecting a grade level from the Filter drop-down menu you may view lockers that have been designated for assignment to a specific grade level, if applicable.

Home » Management » School Administration » School Building Administration » Locker Administration  
» Locker Grade Level Assignment

### Locker Grade Level Assignment

From this screen, you can assign grade levels to lockers within the school

Filter By Grade Level: 09  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
✕	1000	1072	71	71
✕	1251	1368	116	116

Physical Capacity	Total Capacity
187	187

Starting Locker:  ⚡

Ending Locker:

#### Lockers Displayed for Grade Level on the Locker Grade Level Assignment Screen

By default, the filter will only list academic lockers, but if you wish to view all lockers (those specified as academic as well as those NOT marked as academic lockers) uncheck the box **Academic Lockers** and all lockers will be listed.

**Sorting** – You may sort by any column (Starting Locker, Ending Locker, Available Lockers, Capacity) in ascending or descending order by clicking on the column header.

**Filter by Grade Level** (required) – Make a grade level selection from the drop-down list.

**Academic Lockers** – if you wish to view only academic lockers, leave this box checked. If you wish to view all lockers, then uncheck.

**Delete Icon** – Delete this Locker or Locker Range Grade Level Assignment.

**Physical Capacity** – Total Physical Capacity (actual lockers) for this locker grade level.

**Total Capacity** – Total Capacity for this locker grade level (dependent on capacity of the individual lockers).

**Starting Locker** (required) – Enter a locker number or the starting locker number in a range of lockers, to be added to the selected grade level.

**Ending Locker** (optional) – If a range of lockers is being added, then the last locker in the range must be specified in this field.

**Add Range** – Add a new locker range for the specified grade level.

## Add Locker Grade Level Range

**Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Grade Level Assignment**

On the Locker Grade Level Assignment screen, make a Grade Level selection from the drop-down menu. If there are any lockers assigned to that grade level, they will then display on the Locker Grade Level Assignment page as shown below.

Click **Add Range** to add a locker or locker range to the specified Grade Level.

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
X	1000	1072	71	71
X	1251	1368	116	116

Physical Capacity	Total Capacity
187	187

Starting Locker:  ⚡

Ending Locker:

### Adding a Locker Range for the Grade Level

**Starting Locker** (required) – Enter a locker number or the starting locker number in a range of lockers, to be added to the selected grade level.

**Ending Locker** (optional) – If a range of lockers is being added, then the last locker in the range must be specified in this field.

**Available Lockers** – Number of actual lockers available for this locker range.

**Capacity** – Total capacity of all lockers in this locker range.

**Physical Capacity** – Total Physical Capacity (actual lockers) for this locker location.

**Total Capacity** – Total Capacity for this locker location (dependent on capacity of the individual lockers).

**Add Range** – Will add the current Locker or Locker Range to the selected grade level.

Home » SIS » Maintenance » School » Locker Maintenance » Locker Grade Level Assignment

### Locker Grade Level Assignment

From this screen, you can assign grade levels to lockers within the school

The Locker Grade Level Range was saved successfully

Filter By Grade Level: 10  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
X	A051	A100	50	50

Physical Capacity Total Capacity  
50 50

Starting Locker:  ⚡

Ending Locker:  Add Range

Successfully Saved Message

## Delete Locker Grade Level Range

Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Grade Level Assignment

Home » Management » School Administration » School Building Administration » Locker Grade Level Assignment

### Locker Grade Level Assignment

From this screen, you can assign grade levels to lockers within the school

Filter By Grade Level: 09  Academic Lockers

	Starting Locker ^	Ending Locker	Available Lockers	Capacity
X	1000	1072	71	71
X	1251	1368	116	116

Physical Capacity Total Capacity  
187 187

Starting Locker:  ⚡

Ending Locker:  Add Range

Delete Icon

Deleting Locker Range from Grade Level

Click the **delete icon** to delete a specific locker or locker range from the grade level.

Home » Management » School Administration » School Building Administration » Locker Administration » Locker Grade Level Assignment

### Locker Grade Level Assignment

From this screen, you can assign grade levels to lockers within the school

Are you sure you want to delete the following Locker Grade Level Range?

Grade level: 19  
Lockers: A201 to A275

Ok Cancel

Deletion Confirmation Message

**OK** – Delete the Policy Code.

**Cancel** – Do Not Delete the Policy Code.

You will receive a confirmation message that the Grade Level Range has been successfully deleted.

## Maintain Lockers

- To view locker information, see [“View Lockers.”](#)
- To add a new locker record, see [“Add Locker.”](#)
- To edit an existing locker record, see [“Edit Locker.”](#)
- To delete a locker record, see [“Delete Locker.”](#)

## View Lockers

**Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Maintenance**

1. Navigate to the **Locker Maintenance** screen.

A list of locker records displays. By default, the list shows only academic-type lockers with an active status. Locker information is grade level-specific.

The screenshot shows the 'Locker Maintenance' screen with a navigation breadcrumb: Home » Management » School Administration » School Building Administration » Locker Administration » Locker Maintenance. Below the breadcrumb is the title 'Locker Maintenance' and a description: 'From this screen, you can display, add, change and delete data pertaining to lockers. Clicking a locker number shows the students assigned to the locker.' There is an 'Add Locker' button and a 'Filter: Active' dropdown menu with a checked 'Academic Only' checkbox. The main table has columns: Locker Number, Status, Description, Capacity, Residents, Size, Combination Series, Reference Location, and Grade. The table contains 10 rows of data for lockers 0968 through 0976.

	Locker Number ^	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
	0968	Active	EW	1	0		3	309 - English-Williams	10
	0969	Active	EW	1	0		3	309 - English-Williams	10
	0970	Active	EW	1	0		3	309 - English-Williams	10
	0971	Active	EW	1	0		3	309 - English-Williams	10
	0972	Active	EW	1	0		3	309 - English-Williams	10
	0973	Active	EW	1	0		3	309 - English-Williams	10
	0974	Active	EW	1	0		3	309 - English-Williams	10
	0975	Active	EW	1	0		3	309 - English-Williams	10
	0976	Active	EW	1	0		3	309 - English-Williams	10

**Locker Maintenance Screen**

2. Optional: To sort the list on any column, click the column header.
3. Optional: To see a list of locker residents (students assigned to the locker):
  - a. Click the **Locker Number**.

The **Locker Resident** screen displays the student(s) assigned to the locker.

**Locker Resident**  
 This screen displays students assigned to a specific locker.

---

Viewing students assigned to locker 0976

Student
Student12839, ALAN

[Back to Locker](#)

Locker Resident Screen

- b. Click **Back to Locker** to return to the **Locker Maintenance** screen.
4. Optional: Filter the list of lockers in the following ways:
  - To display all lockers (including nonacademic-type lockers), deselect the **Academic Only** check box.
  - To view only those lockers with a different status, select the status in the **Filter** drop-down list.

## Add Locker

**Navigation: Home - Management - School Administration - School Building Administration - Locker Administration - Locker Maintenance**

*Note: Locker information is school year-specific, so any changes you make to lockers in one school year do not affect other school years.*

1. On the **Locker Maintenance** screen, click **Add Locker**.

Home » Management » School Administration » School Building Administration » Locker Administration » Locker Maintenance

**Locker Maintenance**  
 From this screen, you can display, add, change and delete data pertaining to lockers.  
 Clicking a locker number shows the students assigned to the locker.

[Add Locker](#) Filter: Active  Academic Only

	Locker Number ^	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
✕ ✎	0968	Active	EW	1	0		3	309 - English-Williams	10
✕ ✎	0969	Active	EW	1	0		3	309 - English-Williams	10

Add Locker

The **Locker Maintenance** screen displays in add mode.

Locker Maintenance Screen (Add Mode)

2. Enter the **Locker Number** (up to eight alphanumeric characters).
3. Select a **Locker Status** of “Active,” “Repair” or “Unavailable.”
4. Select a **Capacity** (how many students you can assign to this locker).
5. Optional: Complete any of steps as needed:
  - If you are adding a nonacademic locker, deselect the **Academic Locker** check box.
  - Enter a **Description** of the locker.
  - Select a **Size**. Only sizes defined in the Locker Size Code table are present in the drop-down list.
  - In the **Current Series** drop-down list, select a combination series to use with this locker. Only defined series are present in the drop-down list.
  - In the **Reference Location** drop-down list, select the room/location of the locker. Only rooms/locations defined in the Rooms/Locations table are present in the drop-down list. If you do not select anything, the **Reference Location** is “Not Specified,” which is not the same as “None.”

**Note:** If you want to Bulk Assign Lockers by class period, you must specify a Reference Location for those lockers.

- To assign this locker to a specific grade level, select the **Grade**.
- If you are creating a locker that you do not want to be active at this time, deselect the **Is Active** check box.
- To add a combination series, do the following:
  - i. Select the applicable **Series**.
  - ii. Enter the **Combination** to use with the series.

- iii. Click **Add Combination**.
- iv. To add another series/combination, repeat these steps.

**Note:** *StudentInformation allows up to nine locker combination series.*

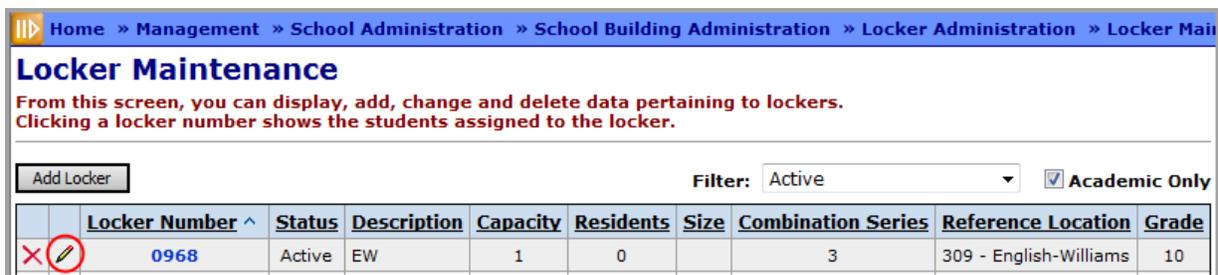
6. If this is the only locker you want to add, click **Save**. If you want to add another locker, click **Save and New**, and repeat the procedure.

## Edit Locker

**Navigation:** Home - Management - School Administration - School Building Administration - Locker Administration - Locker Maintenance

**Note:** *Locker information is school year-specific, so any changes you make to lockers in one school year do not affect other school years.*

1. On the **Locker Maintenance** screen, in the row of the locker you want to edit, click .



Home » Management » School Administration » School Building Administration » Locker Administration » Locker Maintenance

### Locker Maintenance

From this screen, you can display, add, change and delete data pertaining to lockers.  
Clicking a locker number shows the students assigned to the locker.

Add Locker Filter: Active  Academic Only

	Locker Number ^	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
	0968	Active	EW	1	0		3	309 - English-Williams	10

### Edit Locker

The **Locker Maintenance** screen displays in edit mode.

**Locker Maintenance Screen (Edit Mode)**

2. Make any needed changes. For details on this screen’s fields, see [“Add Locker.”](#)
3. If this is the only locker you want to edit, click **Save**. If you want to edit another locker, click **Save and Next**, and repeat the procedure.

## Delete Locker

**Navigation:** Home - Management - School Administration - School Building Administration - Locker Administration - Locker Maintenance

***Note:** Locker information is school year-specific, so any changes you make to lockers in one school year do not affect other school years.*

On the **Locker Maintenance** screen, in the row of the locker you want to delete, click **X**.

	Locker Number ^	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
	0968	Active	EW	1	0		3	309 - English-Williams	10

**Delete Locker**

A confirmation message displays indicating the locker is deleted.

Home » Management » School Administration » School Building Administration » Locker Administration » Locker Maintenance

## Locker Maintenance

From this screen, you can display, add, change and delete data pertaining to lockers.  
Clicking a locker number shows the students assigned to the locker.

The selected Locker was successfully deleted

Add Locker Filter: Active  Academic Only

	Locker Number ^	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
 	0970	Active	EW	1	1		4	Not Specified	09
 	0971	Active	EW	1	1		4	Not Specified	09

### Successful Deletion Message

This page intentionally left blank.

# Student Locker Information

## View Free Lockers

### Navigation: Home - SIS - School - Free Lockers

The Free Lockers screen displays the lockers in the school that are available to be assigned for the current school year. You must have a student in context to view Free Lockers.

Home » SIS » School » Free Lockers

### Free Lockers

This screen displays the lockers in the school that are available to be assigned for the current school year. Clicking a locker number assigns the locker to the working student.

Academic Lockers

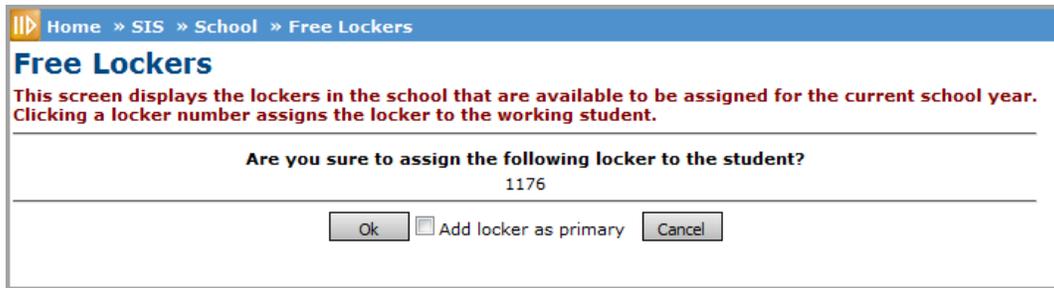
Locker Number ^	Status	Description	Available Capacity	Residents	Capacity	Size	Reference Location	Grade
192	Active		1	0	1		Not Specified	
230	Active		1	0	1		Not Specified	
382	Active		1	0	1		Not Specified	
415	Active		1	0	1		Not Specified	
428	Active		1	0	1		Not Specified	
502	Active		1	0	1		Not Specified	
508	Active		1	0	1		Not Specified	
518:	Active		1	0	1		Not Specified	
719	Active		1	0	1		Not Specified	
1008	Active		1	0	1		CAFE	
1009	Active		1	0	1		CAFE	
1022	Active		1	0	1		CAFE	12
1023	Active		1	0	1		CAFE	12
1024	Active		1	0	1		CAFE	12
1025	Active		1	0	1		CAFE	12
1026	Active		1	0	1		CAFE	12
1027	Active		1	0	1		CAFE	12
1028	Active		1	0	1		CAFE	12
1029	Active		1	0	1		CAFE	12

### Free Lockers Screen

**Sorting** – You may sort by any column (Locker Number, Status, Description, Available Capacity, Residents, Size, Reference Location, Grade) in ascending or descending order by clicking on the column header.

**Academic Lockers** – If checked, only free lockers designated as Academic will be shown. If not checked, all free lockers will be shown.

**Locker Number** – With a student in the context, you can click on the Locker Number to assign a free locker to a student.



### Locker Assignment Confirmation Message

**Add locker as primary** – Designate this locker as the student’s primary locker. The primary locker will print on the student schedule.

**OK** – Assign the specified locker to the student in context. The Locker Information will be updated on the Student Profile – Additional tab. You will receive the message below.

**The Locker has been successfully assigned**

**Cancel** – Do not assign the locker to the student.

---

## Student Profile

### Navigation: Home - SIS - Student - View Profile

Student Locker information can be viewed and assigned in a variety of ways.

Once a student has been assigned a locker it will display on the selected student’s profile or home page as shown below.

Home » SIS » Student » View Profile

**SALAS, PEARL**  
From this screen, you can view the student's profile.

**Address of Residence:** 100 11th St  
Leipsic, OH 45856

**Mailing Address:** 645 S Main St  
Lima, OH 45804

**Phone Number:** (555) 555-5555  Unlisted

**Email Address:**

**Parent/Guardian:** BAILEY, SAMUEL  
H: (555) 555-5555  
W: (555) 555-5555  
M: (555) 555-5555

**Parent/Guardian:** LONG, ROBERTO  
H: (555) 555-5555  
W: (555) 555-5555  
M: (555) 555-5555

**Student Status:** ACTIVE RES

**Birthdate:** 3/10/1997

**Ethnicity:** White

**Program:**

**Academic Locker:** 1176

**Admission History:** 8/21/2007 - Enrolled

**EMIS Situation:** 9 - Resident attending but takes JVS satellite courses P/T

**Percent of Time:** 87%

**Report to EMIS:**

**Effective Date:** 7/1/2012

**Reporting Period:** (K)

I want to...  
I want to...  
- Edit this student's profile  
- View/Edit Full schedule  
- View/apply fees  
- View the medical health log  
- View this student's memberships  
- View Today's Schedule  
- View Contacts  
**- View Lockers**

**PHOTO AVAILABLE**

**View Lockers from the View Student Profile Screen**

By selecting View Lockers from the I want to... menu, more locker details may be viewed. In this example, the student has two lockers and you can see from the details, as shown in the following figure, which one is the primary as well as additional information such as description and combination, if available.

Home » SIS » Student » Lockers

**Student Locker**  
This screen displays locker information for the student.

[View Student Profile](#)

**Locker Number:** 1176 ★

**Combination:**

**Description:**

**Academic Locker:**

---

**Locker Number:** 1185

**Combination:**

**Description:**

**Academic Locker:**

**Student Locker Screen**

**View Student Profile** – Click this button to return to the student's profile page.

## Student Locker Assignment

Navigation: Home - SIS - Student - Locker Assignment

– OR –

Navigation: Home - SIS - Student - Edit Profile - Additional Tab - Locker Assignment link

To assign locker or lockers for a selected student, you must do so through the Locker Assignment screen or on the Addition tab on the Edit Student Profile screen.

**BETA - OH** SALAS, PEARL ID: 00372157 Counselor: Heidi Emhoff  
 BLACK RIVER HIGH SCHOOL 2012-2013 Gender: F Homeroom: Buckeye High School  
 Calendar: DFLT Grade: 10 Status: A

Home » SIS » Student » Locker Assignment

### Student Locker Assignment

From this screen, you can display, assign, and remove a student from a locker.

Locker Icon  Academic Lockers

	Locker Number	Description	Capacity	Size	Combination	Reference Location
✗ ☆	1176		1			Dr. Van Doren
✗ ☆	1185		1			Mr. Walthour

Enter a Locker:

OR Select a Locker:   Show grade appropriate lockers only

OR Select a Location:

Add locker as primary

### Student Locker Assignment Screen

If the student has already been assigned locker/lockers, they will be listed on this screen. There are several ways to assign lockers from this screen.

**Sorting** – You may sort by any column (Locker Number, Description, Capacity, Size, Combination, Reference Location) in ascending or descending order by clicking on the column header.

**View Free Lockers** – Click to go to SIS – School – Free Lockers (see [“View Free Lockers”](#)).

**Academic Lockers** – If checked, only student’s academic lockers are displayed. If unchecked, all of student’s lockers are displayed.

**Delete Icon** – Delete this Locker Assignment.

**Locker Icon** – If the icon is highlighted, the locker is the primary locker. The primary locker will print on the student schedule.

**View Free Lockers** – Allows you to view available lockers and then assign locker from that screen.

**Enter a Locker:** – Type in the locker number you wish to assign to the student.

**OR Select a Locker** – Select a locker from drop-down list (for grade appropriate or all lockers).

**Show grade appropriate lockers only** – If checked, only the available lockers that match the student’s grade level will be shown. If unchecked, will show all available lockers (no matter what

grade level).

**OR Select a Location** – Select a location from this drop-down and a locker will automatically be assigned by location.

**Add locker as primary** – Make this locker the Primary Locker. Only the primary locker will print on the student schedule. This check box defaults to checked.

**Assign Locker** – Click to assign locker selected.

**Edit Student Profile** – Return to Student Profile – General tab.

If the locker assignment is successful, you will receive this message.

**The Locker has been successfully assigned**

If the locker selected (through “Enter a Locker” is not available, you will receive this message.

**The Locker is not available**

## Add Student Locker

**Navigation: Home - SIS - Student - Locker Assignment**

You can also reach this screen by clicking **Locker Assignments** on the student’s Edit Profile – Additional tab page.

The screenshot shows the 'Edit Student Profile' interface. At the top, there is a navigation bar with 'Home » SIS » Student » Edit Profile FY09' and utility links like 'Advanced Search', 'Feedback', 'Mgmt', 'Help', 'Version', and 'Print'. Below the title 'Edit Student Profile', a sub-header states: 'From this screen, you can display and change information regarding a students profile.' The form is organized into tabs: 'General', 'Additional', 'Custom', 'Private', 'FS-Standing', 'FS-Attendance', 'FD-Attributes', 'FN-Attributes', 'FN-Graduate', and 'Transportation'. The 'General' tab is active. It contains several sections: 'Primary Building' (BLACK RIVER HIGH SCHOOL), 'Special Ed' (empty), 'Citizenship' (04 - United States citizen), 'Country of Origin' (empty), 'Building Progression Track' (BLRV - Black River KG - 12), 'New School' (BLACK RIVER HIGH SCHOOL), 'Graduation Year' (empty), 'Pri. Graduation Rule' (empty), 'Alt. Graduation Rule' (empty), 'Counselor' (-- Select Counselor --), 'Scheduling Priority' (1), and 'Locker Assignments' (Assign Primary Locker button, circled in red). There is also a checkbox for 'Show grade appropriate counselors only'. The 'Homeroom' section shows 'Buckeye High School' and an 'Auto-Assign' button. A note below it says: 'Choose from drop down or click Auto-Assign which will randomly assign an available grade-level appropriate homeroom to the student.' At the bottom, there are checkboxes for 'Include in Honor Roll', 'Include in Ranking', and 'Include in GPA', all of which are checked. A 'Flags' section has five numbered boxes (1-5) for marking.

### Locker Assignments Button the Edit Student Profile Screen

There are several options from the Student Locker Assignment screen for assigning the selected student a locker.

Home » SIS » Student » Locker Assignment Adv

### Student Locker Assignment

From this screen, you can display, assign, and remove a student from a locker.

[View Free Lockers](#)  Academic Lockers

	Locker Number	Description	Capacity	Size	Combination	Reference Location
✕	1213		1			Mr. Walthour

Enter a Locker:

OR Select a Locker:   Show grade appropriate lockers only

OR Select a Location:

Add locker as primary

### Student Locker Assignment

Click **View Free Lockers** to view lockers available for assignment.

Home » SIS » School » Free Lockers

### Free Lockers

This screen displays the lockers in the school that are available to be assigned for the current school year. Clicking a locker number assigns the locker to the working student.

Academic Lockers

Locker Number ^	Status	Description	Available Capacity	Residents	Capacity	Size	Reference Location	Grade
192	Active		1	0	1		Not Specified	
230	Active		1	0	1		Not Specified	
382	Active		1	0	1		Not Specified	
415	Active		1	0	1		Not Specified	
428	Active		1	0	1		Not Specified	
502	Active		1	0	1		Not Specified	
508	Active		1	0	1		Not Specified	
518:	Active		1	0	1		Not Specified	
719	Active		1	0	1		Not Specified	
1008	Active		1	0	1		CAFE	
1009	Active		1	0	1		CAFE	
1022	Active		1	0	1		CAFE	12
1023	Active		1	0	1		CAFE	12
1024	Active		1	0	1		CAFE	12
1025	Active		1	0	1		CAFE	12
1026	Active		1	0	1		CAFE	12
1027	Active		1	0	1		CAFE	12
1028	Active		1	0	1		CAFE	12
1029	Active		1	0	1		CAFE	12

### Selecting a Locker

Click on the appropriate locker number to assign that locker number to the selected student.

### Assign Locker Confirmation Screen

You will receive a message asking if you wish to assign the locker to the student.

By selecting **Add locker as primary** you may designate this locker as the primary locker. Only the primary locker will print on the student's schedule.

Another option for assigning a locker is to type the locker number in the Enter a Locker field, as shown in the following figure.

		Locker Number	Description	Capacity	Size	Combination	Reference Location
X	✶	1213		1			Mr. Walthour
X	✶	230		1			Not Specified

Enter a Locker:

OR Select a Locker:   Show grade appropriate lockers only

OR Select a Location:

Add locker as primary

### Entering a Number in the Enter a Locker Field

Then click the **Assign Locker** button to assign the locker.

If the student already has one locker assignment and you wish for this new locker to be the primary locker, make sure to select **Add locker as primary**. Only the primary locker will print on the student schedule.

You may also assign a locker by choosing one from the drop-down list in the OR Select a Locker field.

If you wish to only view Grade Appropriate lockers in this drop-down, then leave the **Show grade appropriate lockers only** checked (default). If you wish to view all available lockers in the drop-down list, deselect the box.

View Free Lockers
 Academic Lockers

		Locker Number	Description	Capacity	Size	Combination	Reference Location
✗	🔑	1213		1			Mr. Walthour
✗	🔑	230		1			Not Specified

Enter a Locker:

OR Select a Locker:   Show grade appropriate lockers only

OR Select a Location: 

1151 (Dr. Van Doren)  
 1152 (Dr. Van Doren)  
 1153 (Dr. Van Doren)  
 1154 (Dr. Van Doren)  
 1155 (Dr. Van Doren)  
 1156 (Dr. Van Doren)  
 1157 (Dr. Van Doren)  
 1158 (Dr. Van Doren)  
 1159 (Dr. Van Doren)  
 1160 (Dr. Van Doren)  
 1161 (Dr. Van Doren)  
 1162 (Dr. Van Doren)  
 1163 (Dr. Van Doren)  
 1164 (Dr. Van Doren)  
 1165 (Dr. Van Doren)  
 1166 (Dr. Van Doren)  
 1167 (Dr. Van Doren)  
 1168 (Dr. Van Doren)  
 1169 (Dr. Van Doren)

Add locker as primary

### Student Locker Assignment Screen

After selecting a locker from the drop-down list, click **Assign Locker** to assign the locker. If you wish this new locker to be designated as the primary locker, select **Add locker as primary** before clicking **Assign Locker**. Only the primary locker will print on the student schedule.

One last way to assign a locker to the selected student is to automatically assign the locker, based on the location.

View Free Lockers
 Academic Lockers

		Locker Number	Description	Capacity	Size	Combination	Reference Location
✗	🔑	1213		1			Mr. Walthour
✗	🔑	230		1			Not Specified

Enter a Locker:

OR Select a Locker:   Show grade appropriate lockers only

OR Select a Location: Miss Chandler

Add locker as primary

### Select a Location

From the OR Select a Location field drop-down list, select a location and click **Assign Locker** and a locker will automatically be assigned based on the selected location (lockers must have been defined for locations, or no locations will be listed in the drop-down list).

## Delete Student Locker

Navigation: Home - SIS - Student - Locker Assignment

Home > SIS > Student > Locker Assignment

### Student Locker Assignment

From this screen, you can display, assign, and remove a student from a locker.

Academic Lockers

	Locker Number	Description	Capacity	Size	Combination	Reference Location
<input type="checkbox"/>	1213		1			Mr. Walthour
<input checked="" type="checkbox"/>	230		1			Not Specified

Enter a Locker:

OR Select a Locker:   Show grade appropriate lockers only

OR Select a Location:

Add locker as primary

### Student Locker Assignment

Click the **delete icon** to delete a specific Student Locker assignment.

Home > SIS > Student > Locker Assignment

### Student Locker Assignment

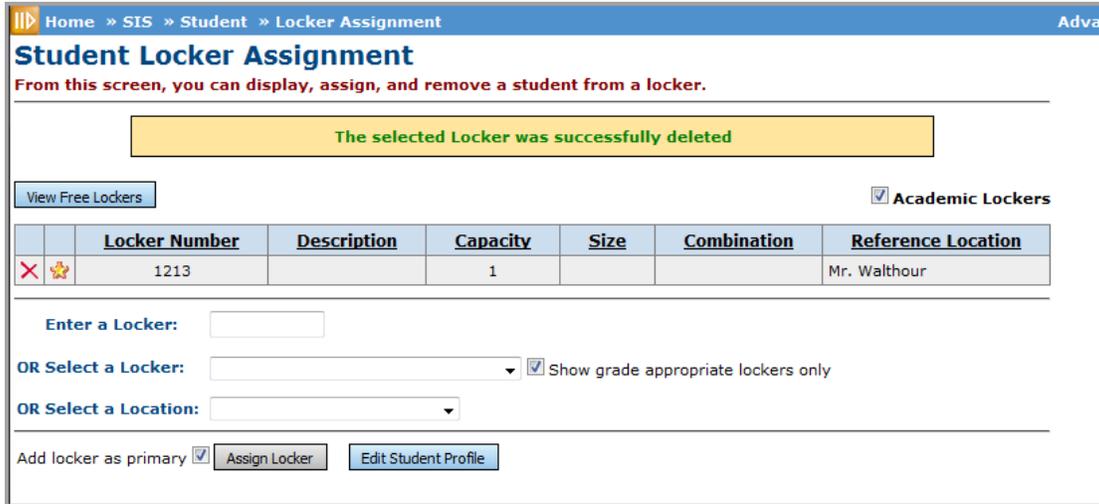
From this screen, you can display, assign, and remove a student from a locker.

Are you sure you want to remove the following Locker from the student?  
230

### Deletion Confirmation Message

**OK** – Delete the Locker from the student's record.

**Cancel** – Do Not Delete the Locker from the student's record.



### Successful Deletion Message

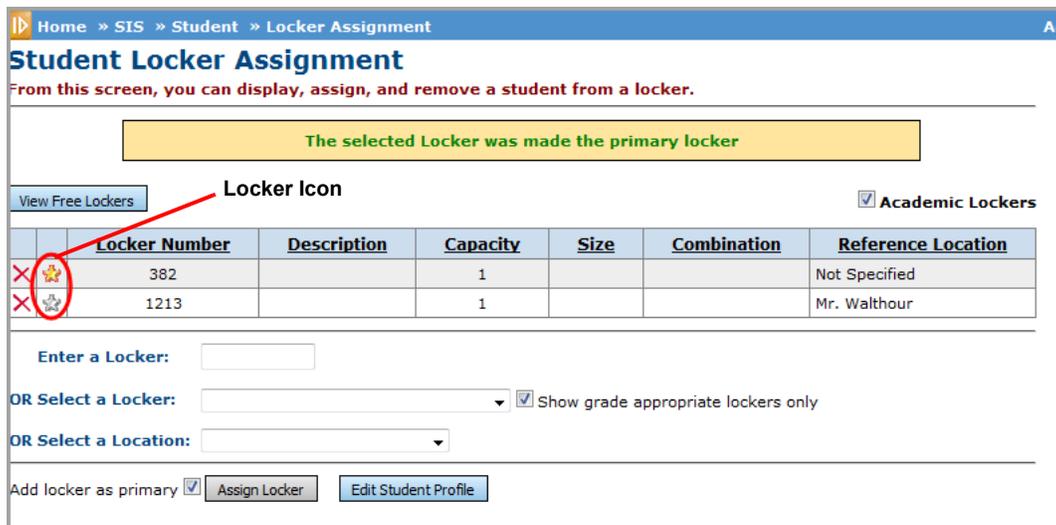
You will receive a confirmation message that the locker has been successfully deleted from the student's record.

## Change Primary Locker

Navigation: Home - SIS - Student - Locker Assignment

**Note:** Only the primary locker will print on the student schedule.

On the Student Locker Assignment screen, click the **locker icon** to change a locker to the primary locker.



### Changing Primary Locker Assignment

## Locker Selection Wizard

**Navigation: Home - SIS - Student - Edit Profile - Additional Tab - Assign Primary Locker Button**

The Locker Selection Wizard allows for the quick selection of a primary locker for the selected student. The Assign Primary Locker button on the Edit Student Profile – Additional tab will open a popup window allowing the user to quickly find and select a locker for the student. If desired, the user can also change the combination series of the locker to be assigned as part of the assignment process.

The screenshot shows the 'Edit Student Profile' form with the 'Additional' tab selected. The 'Locker Assignments' section is highlighted, and the 'Assign Primary Locker' button is circled in red. Other visible fields include 'Primary Building' (BLACK RIVER HIGH SCHOOL), 'Special Ed' (0), 'Citizenship' (04 - United States citizen), 'Building Progression Track' (BLRV - Black River KG - 12), 'New School' (BLACK RIVER HIGH SCHOOL), 'Pri. Graduation Rule' (empty), 'Counselor' (-- Select Counselor --), 'Alt. Graduation Rule' (empty), 'Scheduling Priority' (5), 'Team' (empty), 'Homeroom' (empty), and 'Auto-Assign' button. There are also checkboxes for 'Include in Honor Roll', 'Include in Ranking', and 'Include in GPA', and a 'Flags' section with five input boxes.

### Assign Primary Locker Button

**Locker Assignments** – Click this to go to the Student Locker Assignment screen (see to [“Student Locker Assignment”](#)).

**Assign Primary Locker** – Click this button to invoke the Locker Selection Wizard.

From this screen, you can search for a Locker and Assign the preferred one.

Grade Level:  Location:

Availability:   Auto Select

Locker Number	Grade Level	Location	Available	Residents	Capacity	Series	Combination	
1008		CAFE	1	0	1			<a href="#">Change Series</a>
1009		CAFE	1	0	1	1		<a href="#">Change Series</a>
1022	12	CAFE	1	0	1	1	56-11-28	<a href="#">Change Series</a>
1023	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1024	12	CAFE	1	0	1			<a href="#">Change Series</a>
1025	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1026	12	CAFE	1	0	1			<a href="#">Change Series</a>
1027	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1028	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1029	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1030	12	CAFE	1	0	1			<a href="#">Change Series</a>
1031	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1032	12	CAFE	1	0	1			<a href="#">Change Series</a>
1033	12	CAFE	1	0	1			<a href="#">Change Series</a>
1034	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1035	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1036	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1037	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1038	12	CAFE	1	0	1			<a href="#">Change Series</a>
1039	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1040	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1041	12	CAFE	1	0	1	1		<a href="#">Change Series</a>
1042	12	CAFE	1	0	1			<a href="#">Change Series</a>
1043	12	CAFE	1	0	1			<a href="#">Change Series</a>
1044	12	CAFE	1	0	1	1		<a href="#">Change Series</a>

25 Records Displayed [Back To Top](#)

### Locker Selection Wizard

**Grade Level** – Choose the Grade Level of the open lockers you wish to filter on. The default is Any Grade Level.

**Location** – Choose the Location of the open lockers you wish to filter on. The default is Any Location.

**Availability** – Choose the Availability (greater than zero) of the open lockers you wish to filter on. The default is 1.

**Auto Select** – Check this box to have the system automatically select a locker number for this student. After checking the box, you must then click on the Filter button. The locker number will be assigned and you will be taken back to the Edit Student Profile – Additional tab. Be sure and click Save on the Additional tab to save this new locker information.

**Filter** – Show open lockers based up the criteria selected.

**Locker Number link** – Click on the locker number link to select this locker and assign it to the selected student. The locker number will be assigned and you will be taken back to the Edit Student Profile – Additional tab. Be sure and click Save on the Additional tab to save this new locker information.

**Change Series link** – Click on the change series link to select a combination series.

**From this screen, you can assign a combination series for the selected locker.**

Locker Number: 1167 Location: 10  
 Grade Level: 10 Capacity: 1  
 Residents: 0 Available: -1

Series	Combination
1	11-27-33
2	50-08-24
3	67-30-44

Select a Different Locker

### Changing Locker Combination Series

Click on the Series and/or Combination link to select this Combination Series. Once selected, the Combination Series will be highlighted in orange.

**From this screen, you can assign a combination series for the selected locker.**

Locker Number: 1167 Location: 10  
 Grade Level: 10 Capacity: 1  
 Residents: 0 Available: -1

Series	Combination
1	11-27-33
2	50-08-24
3	67-30-44

Select a Different Locker

### Selected Locker Combination Series

**Select a Different Locker link** – This link will take you back to the initial Locker Selection Wizard screen.

## Locker Bulk Assignment

**Navigation: Home - Management - Ad-Hoc Updates - Locker Bulk Assignment**

The Bulk Locker Assignment allows lockers to be assigned to groups of students with a single input screen. Various selection criteria and assignment methods can be specified.

Locker Bulk Assignment Screen

## Students Tab

**Navigation:** Home - Management - Ad-Hoc Updates - Locker Bulk Assignment - Students Tab

The Students tab of the Locker Bulk Assignment screen allows you to select students by search criteria, student IDs or ad-hoc membership.

### Select Students by Search Criteria

**Last Name** (optional) – Filter by student last name. Check the box to use the wildcard filter. For example, entering “sm” in the Last Name field and checking the box will return “smith,” “smythe,” and “smalley.” If the box is unchecked, the filter will perform a strict match.

**First Name** (optional) – Filter by student first name. Check the box to use the wildcard filter. For example, entering “sa” in the First Name field and checking the box will return “sam”, “sally”, and “samantha.” If the box is unchecked, the filter will perform a strict match.

**Homeroom Assignment** (optional) – Homeroom assignment is not valid for this filter since only students without homerooms will be returned.

**Gender** (optional) – Filter by the selected gender from the drop-down list.

**Program** (optional) – Filter by the selected program from the drop-down list.

**Team** (optional) – Filter by the selected team from the drop-down list.

**Student Status** (optional) – Select one or more Student Statuses to filter. If no Student Statuses are selected, then Student Status will not be used as a filter.

**Grade Level** (optional) – Select one or more Grade Levels to filter. If no Grade Levels are selected, then Grade Level will not be used as a filter.

**Cancel** – Cancel Locker Bulk Assignment and return to Ad-Hoc Updates menu.

**Next>** – Process the student selection and proceed to the Assignment Method tab.

### Select Students by Student IDs

The screenshot shows the 'Locker Bulk Assignment' web application. The breadcrumb trail is 'Home > Management > Ad-Hoc Updates > Locker Bulk Assignment'. The page title is 'Locker Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to lockers'. There are five tabs: 'Students', 'Assignment Method', 'Options', 'Confirmation', and 'Results'. Under 'Select Students By:', three radio buttons are present: 'Search Criteria', 'Student IDs' (which is selected), and 'Ad-Hoc Membership'. Below this is a large empty text input field for entering student IDs. At the bottom, there are 'Cancel' and 'Next >' buttons.

#### Locker Bulk Assignment by Student IDs

**Student ID box** (required) – Enter the Student IDs separated by a comma.

**Cancel** – Cancel Locker Bulk Assignment and return to Ad-Hoc Updates menu.

**Next>** – Process the student selection and proceed to the Assignment Method tab.

### Select Students by Ad-Hoc Membership

The screenshot shows the 'Locker Bulk Assignment' web application. The breadcrumb trail is 'Home > Management > Ad-Hoc Updates > Locker Bulk Assignment'. The page title is 'Locker Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to lockers'. There are five tabs: 'Students', 'Assignment Method', 'Options', 'Confirmation', and 'Results'. Under 'Select Students By:', three radio buttons are present: 'Search Criteria', 'Student IDs', and 'Ad-Hoc Membership' (which is selected). Below this is a dropdown menu labeled 'Ad-Hoc Membership:' with a 'Browse Button' (a button with three dots) highlighted by a red circle and a red arrow. At the bottom, there are 'Cancel' and 'Next >' buttons.

#### Locker Bulk Assignment by Ad-Hoc Membership

**Ad-Hoc Membership** (required) – Select from the pre-defined Ad-Hoc Memberships listed.

**Browse Button** – Find/Build an Ad-Hoc Membership. Refer to *ProgressBook StudentInformation Getting Started Guide* for more details about ad-hoc memberships.

**Cancel** – Cancel Locker Bulk Assignment and return to Ad-Hoc Updates menu.

**Next>** – Process the student selection and proceed to the Assignment Method tab.

## Assignment Method Tab

### Navigation: Home - Management - Ad-Hoc Updates - Locker Bulk Assignment - Assignment Method Tab

The Assignment Method tab of the Locker Bulk Assignment screen allows you to specify how you will assign lockers to the selected students.

The screenshot shows the 'Locker Bulk Assignment' screen with the 'Assignment Method' tab selected. The breadcrumb trail is 'Home » Management » Ad-Hoc Updates » Locker Bulk Assignment'. The title is 'Locker Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to lockers'. The 'Assignment Method' section has radio buttons for 'Grade Level' (selected), 'Homeroom', 'Class Period', 'Alphabetical', 'Random', and 'Clear'. Below this is explanatory text: 'This assignment method will assign lockers to students by selecting ascending lockers for students based on the student's grade level. DASL will attempt to assign all students to lockers configured for the students' grade levels. In some situations, there won't be enough lockers defined for a grade level and some students won't get a locker assigned to them. If desired, these students can be assigned a locker at random by selecting to "Assign Remaining Students at Random". This option will result in more complete assignment of lockers.' There is a checkbox for 'Assign Remaining Students at Random:'. At the bottom are 'Cancel', '< Back', and 'Next >' buttons.

**Assignment Method Tab on the Locker Bulk Assignment Screen**

**Assignment Method** (required) – Choose Grade Level, Homeroom, Class Period, Random or Clear.

**Cancel** – Cancel Locker Bulk Assignment and return to Ad-Hoc Updates menu.

**<Back** – Cancel out of the current tab and go back to the previous tab.

**Next>** – Process the current tab and proceed to the next tab.

### Assignment Method – Grade Level

The Grade Level assignment method will assign lockers to students by selecting random lockers for students based on the student's grade level. StudentInformation will attempt to assign all students to lockers configured for the students' grade levels.

**Assign Remaining Students at Random** (optional) – In some situations, there won't be enough lockers defined for a grade level and some students won't get a locker assigned to them. If desired, these students can be assigned a locker at random by selecting the Assign Remaining Students at Random option. This option will result in more complete assignment of lockers.

**Note:** *If your school does not have any lockers designated to grade levels and you try to bulk assign lockers by grade level, no lockers will be assigned. However, if you select the Assign Remaining Students at Random option, all students will be assigned lockers alphabetically by Grade Level.*

## Assignment Method – Homeroom

The screenshot shows a web application window titled "Locker Bulk Assignment" with a breadcrumb trail: Home » Management » Ad-Hoc Updates » Locker Bulk Assignment. Below the title is a sub-header: "Here you can assign a bulk group of students to lockers". The main content area has a tabbed interface with "Assignment Method" selected. Under "Assignment Method", there are radio buttons for "Grade Level", "Homeroom" (which is selected), "Class Period", "Alphabetical", "Random", and "Clear". Below these are three paragraphs of explanatory text. The first paragraph describes the Homeroom method. The second paragraph discusses situations where lockers are insufficient and offers a "Assign Remaining Students at Random" option. The third paragraph states that a "Homeroom Term" must be selected. Below the text is a dropdown menu for "Homeroom Term" with the text "-- Select Homeroom Term --" and a lightning bolt icon. Below that is a checkbox for "Assign Remaining Students at Random" which is currently unchecked. At the bottom of the form are three buttons: "Cancel", "< Back", and "Next >".

### Homeroom Assignment Method on the Locker Bulk Assignment Screen

The Homeroom assignment method will assign lockers to students by selecting random lockers for students based on the students' homeroom location. StudentInformation will attempt to assign all students to lockers configured with a reference location that matches the students' homeroom locations.

**Homeroom Term** (required) – In order to assign lockers based on homeroom, you must select a homeroom term to use for looking up homeroom assignments for students. Grade levels of students and lockers will be matched where possible. Students not assigned to homerooms will not get locker assignments.

**Assign Remaining Students at Random** (optional) – In some situations, there won't be enough lockers defined for a homeroom location and some students won't get a locker assigned to them. If desired, these students can be assigned a locker at random by selecting the Assign Remaining Students at Random option. This option will result in more complete assignment of lockers.

## Assignment Method – Class Period

The screenshot shows the 'Locker Bulk Assignment' interface. The breadcrumb trail is 'Home > Management > Ad-Hoc Updates > Locker Bulk Assignment'. The title is 'Locker Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to lockers'. There are five tabs: 'Students', 'Assignment Method', 'Options', 'Confirmation', and 'Results'. Under 'Assignment Method', the following options are visible: 'Grade Level', 'Homeroom', 'Class Period' (selected), 'Alphabetical', 'Random', and 'Clear'. A text box explains that this method assigns lockers based on ascending lockers for students based on their class period assignment. It notes that DASL will attempt to assign all students to lockers with a matching reference location. A note states that if there aren't enough lockers, students can be assigned at random by selecting 'Assign Remaining Students at Random'. Below this, there are fields for 'Calendar Date' (8/19/2013) and 'Period of the Day' (-- Select a Period --). There is also a checkbox for 'Assign Remaining Students at Random' which is currently unchecked. At the bottom are 'Cancel', '< Back', and 'Next >' buttons.

### Class Period Assignment Method on the Locker Bulk Assignment Screen

The Class Period assignment method will assign lockers to students by selecting random lockers for students based on the students' class period assignment. StudentInformation will attempt to assign all students to lockers configured with a reference location that matches the students' classroom location during the period of the day selected.

**Calendar Date** (required) and **Period of the Day** (required) – In order to assign lockers based on class period, you must select a calendar date and a period of the day to use for looking up classroom assignments for students. Grade levels of students and lockers will be matched where possible. Students not assigned to a course section during the period of the day selected will not get locker assignments.

**Assign Remaining Students at Random** (optional) – In some situations, there won't be enough lockers defined for a classroom location and some students won't get a locker assigned to them. If desired, these students can be assigned a locker at random by selecting the Assign Remaining Students at Random option. This option will result in more complete assignment of lockers.

## Assignment Method – Alphabetical

The screenshot shows the 'Locker Bulk Assignment' interface with the 'Alphabetical' assignment method selected. The breadcrumb trail is 'Home > Management > Ad-Hoc Updates > Locker Bulk Assignment'. The title is 'Locker Bulk Assignment' with a subtitle 'Here you can assign a bulk group of students to lockers'. There are five tabs: 'Students', 'Assignment Method', 'Options', 'Confirmation', and 'Results'. Under 'Assignment Method', the following options are visible: 'Grade Level', 'Homeroom', 'Class Period', 'Alphabetical' (selected), 'Random', and 'Clear'. A text box explains that this method assigns lockers to students in an alphabetical fashion by student last name. It notes that grade levels of students and all reference locations will be ignored and locker will be assigned in ascending order. At the bottom are 'Cancel', '< Back', and 'Next >' buttons.

### Alphabetical Assignment Method on the Locker Bulk Assignment Screen

The Alphabetical assignment method will assign lockers to students in a alphabetical fashion by student last name. Grade levels of students and all reference locations will be ignored and locker will be assigned in ascending order.

## Assignment Method – Random

The screenshot shows the 'Locker Bulk Assignment' interface. At the top, there is a breadcrumb trail: Home » Management » Ad-Hoc Updates » Locker Bulk Assignment. Below this is the title 'Locker Bulk Assignment' and a subtitle 'Here you can assign a bulk group of students to lockers'. There are five tabs: 'Students', 'Assignment Method', 'Options', 'Confirmation', and 'Results'. The 'Assignment Method' tab is active, showing radio buttons for 'Grade Level', 'Homeroom', 'Class Period', 'Alphabetical', 'Random', and 'Clear'. The 'Random' option is selected. Below the radio buttons, a text box explains: 'This assignment method will assign lockers to students in a random fashion. Grade levels of students and lockers will be ignored, as will all reference locations.' At the bottom, there are 'Cancel', '< Back', and 'Next >' buttons.

### Random Assignment Method on the Locker Bulk Assignment Screen

The Random assignment method will assign lockers to students in a random fashion. Grade levels of students and lockers will be ignored, as will all reference locations.

## Assignment Method – Clear

The screenshot shows the 'Locker Bulk Assignment' interface. At the top, there is a breadcrumb trail: Home » Management » Ad-Hoc Updates » Locker Bulk Assignment. Below this is the title 'Locker Bulk Assignment' and a subtitle 'Here you can assign a bulk group of students to lockers'. There are five tabs: 'Students', 'Assignment Method', 'Options', 'Confirmation', and 'Results'. The 'Assignment Method' tab is active, showing radio buttons for 'Grade Level', 'Homeroom', 'Class Period', 'Alphabetical', 'Random', and 'Clear'. The 'Clear' option is selected. Below the radio buttons, a text box explains: 'This process will clear locker assignments. No new locker assignments will be made, although the student lockers to be cleared can be filtered by the student search options already selected as well as additional options on the next tab.' At the bottom, there are 'Cancel', '< Back', and 'Next >' buttons.

### Clear Assignment Method on the Locker Bulk Assignment Screen

The Clear process will clear locker assignments. No new locker assignments will be made, although the student lockers to be cleared are filtered by the student search options already selected as well as additional options selected on the next tab.

## Options Tab

### Navigation: Home - Management - Ad-Hoc Updates - Locker Bulk Assignment - Options Tab

The Options tab of the Locker Bulk Assignment screen provides various options on how the locker bulk assignment will function.

### Grade Level, Homeroom, Class Period or Random Assignment Method

Home » Management » Ad-Hoc Updates » Locker Bulk Assignment

### Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

Students | Assignment Method | Options | Confirmation | Results

**Students to Include:**

- Students without a primary locker assignment
- Students without any locker assignments
- Students with number of assignments fewer than: 2
- All Students (no limit on number of locker assignments)

**Lockers to Include:**

- Academic lockers only
- Non-Academic lockers only
- Both academic and non-academic lockers

**Create Assignments as:**

- Primary locker assignments
- Secondary locker assignments

**Existing Locker Assignments:**

- Remove primary assignments only
- Remove all assignments
- Keep assignments (update as secondary assignments if new assignments are primary)

Cancel < Back Next >

Options Tab on the Locker Bulk Assignment Screen

## Clear Assignment Method

Home » Management » Ad-Hoc Updates » Locker Bulk Assignment

### Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

Students | Assignment Method | Options | Confirmation | Results

**Lockers to Include:**

- Academic lockers only
- Non-Academic lockers only
- Both academic and non-academic lockers

**Existing Locker Assignments:**

- Remove primary assignments only
- Remove all assignments
- Keep assignments (update as secondary assignments if new assignments are primary)

Cancel < Back Next >

Options Tab When Clear Assignment Method Selected

**Students to Include** (required) – Choose one from the following:

- Students without a primary locker assignment (default) – Only include students that have no primary locker assignment.
- Students without an locker assignments – Only include students that have no locker assignment at all

- Students with number of assignments fewer than x – Only include students that have a total number of locker assignments fewer than the selected number
- All Students (no limit on number of locker assignments) – Include all students

**Lockers to Include** (required) – Choose one from the following:

- Academic lockers only (default)
- Non-Academic lockers only
- Both Academic and non-academic lockers

**Create Assignments as** (required) – Choose one from the following:

- Primary locker assignments (default)
- Secondary locker assignments

**Existing Locker Assignments** (required) – Choose one from the following:

- Remove primary assignments only (default)
- Remove all assignments
- Keep assignments (update as secondary assignments if new assignments are primary)

**Cancel** – Cancel Locker Bulk Assignment and return to Ad-Hoc Updates menu.

**<Back** – Cancel out of the Options tab and go back to the Assignment Method tab.

**Next>** – Process the options and proceed to the Confirmation tab.

## Confirmation Tab

### Navigation: Home - Management - Ad-Hoc Updates - Locker Bulk Assignment - Confirmation Tab

The Confirmation tab of the Locker Bulk Assignment screen allows you to view your locker bulk assignment selections before actually processing the results.

### Grade Level Assignment Method

Home » Management » Ad-Hoc Updates » Locker Bulk Assignment

#### Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

Students	Assignment Method	Options	Confirmation	Results		
Lockers Defined by Grade Level	Physical Lockers	Total Capacity	Existing Assignments	Remaining Capacity	Matching Students	Insufficiency
<a href="#">09 - 09</a>	66	66	0	66	6	
No Grade Level	276	276	4	272		
<b>All Students/Lockers</b>	<b>342</b>	<b>342</b>	<b>4</b>	<b>338</b>	<b>6</b>	

**09 - 09** – You can click on the linked Grade Level to go to the Locker Grade Level Assignment screen.

## Homeroom or Class Period Assignment Method

Home » Management » Ad-Hoc Updates » Locker Bulk Assignment

### Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

Students | Assignment Method | Options | Confirmation | Results

Include statistics for locations with insufficient capacity only

Lockers Defined by Location	Physical Lockers	Total Capacity	Existing Assignments	Remaining Capacity	Matching Students	Insufficiency
HR29 - Mr. Fechuch	0	0	0	0	13	13
24 - Mrs. Berry's Homeroom	0	0	0	0	22	22
HR25 - Mr. Carver	0	0	0	0	13	13
HR28 - Mr. Calame	0	0	0	0	10	10
HR 9 - Mrs. Fox	0	0	0	0	9	9
All Students/Lockers	1052	1052	43	1009	145	

Cancel < Back Finish

### Locker Assignment Confirmation - Homeroom or Class Period Method

**Include statistics for locations with insufficient capacity only** – If this check box is checked, only those locations which do not have enough lockers for the students assigned to them will be displayed (column totals will still be displayed).

## Random Assignment Method

Home » Management » Ad-Hoc Updates » Locker Bulk Assignment

### Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

Students | Assignment Method | Options | Confirmation | Results

Physical Lockers: 1052  
 Total Capacity: 1052  
 Existing Assignments: 43  
 Remaining Capacity: 1009  
 Students to be Assigned: 153  
 Insufficiency:

Cancel < Back Finish

### Locker Bulk Assignment Confirmation - Random Method

**Physical Lockers** – Number of physical lockers defined for this building.

**Total Capacity** – Total student capacity of these physical lockers. Please note that lockers can be defined to have capacity greater than 1.

**Existing Assignments** – Number of existing locker assignments.

**Remaining Capacity** – Total Capacity minus Existing Assignments.

**Matching Students** – For those Assignment Methods that have varying locations, number of students matching each location or grade level.

**Students to be Assigned** – Number of students to be assigned to free lockers.

**Insufficiency** – Listing of students that cannot be assigned to lockers.

**Cancel** – Cancel Locker Bulk Assignment and return to Ad-Hoc Updates menu.

**<Back** – Cancel out of the Confirmation tab and go back to the Options tab.

**Finish** – Process locker bulk assignments and proceed to the Results tab.

## Results Tab

**Navigation: Home - Management - Ad-Hoc Updates - Locker Bulk Assignment - Results Tab**

The Results tab of the Locker Bulk Assignment screen allows you to view your locker bulk assignments by student and locker number.

Student	Locker	Action Taken
ALFORD, MYRTLE	B060	Added assignment as primary locker
apple, jane	1194	Added assignment as primary locker
apple, john	1274	Added assignment as primary locker
AVERY, FRANCIS	D100	Added assignment as primary locker
AVERY, VERONICA	1486	Added assignment as primary locker
BARLOW, DANNY	A074	Added assignment as primary locker
BARNES, MEGAN	1445	Added assignment as primary locker
BARTON, GARY	A013	Added assignment as primary locker
BECKER, BRIAN	B041	Added assignment as primary locker
BENDER, ESTHER	D067	Added assignment as primary locker
BENSON, MIGUEL	1216	Added assignment as primary locker
BENSON, RONALD	B097	Added assignment as primary locker
BERNARD, DOUGLAS	1141	Added assignment as primary locker
BIRD, LOUISE	1075	Added assignment as primary locker

**Results Tab on the Locker Bulk Assignment Screen**

**Student** – Name of student assigned to locker.

**Locker** – Locker number assigned to student.

**Action Taken** – Description of bulk locker assignment. Options include:

- Added assignment as primary locker
- Added assignment as secondary locker

**Start Over** – Create and assign additional Locker Bulk Assignments.

This page intentionally left blank.

# Reports

## Locker Combinations Report (Report Builder)

Navigation: Home – Local – Report Builder Links – Report Builder Reports

The Locker Combinations report lists the locker combinations for which one or more combination series are assigned.

Home » Local » Report Builder Advanced Search | Feedback

### Report Builder

From this screen, you can manage Regular and User Reports created in ProgressBook Report Builder

[ Hide Regular Reports ]

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.
	Period G Student Core Summary Report	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	Period K NonGraduate Core Summary Report	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	Course Fee Analysis	Fee report that shows the outstanding balance, if any, of a student's course fees in each course fees were assessed.
	Discipline Action	Discipline Action report that filters on selected discipline actions and when the punishment is to be served.
	<b>Locker Combinations</b>	Locker report listing all lockers and the all combinations assigned to each one.
	Payments Posted by User	Fee reporting listing payments posted by username for balancing receipts.
	Student Location	Student report that shows where a student is at in the building each period of the day.

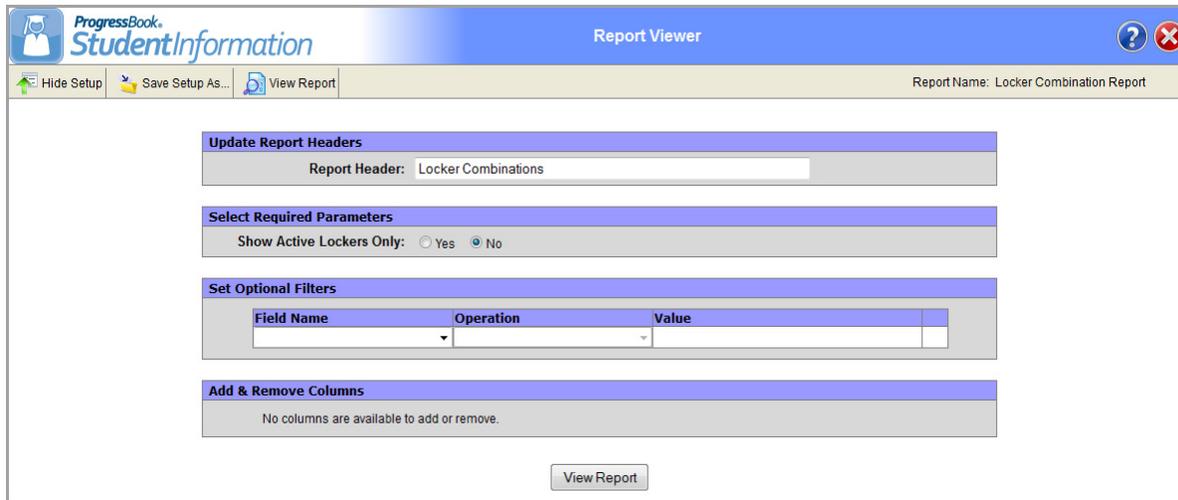
[ Hide User Reports ]

View Report	Name	Description
X	Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.
X	My Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.

### Locker Combinations Report on the Report Builder Reports Screen

1. With the school or district for which you want to run the report in context, on the **Report Builder** screen, click the run icon in the **View Report** column for the Locker Combinations report.

The StudentInformation **Report Viewer** screen displays.



### Locker Combination Report on the Report Viewer Screen

2. In the **Report Header** field, modify the heading as you want it to display at the top of the report, if desired.
3. In the **Select Required Parameters** area, select one of the **Show Active Lockers Only** options:
  - **Yes** – Displays only lockers with a status of active on the generated report.
  - **No** – Displays all lockers regardless of status on the generated report.
4. If you would like to apply an additional filter to the report results, in the **Set Optional Filters** area, perform the following steps:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the Field Name drop-down list. For more information about the filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.
  - c. In the **Value** field, enter or select the appropriate value, if applicable.

**Note:** The available options and acceptable values vary depending on the option you selected in the **Field Name** drop-down list. If you selected an option that requires a date, a calendar is available in the **Value** field. If you selected *Has a Value* or *Does Not Have a Value* in the **Operation** drop-down list, then the **Value** field is unavailable.

- d. To add an additional filter, repeat [step 4\(a\)](#) through [step 4\(c\)](#) in the line below the previous filter.
5. Click **View Report**.

The report displays at the bottom of the window.

Locker Number	Locker Status	Series 1	Series 2	Series 3
1010	Active	10-23-02	17-03-55	86-14-23
1011	Active	44-77-16	19-36-88	03-78-07
1012	Active	33-78-09		
1013	Active	11-22-39	98-23-44	
1014	Active	12-07-55	66-34-18	55-03-25
1015	Active	06-99-24	70-11-03	
1016	Active	87-22-56		
1017	Active	76-21-15	18-20-20	72-13-20
1018	Active	45-90-21	06-72-34	
1019	Active	11-94-02	19-22-30	
1021	Repair	24-68-90		
1022	Active	56-11-28		
1360	Unavailable	25-67-84	74-24-02	
1371	Unavailable	67-90-30		
1438	Unavailable	44-58-03	34-13-92	

#### Locker Combinations Report

6. To save the report with your selected parameters and filters, perform the following steps:
  - a. Click **Save Setup As**.
  - b. In the **New report name** field, enter a unique report name.
  - c. In the **New description** field, enter a description of the report.
  - d. Click **Save**.

The following message displays at the bottom of the screen: "Report setup saved successfully."

The report is saved. You can now run it directly from the **User Reports** area on the **Report Builder Reports** screen.

7. To close the **Report Viewer** screen and return to the **Report Builder Reports** screen, click the close button.

This page intentionally left blank.

---

# ProgressBook StudentInformation Student Medical Guide



# **ProgressBook StudentInformation Student Medical Guide**

(This document is current for ProgressBook StudentInformation v14.4.0 or later.)

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Student Medical Guide* have been made.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.4.0	Global	N/A	Converted source files to FrameMaker. Updated formatting/structure to match ProgressBook Suite. Rewrote topics using procedural steps.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Overview</b>	<b>1</b>
<b>Medical Codes</b>	<b>3</b>
Maintain Medication Codes .....	3
Add Medication Codes .....	3
Edit Medication Codes .....	5
Delete Medication Codes .....	6
Maintain Immunization Codes .....	8
Add Immunization Codes .....	8
Edit Immunization Codes .....	10
Delete Immunization Codes .....	11
Maintain Reason Codes .....	13
Add Reason Codes .....	13
Edit Reason Codes .....	15
Delete Reason Codes .....	16
Maintain Care Type Codes .....	18
Add Care Type Codes .....	18
Edit Care Type Codes .....	20
Delete Care Type Codes .....	22
Maintain Disposition Codes .....	24
Add Disposition Codes .....	24
Edit Disposition Codes .....	26
Delete Disposition Codes .....	27
<b>Medical Records</b>	<b>29</b>
Maintain Student Medical Alerts .....	29
View Student's Medical Alerts .....	29
Add Medical Alerts .....	30
Edit Medical Alerts .....	31
Delete Medical Alerts .....	33
View Student's Medical Contacts .....	34
Maintain Student Medication Records .....	35
View Student's Medications .....	35

---

Add Medications .....	35
Edit Medications.....	37
Delete Medications .....	39
Maintain Student Immunization Records .....	40
View Student's Immunizations .....	40
Add Immunizations .....	41
Edit Immunizations.....	42
Delete Immunizations .....	44
Maintain Student Health Screening Records .....	45
View Student's Health Screenings .....	45
Add Health Screenings .....	47
Edit Health Screenings .....	49
Delete Health Screenings .....	50
Maintain Student Health Logs .....	51
View Student's Health Log .....	51
Add Health Log Entries .....	53
Edit Health Log Entries .....	56
Delete Health Log Entries .....	58
<b>Reports</b> .....	<b>59</b>
Download Student Medical History .....	59
Health Screening Report (SCRN).....	59
Daily Health Log (HLOG).....	60
Student Immunization Report .....	60
Medications Class List .....	61
Medical Alert Class List.....	62

# Overview

You can use StudentInformation to manage the medical records of your students; maintain medical contact information; create medical alerts; track medications, screenings and visits to the school's health clinic; and run reports.

Refer to the appropriate section as follows:

- For information on maintaining medical codes in StudentInformation, see [“Medical Codes.”](#)
- For information on collecting and recording student medical data, see [“Medical Records.”](#)
- For information on the medical reports available in StudentInformation, see [“Reports.”](#)

This page intentionally left blank.

# Medical Codes

Before you can collect and record medical data for students, you must first set up different types of medical codes. See the appropriate topics as follows:

- To maintain codes for commonly taken medications, see [“Maintain Medication Codes.”](#)
- To maintain codes for common immunizations, see [“Maintain Immunization Codes.”](#)
- To maintain codes describing reasons a student visited the school’s health clinic, see [“Maintain Reason Codes.”](#)
- To maintain codes describing the care a student received at the school’s health clinic, see [“Maintain Care Type Codes.”](#)
- To maintain codes describing how a student was handled or dismissed after the student visited the school’s health clinic, see [“Maintain Disposition Codes.”](#)

---

## Maintain Medication Codes

You can maintain medication codes in StudentInformation in the following ways:

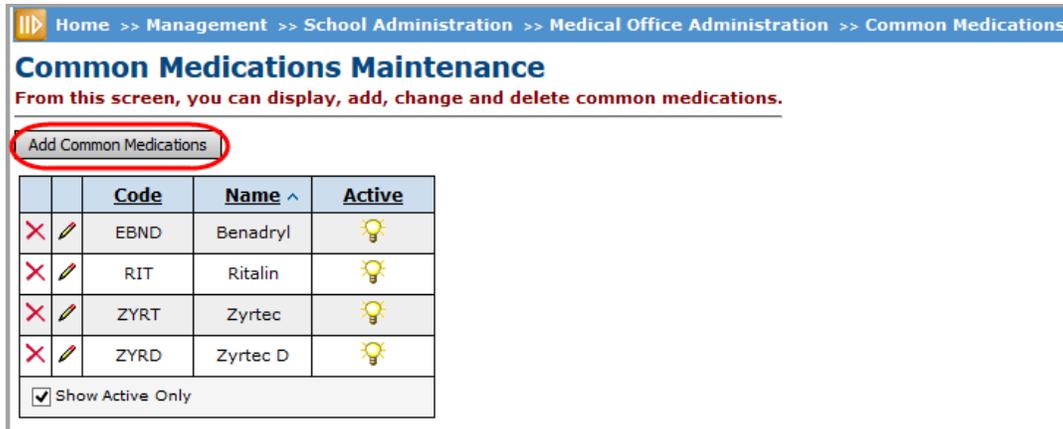
- To enter a new medication code, see [“Add Medication Codes.”](#)
- To edit an existing medication code, see [“Edit Medication Codes.”](#)
- To delete a medication code, see [“Delete Medication Codes.”](#)

**Note:** You can create medication codes at the ITC, district or building level. If   icons display at the beginning of the row, this indicates the record was created at a higher level, and you can only edit or delete it at that higher level.

## Add Medication Codes

**Navigation:** Home – Management – School Administration – Medical Office Administration – Common Medications

1. On the **Common Medications Maintenance** screen, click **Add Common Medications**.



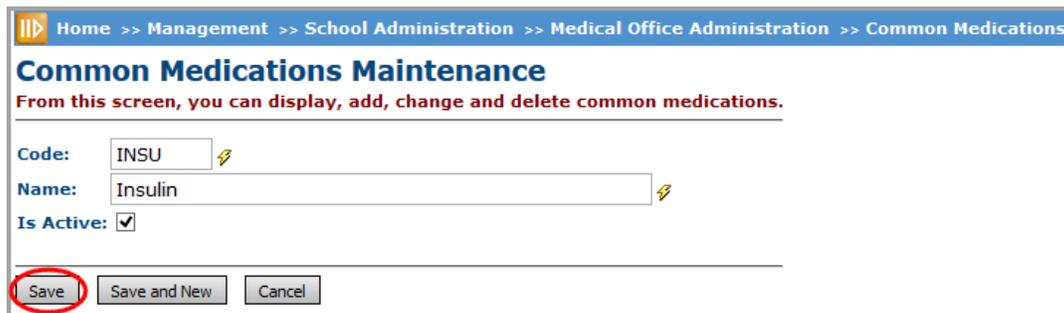
#### Add Medication Codes

The add-edit version of the screen displays.

2. In the **Code** field, enter a medication code of up to four alphanumeric characters.
3. In the **Name** field, enter the name of the medication.
4. Optional: If you do not want this medication code to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive medication codes on new student medical records.

5. Click **Save**. Or, to continue adding medication codes, click **Save and New**.



#### Add Medication Code

A confirmation message displays, and the new medication code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Common Medications

### Common Medications Maintenance

From this screen, you can display, add, change and delete common medications.

The Common Medication was successfully saved

Add Common Medications

		Code	Name ^	Active
		EBND	Benadryl	
		INSU	Insulin	
		RIT	Ritalin	
		ZYRT	Zyrtec	
		ZYRD	Zyrtec D	

Show Active Only

#### Confirmation of Added Medication Code

**Note:** Inactive medication codes (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Medication Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Common Medications

1. On the **Common Medications Maintenance** screen, in the row of the medication code you want to edit, click .

Home >> Management >> School Administration >> Medical Office Administration >> Common Medications

### Common Medications Maintenance

From this screen, you can display, add, change and delete common medications.

Add Common Medications

		Code	Name ^	Active
		EBND	Benadryl	
		INSU	Insulin	
		RIT	Ritalin	
		ZYRT	Zyrtec	
		ZYRD	Zyrtec D	

Show Active Only

#### Edit Medication Codes

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see “Add Medication Codes.”

The screenshot shows the 'Common Medications Maintenance' screen. At the top, there is a breadcrumb trail: Home >> Management >> School Administration >> Medical Office Administration >> Common Medications. Below this, the title 'Common Medications Maintenance' is displayed, followed by the instruction: 'From this screen, you can display, add, change and delete common medications.' The form contains three fields: 'Code:' with the value 'BEN', 'Name:' with the value 'Benadryl', and 'Is Active:' with a checked checkbox. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red.

### Edit Medication Code

A confirmation message displays, and the edited medication code displays in the list.

The screenshot shows the 'Common Medications Maintenance' screen after a successful save. A yellow confirmation banner at the top reads: 'The Common Medication was successfully saved'. Below the banner is a button labeled 'Add Common Medications'. Underneath is a table with the following data:

		Code	Name ^	Active
X		BEN	Benadryl	
X		INSU	Insulin	
X		RIT	Ritalin	
X		ZYRT	Zyrtec	
X		ZYRD	Zyrtec D	

At the bottom of the table, there is a checkbox labeled 'Show Active Only' which is checked.

### Confirmation of Edited Medication Code

## Delete Medication Codes

**Navigation:** Home – Management – School Administration – Medical Office Administration – Common Medications

1. On the **Common Medications Maintenance** screen, in the row of the medication code you want to delete, click **X**.

Home >> Management >> School Administration >> Medical Office Administration >> Common Medications

### Common Medications Maintenance

From this screen, you can display, add, change and delete common medications.

Add Common Medications

		Code	Name ^	Active
		BEN	Benadryl	
		INSU	Insulin	
		RIT	Ritalin	
		ZYRT	Zyrtec	
		ZYRD	Zyrtec D	

Show Active Only

#### Delete Medication Codes

A message displays, asking if you are sure you want to delete the medication code.

2. Click **Ok**.

Home >> Management >> School Administration >> Medical Office Administration >> Common Medications

### Common Medications Maintenance

From this screen, you can display, add, change and delete common medications.

Are you sure you want to deactivate the following Common Medication?  
ZYRD - Zyrtec D

#### Confirm Delete

A confirmation message displays, and the medication code no longer displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Common Medications

### Common Medications Maintenance

From this screen, you can display, add, change and delete common medications.

The selected Common Medication was deactivated successfully.

Add Common Medications

		Code	Name ^	Active
		BEN	Benadryl	
		INSU	Insulin	
		RIT	Ritalin	
		ZYRT	Zyrtec	

Show Active Only

#### Confirmation of Deleted Medication Code

## Maintain Immunization Codes

You can maintain immunization codes in StudentInformation in the following ways:

- To enter a new immunization code, see [“Add Immunization Codes.”](#)
- To edit an existing immunization code, see [“Edit Immunization Codes.”](#)
- To delete an immunization code, see [“Delete Immunization Codes.”](#)

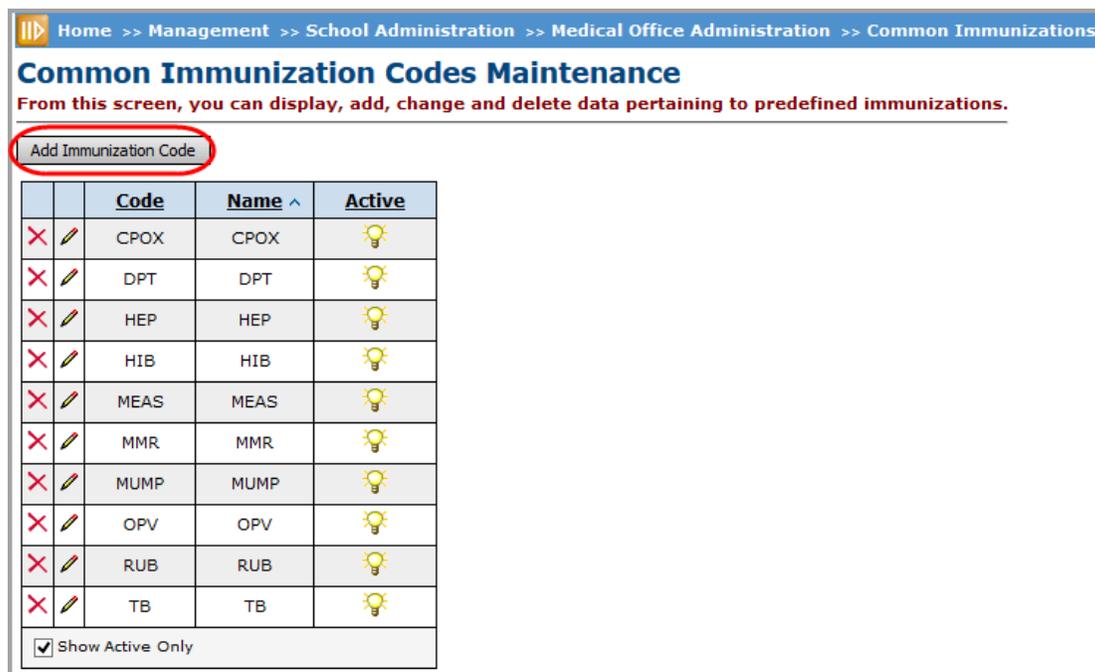
**Note:** You can create immunization codes at the ITC, district or building level. If

  icons display at the beginning of the row, this indicates the record was created at a higher level, and you can only edit or delete it at that higher level.

## Add Immunization Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Common Immunizations

1. On the **Common Immunization Codes Maintenance** screen, click **Add Immunization Code**.



		Code	Name ^	Active
		CPOX	CPOX	
		DPT	DPT	
		HEP	HEP	
		HIB	HIB	
		MEAS	MEAS	
		MMR	MMR	
		MUMP	MUMP	
		OPV	OPV	
		RUB	RUB	
		TB	TB	

Show Active Only

### Add Immunization Codes

The add-edit version of the screen displays.

2. In the **Code** field, enter an immunization code of up to four alphanumeric characters.
3. In the **Name** field, enter the name of the immunization.
4. Optional: If you do not want this immunization code to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive immunization codes on new student medical records.

5. Click **Save**. Or, to continue adding immunization codes, click **Save and New**.

Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

Code:

Name:

Is Active:

**Save**

#### Add Immunization Code

A confirmation message displays, and the new immunization code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

The Immunization Code was successfully saved

Add Immunization Code

		Code	Name ^	Active
		CPOX	CPOX	
		DPT	DPT	
		HEP	HEP	
		HEPB	Hepatitis B	
		HIB	HIB	
		MEAS	MEAS	
		MMR	MMR	
		MUMP	MUMP	
		OPV	OPV	
		RUB	RUB	
		TB	TB	

Show Active Only

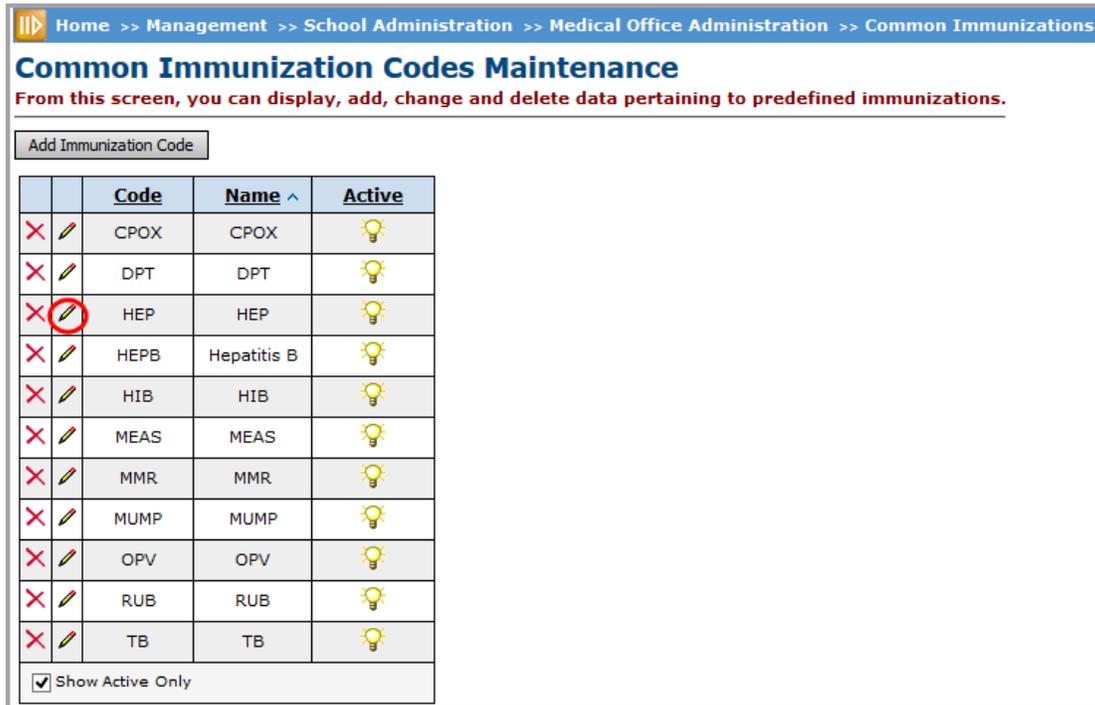
#### Confirmation of Added Immunization Code

**Note:** Inactive immunization codes (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Immunization Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Common Immunizations

1. On the **Common Immunization Codes Maintenance** screen, in the row of the immunization code you want to edit, click .



Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

Add Immunization Code

		Code	Name ^	Active
		CPOX	CPOX	
		DPT	DPT	
		HEP	HEP	
		HEPB	Hepatitis B	
		HIB	HIB	
		MEAS	MEAS	
		MMR	MMR	
		MUMP	MUMP	
		OPV	OPV	
		RUB	RUB	
		TB	TB	

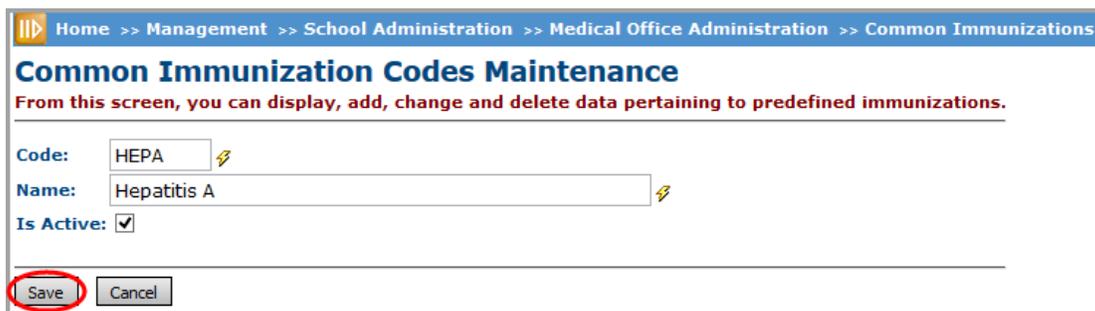
Show Active Only

### Edit Immunization Codes

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Immunization Codes.”](#)



Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

Code:  

Name:  

Is Active:

### Edit Immunization Code

A confirmation message displays, and the edited immunization code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

The Immunization Code was successfully saved

Add Immunization Code

		Code	Name ^	Active
		CPOX	CPOX	
		DPT	DPT	
		HEPA	Hepatitis A	
		HEPB	Hepatitis B	
		HIB	HIB	
		MEAS	MEAS	
		MMR	MMR	
		MUMP	MUMP	
		OPV	OPV	
		RUB	RUB	
		TB	TB	

Show Active Only

**Confirmation of Edited Immunization Code**

## Delete Immunization Codes

**Navigation: Home – Management – School Administration – Medical Office Administration – Common Immunizations**

1. On the **Common Immunization Codes Maintenance** screen, in the row of the immunization code you want to delete, click .

Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

Add Immunization Code

		Code	Name ^	Active
		CPOX	CPOX	
		DPT	DPT	
		HEPA	Hepatitis A	
		HEPB	Hepatitis B	
		HIB	HIB	
		MEAS	MEAS	
		MMR	MMR	
		MUMP	MUMP	
		OPV	OPV	
		RUB	RUB	
		TB	TB	

Show Active Only

#### Delete Immunization Codes

A message displays, asking if you are sure you want to delete the immunization code.

2. Click **Ok**.

Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

Are you sure you want to deactivate the following Immunization Code?  
HEPB - Hepatitis B

#### Confirm Delete

A confirmation message displays, and the immunization code no longer displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Common Immunizations

### Common Immunization Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to predefined immunizations.

The selected Immunization Code was deactivated successfully.

Add Immunization Code

		Code	Name ^	Active
		CPOX	CPOX	
		DPT	DPT	
		HEPA	Hepatitis A	
		HIB	HIB	
		MEAS	MEAS	
		MMR	MMR	
		MUMP	MUMP	
		OPV	OPV	
		RUB	RUB	
		TB	TB	

Show Active Only

Confirmation of Deleted Immunization Code

## Maintain Reason Codes

When adding a student medical health log record in StudentInformation, you have the option to indicate the reason the student visited the school’s health clinic. The reason codes you set up display as check box options on the **Student Medical Health Log**. (See [“Maintain Student Health Logs.”](#)) You can maintain reason codes in StudentInformation in the following ways:

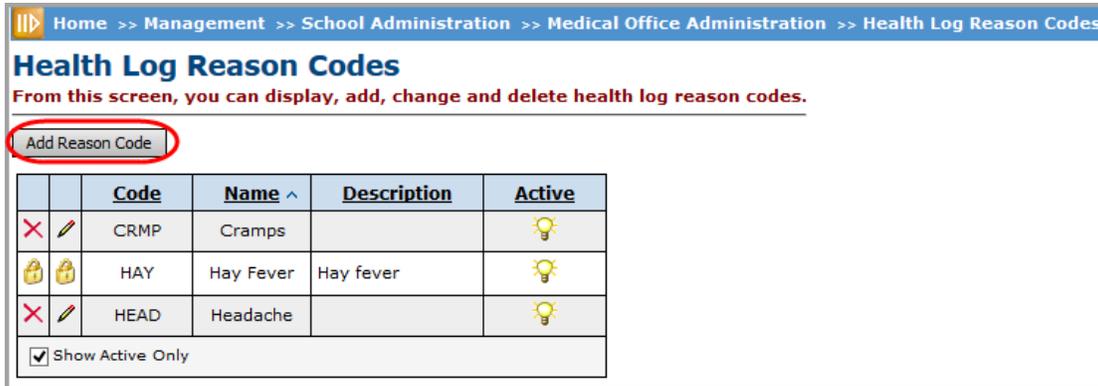
- To enter a new reason code, see [“Add Reason Codes.”](#)
- To edit an existing reason code, see [“Edit Reason Codes.”](#)
- To delete a reason code, see [“Delete Reason Codes.”](#)

**Note:** You can create reason codes at the ITC, district or building level. If icons display at the beginning of the row, this indicates the record was created at a higher level, and you can only edit or delete it at that higher level.

## Add Reason Codes

**Navigation:** Home – Management – School Administration – Medical Office Administration – Health Log Reason Codes

1. On the **Health Log Reason Codes** screen, click **Add Reason Code**.



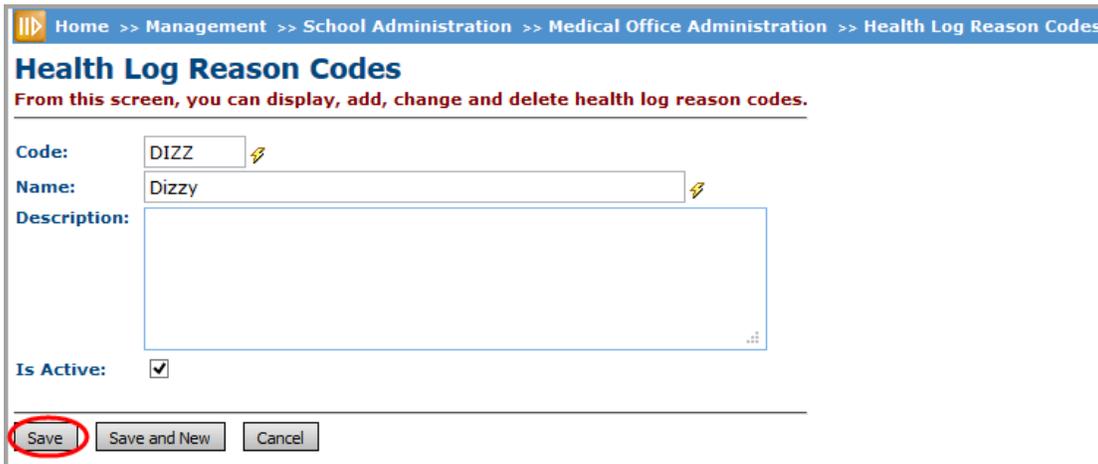
### Add Reason Codes

The add-edit version of the screen displays.

2. In the **Code** field, enter a reason code of up to four alphanumeric characters.
3. In the **Name** field, enter a name for the reason code.
4. Optional: In the **Description** field, enter a description of this code.
5. Optional: If you do not want this reason code to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive reason codes on new student medical records.

6. Click **Save**. Or, to continue adding reason codes, click **Save and New**.



### Add Reason Code

A confirmation message displays, and the new reason code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Health Log Reason Codes

### Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

The Health Log Reason Code was successfully saved

Add Reason Code

		Code	Name ^	Description	Active
		CRMP	Cramps		
		DIZZ	Dizzy		
		HAY	Hay Fever	Hay fever	
		HEAD	Headache		

Show Active Only

#### Confirmation of Added Reason Code

**Note:** Inactive reason codes (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Reason Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Health Log Reason Codes

1. On the **Health Log Reason Codes** screen, in the row of the reason code you want to edit, click .

Home >> Management >> School Administration >> Medical Office Administration >> Health Log Reason Codes

### Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

Add Reason Code

		Code	Name ^	Description	Active
		CRMP	Cramps		
		DIZZ	Dizzy		
		HAY	Hay Fever	Hay fever	
		ACHE	Headache		

Show Active Only

#### Edit Reason Codes

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Reason Codes.”](#)

Home >> Management >> School Administration >> Medical Office Administration >> Health Log Reason Codes

### Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

Code:  ⚡

Name:  ⚡

Description:

Is Active:

**Save**

#### Edit Reason Code

A confirmation message displays, and the edited reason code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Health Log Reason Codes

### Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

The Health Log Reason Code was successfully saved

		Code	Name ^	Description	Active
✗	✎	CRMP	Cramps		💡
✗	✎	DIZZ	Dizzy		💡
🔒	🔒	HAY	Hay Fever	Hay fever	💡
✗	✎	HEAD	Headache		💡

Show Active Only

#### Confirmation of Edited Reason Code

## Delete Reason Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Health Log Reason Codes

1. On the **Health Log Reason Codes** screen, in the row of the reason code you want to delete, click ✗.

Home >> Management >> School Administration >> Medical Office Administration >> Health Log Reason Codes

### Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

Add Reason Code

		Code	Name ^	Description	Active
		CRMP	Cramps		
		DIZZ	Dizzy		
		HEAD	Headache		
		ILL	Student ill		

Show Active Only

#### Delete Reason Codes

A message displays, asking if you are sure you want to delete the reason code.

2. Click **Ok**.

Home >> Management >> School Administration >> Medical Office Administration >> Health Log Reason Codes

### Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

Are you sure you want to deactivate the following Health Log Reason Code?  
ILL - Student ill

#### Confirm Delete

A confirmation message displays, and the reason code no longer displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Health Log Reason Codes

### Health Log Reason Codes

From this screen, you can display, add, change and delete health log reason codes.

The selected Health Log Reason Code was deactivated successfully.

Add Reason Code

		Code	Name ^	Description	Active
		CRMP	Cramps		
		DIZZ	Dizzy		
		HEAD	Headache		

Show Active Only

#### Confirmation of Deleted Reason Code

## Maintain Care Type Codes

When adding a student medical health log record in StudentInformation, you have the option to indicate the type of healthcare given to a student. The care type codes you set up display as check box options on the **Student Medical Health Log**. (See “[Maintain Student Health Logs.](#)”) You can maintain care type codes in StudentInformation in the following ways:

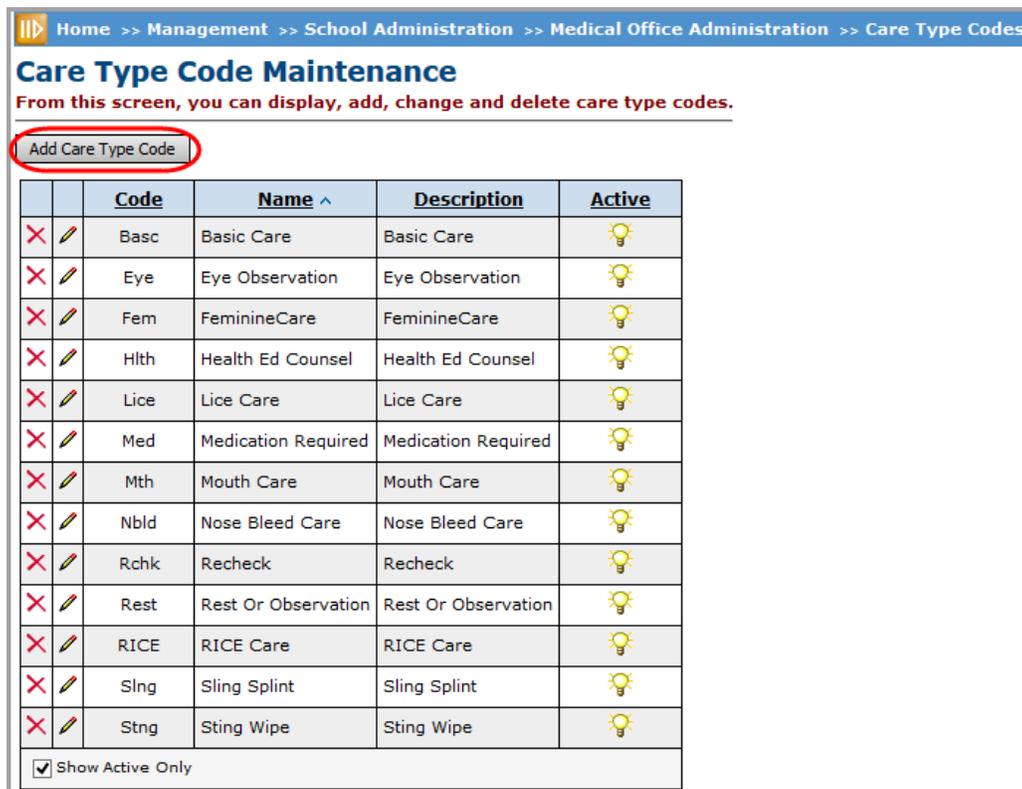
- To enter a new care type code, see “[Add Care Type Codes.](#)”
- To edit an existing care type code, see “[Edit Care Type Codes.](#)”
- To delete a care type code, see “[Delete Care Type Codes.](#)”

**Note:** You can create care type codes at the ITC, district or building level. If   icons display at the beginning of the row, this indicates the record was created at a higher level, and you can only edit or delete it at that higher level.

## Add Care Type Codes

**Navigation:** Home – Management – School Administration – Medical Office Administration – Care Type Codes

1. On the **Care Type Code Maintenance** screen, click **Add Care Type Code**.



**Care Type Code Maintenance**  
From this screen, you can display, add, change and delete care type codes.

[Add Care Type Code](#)

		Code	Name ^	Description	Active
X		Basc	Basic Care	Basic Care	
X		Eye	Eye Observation	Eye Observation	
X		Fem	FeminineCare	FeminineCare	
X		Hlth	Health Ed Counsel	Health Ed Counsel	
X		Lice	Lice Care	Lice Care	
X		Med	Medication Required	Medication Required	
X		Mth	Mouth Care	Mouth Care	
X		Nbld	Nose Bleed Care	Nose Bleed Care	
X		Rchk	Recheck	Recheck	
X		Rest	Rest Or Observation	Rest Or Observation	
X		RICE	RICE Care	RICE Care	
X		Slng	Sling Splint	Sling Splint	
X		Stng	Sting Wipe	Sting Wipe	

Show Active Only

### Add Care Type Codes

The add-edit version of the screen displays.

2. In the **Code** field, enter a care type code of up to four alphanumeric characters.
3. In the **Name** field, enter a name for the care type code.
4. Optional: In the **Description** field, enter a description of this code.
5. Optional: If you do not want this care type code to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive care type codes on new student medical records.

6. Click **Save**. Or, to continue adding care type codes, click **Save and New**.

The screenshot shows a web application interface for 'Care Type Code Maintenance'. The breadcrumb trail is 'Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes'. The title is 'Care Type Code Maintenance' with a subtitle 'From this screen, you can display, add, change and delete care type codes.' The form contains the following fields: 'Code:' with the value 'Antb', 'Name:' with the value 'Antibiotic Ointment', and 'Description:' with the value 'Antibiotic Ointment'. Below these fields is an 'Is Active:' checkbox which is checked. At the bottom of the form are three buttons: 'Save', 'Save and New', and 'Cancel'. The 'Save' button is circled in red.

### Add Care Type Code

A confirmation message displays, and the new care type code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes

### Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

The Care Type Code was successfully saved

Add Care Type Code

		Code	Name ^	Description	Active
		Antb	Antibiotic Ointment	Antibiotic Ointment	
		Basc	Basic Care	Basic Care	
		Eye	Eye Observation	Eye Observation	
		Fem	FeminineCare	FeminineCare	
		Hlth	Health Ed Counsel	Health Ed Counsel	
		Lice	Lice Care	Lice Care	
		Med	Medication Required	Medication Required	
		Mth	Mouth Care	Mouth Care	
		Nbld	Nose Bleed Care	Nose Bleed Care	
		Rchk	Recheck	Recheck	
		Rest	Rest Or Observation	Rest Or Observation	
		RICE	RICE Care	RICE Care	
		Slng	Sling Splint	Sling Splint	
		Stng	Sting Wipe	Sting Wipe	

Show Active Only

#### Confirmation of Added Care Type Code

**Note:** Inactive care type codes (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Care Type Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Care Type Codes

1. On the **Care Type Code Maintenance** screen, in the row of the care type code you want to edit, click .

Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes

### Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

Add Care Type Code

		Code	Name ^	Description	Active
X		Antb	Antibiotic Ointment	Antibiotic Ointment	
X		Basc	Basic Care	Basic Care	
X		Eye	Eye Observation	Eye Observation	
X		Fem	FeminineCare	FeminineCare	
X		Hlth	Health Ed Counsel	Health Ed Counsel	
X		Lice	Lice Care	Lice Care	
X		Med	Medication Required	Medication Required	
X		Mth	Mouth Care	Mouth Care	
X		Nbld	Nose Bleed Care	Nose Bleed Care	
X		Rchk	Recheck	Recheck	
X		Rest	Rest Or Observation	Rest Or Observation	
X		RICE	RICE Care	RICE Care	
X		Slng	Sling Splint	Sling Splint	
X		Stng	Sting Wipe	Sting Wipe	

Show Active Only

### Edit Care Type Codes

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see “Add Care Type Codes.”

Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes

### Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

Code:

Name:

Description:

Is Active:

**Save**

### Edit Care Type Code

A confirmation message displays, and the edited care type code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes

### Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

The Care Type Code was successfully saved

Add Care Type Code

		Code	Name ^	Description	Active
		Antb	Antibiotic Ointment	Antibiotic Ointment	
		Basc	Basic Care	Basic Care	
		Eye	Eye Observation	Eye Observation	
		Fem	FeminineCare	FeminineCare	
		Hlth	Health Ed Counsel	Health Ed Counsel	
		Lice	Lice Care	Lice Care	
		Med	Medication Required	Medication Required	
		Mth	Mouth Care	Mouth Care	
		Nose	Nose Bleed Care	Nose Bleed Care	
		Rchk	Recheck	Recheck	
		Rest	Rest Or Observation	Rest Or Observation	
		RICE	RICE Care	RICE Care	
		Slng	Sling Splint	Sling Splint	
		Stng	Sting Wipe	Sting Wipe	

Show Active Only

Confirmation of Edited Care Type Code

## Delete Care Type Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Care Type Codes

1. On the **Care Type Code Maintenance** screen, in the row of the care type code you want to delete, click .

Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes

### Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

Add Care Type Code

		Code	Name ^	Description	Active
		Antb	Antibiotic Ointment	Antibiotic Ointment	
		Basc	Basic Care	Basic Care	
		Eye	Eye Observation	Eye Observation	
		Fem	FeminineCare	FeminineCare	
		Hlth	Health Ed Counsel	Health Ed Counsel	
		Lice	Lice Care	Lice Care	
		Med	Medication Required	Medication Required	
		Mth	Mouth Care	Mouth Care	
		Nbld	Nose Bleed Care	Nose Bleed Care	
		Rchk	Recheck	Recheck	
		Rest	Rest Or Observation	Rest Or Observation	
		RICE	RICE Care	RICE Care	
		Slng	Sling Splint	Sling Splint	
		Stng	Sting Wipe	Sting Wipe	

Show Active Only

### Delete Care Type Codes

A message displays, asking if you are sure you want to delete the care type code.

2. Click **Ok**.

Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes

### Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

**Are you sure you want to deactivate the following Care Type Code?**  
Antb - Antibiotic Ointment

### Confirm Delete

A confirmation message displays, and the care type code no longer displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Care Type Codes

### Care Type Code Maintenance

From this screen, you can display, add, change and delete care type codes.

The selected Care Type Code was deactivated successfully.

Add Care Type Code

		Code	Name ^	Description	Active
		Basc	Basic Care	Basic Care	
		Eye	Eye Observation	Eye Observation	
		Fem	FeminineCare	FeminineCare	
		Hlth	Health Ed Counsel	Health Ed Counsel	
		Lice	Lice Care	Lice Care	
		Med	Medication Required	Medication Required	
		Mth	Mouth Care	Mouth Care	
		Nbld	Nose Bleed Care	Nose Bleed Care	
		Rchk	Recheck	Recheck	
		Rest	Rest Or Observation	Rest Or Observation	
		RICE	RICE Care	RICE Care	
		Slng	Sling Splint	Sling Splint	
		Stng	Sting Wipe	Sting Wipe	

Show Active Only

#### Confirmation of Deleted Care Type Code

## Maintain Disposition Codes

When adding a student medical health log record in StudentInformation, you have the option to indicate how a student was handled or dismissed after the student visited the school’s health clinic. (See [“Maintain Student Health Logs.”](#)) You can maintain disposition codes in StudentInformation in the following ways:

- To enter a new disposition code, see [“Add Disposition Codes.”](#)
- To edit an existing disposition code, see [“Edit Disposition Codes.”](#)
- To delete a disposition code, see [“Delete Disposition Codes.”](#)

**Note:** You can create disposition codes at the ITC, district or building level. If icons display at the beginning of the row, this indicates the record was created at a higher level, and you can only edit or delete it at that higher level.

## Add Disposition Codes

**Navigation:** Home – Management – School Administration – Medical Office Administration – Disposition Codes

1. On the **Disposition Codes** screen, click **Add Disposition Code**.

Home >> Management >> School Administration >> Medical Office Administration >> Disposition Codes

## Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

**Add Disposition Code**

		Code	Name ^	Description	Active
X	✎	Phon	Phone Call Home	Phone Call Home	💡
X	✎	Clas	Return to classroom		💡
X	✎	Home	Student sent home		💡
X	✎	ER	Student taken to Emergency Room		💡

Show Active Only

### Add Disposition Codes

The add-edit version of the screen displays.

- In the **Code** field, enter a disposition code of up to four alphanumeric characters.
- In the **Name** field, enter a name for the disposition code.
- Optional: In the **Description** field, enter a description of this code.
- Optional: If you do not want this disposition code to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive disposition codes on new student medical records.

- Click **Save**. Or, to continue adding disposition codes, click **Save and New**.

Home >> Management >> School Administration >> Medical Office Administration >> Disposition Codes

## Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

**Code:**  ✎

**Name:**  ✎

**Description:**

**Is Active:**

**Save** **Save and New** **Cancel**

### Add Disposition Code

A confirmation message displays, and the new disposition code displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Disposition Codes

### Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

The Disposition Code was successfully saved

Add Disposition Code

		Code	Name ^	Description	Active
		Phon	Phone Call Home	Phone Call Home	
		Optm	Referred to optometrist	Given letter to follow up with optometrist	
		Clas	Return to classroom		
		Home	Student sent home		
		ER	Student taken to Emergency Room		

Show Active Only

#### Confirmation of Added Disposition Code

**Note:** Inactive disposition codes (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Disposition Codes

Navigation: Home – Management – School Administration – Medical Office Administration – Disposition Codes

1. On the **Disposition Codes** screen, in the row of the disposition code you want to edit, click .

Home >> Management >> School Administration >> Medical Office Administration >> Disposition Codes

### Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

Add Disposition Code

		Code	Name ^	Description	Active
		Phon	Phone Call Home	Phone Call Home	
		Optm	Referred to optometrist	Given letter to follow up with optometrist	
		Clas	Return to classroom		
		Home	Student sent home		
		ER	Student taken to Emergency Room		

Show Active Only

#### Edit Disposition Codes

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see “Add Disposition Codes.”

### Edit Disposition Code

A confirmation message displays, and the edited disposition code displays in the list.

		Code	Name ^	Description	Active
X		Phon	Phone Call Home	Phone Call Home	
X		Optm	Referred to optometrist	Follow up with optometrist letter	
X		Clas	Return to classroom		
X		Home	Student sent home		
X		ER	Student taken to Emergency Room		

Show Active Only

### Confirmation of Edited Disposition Code

## Delete Disposition Codes

**Navigation:** Home – Management – School Administration – Medical Office Administration – Disposition Codes

1. On the **Disposition Codes** screen, in the row of the disposition code you want to delete, click .

Home >> Management >> School Administration >> Medical Office Administration >> Disposition Codes

### Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

Add Disposition Code

		Code	Name ^	Description	Active
		Phon	Phone Call Home	Phone Call Home	
		Optm	Referred to optometrist	Follow up with optometrist letter	
		Clas	Return to classroom		
		Home	Student sent home		
		ER	Student taken to Emergency Room		

Show Active Only

### Delete Disposition Codes

A message displays, asking if you are sure you want to delete the disposition code.

2. Click **Ok**.

Home >> Management >> School Administration >> Medical Office Administration >> Disposition Codes

### Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

Are you sure you want to deactivate the following Disposition Code?  
Optm - Referred to optometrist

### Confirm Delete

A confirmation message displays, and the disposition code no longer displays in the list.

Home >> Management >> School Administration >> Medical Office Administration >> Disposition Codes

### Disposition Codes

From this screen, you can display, add, change and delete disposition codes.

The selected Disposition Code was deactivated successfully.

Add Disposition Code

		Code	Name ^	Description	Active
		Phon	Phone Call Home	Phone Call Home	
		Clas	Return to classroom		
		Home	Student sent home		
		ER	Student taken to Emergency Room		

Show Active Only

### Confirmation of Deleted Disposition Code

# Medical Records

StudentInformation lets you collect and record student medical data. See the appropriate topics as follows:

- To maintain student medical alerts, see [“Maintain Student Medical Alerts.”](#)
- To view a student’s medical contact information, see [“View Student’s Medical Contacts.”](#)
- To maintain records of medication a student needs to take at school, see [“Maintain Student Medication Records.”](#)
- To maintain records of health screenings given to students at your school’s health clinic, see [“Maintain Student Health Screening Records.”](#)
- To maintain student immunization records, see [“Maintain Student Immunization Records.”](#)
- To maintain records of student visits to your school’s health clinic, see [“Maintain Student Health Logs.”](#)

---

## Maintain Student Medical Alerts

You can maintain student medical alert information in the following ways:

- To view any medical alerts for a student, see [“View Student’s Medical Alerts.”](#)
- To enter a new medical alert, see [“Add Medical Alerts.”](#)
- To edit a medical alert, see [“Edit Medical Alerts.”](#)
- To delete a medical alert, see [“Delete Medical Alerts.”](#)

## View Student’s Medical Alerts

In the student in context area of the banner, if a student has one or more medical alerts, a  icon displays.

**Note:** Medical alerts are not year-specific. They display indefinitely or until the specified **Ending Date**.

To open the medical alert, click .

SIS	Teacher Menu	EZ Query	Management	EMIS	My Account	ITC
<b>BETA - OH</b>	<a href="#">CALLAHAN, BOBBY</a> DALTON HIGH SCHOOL 2013-2014 Calendar: DFLT	ID: 00150130 Gender: M Grade: 11	Counselor: WATKINS, NAOMI Homeroom: 5B Lunch Status: A			

**Student with Medical Alert**

The **Medical Alerts** screen displays, and you can review the student’s medical alert details.

**Note:** If this alert is life threatening, a ⚠ icon displays in the **Life Threatening** column.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Add Medical Alert

		Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
X	✎	Aug 05, 2013	Headaches--meds in clinic	1	Aug 22, 2011				💡

Show Active Only

Medical Alert Details

## Add Medical Alerts

Navigation: SIS – Student – Medical – Medical Alerts

1. With the appropriate student in context, on the **Medical Alerts** screen, click **Add Medical Alert**.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Add Medical Alert

		Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
X	✎	Aug 05, 2013	Headaches--meds in clinic	1	Aug 22, 2011				💡

Show Active Only

Add Medical Alerts

The add-edit version of the screen displays.

2. In the **Priority** drop-down list, select the priority order in which this alert should appear in the list of this student’s medical alerts. Priority ranges from 1 (highest) to 10 (lowest).
3. Optional: In the **Starting Date** and/or **Ending Date** fields, enter dates to define the starting and/or ending time period during which this alert should actively display for the student, or select a date or dates from the calendar date picker.
4. In the **Medical Alert Condition** field, define the condition causing this alert.
5. Optional: If the alert is life threatening, select the **Life Threatening** check box.
6. Optional: If you do not want this medical alert to be active at this point, deselect the **Is Active** check box.
7. Click **Save**. Or, to continue adding medical alerts, click **Save and New**.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Date: 3/19/2014

Priority: 1

Starting Date: 03/19/2014

Ending Date:

Medical Alert Condition: Student is allergic to bee stings; carries an EpiPen

Life Threatening:

Is Active:

Save Save and New Cancel

### Add Medical Alert

A confirmation message displays, and the new medical alert displays in the list.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

The Medical Alert was successfully saved

Add Medical Alert

		Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
X		Aug 05, 2013	Headaches--meds in clinic	1	Aug 22, 2011				💡
X		Mar 19, 2014	Student is allergic to bee stings; carries an EpiPen	1	Mar 19, 2014				💡

Show Active Only

### Confirmation of Added Medical Alert

**Note:** Inactive medical alerts (indicated with a 💡 icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Medical Alerts

Navigation: SIS – Student – Medical – Medical Alerts

1. With the appropriate student in context, on the **Medical Alerts** screen, in the row of the medical alert you want to edit, click .

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Add Medical Alert

	Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
	Aug 05, 2013	Headaches--meds in clinic	1	Aug 22, 2011				
	Mar 19, 2014	Student is allergic to bee stings; carries an EpiPen	1	Mar 19, 2014				

Show Active Only

### Edit Medical Alerts

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Medical Alerts.”](#)

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Date:

Priority:

Starting Date:

Ending Date:

Medical Alert Condition:

Life Threatening:

Is Active:

**Save**

### Edit Medical Alert

A confirmation message displays, and the edited medical alert displays in the list.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

The Medical Alert was successfully saved

Add Medical Alert

		Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
✕	✎	Aug 05, 2013	Headaches--meds in clinic	1	Aug 22, 2011				💡
✕	✎	Mar 19, 2014	Student is allergic to bee stings; carries an EpiPen	1	Mar 19, 2014			⚠️	💡

Show Active Only

### Confirmation of Edited Medical Alert

## Delete Medical Alerts

Navigation: SIS – Student – Medical – Medical Alerts

1. With the appropriate student in context, on the **Medical Alerts** screen, in the row of the medical alert you want to delete, click ✕.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Add Medical Alert

		Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
✕	✎	Aug 05, 2013	Headaches--meds in clinic	1	Aug 22, 2011				💡
✕	✎	Mar 19, 2014	Student is allergic to bee stings; carries an EpiPen	1	Mar 19, 2014			⚠️	💡

Show Active Only

### Delete Medical Alerts

A message displays, asking if you are sure you want to delete the medical alert.

2. Click **Ok**.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

Are you sure you want to delete the following Medical Alert?  
Headaches--meds in clinic

### Confirm Delete

A confirmation message displays, and the medical alert no longer displays in the list.

Home >> SIS >> Student >> Medical >> Medical Alerts

### Medical Alerts

From this screen, you can display, add, change and delete data pertaining to the medical alerts of students.

The selected Medical Alert was deactivated successfully.

Add Medical Alert

		Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening	Active
✖	✎	Mar 19, 2014	Student is allergic to bee stings; carries an EpiPen	1	Mar 19, 2014			⚠	💡

Show Active Only

**Confirmation of Deleted Medical Alert**

## View Student’s Medical Contacts

### Navigation: SIS – Student – Medical – Medical Contacts

With the appropriate student in context, the **Medical Contacts** (view only) screen lists the individuals designated as the student’s medical contacts.

**Note:** For information on setting up medical contacts for a student, see *ProgressBook StudentInformation Student and Registration Guide*.

Home >> SIS >> Student >> Medical >> Medical Contacts

### Medical Contacts

From this screen, you can view student contact information.

<b>Parent(s)</b> Casey and Jane Callahan Home: (419) 555-0720	<b>Doctor</b> Anna Stephens Work: (440) 555-1212 Ext:	<b>Dentist</b> Tom Avvelone Work: (440) 555-8621 Ext:
<b>Hospital</b> Downtown Children's Hospital Work: (440) 555-2136 Ext:		

**Medical Contacts Screen**

## Maintain Student Medication Records

You can maintain information about medications students need to take at school in the following ways:

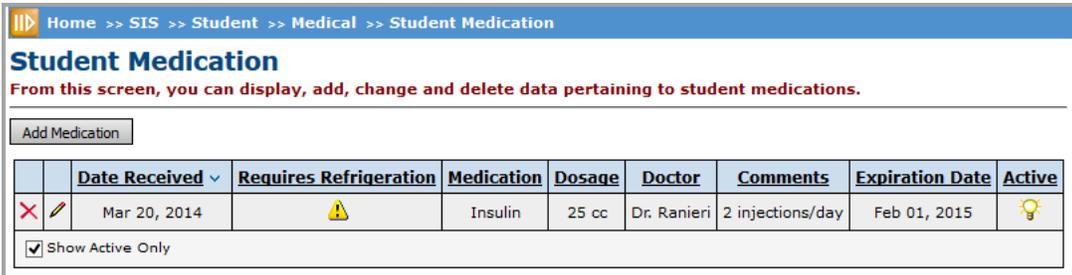
- To view any medications a student needs to take at school, see [“View Student’s Medications.”](#)
- To enter a new medication, see [“Add Medications.”](#)
- To edit a medication, see [“Edit Medications.”](#)
- To delete a medication, see [“Delete Medications.”](#)
- To track specific instances of administering medication to a student, see [“Maintain Student Health Logs.”](#)

### View Student’s Medications

**Navigation: SIS – Student – Medical – Student Medication**

With the appropriate student in context, the **Student Medication** screen displays all medications the student needs to take at school.

**Note:** If a medication requires refrigeration, a  icon displays in the **Requires Refrigeration** column.



Home >> SIS >> Student >> Medical >> Student Medication								
<b>Student Medication</b>								
From this screen, you can display, add, change and delete data pertaining to student medications.								
<input type="button" value="Add Medication"/>								
	Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
	Mar 20, 2014		Insulin	25 cc	Dr. Ranieri	2 injections/day	Feb 01, 2015	
<input checked="" type="checkbox"/> Show Active Only								

**Student Medication Screen**

### Add Medications

**Navigation: SIS – Student – Medical – Student Medication**

1. With the appropriate student in context, on the **Student Medication** screen, click **Add Medication**.

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

**Add Medication**

	Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
X	Mar 20, 2014		Insulin	25 cc	Dr. Ranieri	2 injections/day	Feb 01, 2015	💡

Show Active Only

### Add Medications

The add-edit version of the screen displays.

- In the **Date Received** field, enter the date you received the medication to store at the school's health clinic for this student, or select a date from the calendar date picker.
- Optional: If this medication expires, in the **Expiration Date** field, enter or select the expiration date on which you should throw the medication away.
- In the **Medication** drop-down list, select one of the defined common medications, if applicable. If the medication does not appear in the list, select "Other" and then enter the name of the medication in the **Medication Name** field.

**Note:** For information on maintaining the common medications included in this list, see "[Maintain Medication Codes.](#)"

- In the **Dosage** field, enter how much of the medication the student needs to take each time you administer it.
- In the **Doctor** field, enter the name of the doctor who prescribed this medication.

**Note:** If this is not a prescription medication, enter other details, such as "N/A," "mother," "over the counter," etc.

- Optional: If you need to enter any other information, enter it in the **Comments** field.
- Optional: If this medication requires refrigeration, select the **Requires Refrigeration** check box.
- Optional: If you do not want this medication record to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot use inactive medications on new student medical records.

- Click **Save**. Or, to continue adding medications, click **Save and New**.

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

Date Received: 05/01/2014

Expiration Date: 05/01/2015

Medication: Other

Medication Name: Advil

Dosage: 200 mg

Doctor: Dr. Anderson

Comments: 1-2 tablets as needed for headaches

Requires Refrigeration:

Is Active:

Save Save and New Cancel

### Add Medication

A confirmation message displays, and the new medication displays in the list.

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

The Student Medication was saved successfully

Add Medication

	Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
X	May 01, 2014		Advil	200 mg	Dr. Anderson	1-2 tablets as needed for headaches	May 01, 2015	💡
X	Mar 20, 2014		Insulin	25 cc	Dr. Ranieri	2 injections/day	Feb 01, 2015	💡

Show Active Only

### Confirmation of Added Medication

**Note:** Inactive medications (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

## Edit Medications

### Navigation: SIS – Student – Medical – Student Medication

1. With the appropriate student in context, on the **Student Medication** screen, in the row of the medication you want to edit, click .

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

Add Medication

	Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
	May 01, 2014		Advil	200 mg	Dr. Anderson	1-2 tablets as needed for headaches	May 01, 2015	
	Mar 20, 2014		Insulin	25 cc	Dr. Ranieri	2 injections/day	Feb 01, 2015	

Show Active Only

### Edit Medications

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Medications.”](#)

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

Date Received: 3/20/2014

Expiration Date: 2/1/2015

Medication: Insulin

Medication Name:

Dosage: 25 cc

Doctor: Dr. Ranieri

Comments: 2 injections/day

Requires Refrigeration:

Is Active:

Save

### Edit Medication

A confirmation message displays, and the edited medication displays in the list.

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

The Student Medication was saved successfully

Add Medication

	Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
X	May 01, 2014		Advil	200 mg	Dr. Anderson	1-2 tablets as needed for headaches	May 01, 2015	Lightbulb
X	Mar 20, 2014	Warning	Insulin	25 cc	Dr. Ranieri	2 injections/day	Feb 01, 2015	Lightbulb

Show Active Only

### Confirmation of Edited Medication

## Delete Medications

Navigation: SIS – Student – Medical – Student Medication

1. With the appropriate student in context, on the **Student Medication** screen, in the row of the medication you want to delete, click **X**.

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

Add Medication

	Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
X	May 01, 2014		Advil	200 mg	Dr. Anderson	1-2 tablets as needed for headaches	May 01, 2015	Lightbulb
X	Mar 20, 2014	Warning	Insulin	25 cc	Dr. Ranieri	2 injections/day	Feb 01, 2015	Lightbulb

Show Active Only

### Delete Medications

A message displays, asking if you are sure you want to delete the medication.

2. Click **Ok**.

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

Are you sure you want to deactivate the following Medication?  
Advil

### Confirm Delete

A confirmation message displays, and the medication no longer displays in the list.

Home >> SIS >> Student >> Medical >> Student Medication

### Student Medication

From this screen, you can display, add, change and delete data pertaining to student medications.

The selected Medication was deactivated successfully.

Add Medication

	Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date	Active
X	Mar 20, 2014	⚠	Insulin	25 cc	Dr. Ranieri	2 injections/day	Feb 01, 2015	💡

Show Active Only

Confirmation of Deleted Medication

## Maintain Student Immunization Records

You can maintain information about student immunizations in the following ways:

- To view a student’s immunizations, see [“View Student’s Immunizations.”](#)
- To enter a new immunization record for a student, see [“Add Immunizations.”](#)
- To edit an immunization record, see [“Edit Immunizations.”](#)
- To delete an immunization record, see [“Delete Immunizations.”](#)

### View Student’s Immunizations

Navigation: SIS – Student – Medical – Immunizations

With the appropriate student in context, the **Immunizations** screen displays all of the student’s immunization records.

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

Add Immunization

	Date	Name	Comments	Waiver
X	Feb 01, 2005	HIB		<input type="checkbox"/>
X	Dec 09, 2004	CPOX		<input type="checkbox"/>
X	Dec 09, 2004	DPT		<input type="checkbox"/>
X	Dec 09, 2004	MMR		<input type="checkbox"/>
X	Dec 09, 2004	OPV		<input type="checkbox"/>
X	Dec 09, 2004	HIB		<input type="checkbox"/>
X	Dec 09, 2004	Hepatitis A		<input type="checkbox"/>

Immunizations Screen

## Add Immunizations

### Navigation: SIS – Student – Medical – Immunizations

1. With the appropriate student in context, on the **Immunizations** screen, click **Add Immunization**.

The screenshot shows the 'Immunizations' screen with a navigation breadcrumb: Home >> SIS >> Student >> Medical >> Immunizations. Below the breadcrumb is the title 'Immunizations' and a red instruction: 'From this screen, you can display, add, change and delete data pertaining to student immunization records.' A button labeled 'Add Immunization' is circled in red. Below the button is a table with the following data:

		Date ▾	Name	Comments	Waiver
✕	✎	Feb 01, 2005	HIB		<input type="checkbox"/>
✕	✎	Dec 09, 2004	CPOX		<input type="checkbox"/>
✕	✎	Dec 09, 2004	DPT		<input type="checkbox"/>
✕	✎	Dec 09, 2004	MMR		<input type="checkbox"/>
✕	✎	Dec 09, 2004	OPV		<input type="checkbox"/>
✕	✎	Dec 09, 2004	HIB		<input type="checkbox"/>
✕	✎	Dec 09, 2004	Hepatitis A		<input type="checkbox"/>

### Add Immunizations

The add-edit version of the screen displays.

2. In the **Date** field, enter the date of the immunization, or select a date from the calendar date picker.
3. In the **Immunization Type** drop-down list, select one of the defined common immunizations.

**Note:** For information on maintaining the common immunizations included in this list, see [“Maintain Immunization Codes.”](#)

4. Optional: If the immunization is done as part of a series, in the **Series** field, enter the number in the series of this immunization.
5. Optional: If you need to enter any other information, enter it in the **Comments** field.
6. Optional: If the student has received a waiver for this immunization, select the **Waiver** check box.
7. Click **Save**. Or, to continue adding immunizations, click **Save and New**.

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

Date: 12/09/2004

Immunization Type: TB - TB

Series:

Comments:

Waiver:

Save Save and New Cancel

### Add Immunization

A confirmation message displays, and the new immunization displays in the list.

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

The Immunization was saved successfully

Add Immunization

	Date	Name	Comments	Waiver
X	Feb 01, 2005	HIB		<input type="checkbox"/>
X	Dec 09, 2004	CPOX		<input type="checkbox"/>
X	Dec 09, 2004	DPT		<input type="checkbox"/>
X	Dec 09, 2004	MMR		<input type="checkbox"/>
X	Dec 09, 2004	OPV		<input type="checkbox"/>
X	Dec 09, 2004	HIB		<input type="checkbox"/>
X	Dec 09, 2004	Hepatitis A		<input type="checkbox"/>
X	Dec 09, 2004	TB		<input type="checkbox"/>

### Confirmation of Added Immunization

## Edit Immunizations

Navigation: SIS – Student – Medical – Immunizations

1. With the appropriate student in context, on the **Immunizations** screen, in the row of the immunization you want to edit, click .

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

Add Immunization

		Date ▾	Name	Comments	Waiver
X	✎	Feb 01, 2005	HIB		<input type="checkbox"/>
X	✎	Dec 09, 2004	CPOX		<input type="checkbox"/>
X	✎	Dec 09, 2004	DPT		<input type="checkbox"/>
X	✎	Dec 09, 2004	MMR		<input type="checkbox"/>
X	✎	Dec 09, 2004	OPV		<input type="checkbox"/>
X	✎	Dec 09, 2004	HIB		<input type="checkbox"/>
X	✎	Dec 09, 2004	Hepatitis A		<input type="checkbox"/>
X	✎	Dec 09, 2004	TB		<input type="checkbox"/>

### Edit Immunizations

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Immunizations.”](#)

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

Date: 12/9/2004

Immunization Type: TB - TB

Series:

Comments: Tuberculosis

Waiver:

Save Cancel

### Edit Immunization

A confirmation message displays, and the edited immunization displays in the list.

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

The Immunization was saved successfully

Add Immunization

		Date ▾	Name	Comments	Waiver
✕	✎	Feb 01, 2005	HIB		<input type="checkbox"/>
✕	✎	Dec 09, 2004	CPOX		<input type="checkbox"/>
✕	✎	Dec 09, 2004	DPT		<input type="checkbox"/>
✕	✎	Dec 09, 2004	MMR		<input type="checkbox"/>
✕	✎	Dec 09, 2004	OPV		<input type="checkbox"/>
✕	✎	Dec 09, 2004	HIB		<input type="checkbox"/>
✕	✎	Dec 09, 2004	Hepatitis A		<input type="checkbox"/>
✕	✎	Dec 09, 2004	TB	Tuberculosis	<input type="checkbox"/>

Confirmation of Edited Immunization

## Delete Immunizations

Navigation: SIS – Student – Medical – Immunizations

1. With the appropriate student in context, on the **Immunizations** screen, in the row of the immunization you want to delete, click ✕.

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

Add Immunization

		Date ▾	Name	Comments	Waiver
✕	✎	Feb 01, 2005	HIB		<input type="checkbox"/>
✕	✎	Dec 09, 2004	CPOX		<input type="checkbox"/>
✕	✎	Dec 09, 2004	DPT		<input type="checkbox"/>
✕	✎	Dec 09, 2004	MMR		<input type="checkbox"/>
✕	✎	Dec 09, 2004	OPV		<input type="checkbox"/>
✕	✎	Dec 09, 2004	HIB		<input type="checkbox"/>
✕	✎	Dec 09, 2004	Hepatitis A		<input type="checkbox"/>
✕	✎	Dec 09, 2004	TB	Tuberculosis	<input type="checkbox"/>

Delete Immunizations

A message displays, asking if you are sure you want to delete the immunization.

2. Click **Ok**.

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

Are you sure you want to delete the following Immunization?  
12/9/2004 12:00:00 AM - TB - TB

Ok Cancel

#### Confirm Delete

A confirmation message displays, and the immunization no longer displays in the list.

Home >> SIS >> Student >> Medical >> Immunizations

### Immunizations

From this screen, you can display, add, change and delete data pertaining to student immunization records.

The selected Immunization was successfully deleted

Add Immunization

		Date ▾	Name	Comments	Waiver
X	✎	Feb 01, 2005	HIB		<input type="checkbox"/>
X	✎	Dec 09, 2004	CPOX		<input type="checkbox"/>
X	✎	Dec 09, 2004	DPT		<input type="checkbox"/>
X	✎	Dec 09, 2004	MMR		<input type="checkbox"/>
X	✎	Dec 09, 2004	OPV		<input type="checkbox"/>
X	✎	Dec 09, 2004	HIB		<input type="checkbox"/>
X	✎	Dec 09, 2004	Hepatitis A		<input type="checkbox"/>

#### Confirmation of Deleted Immunization

## Maintain Student Health Screening Records

StudentInformation lets you track several types of health screenings given to students in your school's health clinic. This topic covers all of the screening records available in the product. You can maintain information about student health screenings in the following ways:

- To view a student's health screenings, see ["View Student's Health Screenings."](#)
- To enter a new health screening record for a student, see ["Add Health Screenings."](#)
- To edit a health screening record, see ["Edit Health Screenings."](#)
- To delete a health screening record, see ["Delete Health Screenings."](#)

## View Student's Health Screenings

With the appropriate student in context, you can view all of the student's health screening records by selecting the appropriate navigation for each screening type as shown:

### Navigation: SIS – Student – Medical – Vision Screening

Home >> SIS >> Student >> Medical >> Vision Screening									
Vision Screening									
From this screen, you can display, add, change and delete data pertaining to the vision screening of students.									
Add Screening									
	Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
X	Mar 20, 2014	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		

### Vision Screening

### Navigation: SIS – Student – Medical – Dental Screening

Home >> SIS >> Student >> Medical >> Dental Screening					
Dental Screening					
From this screen, you can display, add, change and delete data pertaining to student dental exam records.					
Add Screening					
	Exam Date	Mouthwash	Referral Date	Special Services Rendered	Findings
X	Aug 01, 2013	<input checked="" type="checkbox"/>			no cavities; redness of gums; check again in 2 months

### Dental Screening

### Navigation: SIS – Student – Medical – Hearing Screening

Home >> SIS >> Student >> Medical >> Hearing Screening				
Hearing Screening				
From this screen, you can display, add, change and delete data pertaining to the hearing of students.				
Add Screening				
	Exam Date	Result Code	Comments	
X	Feb 09, 2014	P		

### Hearing Screening

### Navigation: SIS – Student – Medical – Growth Screening

Home >> SIS >> Student >> Medical >> Growth Screening				
Growth Screening				
From this screen, you can display, add, change and delete data pertaining to the growth of students.				
Add Screening				
	Height	Weight	Exam Date	Comments
X	62	130	Feb 09, 2014	

### Growth Screening

## Navigation: SIS – Student – Medical – Scoliosis Screening

	Exam Date	Result Code	Comments
X	Sep 12, 2013	P	

### Scoliosis Screening

## Add Health Screenings

### Navigation: SIS – Student – Medical – <Screening Type> Screening

**Note:** You can use this procedure to add all of the available types of student health screening records.

1. With the appropriate student in context, navigate to the appropriate screening type screen. (See “[View Student’s Health Screenings.](#)”)
2. Click **Add Screening**.

	Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
X	Mar 20, 2014	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		

### Add Screenings

The add-edit version of the screen displays.

3. Enter information about this record based on the screening type as follows:

#### Vision Screening:

- **Exam Date** – Date the vision screening took place
- **Glasses/Contacts** – Select if the student wears “Glasses,” “Contacts” or “None.”
- **Right Eyesight** – Visual acuity of the right eye (e.g., 20/30)
- **Left Eyesight** – Visual acuity of the left eye (e.g., 20/30)
- Optional fields:
  - **Plus Lenses** – Student’s vision test results with the use of lenses
  - **Near Sighted** – Student’s near sighted screening results
  - **Far Sighted** – Student’s far sighted screening results
  - **Color Blindness** – Student’s color blindness screening results
  - **Stereopsis** – Student’s stereopsis (eye alignment-depth perception) screening results

- **Comments** – Any additional information related to this screening

**Dental Screening:**

- **Exam Date** – Date the dental screening took place
- Optional fields:
  - **Referral Date** – Date of referral to another health provider
  - **Special Services Rendered** – Any special services provided during this dental screening
  - **Findings** – Any findings as a result of this screening
  - **Mouthwash** – Select check box if student used mouthwash during this screening.

**Hearing Screening:**

- **Exam Date** – Date the hearing screening took place
- **Result Code** – Student's hearing test results
- (Optional): **Comments** – Any additional information related to this screening

**Growth Screening:**

- **Exam Date** – Date the growth screening took place
- **Height** – Student's height in inches
- **Weight** – Student's weight in pounds
- (Optional): **Comments** – Any additional information related to this screening

**Scoliosis Screening:**

- **Exam Date** – Date the scoliosis screening took place
- **Result Code** – Student's scoliosis test results
- (Optional): **Comments** – Any additional information related to this screening

4. Click **Save**. Or, to continue adding screenings, click **Save and New**.

Home >> SIS >> Student >> Medical >> Vision Screening

### Vision Screening

From this screen, you can display, add, change and delete data pertaining to the vision screening of students.

Exam Date: 04/18/2015

Glasses/Contacts: None

Right Eyesight: 20/20

Left Eyesight: 20/20

Plus Lenses: Not Applicable

Near Sighted: Pass

Far Sighted: Pass

Color Blindness: Pass

Stereopsis: Not Applicable

Referral Date:

Comments:

Save Save and New Cancel

**Add Screening**

A confirmation message displays, and the new screening displays in the list.

Home >> SIS >> Student >> Medical >> Vision Screening

### Vision Screening

From this screen, you can display, add, change and delete data pertaining to the vision screening of students.

The Vision Screening was saved successfully

Add Screening

	Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
	Apr 18, 2015	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		
	Mar 20, 2014	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		

### Confirmation of Added Screening

## Edit Health Screenings

Navigation: SIS – Student – Medical – <Screening Type> Screening

**Note:** You can use this procedure to edit all of the available types of student health screening records.

1. With the appropriate student in context, navigate to the appropriate screening type screen. (See “[View Student’s Health Screenings.](#)”)
2. In the row of the screening you want to edit, click .

Home >> SIS >> Student >> Medical >> Vision Screening

### Vision Screening

From this screen, you can display, add, change and delete data pertaining to the vision screening of students.

Add Screening

	Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
	Apr 18, 2015	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		
	Mar 20, 2014	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		

### Edit Screenings

The add-edit version of the screen displays.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see “[Add Health Screenings.](#)”

**Edit Immunization**

A confirmation message displays, and the edited screening displays in the list.

	Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
✕	Apr 18, 2015	N	R - 20/200 L - 20/20	R	Near - F Far - P	P	N	Apr 18, 2015	Referred to ophthalmologist
✕	Mar 20, 2014	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		

**Confirmation of Edited Screening**

**Delete Health Screenings**

Navigation: SIS – Student – Medical – <Screening Type> Screening

*Note: You can use this procedure to delete all of the available types of student health screening records.*

1. With the appropriate student in context, navigate to the appropriate screening type screen. (See “View Student’s Health Screenings.”)
2. In the row of the screening you want to edit, click ✕.

Home >> SIS >> Student >> Medical >> Vision Screening

**Vision Screening**  
From this screen, you can display, add, change and delete data pertaining to the vision screening of students.

Add Screening

	Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
<input checked="" type="checkbox"/>	Apr 18, 2015	N	R - 20/200 L - 20/20	R	Near - F Far - P	P	N	Apr 18, 2015	Referred to ophthalmologist
<input checked="" type="checkbox"/>	Mar 20, 2014	N	R - 20/20 L - 20/20	N	Near - P Far - P	P	N		

### Delete Screenings

A message displays, asking if you are sure you want to delete the screening.

3. Click **Ok**.

Home >> SIS >> Student >> Medical >> Vision Screening

**Vision Screening**  
From this screen, you can display, add, change and delete data pertaining to the vision screening of students.

Are you sure you want to delete the following Vision screening?  
3/20/2014 -

### Confirm Delete

A confirmation message displays, and the screening no longer displays in the list.

Home >> SIS >> Student >> Medical >> Vision Screening

**Vision Screening**  
From this screen, you can display, add, change and delete data pertaining to the vision screening of students.

The selected Vision Screening was successfully deleted

Add Screening

	Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
<input checked="" type="checkbox"/>	Apr 18, 2015	N	R - 20/200 L - 20/20	R	Near - F Far - P	P	N	Apr 18, 2015	Referred to ophthalmologist

### Confirmation of Deleted Screening

## Maintain Student Health Logs

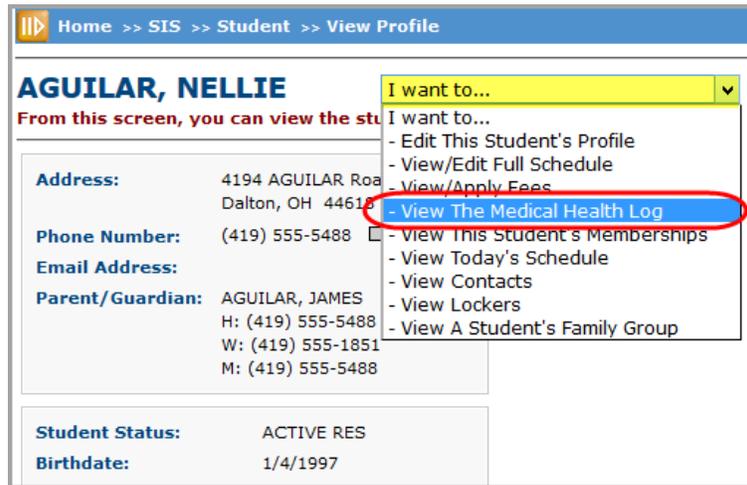
Student health logs provide information about students' visits to your school's health clinic. You can maintain health log information in the following ways:

- To view a student's health log, see ["View Student's Health Log."](#)
- To create a new entry in the health log for a student, see ["Add Health Log Entries."](#)
- To edit a health log entry, see ["Edit Health Log Entries."](#)
- To delete a health log entry, see ["Delete Health Log Entries."](#)

## View Student's Health Log

You can access a student's health log in either of the following ways:

- With the appropriate student in context, navigate to **SIS – Student – Medical – Health Log**.
- On the student's **View Profile** screen, in the **I want to...** drop-down list, select "View The Medical Health Log."



**View Profile Screen**

The **Student Medical Health Log** screen displays all of the student's visits to the school's health clinic during the current school year.

**Note:** To view previous years' history, select the **Show Visits from All Years** check box.

To view details of a clinic visit, in the row of the visit, click .

The screenshot shows the 'Student Medical Health Log' screen. The page header includes navigation links: Home >> SIS >> Student >> Medical >> Health Log. Below the header, there is a button labeled 'Add Entry'. The main content is a table with the following columns: Check In Date, Time In, Time Out, Cared By, Temperature, Contacted, Comments, Care Given, Disposition, Reason, Note Sent Home, Note to Teacher, and Accident Report. A single entry is visible for August 07, 2013, with a magnifying glass icon over the first cell. The entry details are: Time In: 02:45 PM, Time Out: 03:00 PM, Cared By: MAE CONNER, Temperature: 102.00, Comments: Student was administered Advil 200mg for fever, Care Given: Med, Disposition: Student sent home, Reason: HEAD, Note Sent Home: , Note to Teacher: , Accident Report: . Below the table, there is a checkbox labeled 'Show Visits from All Years' which is currently unchecked.

	Check In Date	Time In	Time Out	Cared By	Temperature	Contacted	Comments	Care Given	Disposition	Reason	Note Sent Home	Note to Teacher	Accident Report
	Aug 07, 2013	02:45 PM	03:00 PM	MAE CONNER	102.00		Student was administered Advil 200mg for fever	Med	Student sent home	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Show Visits from All Years

**Student Medical Health Log Screen**

Home >> SIS >> Student >> Medical >> Health Log >> Health Log Entry Details

### Student Medical Health Log Entry

From this screen, you can view the details for a Medical Health Log entry.

**Date:** 8/7/2013  
**Time In:** 02:45 PM  
**Time Out:** 03:00 PM

**Care By:** CONNER, MAE  
**Reason:** Headache  
**Location:** CAFE  
**Temperature:** 102.00

**Contacted:**  
**Disposition:** Student sent home  
**Care Given:** Medication Required  
**Comments:** Student was administered Advil 200mg for fever

**Note Sent Home:**   
**Note Sent to Teacher:**   
**Accident Report:**

[Return to Health Log](#)

Health Log Entry Details

## Add Health Log Entries

Navigation: SIS – Student – Medical – Health Log

1. With the appropriate student in context, on the **Student Medical Health Log** screen, click **Add Entry**.

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

**Add Entry**

		Check In Date	Time In	Time Out	Cared By	Temperature	Contacted	Comments	Care Given	Disposition	Reason	Note Sent Home	Note to Teacher	Accident Report
X		Aug 07, 2013	02:45 PM	03:00 PM	MAE CONNER	102.00		Student was administered Advil 200mg for fever	Med	Student sent home	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Show Visits from All Years

Add Health Log Entries

The add-edit version of the screen displays.

2. In the **Date of Visit** field, enter the date the student visited the health clinic, or select the date from the calendar date picker.
3. In the **Time In** field, enter the time the student arrived at the health clinic, or select the time from the drop-down time picker. (As a shortcut, you can enter time as **10A** for 10:00 A.M. or **3:02P** for 3:02 P.M.)

4. Optional: To record the time the student left the health clinic, in the **Time Out** field, enter the time or select it from the drop-down time picker. (As a shortcut, you can enter time as **10A** for 10:00 A.M. or **3:02P** for 3:02 P.M.)
5. In the **Care By** drop-down list, select the staff member who attended to the student in the clinic.
6. Optional: To record the reason for the student's visit to the clinic, in the **Reason** option, select the check box(es) to indicate the reason(s).

**Note:** For information on maintaining the reason codes included in this list, see ["Maintain Reason Codes."](#)

7. In the **Location** drop-down list, select the location in the school where the student became injured or ill.
8. Optional: To record the student's temperature, in the **Temperature** field, enter a numeric temperature of 2-3 digits in the range of 90-110.
9. Optional: To record details of anyone you contacted regarding the student's condition, enter this information in the **Contacted** field.
10. Optional: To record how you handled or dismissed the student or where you sent the student after the clinic visit, in the **Disposition** drop-down list, select the appropriate option.

**Note:** For information on maintaining the disposition codes included in this list, see ["Maintain Disposition Codes."](#)

11. Optional: To record the care you gave to the student during the clinic visit, in the **Care Given** option, select the check box(es) to indicate the care method(s).

**Note:** For information on maintaining the care type codes included in this list, see ["Maintain Care Type Codes."](#)

12. Optional: If you need to enter any other information, enter it in the **Comments** field.
13. Optional: To record any documentation related to this clinic visit, select the **Note Sent Home**, **Note Sent to Teacher** (to inform the teacher that the student went home) and/or **Accident Report** check boxes, as appropriate.
14. Click **Save**. Or, to continue adding health log entries, click **Save and New**.

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

**Date of Visit:** 3/20/2014

**Time In:** 11:30 AM

**Time Out:** 12:00 PM

**Care By:** LESLIE CRANE

**Reason:**  Cramps  Dizzy  Headache

**Location:** 131 - BIO

**Temperature:**

**Contacted:**

**Disposition:** Return to classroom

**Care Given:**

Antibiotic Ointment  Health Ed Counsel  Nose Bleed Care  RICE Care  
 Basic Care  Lice Care  Recheck  Sling Splint  
 Eye Observation  Medication Required  Rest Or Observation  Sting Wipe  
 FeminineCare  Mouth Care

**Comments:**

**Note Sent Home:**

**Note Sent To Teacher:**

**Accident Report:**

**Save** **Save and New** **Cancel**

### Add Health Log Entry

A confirmation message displays, and the new health log entry displays in the list.

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

The Student Medical Health Log was saved successfully

Add Entry

			Check In Date	Time In	Time Out	Cared By	Temperature	Contacted	Comments	Care Given	Disposition	Reason	Note Sent Home	Note to Teacher	Accident Report
X	🔍	✎	Mar 20, 2014	11:30 AM	12:00 PM	LESLIE CRANE				Rest	Return to classroom	DIZZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	🔍	✎	Aug 07, 2013	02:45 PM	03:00 PM	MAE CONNER	102.00		Student was administered Advil 200mg for fever	Med	Student sent home	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Show Visits from All Years

### Confirmation of Added Health Log Entry

## Edit Health Log Entries

### Navigation: SIS – Student – Medical – Health Log

1. With the appropriate student in context, on the **Student Medical Health Log** screen, in the row of the health log entry you want to edit, click .

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

Add Entry

			Check In Date	Time In	Time Out	Cared By	Temperature	Contacted	Comments	Care Given	Disposition	Reason	Note Sent Home	Note to Teacher	Accident Report
X			Mar 20, 2014	11:30 AM	12:00 PM	LESLIE CRANE				Rest	Return to classroom	DIZZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X			Aug 07, 2013	02:45 PM	03:00 PM	MAE CONNER	102.00		Student was administered Advil 200mg for fever	Med	Student sent home	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Show Visits from All Years

### Edit Health Log Entries

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Health Log Entries.”](#)

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

**Date of Visit:** 3/20/2014

**Time In:** 11:30 AM

**Time Out:** 12:00 PM

**Care By:** LESLIE CRANE

**Reason:**  Cramps  Dizzy  Headache

**Location:** 131 - BIO

**Temperature:**

**Contacted:**

**Disposition:** Return to classroom

**Care Given:**  Antibiotic Ointment  Health Ed Counsel  Nose Bleed Care  RICE Care  
 Basic Care  Lice Care  Recheck  Sling Splint  
 Eye Observation  Medication Required  Rest Or Observation  Sting Wipe  
 FeminineCare  Mouth Care

**Comments:** Student felt better after resting

**Note Sent Home:**

**Note Sent To Teacher:**

**Accident Report:**

**Save** Save and New Cancel

### Edit Health Log Entry

A confirmation message displays, and the edited health log entry displays in the list.

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

The Student Medical Health Log was saved successfully

Add Entry

			Check In Date	Time In	Time Out	Cared By	Temperature	Contacted	Comments	Care Given	Disposition	Reason	Note Sent Home	Note to Teacher	Accident Report
X	🔍	✏️	Mar 20, 2014	11:30 AM	12:00 PM	LESLIE CRANE			Student felt better after resting	Rest	Return to classroom	DIZZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	🔍	✏️	Aug 07, 2013	02:45 PM	03:00 PM	MAE CONNER	102.00		Student was administered Advil 200mg for fever	Med	Student sent home	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Show Visits from All Years

### Confirmation of Edited Health Log Entry

## Delete Health Log Entries

Navigation: SIS – Student – Medical – Health Log

With the appropriate student in context, on the **Student Medical Health Log** screen, in the row of the health log entry you want to delete, click **X**.

**Note:** There is no confirmation screen and no undo. Before deleting this record, be sure this is the action you want to take.

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

Add Entry

			Check In Date	Time In	Time Out	Cared By	Temperature	Contacted	Comments	Care Given	Disposition	Reason	Note Sent Home	Note to Teacher	Accident Report
			Mar 20, 2014	11:30 AM	12:00 PM	LESLIE CRANE			Student felt better after resting	Rest	Return to classroom	DIZZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Aug 07, 2013	02:45 PM	03:00 PM	MAE CONNER	102.00		Student was administered Advil 200mg for fever	Med	Student sent home	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Show Visits from All Years

### Delete Health Log Entries

The health log entry no longer displays in the list.

Home >> SIS >> Student >> Medical >> Health Log

### Student Medical Health Log

From this screen, you can display and add data pertaining to a student's logged visits to the school health clinic.

Add Entry

			Check In Date	Time In	Time Out	Cared By	Temperature	Contacted	Comments	Care Given	Disposition	Reason	Note Sent Home	Note to Teacher	Accident Report
			Aug 07, 2013	02:45 PM	03:00 PM	MAE CONNER	102.00		Student was administered Advil 200mg for fever	Med	Student sent home	HEAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Show Visits from All Years

### Health Log Entry Deleted

# Reports

The following reports are available in StudentInformation to help you manage your student medical data:

- [“Download Student Medical History”](#)
- [“Health Screening Report \(SCRN\)”](#)
- [“Daily Health Log \(HLOG\)”](#)
- [“Student Immunization Report”](#)
- [“Medications Class List”](#)
- [“Medical Alert Class List”](#)

For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

---

## Download Student Medical History

**Navigation: Home – EZ Query – Reports – Download Student Medical History**

This report lets you download student medical history to use in other applications and reports.

	A	B	C	D	E	F	G	H	I	J
1	SchoolCoc	SSN	StudentNu	Status	StudentNa	Comment	MedicalCo	AlertName	AlertComments	Grade
2	DAHS	3.7E+08	7001	A	CONTRARY, JASON WILLIAM		Medical	Jason has asthri		9
3	DAHS	99898907	7002	A	PERRY, RICHARD MATTHE (RI		Medical	glass eye		9
4	DAHS	1.35E+08	7005	A	WILLIAMSON, RYAN SETH		Medical	diabetic		9

### Download Student Medical History

## Health Screening Report (SCRN)

Navigation: Home – SIS – Medical – Medical Reports – Health Screening Report (SCRN)

This report displays information on student health screenings.

ID	STUDENT NAME	GN	GR	COUNSELOR	HMRM	HMRM TEACHER	SCREENING TYPE	EXAM DATE	RESULT	REFERRAL DATE	SERVICES
150215	AGUILAR, NELLIE	F	11	NAOMI WATKINS	5B Lunch	JEFFERY BRANCH	Hearing	2/9/2014 12:00:00 AM	P		
150215	AGUILAR, NELLIE	F	11	NAOMI WATKINS	5B Lunch	JEFFERY BRANCH	Scoliosis	9/12/2013 12:00:00 AM	P		
150215	AGUILAR, NELLIE	F	11	NAOMI WATKINS	5B Lunch	JEFFERY BRANCH	Vision	2/20/2014 12:00:00 AM			
150215	AGUILAR, NELLIE	F	11	NAOMI WATKINS	5B Lunch	JEFFERY BRANCH	Growth	2/9/2014 12:00:00 AM			

Health Screening Report (SCRN)

## Daily Health Log (HLOG)

Navigation: Home – SIS – Medical – Medical Reports – Daily Health Log (HLOG)

This report displays all health log entries for a specified date range.

ID	STUDENT NAME	GN	GR	DATE OF CARE	TIME IN	TIME OUT	HEALTH LOG REASON	TYPE OF CARE	TEMP	DISPOSITION	Care Given By	
150215	AGUILAR, NELLIE	F	11	08/07/2013	14:48:00	18:00:00	HEAD - Headache	Med - Medication Required	102.00	Home	MAE CORNER	
							COMMENTS	Student was administered Advil 200mg for fever				

Daily Health Log (HLOG)

# Student Immunization Report

Navigation: Home – SIS – Medical – Medical Reports – Student Immunization Report

This report displays all student immunizations for a specified date range.

REPORT: DASL - IMMUNIZATIONS		DALTON HIGH SCHOOL		RUN AT 11:19 AM 3/21/2014				
SCHOOLYEAR:		STUDENT IMMUNIZATIONS		PAGE 1 OF 1				
STUDENT NAME:	STUDENT NUMBER:	GRADE:	SERIES	IMMUNIZATION DATE	IMMUNIZATION TYPE	WAIVER	GRADE	COMMENTS
AGUILAR, NELLIE	150215	11	N/A	Dec 9, 2004	CPOX	NO	11	
AGUILAR, NELLIE	150215	11	N/A	Dec 9, 2004	DPT	NO	11	
AGUILAR, NELLIE	150215	11	N/A	Dec 9, 2004	Hepatitis A	NO	11	
AGUILAR, NELLIE	150215	11	N/A	Dec 9, 2004	HIB	NO	11	
AGUILAR, NELLIE	150215	11	N/A	Feb 1, 2005	HIB	NO	11	
AGUILAR, NELLIE	150215	11	N/A	Dec 9, 2004	MMR	NO	11	
AGUILAR, NELLIE	150215	11	N/A	Dec 9, 2004	OPV	NO	11	
AGUILAR, NELLIE	150215	11	N/A	Dec 9, 2004	TB	NO	11	

## Student Immunization Report

## Medications Class List

Navigation: Home – Teacher Menu – Medications

This list lets you quickly review prescription medications for students by course section.

**Note:** You must have the correct security access to view this screen.

Home >> Teacher Menu >> Medications

### Medications Class List

From this screen you can view and print classlists of student medications

Teacher: MICHAEL WEBBER Course Section: 330 - 7 [Return to Course List](#)

<b>CONTRARY, MARY M.</b>	<b>0005001</b>	<b>Grade: 11</b>
• <b>Experimental Drug</b> This must be taken every day promptly at 9 am!	• 1 tablet at 9 am	• 6/1/2005 - 5/1/2006
<b>SPRAT, JACK JOSEPH</b>	<b>0005004</b>	<b>Grade: 11</b>
• <b>Zyrtec D</b>	• 1 pill at noon	• 8/14/2004

Medications Class List

## Medical Alert Class List

### Navigation: Home – Teacher Menu – Medical Alerts

This list lets you quickly review medical alerts for students by course section.

**Note:** You must have the correct security access to view this screen.

Home » Teacher Menu » Medical Alerts

### Medical Alert Class List

From this screen you can view and print classlists of student medical alerts

---

**Teacher:** MICHAEL WEBBER **Course Section:** 330 - 7

All Students     Only Students with Alerts    Return to Course List

---

<b>CONTRARY, MARY M.</b>	<b>00005001</b>	<b>Grade: 11</b>
<b>PERRY, MICHAEL JAY</b>	<b>00005002</b>	<b>Grade: 11</b>
<b>POTTS, IAN MICHAEL</b>	<b>00005003</b>	<b>Grade: 11</b>
<b>SPRAT, JACK JOSEPH</b>	<b>00005004</b>	<b>Grade: 11</b>
<ul style="list-style-type: none"> <li>• student is allergic to bee stings, carries an Epi-pen ⚠ 2/14/2005</li> </ul>	JOLENE TREECE (ONE PARENT) Home: (419) 228-7417	
<b>WELLS, JONA RENEE</b>	<b>00005005</b>	<b>Grade: 11</b>

**Medical Alert Class List**

This page intentionally left blank.

---

# ProgressBook StudentInformation EZ Query Guide



# **ProgressBook StudentInformation EZ Query Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation EZ Query Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	<a href="#">“View Student’s Discipline Records”</a>	14	Updated procedure and images to reflect new screen design showing all discipline data for a student in a single view.
14.6.7	<a href="#">“View Student’s EMIS Reportable Data”</a>	14	Update image of “FN - Attributes” selection to show removal of the <b>Choose a Reporting Period</b> drop-down list and removed text referring to selecting a reporting period.
14.6.4	<a href="#">“View Student’s EMIS Reportable Data”</a>	14	Updated image of “FN - Attributes” view to show <b>Updated December 1st IEP Outcome</b> field renamed to <b>Oct Childcount IEP Outcome</b> .
14.6.4	<a href="#">“Compare Student’s Home School and JVS Data”</a>	23	Updated image of “EMIS - FN” view to show <b>Updated December 1st IEP Outcome</b> field renamed to <b>Oct Childcount IEP Outcome</b> .
14.6.0	<a href="#">“View Student’s EMIS Reportable Data”</a>	14	Updated image of “FD - Attributes” selection to show new <b>Reporting Calendar</b> field.
14.6.0	<a href="#">“Compare Student’s Home School and JVS Data”</a>	23	Updated image of “EMIS - FD” selection to show new <b>Reporting Calendar</b> and <b>Attendance Pattern</b> fields.
14.4.3	<a href="#">“Compare Student’s Home School and JVS Data”</a>	23	Removed reference to <b>Reporting Period</b> drop-down list for the “EMIS - FN” option and updated image.
14.4.3	<a href="#">“SIS Student Search”</a>	65	Updated image of <b>Summary</b> tab to remove <b>Effective Reporting Period</b> .
14.4.0	Global	N/A	Converted source files to FrameMaker. Updated formatting/structure to match ProgressBook Suite. Rewrote topics using procedural steps.
14.4.0	“Testing”	N/A	Removed entire section since these options are no longer available in StudentInformation.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Overview</b>	<b>1</b>
<b>Individual Student Data</b>	<b>3</b>
View Student's Attendance .....	3
View Student's Contacts.....	5
View Student's Course History.....	8
View Student's Course Requests.....	11
View Student's Demographic Data.....	12
View Student's Discipline Records.....	14
View Student's EMIS Reportable Data.....	14
View Student's Enrollment History .....	17
View Student's School Medical Records.....	18
View Student's Memberships and Special Education Services.....	19
View Student's Schedule.....	22
Compare Student's Home School and JVS Data.....	23
Add District Trusts .....	34
View Student's Fees.....	36
View Student's Marks.....	37
<b>Tools</b>	<b>39</b>
View My Class Schedule.....	39
Generate Student List .....	40
Maintain Seating Charts.....	42
View Seating Charts.....	42
Create Seating Charts.....	44
Assign Seats .....	47
Edit Seating Charts .....	49
Delete Seating Charts .....	51
Generate Absence List.....	52
View Teacher Directory .....	54
View Upcoming Student Birthdays .....	55
View Birthday List.....	55
View Birthday Calendar.....	56

---

<b>Reports</b>	<b>59</b>
Absence Graph.....	59
Battelle For Kids Download.....	61
Download Class List .....	62
Download Student Address .....	63
Download Student Medical History .....	64
Medicaid Eligibility Rate (MER) Download.....	64
SIS Student Search .....	65
Student Membership/Services Search.....	68
List of Students Without Disciplinary Incidents .....	69
Weekday Attendance Percentage .....	71

# Overview

The EZ Query menu provides access to StudentInformation data in read-only format.

**Note:** *Some of these options may not be available to you based on the security setup of your user account. For example, if you do not have the teacher role assigned in StudentInformation security, you may need to have staff member impersonations or permission to view students in EZ Query set up for your account. For more information, see ProgressBook StudentInformation Security Guide.*

- To view data for a single student, see [“Individual Student Data.”](#)
- To view classroom management resources, see [“Tools.”](#)
- To view reports, see [“Reports.”](#)

This page intentionally left blank.

# Individual Student Data

EZ Query's **EZ Students** screens let you view data for an individual student.

**Note:** If you have the job function of teacher in StudentInformation security, you can see data for all students (even those not assigned to your course sections). If you have any other job function or no job function assigned, your user account must be set up either with the associated staff member impersonations or the option to **Allow Staff Member to view all Students in EZ Query** in order for you to see this data. For more information, see ProgressBook StudentInformation Security Guide.

Refer to the appropriate topic as follows:

- [“View Student’s Attendance”](#)
- [“View Student’s Contacts”](#)
- [“View Student’s Course History”](#)
- [“View Student’s Course Requests”](#)
- [“View Student’s Demographic Data”](#)
- [“View Student’s Discipline Records”](#)
- [“View Student’s EMIS Reportable Data”](#)
- [“View Student’s Enrollment History”](#)
- [“View Student’s School Medical Records”](#)
- [“View Student’s Memberships and Special Education Services”](#)
- [“View Student’s Schedule”](#)
- [“Compare Student’s Home School and JVS Data”](#)
- [“View Student’s Fees”](#)
- [“View Student’s Marks”](#)

---

## View Student’s Attendance

**Note:** For detailed information about student attendance, see ProgressBook StudentInformation Attendance and Calendar Guide.

### Navigation: Home – EZ Query – EZ Students – Attendance

With a student in context, the **Attendance** screen displays the student’s overall attendance rate and attendance incidents broken out by attendance code in both pie chart and table format.

To view the student’s absence history for previous school years and buildings, click **View Absence History**.

Home » EZ Query » EZ Students » Attendance

## Attendance

[View Absence History](#)

### Attendance Rate

Description	Value
Present Days	155.00
EXCUSED	6.00

Date	Type	AM/PM	Comment	Reason	Note
Sep 07, 2010	EXCUSED		FEVER	SICK	PRNT CALL
Sep 09, 2010	EXCUSED	PM	SENT HOME ILL	ILL/SNT HM	SCH CALL
Sep 15, 2010	OTHER	PM	ORTHO	DOC/DENT	PRNT CALL
Oct 18, 2010	EXCUSED	PM	DR.	DOC/DENT	PRNT CALL
Oct 27, 2010	OTHER	PM	DENT	DOC/DENT	PRNT CALL
Nov 16, 2010	EXCUSED		ILL	SICK	PRNT CALL
Jan 21, 2011	EXCUSED		ILL	SICK	PRNT CALL
Jan 28, 2011	EXCUSED	PM	DR.	DOC/DENT	PRNT CALL
Feb 09, 2011	OTHER	AM	ORTHO	DOC/DENT	PRNT CALL
Feb 14, 2011	EXCUSED		COLL	COLLEGE	ADVANCED
Feb 24, 2011	OTHER	PM	JOB INTERVIEW	ERRAND	PRNT CALL
Mar 07, 2011	EXCUSED	PM	SCHOLARSHIP INTERVIEW	ERRAND	PRNT CALL

### Attendance Incidents

Description	Absence Type	Total
Perfect Days		149
EXCUSED	E	8
OTHER	O	4

Attendance

Home » EZ Query » EZ Students » Attendance

### Attendance

Return To Attendance

School Year	School	Days Attended	Days Absent Excused	Days Absent Unexcused	Days Partial
2004-2005	DASL HIGH SCHOOL	0	5.00	0	0

#### Absence History

## View Student's Contacts

**Note:** For detailed information about student contacts, see *ProgressBook StudentInformation Student and Registration Guide*.

### Navigation: Home – EZ Query – EZ Students – Contact

1. With a student in context, on the **Contact** screen drop-down list, select the format in which you want to display information about the student's contacts.
2. Optional: If you want this screen to default to your display format selection each time, click **Set As Default**.

Home » EZ Query » EZ Students » Contact

### Contact

Select a Display Format From List:

AddressLabels	Set As Default
AddressLabels	
AddressLine	
AddressLine2	
AddressLineGrid	
ExpandedAddress	

#### Contacts

The contact information displays based on the display format you selected as follows:

Home » EZ Query » EZ Students » Contact

### Contact

Select a Display Format From List:

AddressLabels

EMERGENCY ROOM

ST.RITAS  
(419) 233-8798

MOTHER CELL

SARA FELLER  
(419) 244-7654

ONE PARENT

SHARON CONTRARY  
9876 NONE RD.  
SHAWNEE, OH 45806

Primary

MARION M/M CONTRARY  
90 ELM STREET  
LIMA, OH 45801  
(419) 228-7417

Display Format – AddressLabels

Home » EZ Query » EZ Students » Contact

### Contact

Select a Display Format From List:

AddressLine

Type:	EMERGENCY ROOM
Name:	ST.RITAS
Address:	
City, State Zip:	
Telephone:	(419) 233-8798
Email Address:	

Type:	MOTHER CELL
Name:	SARA FELLER
Address:	
City, State Zip:	
Telephone:	(419) 244-7654
Email Address:	

Type:	ONE PARENT
Name:	SHARON CONTRARY
Address:	9876 NONE RD.
City, State Zip:	SHAWNEE, OH 45806
Telephone:	
Email Address:	

Display Format – AddressLine

Home » EZ Query » EZ Students » Contact

### Contact

Select a Display Format From List:

AddressLine2

Type: EMERGENCY ROOM  
 Name: ST.RITAS  
 Address:  
 City, State Zip:  
 Telephone: (419) 233-8798  
 Email Address:

Type: MOTHER\_CELL  
 Name: SARA FELLER  
 Address:  
 City, State Zip:  
 Telephone: (419) 244-7654  
 Email Address:

Type: ONE PARENT  
 Name: SHARON CONTRARY  
 Address: 9876 NONE RD.  
 City, State Zip: SHAWNEE, OH 45806  
 Telephone:  
 Email Address:

Type: Primary  
 Name: MARION M/M CONTRARY  
 Address: 90 ELM STREET  
 City, State Zip: LIMA, OH 45801  
 Telephone: (419) 228-7417  
 Email Address:

Display Format – AddressLine2

Home » EZ Query » EZ Students » Contact

### Contact

Select a Display Format From List:

AddressLineGrid

Type	Name	Address	City, State Zip	Telephone	Email Address
EMERGENCY ROOM	ST.RITAS			(419) 233-8798	
MOTHER_CELL	SARA FELLER			(419) 244-7654	
ONE PARENT	SHARON CONTRARY	9876 NONE RD.	SHAWNEE, OH 45806		
Primary	MARION M/M CONTRARY	90 ELM STREET	LIMA, OH 45801	(419) 228-7417	

Display Format – AddressLineGrid

Home » EZ Query » EZ Students » Contact

### Contact

Select a Display Format From List:

ExpandedAddress

Type:	EMERGENCY ROOM
Name:	ST.RITAS
House Number:	
Street Direction:	
Street Name:	
Street Type:	
Apartment - PO Box:	
Complex:	
City, State Zip:	
Telephone:	(419) 233-8798
Email Address:	

Type:	MOTHER CELL
Name:	SARA FELLER
House Number:	
Street Direction:	
Street Name:	
Street Type:	
Apartment - PO Box:	
Complex:	
City, State Zip:	
Telephone:	(419) 244-7654
Email Address:	

Display Format – ExpandedAddress

## View Student's Course History

**Note:** For detailed information about student course history, see *ProgressBook StudentInformation Course History, Class Rank and Transcripts Guide*.

### Navigation: Home – EZ Query – EZ Students – Course History

1. With a student in context, on the **Course History** screen drop-down list, select the format in which you want to display information about the student's course history.
2. Optional: If you want this screen to default to your display format selection each time, click **Set As Default**.

Home » EZ Query » EZ Students » Course History

### Course History

Select a Display Format From List:

CourseHistoryGradesGrid

CourseHistoryGradesGrid  
 CourseHistoryGradesGridFinal  
 CourseHistoryMainGrid

### Course History

The course history information displays based on the display format you selected as follows:

Home » EZ Query » EZ Students » Course History

### Course History

Select a Display Format From List:

CourseHistoryGradesGrid

Grade	School Year	Course Name	Course Section	School
09	2001	LATIN I	1	DAHS

Mark Type	Mark	Absences	Attempted Credit	Earned Credit
Avg	C	0.00	1.00	1.00

Grade	School Year	Course Name	Course Section	School
09	2001	ALGEBRA II	1	DAHS

Mark Type	Mark	Absences	Attempted Credit	Earned Credit
Qtr	F	4.00	0.25	0.00
Qtr	F	4.00	0.25	0.00
Exam	D	4.00	0.00	0.00
Avg	B	4.00	0.50	0.50
Avg	C	0.00	1.00	1.00
Qtr	F	4.00	0.25	0.00
Qtr	A	4.00	0.25	0.25
Exam	A	4.00	0.00	0.00
Avg	C	4.00	0.50	0.50

### Display Format – CourseHistoryGradesGrid

Home » EZ Query » EZ Students » Course History

### Course History

Select a Display Format From List:  
 CourseHistoryGradesGridFinal

Grade	School Year	Course Name	Course Section	School	Mark Type	Mark	Absences	Attempted Credit	Earned Credit
09	2001	LATIN I	1	DAHS					
09	2001	FRENCH I	1	DAHS					
09	2001	SPANISH I	1	DAHS					
09	2001	HEALTH	1	DAHS					
09	2001	ALGEBRA II	1	DAHS					
09	2001	SOC STUDIES	1	DAHS					
09	2001	ENGLISH	1	DAHS					
09	2001	BIOL I H	1	DAHS					
10	2002	LATIN II	1	DAHS					
10	2002	FRENCH II	1	DAHS					
10	2002	SPANISH II	1	DAHS					
10	2002	HI MATH	1	DAHS					
10	2002	10 SCIENCE	1	DAHS					
10	2002	AM HISTORY 10	1	DAHS					
10	2002	ENGLISH	1	DAHS					
11	2004	DRAWING	2	DAHS					
11	2004	BASIC ENGLISH 11	1	DAHS					
11	2004	CHEMISTRY I	7	DAHS					
11	2004	ALGEBRA II	8	DAHS					
11	2004	LATIN III	1	DAHS					
11	2004	FRENCH III	1	DAHS					
11	2004	SPANISH III	3	DAHS					

Display Format – CourseHistoryGradesGridFinal

Home » EZ Query » EZ Students » Course History

### Course History

Select a Display Format From List:

CourseHistoryMainGrid

Grade	School Year	Course Name	Course Section	School
09	2001	LATIN I	1	DAHS
09	2001	FRENCH I	1	DAHS
09	2001	SPANISH I	1	DAHS
09	2001	HEALTH	1	DAHS
09	2001	ALGEBRA II	1	DAHS
09	2001	SOC STUDIES	1	DAHS
09	2001	ENGLISH	1	DAHS
09	2001	BIOL I H	1	DAHS
10	2002	LATIN II	1	DAHS
10	2002	FRENCH II	1	DAHS
10	2002	SPANISH II	1	DAHS
10	2002	HI MATH	1	DAHS
10	2002	10 SCIENCE	1	DAHS
10	2002	AM HISTORY 10	1	DAHS
10	2002	ENGLISH	1	DAHS
11	2004	DRAWING	2	DAHS
11	2004	BASIC ENGLISH 11	1	DAHS
11	2004	CHEMISTRY I	7	DAHS
11	2004	ALGEBRA II	8	DAHS
11	2004	LATIN III	1	DAHS
11	2004	FRENCH III	1	DAHS
11	2004	SPANISH III	3	DAHS

Display Format – CourseHistoryMainGrid

## View Student's Course Requests

**Note:** For detailed information about student course history, see *ProgressBook StudentInformation Scheduling Guide*.

### Navigation: Home – EZ Query – EZ Students – Course Requests

With a student in context, the **Course Requests** screen displays the student's current course requests.

Home » EZ Query » EZ Students » Course Requests

### Course Requests

School Year	Course	Course Name	Priority	Credit Units	Grade	Alternate Course	Assigned Course	Assigned Section	Status
2007-2008	182	FRENCH I	9	1.000000	09		182	2	Approved
2007-2008	233	ANATOMY	8	1.000000	09		233	2	Approved
2007-2008	240	PRACTICAL GEOMETRY	8	1.000000	09		240	1	Approved
2007-2008	255	AMER HISTORY AP	9	1.000000	09		255	2	Approved
2007-2008	423	SOCIOLOGY	1	0.500000	09		423	2	Approved
2007-2008	431	PHYSICS	9	1.000000	09		431	2	Approved
2007-2008	573	ENGLISH	1	1.000000	09		573	2	Approved
2007-2008	655	MATH	9	1.000000	09		655	2	Approved
2007-2008	962	ECONOMICS	8	0.500000	09		962	3	Approved
2007-2008	052	LANGUAGE ARTS	8	1.000000	09		052	2	Approved
2007-2008	2007	ART	8	1.000000	09		2007	1	Approved
2007-2008	232	BIOLOGY I	9	1.000000	09		232	1	Approved

Course Requests

## View Student's Demographic Data

*Note: For detailed information about student demographics, see ProgressBook StudentInformation Student and Registration Guide.*

### Navigation: Home – EZ Query – EZ Students – Demographic

With a student in context, the **Demographic** screen displays the student's picture, basic demographic data and admission data.

## Demographic

Address:	90 ELM STREET LIMA, OH 45801
Phone:	(419) 228-7417
Unlisted:	
Primary Student Contact:	CONTRARY, MARION
Contact Type:	TWO PARENTS
Gender:	FEMALE
Birthdate:	11/17/1987
Counselor:	
EMIS Situation:	Resident attending full time
Grade:	11
School Year:	2004-2005
Homeroom:	
Disability Condition:	03
Program Code:	
Locker:	
Locker Combination:	
District of Residence IRN:	043877
Diploma Date:	
Ethnicity:	W
Schedule Priority:	5



20 Records Displayed [Back To Top](#)

School Year	Admitted	Admission Code	Withdrew	Withdraw Code	Withdrew To	Admitted From	Calendar
1992-1993	Aug 01, 1992	01					1
1993-1994							1
1994-1995							1

### Demographics

## View Student's Discipline Records

**Note:** For detailed information about discipline, see *ProgressBook StudentInformation Discipline Guide*.

### Navigation: StudentInformation – EZ Query – EZ Students – Discipline

With a student in context on the **Discipline** screen, review the student's discipline data.

StudentInformation > EZ Query > EZ Students > Discipline

### Discipline

**Incident Number:** 99821   **Name:** TEST   **Date:** 12/12/2014   **Building:** Ashland High School   **Homeroom:** ACWHCC   **Grade:** 11  
**Referred By:** -   **Place:** On School Property   **Location:** 0115   **Against Property:** No   **Needs Letter:** Yes  
**Description:** Test

Infraction	Policy	Policy/Infraction Comment
Disobedient/Disruptive	RULE 1-DISRUPTION	

Action	Start Date	End Date	Duration	Demerits	Served	Modified Expulsion	Received Services	Action Comment
After School Detention	12/12/2014	12/12/2014	1.00		Yes	No	No	

Parent Involvement	Name	Address	Phone	Email	Date	Parent Involvement Comment
Family Counseling	(Custodial Paren)				12/12/2014	

### Discipline

## View Student's EMIS Reportable Data

**Note:** EMIS reportable data for years prior to FY09 is not available on this screen.

**Note:** For detailed information about student EMIS reportable data, see *ProgressBook StudentInformation Student and Registration Guide*.

### Navigation: StudentInformation – EZ Query – EZ Students – EMIS Demographic

With a student in context, on the **EMIS Demographic** screen, in the **Choose data to view** drop-down list, select the type of EMIS data you want to display for the student. The selections, with the exception of "EMIS - Student," are based on student profile tabs containing EMIS reportable data.

The EMIS information displays based on your selection as follows:

Home » EZ Query » EZ Students » EMIS Demographic

### EMIS Demographic

From this screen users can view a student's EMIS data.

Choose data to view: FS - Standing

**FS Standing List:**

Start Date	Withdraw Date	Withdraw Reason	EMIS Situation	District Relationship	District Of Residence	How Received	How Received IRN	Percent Of Time	Attending Building IRN	Sent To Reason 1	Sent To IRN 1	Sent To % Of Time 1
7/1/2012		**	5	1	043505	*	*****	100	001081	NA	*****	0

**FS Standing Detail:**

Effective Start Date: 7/1/2012

---

EMIS Id: 278894984      State Student Id: FZ6983505

---

District Admission Date: 2/21/2012      Admission Reason: 6 - Transferred from other Ohio public district/community school  
 Admitted From IRN: \*\*\*\*\*      Withdraw Reason: \*\* - Not Applicable, Did not withdraw/was not truant  
 District Withdraw Date:        
 Withdrawn To IRN:     

---

EMIS Situation: 5 - 5 - Resident attending Full Time

---

District Relationship: 1 - Stud. rcvg instr. in whole/part from rep. dist      District of Residence: 043505 - Ashland City SD  
 How Received: \* - Not Applicable      How Received IRN: \*\*\*\*\*  
 Percent of Time: 100      Tuition Type: N - Non-tuition student (default)  
 Attending Building IRN: 001081 - Ashland High School      Assigned Building IRN: \*\*\*\*\*  
 County of Residence: 18 - Cuyahoga

---

**Sent To 1**      **Sent To 2**  
 Reason: NA - Not sent to another district      Reason: NA - Not sent to another district  
 IRN: \*\*\*\*\*      IRN: \*\*\*\*\*  
 Percent of Time: 0      Percent of Time: 0

**EMIS Reportable Data – From FS - Standing Tab of Profile**

Home » EZ Query » EZ Students » EMIS Demographic Advanced Search | Feedback | Mgmt | Help | Version | Print

### EMIS Demographic

From this screen users can view a student's EMIS data.

Choose data to view: FS - Attendance

**FS Attendance List:**

Start Date	Withdraw Date	Withdraw Reason	Oct CW Attendance Days	Oct CW Excused Absence Days	Oct CW Unexcused Absence Days	School Year Attendance Days	School Year Excused Absence Days	School Year Unexcused Absence Days	Other SY Attendance Days	Other SY Excused Absence Days	Other SY Unexcused Absence Days
8/1/2009		**	5.00	0	0	172.00	1.00	0	0	0	0

**FS Attendance Detail:**

Effective Start Date: 8/1/2009      District Withdraw Date:        
 District Withdraw Reason: \*\* - Not Applicable, Did not withdraw/was not truant

---

**October Count Week**  
 Attendance Days: 5.00  
 Excused Absence Days: 0  
 Unexcused Absence Days: 0  
 Non-Attending Reason: \* - Not Applicable

---

**School Year**      **Other Entity School Year**  
 Attendance Days: 172.00      Attendance Days: 0  
 Excused Absence Days: 1.00      Excused Absence Days: 0  
 Unexcused Absence Days: 0      Unexcused Absence Days: 0

**EMIS Reportable Data – From FS - Attendance Tab of Profile**

StudentInformation > EZ Query > EZ Students > EMIS Demographic

### EMIS Demographic

From this screen users can view a student's EMIS data.

Choose data to view:

**FD Attributes List:**

Start Date	Withdraw Date	Withdraw Reason	St. Eq. Gr. Level	Disability	504 Plan	Disadvantagemnt	Free/Reduced Lunch	LEP	Migrant Status	Immigrant Status	Preschool Poverty
7/1/2014		**	12	**	N	*	None	N	N	N	N

**FD Attributes Detail:**

<b>Effective Start Date:</b>	7/1/2014
<b>District Withdraw Date:</b>	<b>Withdraw Reason:</b> ** - Not Applicable, Did not withdraw/was not truant
	<b>State Equivalent Grade Level:</b> 12 - Twelfth Grade
<b>Disability Condition:</b>	** - Not Applicable
<b>Disadvantagemnt:</b>	* - Not Applicable
<b>Limited English Proficiency:</b>	N - No, the student is not of Limited English Proficiency
<b>Homeless Status:</b>	* - Not Applicable
<b>Migrant Status:</b>	N - No
<b>Foreign Exchange Graduation Plan</b>	* - Not Applicable - not a foreign exchange student
<b>Reporting Calendar:</b>	(DFLT) Default
<b>Attendance Pattern:</b>	** - Not Applicable
	<b>Section 504 Plan:</b> N - No
	<b>Free / Reduced Lunch Status:</b> None
	<b>LEP Reclass Date:</b>
	<b>Homeless Unaccompanied Youth:</b> * - Not Applicable
	<b>Immigrant Status:</b> N - No
	<b>Preschool Poverty Level:</b> N - Not a Preschool student

EMIS Reportable Data – From FD - Attributes Tab of Profile

StudentInformation > EZ Query > EZ Students > EMIS Demographic

### EMIS Demographic

From this screen users can view a student's EMIS data.

Choose data to view:

**FN Attributes Detail:**

<b>EMIS Grade Next Year:</b>	10 - Tenth Grade
<b>Retained Status:</b>	* - Student was not retained at the end of the previous school year
<b>Oct Childcount IEP Outcome:</b>	**** - No Change from latest IEP reported to ODE
<b>CTE Program Area:</b>	<b>Fiscal Year Began 9th:</b>
<b>CTE Program of Concentration:</b> ** - Student is not a concentrator in any CTE Program	<b>Tech Prep Completer:</b> N
<b>Majority Of Attendance IRN:</b> *****	<b>Accountability IRN:</b> *****
<b>Report to EMIS:</b>	Yes

EMIS Reportable Data – From FN - Attributes Tab of Profile

### EMIS Demographic

From this screen users can view a student's EMIS data.

Choose data to view: FN - Graduate

**FN Attributes Detail:**

<b>CORE Economics and Financial Literacy Requirement Met:</b>	N - District has not determined this student met requirement
<b>CORE Fine Arts Requirement Met:</b>	N - District has not determined this student met requirement
<b>CORE Graduation Requirement Exemption:</b>	Y
<b>Exempted from Physical Education Graduation Requirement:</b>	N - District not adopted policy or student has not met all of policy re
<b>Graduation Date:</b>	6/1/2012
<b>Diploma Type:</b>	* - Not Applicable
<b>OGT Graduation Alternative:</b>	1 - Used for one test not yet passed
<b>Military Compact Graduation Alternative:</b>	Y

### EMIS Reportable Data – From FN - Graduate Tab of Profile

Home » EZ Query » EZ Students » EMIS Demographic

### EMIS Demographic

From this screen users can view a student's EMIS data.

Choose data to view: EMIS - Student

**EMIS - Student Detail:**

<b>Legal First Name:</b>	
<b>Legal Middle Name:</b>	LYNN
<b>Legal Last Name:</b>	
<b>Mother's Maiden Name:</b>	
<hr/>	
<b>Birthplace City:</b>	LIMA
<b>Birthdate:</b>	9/9/1994
<b>Age:</b>	15
<b>Gender:</b>	F - Female
<hr/>	
<b>Ethnicity:</b>	W - White, Non-Hispanic
<b>Native Language:</b>	ENG - English (Default)
<b>Home Language:</b>	*** - Neither LEP nor Immigrant in current fiscal year-specific home lang

### EMIS Reportable Data – EMIS - Student (Not From Profile)

## View Student's Enrollment History

**Note:** EMIS enrollment data for years prior to FY09 is not available on this screen.

**Note:** For detailed information about student enrollment, see *ProgressBook Student Information Student and Registration Guide*.

### Navigation: Home – EZ Query – EZ Students – Enrollment

With a student in context, the **Enrollment** screen displays the student's enrollment history for all school years for which the student was enrolled in a school or district using StudentInformation.

DASL Enrollment						
Year	Year Type	Date	Event	School	Calendar	Admission/Withdraw Code
2004 - 2005	Regular	Oct 04, 2004	District Admission	Ada Ex VIII SD		
2004 - 2005	Regular	Oct 04, 2004	Building Admission	ADA HIGH SCHOOL	1	FROM ANOTHER PUBLIC SCHOOL DISTRICT IN OHIO
2005 - 2006	Regular		Intrabuilding Progression	ADA HIGH SCHOOL	1	
2006 - 2007	Regular		Intrabuilding Progression	ADA HIGH SCHOOL	1	
2007 - 2008	Regular		Intrabuilding Progression	ADA HIGH SCHOOL	1	
2008 - 2009	Regular		Intrabuilding Progression	ADA HIGH SCHOOL	1	
2009 - 2010	Regular		Intrabuilding Progression	ADA HIGH SCHOOL	1	

EMIS Enrollment																
Start Date	Withdraw Date	Withdraw Reason	EMIS Situation	District Relationship	District Of Residence	How Received	How Received IRN	Tuition Type	Percent Of Time	Attending Building IRN	Sent To Reason 1	Sent To IRN 1	Sent To % Of Time 1	Sent To Reason 2	Sent To IRN 2	Sent To % Of Time 2
7/1/2009		**	5	1	045187	*	*****	N	100	000067	NA	*****	0	NA	*****	0
7/1/2008		**	5	1	045187	*	*****	N	100	000067	NA	*****	0	NA	*****	0

### Enrollment History

## View Student's School Medical Records

**Note:** For detailed information about student medical information, see *ProgressBook StudentInformation Student Medical Guide*.

### Navigation: Home – EZ Query – EZ Students – Medical

With a student in context, the **Medical** screen displays any information about the student's medical alerts, medication to be taken at school, health screening done by the school and immunization records.

Home » EZ Query » EZ Students » Medical

### Medical

**Medical Alerts**

Date	Alert Description	Priority	Starting Date	Ending Date	Author	Life Threatening
Feb 09, 2005	Hannah has asthma and uses an inhaler	8	Feb 09, 2005		noacsc.christine	
Feb 09, 2005	Diabetes	10	Feb 09, 2005		noacsc.christine	

**Student Medication**

Date Received	Requires Refrigeration	Medication	Dosage	Doctor	Comments	Expiration Date
Mar 15, 2004		Insulin	25 cc	Dr. Dolittle	2 injections a day	Feb 01, 2005

**Vision Screening**

Exam Date	Glasses / Contacts	Right / Left Eyesight	Plus Lenses	Nearsighted / Farsighted	Color Blindness	Stereopsis	Referral Date	Comments
Jun 03, 2004	N	R - 20 L - 20	N	Near - P Far - P	P	P		

**Scoliosis Screening**

Exam Date	Result Code	Comments
Sep 12, 2004	P	

**Dental Screening**

Exam Date	Mouthwash	Referral Date	Special Services Rendered	Findings
Aug 01, 2004	<input checked="" type="checkbox"/>			

**Growth Screening**

Height	Weight	Exam Date	Comments
62	130	Feb 09, 2005	

**Hearing Screening**

Exam Date	Result Code	Comments
Feb 09, 2004	P	

**Immunizations**

Date	Name	Comments	Waiver
Feb 01, 2005	HIB		<input type="checkbox"/>
Dec 09, 2004	OPV		<input type="checkbox"/>
Dec 09, 2004	DPT		<input type="checkbox"/>
Dec 09, 2004	TB		<input type="checkbox"/>
Dec 09, 2004	CPOX		<input type="checkbox"/>
Dec 09, 2004	MMR		<input type="checkbox"/>
Dec 09, 2004	HIB		<input type="checkbox"/>
Dec 09, 2004	HEP		<input type="checkbox"/>

### Medical Records

## View Student's Memberships and Special Education Services

**Note:** For detailed information about student memberships, see *ProgressBook StudentInformation Student and Registration Guide*.

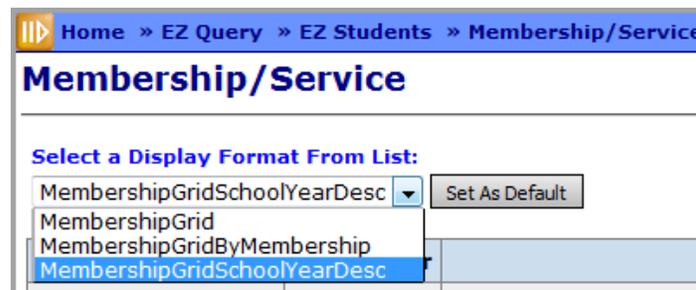
### Navigation: Home – EZ Query – EZ Students – Membership/Service

1. With a student in context, on the **Membership/Service** screen, in the **Select a Display Format From List** drop-down list, select the format in which you want to display information about the student's memberships and special education services:
  - **MembershipGrid** – Sorts by membership or special education service code (ascending), then by school year (for multiple memberships with the same code)

- **MembershipGridByMembership** – Sorts by membership or special education service code (descending), then by school year (for multiple memberships with the same code)
- **MembershipGridSchoolYearDesc** – Sorts by school year (descending), then by membership or special education service code (descending).

**Note:** If FY12 or earlier is in context, this screen is named **Membership**.

2. Optional: If you want this screen to default to your display format selection each time, click **Set As Default**.



**Memberships and Special Education Services**

The membership/special education information displays based on the display format you selected as follows:

Home >> EZ Query >> EZ Students >> Membership/Service

### Membership/Service

Select a Display Format From List:  
 MembershipGrid

Membership/Service	School Year	Description
598ff3c9		Admission Reason Update
83a3246d		ALL FREE/REDUCED CLEAR
d1c420b4		FREE
f238c07f		New DLTN pt
231005	2006	TI MATHEMATICS
231001	2010	Title I Reading
231005	2010	Title I Mathematics
231001	2011	Title I Reading
231005	2011	Title I Mathematics
420015	2012	Other - Athletics and Related Programs (not Intrschlstc Athl

**Memberships and Special Education Services – MembershipGrid**

Home >> EZ Query >> EZ Students >> Membership/Service

### Membership/Service

Select a Display Format From List:  
 MembershipGridByMembership

Membership/Service	School Year	Description
f238c07f		New DLTN pt
d1c420b4		FREE
83a3246d		ALL FREE/REDUCED CLEAR
598ff3c9		Admission Reason Update
420015	2012	Other - Athletics and Related Programs (not Intrschlstc Athl
231005	2010	Title I Mathematics
231005	2011	Title I Mathematics
231005	2006	TI MATHEMATICS
231001	2010	Title I Reading
231001	2011	Title I Reading

**Memberships and Special Education Services – MembershipGridByMembership**

Home >> EZ Query >> EZ Students >> Membership/Service

### Membership/Service

Select a Display Format From List:  
MembershipGridSchoolYearDesc ▼ Set As Default

Membership/Service	School Year	Description
420015	2012	Other - Athletics and Related Programs (not Intrschlstc Athl
231001	2011	Title I Reading
231005	2011	Title I Mathematics
231001	2010	Title I Reading
231005	2010	Title I Mathematics
231005	2006	TI MATHEMATICS
598ff3c9		Admission Reason Update
83a3246d		ALL FREE/REDUCED CLEAR
d1c420b4		FREE
f238c07f		New DLTN pt

**Memberships and Special Education Services –  
MembershipGridSchoolYearDesc**

## View Student's Schedule

**Note:** For detailed information about student schedules, see *ProgressBook StudentInformation Student and Registration Guide* and *ProgressBook StudentInformation Scheduling Guide*.

### Navigation: Home – EZ Query – EZ Students – Schedule

1. With a student in context, on the **Schedule** screen, select the **Type(s)** of course section assignments you want to view for this student and the **Fields to Display** in the grid.
2. Click **Display**.

The student's current course schedule displays based on the options you selected.

Home » EZ Query » EZ Students » Schedule

### Schedule

From this screen, you can view a student's schedule.

[Hide Filter & Display Options]

Type:  Assigned  Dropped  Removed

Fields to Display:

Group Code  Group Name  Group Section  Course Code  Course Name  Course Section  Meeting Time Desc  Location Code  Location Name

Term Code  Term Name  Assignment Status  Start Date  Stop Date  Period Code  Period Name  Teacher

Display

Course	Course Name	Crs Sec	Mtg Time	Teacher	Term Name	Start	End
0148	COMMUNICATIONS	11	1 (224)	MRS. R. Teacher1674	1st Semester	08/26/2009	
0900	PERSONAL FINANCE	12	1 (215)	MR. N. Teacher1613	2nd Semester	01/25/2010	
STWK	STUDENT WORKER	2	2 (316)	MRS. E. Teacher1711	A-Y	08/27/2009	
0232	CERAMICS SPECIAL PROJECTS	3	3 (427)	MR. G. Teacher1590	A-Y	08/26/2009	
0140	ENGLISH 12	4	4 (224)	MRS. R. Teacher1674	A-Y	08/26/2009	
0509	ALGEBRA III	5	5 (227)	MRS. J. Teacher1654	A-Y	08/27/2009	
0736	PSYCHOLOGY	61	6 (226)	MR. R Teacher1626	1st Semester	08/26/2009	
0737	SOCIOLOGY	62	6 (226)	MR. R Teacher1626	2nd Semester	01/25/2010	
0614	GEOLOGY	71	7 (220)	MRS. C. Teacher1587	1st Semester	08/26/2009	
0615	ASTRONOMY	72	7 (220)	MRS. C. Teacher1587	2nd Semester	01/25/2010	
0233	PHOTOGRAPHY	81	8 (121)	MRS. J. Teacher1593	1st Semester	08/26/2009	
0250	CRAFTS SPECIAL PROJECTS	82	8 (121)	MRS. J. Teacher1593	2nd Semester	01/25/2010	

### Schedule

## Compare Student's Home School and JVS Data

**Note:** Before you can view and compare data from the JVS, your school district must set up the JVS as a trusted district. For information on this setup, see ["Add District Trusts."](#)

**Note:** Data for years prior to FY09 is not available on this screen.

### Navigation: StudentInformation – EZ Query – EZ Students – Shared Student Data (JVS/Home)

1. With a student in context, on the **Shared Student Data (JVS/Home)** screen, in the **Choose trusted district and school** drop-down list, select the student's JVS district for which you want to view data about the student.

2. In the **Choose data to review** drop-down list, select one of the following types of data that you want to compare for the student:
  - Addresses and Primary Contact
  - Daily Absences
  - General/Additional
  - EMIS - FS
  - EMIS - FD
  - EMIS - FN
  - EMIS - Graduate
  - Schedule
  - Assessments
  - Course History
  - Special Education Events

First	Middle	Last	State Student Id
		Student94666	AK0474820

**Shared Student Data (JVS/Home)**

The data from both your school and the student’s JVS school displays for the school year in context, based on the type of data you selected to compare.

If you select “Addresses and Primary Contact,” comparative residence address data displays. You can view mailing address information or primary contact information by selecting the appropriate option in the **Address or Primary Contact** drop-down list and then clicking **Filter**.

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: Anytown Vill SD - ANYTOWN HIGH SCHOOL

First	Middle	Last	State Student Id
		Student94666	AK0474820

Choose data to review: Addresses and Primary Contact

Address or Primary Contact: Residence Address

Data Item	DASL JVSD	Anytown Vill SD - ANYTOWN HIGH SCHOOL
<b>Address</b>	645 S Main St	645 S Main St
<b>Address 2</b>		
<b>City</b>	Lima	Lima
<b>State</b>	OH	OH
<b>Zip</b>	45804 - 1241	45804 - 1241
<b>Is Unlisted</b>	No	No
<b>Home Phone</b>	555-555-5555	555-555-5555
<b>Email Address</b>		

Shared Student Data (JVS/Home) – Addresses and Primary Contact

## Individual Student Data

If you select “Daily Absences,” comparative absence data displays for the period from the calendar master start date to today’s date. You can select a different date range by entering or selecting different dates in the **Absences From** and **Absences To** fields and then clicking **Filter**.

**Note:** This screen does not display period absences.

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: Anytown Vill SD - ANYTOWN HIGH SCHOOL

First	Middle	Last	State Student Id
		Student94666	AK0474820

Choose data to review: Daily Absences

Absences From: 7/1/2009 Absences To: 3/16/2010 Filter

Date	DASL CAREER CENTER					Anytown Vill SD - ANYTOWN HIGH SCHOOL				
	Level	Type	Reason	In	Out	Level	Type	Reason	In	Out
Feb 04, 2010						Full Absence	EXCUSED	ILL		9:30 AM
Jan 27, 2010						Non-Absence	EARLY DIS	APPT		3:00 PM
Jan 26, 2010						Full Absence	EXCUSED	APPT		
Jan 21, 2010						PM Absence	Unexcused Absence-PM only	ILL		11:40 AM
Jan 11, 2010						Full Absence	UNEXCUSED	ILL		
Jan 05, 2010						Full Absence	UNEXCUSED	UNEXCUSED		10:38 AM
Dec 15, 2009						PM Absence	Excused Absence-PM only	APPT		2:00 PM
Dec 03, 2009						Full Absence	EXCUSED	ILL		10:47 AM
Nov 30, 2009						PM Absence	Excused Absence-PM only	ILL		12:55 PM
Nov 24, 2009						PM Absence	Excused Absence-PM only	APPT		1:30 PM
Nov 19, 2009						PM Absence	Excused Absence-PM only	ILL		12:22 PM
Nov 18, 2009						Full Absence	EXCUSED	ILL		
Nov 09, 2009						PM Absence	Excused Absence-PM only	ILL		12:30 PM
Nov 04, 2009						PM Absence	Excused Absence-PM only	ILL		12:30 PM
Oct 08, 2009						Full Absence	EXCUSED	APPT		
Sep 10, 2009						PM Absence	Excused Absence-PM only	APPT		2:13 PM

Shared Student Data (JVS/Home) – Daily Absences

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: Anytown Vill SD - ANYTOWN HIGH SCHOOL

First	Middle	Last	State Student Id
XXXXXXXXXX	XXXXXXXXXX	Student94666	AK0474820

Choose data to review: General/Additional

Data Item	DASL JVSD	Anytown Vill SD - ANYTOWN HIGH SCHOOL
Student Status:	OTH RESIDE	NON-RES
Overall Student Status:	Inactive	Active
Ethnicity:	WHITE	WHITE
Gender:	F	F
Citizenship:		
Country of Origin:		
Native Language:		English (Default)
Home Language:	Neither LEP nor Immigrant in current fiscal year-specific home lang	Neither LEP nor Immigrant in current fiscal year-specific home lang
Birth Date	03/19/1992	03/19/1992
Birth Date Verification Code:		B
Birthplace City:	KENTON	KENTON
Building Grade Level:	12	12
Next Grade Level:	GR	GR
Include In Honor Roll:	Yes	Yes
Include In Ranking:	Yes	Yes
Graduation Year:		
Counselor		
Program:	GRADS	Not applicable
Home School IRN:	000067	
Home School Name:	Ada High School	
Community Service Hours:		
Report To EMIS:	True	True
Legal First Name:	XXXXXXXXXX	XXXXXXXXXX
Legal Middle Name:	XXXXXXXXXX	XXXXXXXXXX
Legal Last Name:	Student14949	XXXXXXXXXX
Legal Last Name Suffix:		XXXXXXXXXX

Shared Student Data (JVS/Home) – General/Additional

Individual Student Data

If you select “EMIS - FS,” comparative data about the student’s FS record displays for a particular effective date during the school year in context. To view this comparative data for a different date on which the student’s FS record changed, in the **Effective Date** drop-down list, select a different date.

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: Ashland-West Holmes JVS District - ASHLAND-WEST HOLMES JVS

First	Middle	Last	State Student Id
COREY		JOHNS	GB4626299

Choose data to review: EMIS - FS

Effective Date: 07/02/12 - Ashland-West Holmes JVS District

Data Item	ASHLAND HIGH SCHOOL	Ashland-West Holmes JVS District - ASHLAND-WEST HOLMES JVS
Effective Start Date	07/01/2012	07/02/2012
District Admission Date	08/27/2001	07/02/2012
Admitted from IRN	*****	*****
District Withdraw Date		
Withdrawn to IRN	*****	*****
Admission Reason	7 - Not newly enrolled in this school district	1 - Student transferred from home school in Ohio
District Withdraw Reason	** - Not Applicable, Did not withdraw/was not truant	** - Not Applicable, Did not withdraw/was not truant
EMIS Situation	5 - Resident attending Full Time	302 - Regular student attending JVS F/T or P/T
District Relationship	1 - Stud. rcvg instr. in whole/part from rep. dist	1 - Stud. rcvg instr. in whole/part from rep. dist
How Received	* - Not Applicable	* - Not Applicable
Percent of Time	100	100
Attending Building IRN	001081 - Ashland High School	062059 - Ashland-W Holmes Career Center
District of Residence	043505 - Ashland City SD	047696 - West Holmes Local SD
County Of Residence	18 - Cuyahoga	18 - Cuyahoga
How Received IRN	*****	*****
Tuition Type	N - Non-tuition student (default)	N - Non-tuition student (default)
Assigned Building IRN	*****	*****
Sent To 1 Reason	NA - Not sent to another district	NA - Not sent to another district
Sent To 1 IRN	*****	*****
Sent To 1 Percent of Time	0	0
Sent To 2 Reason	NA - Not sent to another district (default)	NA - Not sent to another district (default)
Sent To 2 IRN	*****	*****
Sent To 2 Percent of Time	0	0
School Year Attendance Days	0.00	0.00
School Year Excused Absence Days	0.00	0.00
School Year UnExcused Absence Days	0.00	0.00
Other School Year Attendance Days	0.00	0.00
Other School Year Excused Absence Days	0.00	0.00
Other School Year UnExcused Absence Days	0.00	0.00
October CW Attendance Days	0.00	0.00
October CW Excused Absence Days	0.00	0.00
October CW UnExcused Absence Days	0.00	0.00
October Non-Attending Reason	* - Not Applicable	* - Not Applicable

Shared Student Data (JVS/Home) – EMIS - FS

If you select “EMIS - FD,” comparative data about the student’s FD record displays for a particular effective date during the school year in context. To view this comparative data for a different date on which the student’s FD record changed, in the **Effective Date** drop-down list, select a different date.

StudentInformation > EZ Query > EZ Students > Shared Student Data (JVS/Home)

Choose trusted district and school: Dalton Local Schools - DALTON HIGH SCHOOL ▼

First	Middle	Last	State Student Id
WALTER		BAILEY	JG2343985

Choose data to review: EMIS - FD ▼

Effective Date: 09/04/14 - Ashland-West Holmes JVS District  
07/01/14 - Dalton Local Schools

Data Item	ASHLAND-WEST HOLMES JVS	Dalton Local Schools - DALTON HIGH SCHOOL
Effective Start Date	09/04/2014	07/01/2014
District Withdraw Date		
District Withdraw Reason	*** - Not Applicable, Did not withdraw/was not truant	*** - Not Applicable, Did not withdraw/was not truant
Disability Condition	** - Not Applicable	** - Not Applicable
Disadvantagemnt	* - Not Applicable	* - Not Applicable
Limited English Proficiency	N - No, the student is not of Limited English Proficiency	N - No, the student is not of Limited English Proficiency
LEP Reclass Date		
Homeless Status	* - Not Applicable	* - Not Applicable
Section 504 Plan	N - No	N - No
Homeless Unaccompanied Youth	* - Not Applicable	* - Not Applicable
Migrant Status	N - No	N - No
Immigrant Status	N - No	N - No
Foreign Exchange Graduation Plan	* - Not Applicable - not a foreign exchange student	* - Not Applicable - not a foreign exchange student
Preschool Poverty Level	N - Not a Preschool student	N - Not a Preschool student
Reporting Calendar	DFLT - Default	DFLT - Default
Attendance Pattern	** - Not Applicable	** - Not Applicable

Shared Student Data (JVS/Home) – EMIS - FD

StudentInformation > EZ Query > EZ Students > Shared Student Data (JVS/Home)

Choose trusted district and school: Ashland-West Holmes JVS District - ASHLAND-WEST HOLMES JVS ▾

First	Middle	Last	State Student Id

Choose data to review: EMIS - FN ▾

Data Item	ASHLAND HIGH SCHOOL	Ashland-West Holmes JVS District - ASHLAND-WEST HOLMES JVS
Grade Level Next Year	11 - Eleventh Grade	11 - Eleventh Grade
Oct Childcount IEP Outcome	**** - No Change from latest IEP reported to ODE	**** - No Change from latest IEP reported to ODE
Fiscal Year Began 9th	2014	2014
Majority Of Attendance IRN	*****	*****

Shared Student Data (JVS/Home) – EMIS - FN

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: XXXXXXXX City Schools - XXXXXXXX HIGH SCHOOL ▾

First	Middle	Last	State Student Id
First Name		First Name	ZZ000000

Choose data to review: EMIS - Graduate ▾

Data Item	XXXXXXXXXX JVS District	XXXXXXXXXX HIGH SCHOOL
CORE Economics and Financial Literacy Requirement Met	N - District has not determined this student met requirement	N - District has not determined this student met requirement
CORE Fine Arts Requirement Met	N - District has not determined this student met requirement	Y - District determined this student met requirement
CORE Graduation Requirement Exemption	N	N
Exempted From Physical Education Graduation Requirement	N - District not adopted policy or student has not met all of policy re	N - District not adopted policy or student has not met all of policy re
Diploma Date		
Diploma Type	* - Not Applicable	* - Not Applicable
OGT Graduation Alternative	0 - OGT Graduation Alternative	0 - OGT Graduation Alternative
Military Compact Graduation Alternative	N	N

Shared Student Data (JVS/Home) – EMIS - Graduate

If you select “Schedule,” comparative schedule data for the student displays. If you want to filter the display, click **Show Filter & Display Options**. Then select the **Type(s)** of course section assignments you want to view for this student and the **Fields to Display** in the grid, and click **Display**.

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: Anytown Vill SD - ANYTOWN HIGH SCHOOL

First	Middle	Last	State Student Id
		Student94666	AK0474820

Choose data to review: Schedule

[\[Show Filter & Display Options\]](#)

**DASL JVSD**

Course	Course Name	Section	Meeting Time	Teacher	Term Name	Start	Stop
8203	GRADS - ADA	1	05 (AVHS)	TARA Teacher1459	All Year Course	08/31/2009	

**Anytown Vill SD - ANYTOWN HIGH SCHOOL**

Course	Course Name	Section	Meeting Time	Teacher	Term Name	Start	Stop
SH	STUDY HALL	11	1 (CAF)	MS. S. Teacher1615	1st Semester	08/26/2009	
SH	STUDY HALL	12	1 (CAF)	MS. S. Teacher1615	2nd Semester	01/25/2010	
0912	ECONOMICS	21	2 (215)	MR. N. Teacher1600	1st Semester	08/26/2009	
0911	BUSINESS LAW	22	2 (215)	MR. N. Teacher1600	2nd Semester	01/25/2010	
0917	COMPUTER OFFICE PROGRAM 3	31	3 (215)	MR. N. Teacher1600	1st Semester	08/26/2009	
0918	COMPUTER OFFICE PROGRAM 4	32	3 (215)	MR. N. Teacher1600	2nd Semester	01/25/2010	
0140	ENGLISH 12	4	4 (224)	MRS. R. Teacher1660	A-Y	08/26/2009	
SH	STUDY HALL	55	5 (229)	MRS. L. Teacher1566	1st Semester	08/26/2009	
SH	STUDY HALL	56	5 (229)	MRS. L. Teacher1566	2nd Semester	08/26/2009	
0613	CP BIOLOGY	6	6 (220)	MRS. C. Teacher1574	A-Y	08/26/2009	
0900	PERSONAL FINANCE	71	7 (215)	MR. N. Teacher1600	1st Semester	08/26/2009	
0148	COMMUNICATIONS	72	7 (224)	MRS. R. Teacher1660	2nd Semester	01/25/2010	
0110	YEARBOOK	8	8 (224)	MRS. R. Teacher1660	A-Y	08/27/2009	

Shared Student Data (JVS/Home) – Schedule

[\[Hide Filter & Display Options\]](#)

**Type:**  Assigned  Dropped  Removed

**Fields to Display:**

Course Code  Course Name  Course Section  Meeting Time Desc  Location Code  Location Name  Teacher

Term Code  Term Name  Assignment Status  Start Date  Stop Date  Period Code  Period Name

Show Filter & Display Options

## Individual Student Data

If you select “Assessments,” comparative assessment score data for the student displays. If you want to filter the display, deselect the check box beside each assessment score you do not want to view, and click **Display**.

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: Axxxxx-Bxxxxx JVS District - Axxxxx-Bxxxxx JVS

First	Middle	Last	State Student Id
FirstName	MiddleName	LastName	72999999

Choose data to review: Assessments

[Hide Filter & Display Options]

ALL Assessments

OGT

OAA

**Dxxxxx High School**

**OGT**

Part	Test Date	Test Type	Grade at Test Time	Accomm	Raw Score	Scaled Score	Score Not Reported	Grad Req	Standard	Passing
Writing	10/2010	STR	11	NO	290	413	*	Y	Proficient	<input checked="" type="checkbox"/>
Math	03/2010	STR	10	NO	285	421	*	Y	Proficient	<input checked="" type="checkbox"/>
Reading	03/2010	STR	10	NO	305	424	*	Y	Proficient	<input checked="" type="checkbox"/>
Science	03/2010	STR	10	NO	345	434	*	Y	Accelerated	<input checked="" type="checkbox"/>
Social Studies / Citizenship	03/2010	STR	10	NO	330	431	*	Y	Accelerated	<input checked="" type="checkbox"/>
Writing	03/2010	STR	10	NO	255	397	*	Y	Basic	<input type="checkbox"/>

**OAA**

Part	Test Date	Test Type	Grade at Test Time	Accomm	Raw Score	Scaled Score	Score Not Reported	Grad Req	Standard	Passing
Math	05/2008	STR	08	NO	140	395	*		Basic	<input type="checkbox"/>
Reading	05/2008	STR	08	NO	240	411	*		Proficient	<input checked="" type="checkbox"/>
Science	05/2008	STR	08	NO	240	403	*		Proficient	<input checked="" type="checkbox"/>
Social Studies / Citizenship	05/2008	STR	08	NO	220	394	*		Basic	<input type="checkbox"/>
Math	05/2007	STR	07	NO	150	397	*		Basic	<input type="checkbox"/>
Reading	05/2007	STR	07	NO	170	390	*		Basic	<input type="checkbox"/>
Writing	05/2007	STR	07	NO	180	390	*		Basic	<input type="checkbox"/>

**Axxxxx-Bxxxxx JVS District - Axxxxx-Bxxxxx JVS**

**OGT**

Part	Test Date	Test Type	Grade at Test Time	Accomm	Raw Score	Scaled Score	Score Not Reported	Grad Req	Standard	Passing
There are no records to display										

**OAA**

Part	Test Date	Test Type	Grade at Test Time	Accomm	Raw Score	Scaled Score	Score Not Reported	Grad Req	Standard	Passing
There are no records to display										

### Shared Student Data (JVS/Home) – Assessments

If you select “Course History,” comparative course history data for the student displays for all school years and credit types. If you want to filter the display, select the school year(s) and credit type(s) to include by moving them from the associated multiselect lists on the left to the ones on the right, select the check box beside each type of manual course record you want to view (“Is High School Credit,” “Include in GPA” and/or “Include in Total Credits”), and click **Display**.

Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)

Choose trusted district and school: Ashland-West Holmes JVS District - ASHLAND-WEST HOLMES JVS

First	Middle	Last	State Student Id
TED		WARREN	GB2895248

Choose data to review: Course History

[Hide Filter & Display Options]

**Include School Years:**

**School Years Available:**

- 2012-2013
- 2011-2012
- 2010-2011
- 2009-2010
- 2009 Summer

**School Years Selected:**

**Credit Type(Home District):**

**Credit Type Available:**

- Not Used
- Progress 1
- Progress 2
- Progress 3
- Progress 4

**Credit Type Selected:**

**Credit Type(Shared District):**

**Credit Type Available:**

- Not Used
- Progress 1
- Progress 2
- Progress 3
- Progress 4

**Credit Type Selected:**

Show 'Is High School Credit' Courses Only:
  Show 'Include in GPA' Courses Only:
  Show 'Include in Total Credits' Courses Only:

**Display**

**ASHLAND HIGH SCHOOL**

School	School Year	Grade	Term Code	Course Code	Course Name	Mark Type	Mark	Attempted Credits	Earned Credits	Course CORE Subject Area	Course Is High School Credit	Course Include in GPA	Course Include in Total Credits
ASHLAND HIGH SCHOOL	2010-2011	10	FIN	875A	TEAM SPORTS	Final	A+	0.25000	0.25000	PHE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ASHLAND HIGH SCHOOL	2010-2011	10	AV2	875A	TEAM SPORTS	Avg	A+	0.25000		PHE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Shared Student Data (JVS/Home) – Course History

If you select “Special Education Events,” comparative special education event data displays for the student. You can select a different date range by entering or selecting different dates in the **From Date** and **To Date** fields. You can also show previous years or inactive events by deselecting the **Show Current Year Only** or **Active Events** check boxes, respectively. Then click **Display**.

The screenshot shows the 'Shared Student Data (JVS/Home)' interface. At the top, it displays the breadcrumb 'Home » EZ Query » EZ Students » Shared Student Data (JVS/Home)'. Below this, there is a dropdown menu for 'Choose trusted district and school' set to 'Mapleton Local Schools - MAPLETON HIGH SCHOOL'. A table lists student information: First (SHARON), Middle (PETERS), Last (PETERS), and State Student Id (GD4868311). Below that, 'Choose data to review' is set to 'Special Education Events'. There are filter options: 'From Date' (7/1/2011), 'To Date' (6/30/2012), 'Show Current Year Only' (checked), and 'Active Events' (checked). A 'Display' button is present. Two tables of data are shown below the filters. The first table is for 'ASHLAND HIGH SCHOOL' and the second is for 'Mapleton Local Schools - MAPLETON HIGH SCHOOL'. Both tables have columns for School, Event Date, Date Type, Start Date, End Date, IEP Test Type, Secondary Planning, and Outcome.

School	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome
ASHS	Sep 21, 2011	RIEP - IEP Completion Date-Reevaluation	Sep 21, 2011	Sep 20, 2012	ALT	TFYG	IE15 - Special ed outside regular class more than 60% of day

School	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome
MAHS	Sep 21, 2011	RIEP - IEP Completion Date-Reevaluation	Sep 21, 2011	Sep 20, 2012	ALT	TFYG	IE15 - Special ed outside regular class more than 60% of day

Shared Student Data (JVS/Home) – Special Education Events

## Add District Trusts

### Navigation: Home – Management – District Administration – District Trusts

District trusts are relationships you set up at the district level to designate another district (such as a JVS) as a trusted district. This type of relationship provides a read-only “window” for districts to share data about students they have in common.

**Note:** The only screen where districts can view information about students in common is the **Shared Student Data (JVS/Home)** screen. (See [“Compare Student’s Home School and JVS Data.”](#))

1. On the **District Trusts** screen, click **Add District Trust**.

Home >> Management >> District Administration >> District Trusts

### District Trusts

From this screen, you can display, add, change and delete District Trusts.

**Add District Trust**

		District Code	District Name ^	District IRN	Trust Type
X	/	ASHC	Ashland City Schools	043505	EZ Query
X	/	CHIP	Chippewa Local Schools	050534	EZ Query
X	/	EHLM	East Holmes Local Schools	047688	EZ Query
X	/	GREN	Green Local Schools	050559	EZ Query
X	/	LOPR	Loudonville-Perrysville Ex. Village Schools	045468	EZ Query
X	/	NRWS	Northwestern Local Schools	050575	EZ Query
X	/	NRCN	Norwayne Local Schools	050567	EZ Query
X	/	ORVL	Orrville City Schools	044610	EZ Query
X	/	RITT	Rittman Ex. Village Schools	045591	EZ Query
X	/	SOEA	Southeast Local Schools	050583	EZ Query
X	/	TRCE	Tri-County ESC District	050526	EZ Query
X	/	WSCC	Wayne County Schools Career Center District	051714	EZ Query
X	/	WHOL	West Holmes Local Schools	047696	EZ Query
X	/	WSTR	Wooster City Schools	045120	EZ Query

### Add District Trusts

The add-edit version of the screen opens.

2. In the **Trusted District** drop-down list, select the district that you want to allow to view data for your students in common.
3. In the **Trust Type** field, select the **EZ Query** check box.
4. Click **Save**. Or to continue adding district trusts, click **Save and New**.

Home >> Management >> District Administration >> District Trusts

### District Trusts

From this screen, you can display, add, change and delete District Trusts.

Trusted District: AWHC - Ashland-West Holmes JVS District

Trust Type:  EZ Query

**Save** Save and New Cancel

### Add District Trust

A confirmation message displays, and the district now appears in the list of district trusts.

Home >> Management >> District Administration >> District Trusts

### District Trusts

From this screen, you can display, add, change and delete District Trusts.

The District Trust was saved successfully

Add District Trust

		District Code	District Name ^	District IRN	Trust Type
X	/	ASHC	Ashland City Schools	043505	EZ Query
X	/	AWHC	Ashland-West Holmes JVS District	062042	EZ Query
X	/	CHIP	Chippewa Local Schools	050534	EZ Query
X	/	EHLM	East Holmes Local Schools	047688	EZ Query
X	/	GREN	Green Local Schools	050559	EZ Query
X	/	LOPR	Loudonville-Perrysville Ex. Village Schools	045468	EZ Query
X	/	NRWS	Northwestern Local Schools	050575	EZ Query
X	/	NRCN	Norwayne Local Schools	050567	EZ Query
X	/	ORVL	Orrville City Schools	044610	EZ Query
X	/	RITT	Rittman Ex. Village Schools	045591	EZ Query
X	/	SOEA	Southeast Local Schools	050583	EZ Query
X	/	TRCE	Tri-County ESC District	050526	EZ Query
X	/	WSCC	Wayne County Schools Career Center District	051714	EZ Query
X	/	WHOL	West Holmes Local Schools	047696	EZ Query
X	/	WSTR	Wooster City Schools	045120	EZ Query

**District Trust Added**

## View Student's Fees

*Note: For detailed information about student fees, see ProgressBook StudentInformation Fees Guide.*

### Navigation: Home – EZ Query – EZ Students – Student Fees

With a student in context, the **Student Fees** screen displays fee information for the student. If you want to hide certain types of fees, in the **Fee Options** area, deselect the fees type(s).

Home » EZ Query » EZ Students » Student Fees

### Student Fees

This page lists all of the student's fees that have a balance or credit due

<b>Total Fees Assessed</b>	\$424.00
P - Payment	\$306.50
<b>Overall Balance</b>	<b>\$117.50</b>

**Fee Options**

Show Fees from Past School Years:

Show Fees from Future School Years:

Show Fees from All Buildings:

Fee Type	Fee Code	Date	Course	Section	Description	Amount Assessed	Amount Paid	Amount Owed	School Code
General Fee	10	Aug 17, 2009			AGENDA	\$5.50	\$0.00	\$5.50	AVHS
Course Fee	0233-1	Aug 17, 2009	PHOTOGRAPHY		PHOTOGRAPHY	\$40.00	\$18.00	\$22.00	AVHS
Course Fee	0232~1	Aug 17, 2009	CERAMICS SPECIAL PROJECTS		CERAMICS SP PRO	\$50.00	\$0.00	\$50.00	AVHS
Course Fee	0259-1	Aug 17, 2009	CRAFTS SPECIAL PROJECTS		CRAFTS (SPPROJ)	\$40.00	\$0.00	\$40.00	AVHS
<b>Total</b>						<b>\$135.50</b>	<b>\$18.00</b>	<b>\$117.50</b>	

### Fees

## View Student's Marks

*Note: For detailed information about student current courses and marks, see ProgressBook StudentInformation Scheduling Guide and ProgressBook StudentInformation Marks Guide.*

### Navigation: Home – EZ Query – EZ Students – Student Marks

With a student in context, the **Student Marks** screen displays the student's marks for each current course based on the finalized schedule of the school and school year in context.

You can select different course terms to display by moving them from the **Course Terms** multiselect list on the left to the **Selected** list on the right and clicking **View**.

Home » EZ Query » EZ Students » Student Marks

### Student Marks

From this screen you can view student marks

[\[Hide Filter & Display Options\]](#)

**Filters:**

**Course Terms**

1st 9 wks  
1st Semester  
234  
2nd 9 wks

**Selected**

3rd 9 wks  
A-Y

**View**

Term	Code	Name	Sec	Status	Cred	Teach	Per	Qtr1	1Int	Qtr2	2Int	1Exm
A-Y	0214	CHORUS-SELECT	1	Assigned	1.00	BARG	1	91.76	100.00	97.24	100.00	
A-Y	0632	ADVANCED BIOLOGY	3	Assigned	1.00	BOWD	3	84.92	83.04	89.75	91.70	
A-Y	0540	TRIGONOMETRY/PRE-CALCULUS	4	Assigned	1.00	LUDA	4	89.14	88.00	86.44	87.71	
A-Y	0132	ENGLISH 11 CP	5	Assigned	1.00	RECK	5	89.57	90.19	93.68	91.89	
A-Y	0631	ADVANCED CHEMISTRY	6	Assigned	1.00	LUSK	6	88.54	88.14	92.18	87.18	
A-Y	0731	AMERICAN GOVERNMENT	7	Assigned	1.00	JOCH	7	90.57	88.78	90.97	93.50	
A-Y	0215	BAND	8	Assigned	1.00	LISC	8	100.00	100.00	94.00	100.00	

### Marks



# Tools

EZ Query's **Tools** screens provide a collection of classroom management resources.

**Note:** *If you do not have access to these screens on the site map, these options do not display. If you do, you can access all students regardless of your job function and without using staff impersonations. For more information, see ProgressBook StudentInformation Security Guide.*

Refer to the appropriate topic as follows:

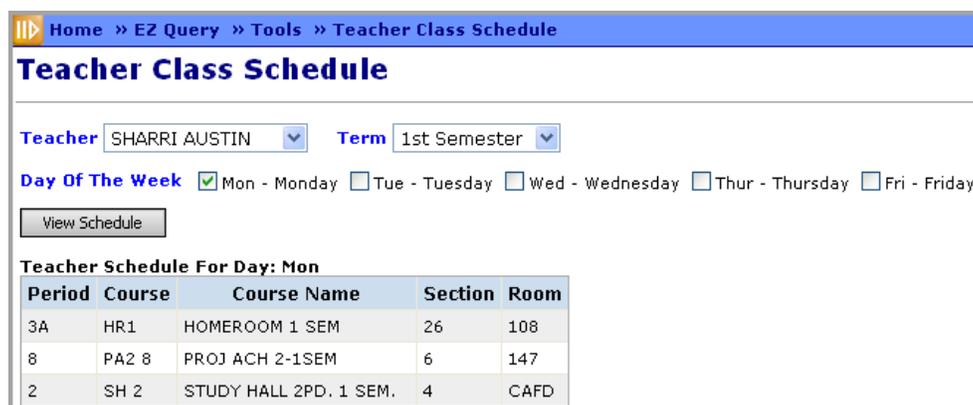
- [“View My Class Schedule”](#)
- [“Generate Student List”](#)
- [“Maintain Seating Charts”](#)
- [“Generate Absence List”](#)
- [“View Teacher Directory”](#)
- [“View Upcoming Student Birthdays”](#)

---

## View My Class Schedule

**Navigation:** Home – EZ Query – Tools – Teacher Class Schedule

On the **Teacher Class Schedule** screen, you can see your own schedule or that of another teacher by class period. Select the **Teacher**, **Term** and at least one **Day Of The Week**, and click **View Schedule**.



Period	Course	Course Name	Section	Room
3A	HR1	HOMEROOM 1 SEM	26	108
8	PA2 8	PROJ ACH 2-1SEM	6	147
2	SH 2	STUDY HALL 2PD. 1 SEM.	4	CAFD

**Teacher Class Schedule**

## Generate Student List

Navigation: Home – EZ Query – Tools – Student List

**Note:** If you do not have the job function of teacher in StudentInformation security, to use this option, you must have the permission to **Allow Staff Member to view all Students in EZ Query**. For more information, see ProgressBook StudentInformation Security Guide.

On the **Student List** screen, you can view and download a list of students assigned to specific course sections as a detailed list or picture list. Select your criteria, and click **Build List**.

**Note:** For information on running reports, see ProgressBook StudentInformation Getting Started Guide.

The screenshot shows the 'Student List' web application interface. At the top, there is a breadcrumb trail: Home >> EZ Query >> Tools >> Student List. Below this is the title 'Student List' and a subtitle: 'From this screen users can view student lists at the school and school year in context'. A link '[Hide Filter & Display Options]' is visible. The main section is divided into several filter and display options:

- Assignment Filters:** Includes radio buttons for 'Course Section Assignment' (selected) and 'Homeroom Assignment'.
- Assignment Date:** A text input field containing '6/2/2014' with a calendar icon and a lightning bolt icon.
- Teacher:** A dropdown menu with '[ Select Teacher ]' and a lightning bolt icon, followed by a checkbox for 'Show All Teachers'.
- Course:** A dropdown menu with '[ All ]'.
- Section:** A dropdown menu with '[ All ]'.
- Student Filters:**
  - Gender:** A dropdown menu with '[ All ]'.
  - Available Grade Levels:** A list box containing '08 - 08', '09 - 09', '10 - 10', and '11 - 11' with up/down arrows and a double-headed arrow to a 'Selected' list box.
  - Available Ethnicities:** A list box containing 'A - Asian', 'B - Black', 'H - Hispanic', and 'I - American Indian' with up/down arrows and a double-headed arrow to a 'Selected' list box.
- Display Options:**
  - List Type:** Radio buttons for 'Detailed Information' (selected) and 'Picture List'.
  - Sort Column:** A dropdown menu with 'Student Name'.
  - Sort Type:** A dropdown menu with 'Ascending'.
- File Download Options:** Two dropdown menus: 'Select A File Type' and 'Select A Download Method'.
- Build List:** A button at the bottom left.

Student List – Select Criteria

If you select “Detailed Information,” student demographic details display. To view additional information about a student, click the student’s name.

Home » EZ Query » Tools » Student List

## Student List

From this screen users can view student lists at the school and school year in context

[\[Show Filter & Display Options\]](#)

**Assignment Date:** 5/27/2010  
**Teacher:** Teacher1186, HOPE  
**Sort Column:** Student Name  
**Sort Type:** Ascending

Student Name	Number	Birthdate	Gender	Ethnicity	Grade	Status	Email
<b>Student73883, STACY</b>	13851	09/09/1994	F	WHITE	09	ACTIVE RES	
Parent: STEVE/BARB Student73883		Address: 645 S Main St Lima OH 45804-1241 Phone: (555) 555-5555 (Home Phone)					
<b>Student73885, KELLEY</b>	13849	07/18/1994	F	WHITE	09	ACTIVE RES	
Parent: DAN/JULIE Student73885		Address: 645 S Main St Lima OH 45804-1241 Phone: (555) 555-5555 (Home Phone)					
<b>Student73886, MICHAEL</b>	13848	07/10/1994	M	WHITE	09	ACTIVE RES	
Parent: BARRY/CARLA Student73886		Address: 645 S Main St Lima OH 45804-1241 Phone: (555) 555-5555 (Home Phone)					
<b>Student73887, ALEX</b>	13847	12/07/1994	M	WHITE	09	ACTIVE RES	
Parent: STEVE/KELLY Student73887		Address: 645 S Main St Lima OH 45804-1241 Phone: (555) 555-5555 (Home Phone)					
<b>Student73888, MATTHEW</b>	13846	03/17/1995	M	WHITE	09	ACTIVE RES	
Parent: BRIAN/KRIS Student73888		Address: 645 S Main St Lima OH 45804-1241 Phone: (555) 555-5555 (Home Phone)					
<b>Student73889, ALLISON</b>	13845	06/27/1995	F	WHITE	09	ACTIVE RES	
Parent: GARY/LORI Student73889		Address: 645 S Main St Lima OH 45804-1241 Phone: (555) 555-5555 (Home Phone)					

### Student List – Detailed Information

Home » EZ Query » Tools » Student List

### Student List

From this screen users can view student lists at the school and school year in context

[Show Filter & Display Options]

Assignment Date: 5/27/2010  
 Teacher: Teacher1186, HOPE  
 Sort Column: Student Name  
 Sort Type: Ascending

<< First < Previous 1 | 2 | 3 | 4 | 5 ... Next > Last >>

173 Records Found

NO PHOTO AVAILABLE	NO PHOTO AVAILABLE	NO PHOTO AVAILABLE	NO PHOTO AVAILABLE
STACY Student73883	KELLEY Student73885	MICHAEL Student73886	ALEX Student73887
NO PHOTO AVAILABLE	NO PHOTO AVAILABLE	NO PHOTO AVAILABLE	NO PHOTO AVAILABLE
MATTHEW Student73888	ALLISON Student73889	LOGAN Student73891	JACOB Student73896

Student List – Picture List

## Maintain Seating Charts

You can maintain classroom seating charts in StudentInformation in the following ways:

- To view an existing seating chart, see [“View Seating Charts.”](#)
- To create a new seating chart, see [“Create Seating Charts.”](#)
- To assign seats to students, see [“Assign Seats.”](#)
- To edit the setup of an existing seating chart, see [“Edit Seating Charts.”](#)
- To delete a seating chart, see [“Delete Seating Charts.”](#)

## View Seating Charts

Navigation: Home – EZ Query – Tools – Seating Chart

You can see classroom seating charts for your own classes or those of another teacher.

1. On the **Seating Chart** screen, select the **Teacher** and **Date**, and click **Go**.

A list of seating charts for the indicated teacher and date displays.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

	Name	Scheduling Term	Period ^	Rotation Day	Location	Course Sections	Class Date	Active
✕	Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	💡
✕	7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	💡

Show Active Only

### Select Seating Chart

- Click the name of the seating chart you want to view.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

	Name	Scheduling Term	Period ^	Rotation Day	Location	Course Sections	Class Date	Active
✕	Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	💡
✕	7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	💡

Show Active Only

### View Seating Chart

The selected seating chart displays.

**Note:** For information on assigning seats to students, see [“Assign Seats.”](#)

Home » EZ Query » Tools » Seating Chart

## Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Name: test3

1	2
3	4
5	6
<p>New Student</p> <p>7</p> <p>NO PHOTO AVAILABLE</p> <p>JACOBS, SARA NICOLE</p>	<p>New Student</p> <p>8</p> <p>NO PHOTO AVAILABLE</p> <p>SOGY, SARAH (SARAH)</p>
<p>New Student</p> <p>9</p> <p>NO PHOTO AVAILABLE</p> <p>Smith, Jenna</p>	<p>10</p>

Cancel

View Seating Chart

## Create Seating Charts

Navigation: Home – EZ Query – Tools – Seating Chart

You can create one or more classroom seating charts per course section for your own classes or those of another teacher.

1. On the **Seating Chart** screen, select the **Teacher** and **Date**.
2. Click **Add Seating Chart**.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

Name	Scheduling Term	Period ^	Rotation Day	Location	Course Sections	Class Date	Active
Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	💡

Show Active Only

### Create Seating Charts

The add-edit version of the screen displays.

- In the **Period** drop-down list, select a class period (course section) specific to the teacher for whom you are creating the seating chart.
- For the **Start In Corner** option, select the radio button that corresponds to the physical corner of the room where you wish to start creating the seating chart (i.e., top left, top right, bottom left or bottom right).
- Optional: Specify a number of **Columns** for the seating chart.

**Note:** If you leave this field blank, StudentInformation calculates the number of columns based on the number of students.

- In the **Pictures** drop-down list, select the scaling of the student picture size (from 10% to 200% of original size).
- To make the student pictures display on the seating chart, select the **Show** check box. To hide them, deselect the check box.
- Optional: Select a **Collision Mode** to determine what should happen if you move a student into a seat that displaces another student:
  - Switch target with source** – Switches the two students
  - Move target to end** – Moves displaced student to the end of the seating chart
- If the **Location** drop-down list is activated (i.e., not grayed out), select the course section location.
- In the **Render** drop-down list, select how you want to arrange the student names and/or pictures on the seating chart (“Across” or “Up and Down”).
- In the **Sort By** drop-down list, select how you want to sort the student names and/or pictures on the seating chart (“Student Name Ascending,” “Student Name Descending” or “Random”).
- Optional: Specify a number of **Rows** for the seating chart.

**Note:** If you leave this field blank, StudentInformation calculates the number of rows based on the number of students.

13. Select the **Perspective** of the student seats:
  - **In Seats** – Prints the front of the classroom at the top, as if you are sitting in one of the seats
  - **Facing Seats** – Prints the front of the classroom at the bottom, as if you are standing at the front of the classroom and facing the seats
14. Optional: If you want the seat number drop-down list to display on the seating chart, select the **Move Drop Down** check box.
15. Click **Generate**.

The screenshot shows a web interface titled "Seating Chart" with a breadcrumb trail: Home » EZ Query » Tools » Seating Chart. Below the title is a red instruction: "From this screen, you can display, add, change and delete data pertaining to Seating Charts." A link "[Hide Grid Options]" is visible. The configuration area includes several fields: "Period:" and "Location:" are dropdown menus with "-- Select a Period --" selected; "Start In Corner:" has four radio buttons; "Columns:" is an empty text input; "Pictures:" is a dropdown set to "50%" with a checked "Show" checkbox; "Collision Mode:" is a dropdown set to "Switch target with source"; "Render:" is a dropdown set to "Across"; "Sort By:" is a dropdown set to "Student Name Ascending"; "Rows:" is an empty text input; "Perspective:" is a dropdown set to "In Seats"; and "Move Drop Down:" is a checked checkbox. At the bottom, there are "Generate" and "Cancel" buttons, with "Generate" circled in red.

### Create Seating Chart

The screen expands to display more options.

16. Optional: If you need to make any changes to the original fields you completed, make the changes and click **Update**.
17. Enter a **Name** for this seating chart.
18. Optional: If you do not want this seating chart to be currently active, deselect the **Is Active** check box.
19. Click **Save**.

Home » EZ Query » Tools » Seating Chart

## Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

[Hide Grid Options]

**Period:** 7 - LANGUAGE ARTS 8 (9)... ⚡ **Location:** GIFTED ⚡  
**Columns:** 0 **Rows:** 0  
**Pictures:** 50%  Show **Perspective:** In Seats  
**Collision Mode:** Switch target with source **Move Drop Down:**

**Name:** 7th LA in Gifted ⚡  Is Active

### Create Seating Chart – Expanded View

The new seating chart displays on the **Seating Chart** screen.

Home » EZ Query » Tools » Seating Chart

## Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

**Teacher:** LORI SMITH ⚡ **Date:** 1/25/2005 ⚡

Name	Scheduling Term	Period ^	Rotation Day	Location	Course Sections	Class Date	Active
✕  Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	
✕  7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	

Show Active Only

### Seating Chart Created

**Note:** You still need to assign seats to students. For information on this procedure, see [“Assign Seats.”](#)

## Assign Seats

### Navigation: Home – EZ Query – Tools – Seating Chart

You can assign seats to students immediately after creating the seating chart (See [“Create Seating Charts.”](#)) or at a later time if new students join your class or you want to reassign seats.

1. On the **Seating Chart** screen, select the **Teacher** and **Date**, and click **Go**.  
A list of seating charts matching your criteria displays.
2. Click the name of the seating chart.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

Name	Scheduling Term	Period	Rotation Day	Location	Course Sections	Class Date	Active
Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	Lightbulb icon
7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	Lightbulb icon

Show Active Only

### View Seating Charts

The seat assignment version of the screen displays.

- For any student who is new or unassigned to a seat, in the associated **New Student** drop-down list, select a seat number for the student.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Name: test3

1	2
3	4
5	6
New Student 7  JACOBS, SARA NICOLE	New Student 8  SOGY, SARAH (SARAH)
New Student 9  Smith, Jenna	10

Cancel

### Assign Seats

StudentInformation assigns the seat(s) to the student(s).

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Name: test3

<p>New Student 1</p> <p>NO PHOTO AVAILABLE</p> <p>JACOBS, SARA NICOLE</p>	<p>New Student 2</p> <p>NO PHOTO AVAILABLE</p> <p>SOGY, SARAH (SARAH)</p>
<p>3</p>	<p>New Student 4</p> <p>NO PHOTO AVAILABLE</p> <p>Smith, Jenna</p>
5	6
7	8
9	10

Cancel

Seats Assigned

## Edit Seating Charts

Navigation: Home – EZ Query – Tools – Seating Chart

You can edit the setup of an existing seating chart.

1. On the **Seating Chart** screen, select the **Teacher** and **Date**, and click **Go**.  
A list of seating charts matching your criteria displays.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

Name	Scheduling Term	Period	Rotation Day	Location	Course Sections	Class Date	Active
Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	
7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	

Show Active Only

### Search for Seating Chart

- In the row of the seating chart you want to edit, click .

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

Name	Scheduling Term	Period	Rotation Day	Location	Course Sections	Class Date	Active
Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	
7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	

Show Active Only

### Edit Seating Charts

The add-edit version of the screen displays.

- Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Create Seating Charts.”](#)

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

[Hide Grid Options]

Period: 7 - LANGUAGE ARTS 8 (9)... Location: GIFTED

Columns: 0 Rows: 0

Pictures: 50%  Show Perspective: In Seats

Collision Mode: Switch target with source Move Drop Down:

Update Cancel

Name: 7th LA in Gifted  Is Active

Save Cancel

### Edit Seating Chart

## Delete Seating Charts

Navigation: Home – EZ Query – Tools – Seating Chart

1. On the **Seating Chart** screen, select the **Teacher** and **Date**, and click **Go**.  
A list of seating charts matching your criteria displays.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

	Name	Scheduling Term	Period ^	Rotation Day	Location	Course Sections	Class Date	Active
✕	Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	💡
✕	7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	💡

Show Active Only

### Search for Seating Chart

2. In the row of the seating chart you want to delete, click ✕.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH Date: 1/25/2005 Go

Add Seating Chart

	Name	Scheduling Term	Period ^	Rotation Day	Location	Course Sections	Class Date	Active
✕	Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	💡
✕	7th LA in Gifted	1/02	7	T	GIFTED	SOCIAL STUDIES 8 (4)	Jan 25, 2005	💡

Show Active Only

### Delete Seating Charts

A message displays, asking if you are sure you want to delete the seating chart.

3. Click **Ok**.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Are you sure you want to deactivate the following Seating Chart?  
7th LA in Gifted

Ok Cancel

### Confirm Delete

The seating chart no longer displays on the **Seating Chart** screen.

Home » EZ Query » Tools » Seating Chart

### Seating Chart

From this screen, you can display, add, change and delete data pertaining to Seating Charts.

Teacher: LORI SMITH  Date: 1/25/2005

	Name	Scheduling Term	Period ^	Rotation Day	Location	Course Sections	Class Date	Active
<input type="checkbox"/>	Period 2 - Chart 1	1/02	2	T	LANGUAGE ARTS/READING - 7TH	READING 8 (7)	Jan 25, 2005	<input type="checkbox"/>

Show Active Only

**Seating Chart Deleted**

## Generate Absence List

**Navigation: Home – EZ Query – Tools – Absence List**

On the **Absence List** screen, you can view and download a list of all student absences by date for the school in context. Select your criteria, and click **View**.

**Note:** For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

**Note:** The **Absence Reason**, **Absence Note** and **Absence Comments** column options do not display if your school, district or ITC has chosen to make them unavailable. For more information, see *ProgressBook StudentInformation School Year Setup and Configuration Guide*.

Home >> EZ Query >> Tools >> Absence List

## Absence List

From this screen users can view student lists at the school and school year in context

[\[Hide Filter & Display Options\]](#)

**Absence Filters:**

School: ASHLAND HIGH SCHOOL

Absence Date: 4/18/2014

**Absence Type**

EXCUSED  
TRUANT  
NOT ABSENT  
DISC CTR

**Selected**

**Collection Periods**

**Selected**

**Student Filters:**

**Teachers**

ALFORD, SEAN  
ANTHONY, ALLISON  
ARNOLD, CHRISTINA  
AYALA, KAREN

**Selected**

Show All Teachers

**Homeroms**

3-104 (0104)  
3-113 (0113)  
3-128 (0128)  
3-133 (0133)

**Selected**

Show All Homeroms

**Counselors**

FITZGERALD, ANDRE  
FREEMAN, MELINDA  
MONTGOMERY, RAUL  
WALLER, SONIA

**Selected**

Show All Counselors

**Display Options:**

**Columns to Display:**

Student Home School IRN     Student Home School Name     Student Grade Level     Student Name

Student Calendar     Student Homeroom     Student Counselor

Absence Level     Absence Time In     Absence Time Out     Absence AMPM

Absence Date     Absence Collection Period     Absence Type     Absence Reason

Absence Note     Absence Comments

**File Download Options**

Select A File Type    Select A Download Method

### Absence List – Select Criteria

Home » EZ Query » Tools » Absence List

## Absence List

From this screen users can view student lists at the school and school year in context

[\[Show Filter & Display Options\]](#)

**Absence Date:** 6/4/2010

**Homerooms:** 104 (KINDERGARTEN)

Grade	Student Name	Cal.	Level	Type	Reason	Note	In	Out	AM/PM	Comments
KG	ALBERTSON, JAYDEN	1	Full Absence	ABSENT						
KG	ALBERTSON, JAYDEN	1	Full Absence	ABSENT						
KG	ALBERTSON, JAYDEN	1	Full Absence	EXCUSED	EXCUSED					w/d
KG	ALBERTSON, JAYDEN	1	Full Absence	ABSENT						
KG	ALBERTSON, JAYDEN	1	Full Absence	ABSENT						
KG	ALBERTSON, JAYDEN	1	Full Absence	EXCUSED	TRIP	PARENT				

Absence List

## View Teacher Directory

On the **Teacher Directory** screen, you can look up contact information for a specific teacher by selecting the **Teacher** and clicking **Lookup Teacher**.

Home » EZ Query » Tools » Teacher Directory

## Teacher Directory

**Teacher** MICHAEL WEBBER

MICHAEL WEBBER  
 300 VINE AVENUE  
 LIMA, OH 45805  
 (419) 228-4890

Teacher Directory

## View Upcoming Student Birthdays

Navigation: Home – EZ Query – Tools – Upcoming Birthdays

**Note:** If you do not have the job function of teacher in StudentInformation security, to use this option, you must have the permission to **Allow Staff Member to view all Students in EZ Query**. For more information, see ProgressBook StudentInformation Security Guide.

You can view upcoming student birthdays by school in both list and calendar formats. See the appropriate topic as follows:

- [“View Birthday List”](#)
- [“View Birthday Calendar”](#)

### View Birthday List

1. On the **Upcoming Birthdays** screen, in the drop-down list, select the school for which you want to view student birthdays.
2. Select the “List” format.
3. Click **Submit**.

The screenshot shows the top navigation bar with the path: Home >> EZ Query >> Tools >> Upcoming Birthdays. Below this is the title 'Upcoming Birthdays'. A red circle highlights the 'DALTON HIGH SCHOOL' dropdown menu, the 'List' radio button (which is selected), the 'Calendar' radio button, and the 'Submit' button.

#### View Birthday List

The screen displays a list of all birthdays of active students coming up in the next week.

4. Optional: To change the date range of birthdays in the list, in the **Birthdate Date Range** fields, enter or select a beginning and ending date, and click **Refresh**.

The screenshot shows the 'Upcoming Birthdays' screen with the 'Birthdate Date Range' filter set to 3/31/2014 to 4/7/2014. A red circle highlights the date range fields and the 'Refresh' button. Below the filter is a table of student birthdays.

First Name	Last Name	Birthday ^	Birthdate	Age on Birthday	Grade	Homeroom	Homeroom Teacher	School
HAZEL	SHAFFER	3/31/2014	03/31/1998	16	10	5B	BRANCH, JEFFERY	DAHS
GUY	RAMIREZ	4/1/2014	04/01/1998	16	10	5B	BRANCH, JEFFERY	DAHS
CAROLYN	SIMS	4/1/2014	04/01/1995	19	12	A121	BOYER, DOLORES	DAHS
VICTOR	CALLAHAN	4/3/2014	04/03/1998	16	09	5A	BRANCH, JEFFERY	DAHS
PHILIP	SPENCER	4/6/2014	04/06/1998	16	09	5A	BRANCH, JEFFERY	DAHS

#### Birthday List

The screen refreshes to display the upcoming birthdays for the selected date range.

Home >> EZ Query >> Tools >> Upcoming Birthdays

### Upcoming Birthdays

DALTON HIGH SCHOOL  List  Calendar

Birthdate Date Range: 3/31/2014 to 04/14/2014

First Name	Last Name	Birthday ^	Birthdate	Age on Birthday	Grade	Homeroom	Homeroom Teacher	School
HAZEL	SHAFFER	3/31/2014	03/31/1998	16	10	5B	BRANCH, JEFFERY	DAHS
GUY	RAMIREZ	4/1/2014	04/01/1998	16	10	5B	BRANCH, JEFFERY	DAHS
CAROLYN	SIMS	4/1/2014	04/01/1995	19	12	A121	BOYER, DOLORES	DAHS
VICTOR	CALLAHAN	4/3/2014	04/03/1998	16	09	5A	BRANCH, JEFFERY	DAHS
PHILIP	SPENCER	4/6/2014	04/06/1998	16	09	5A	BRANCH, JEFFERY	DAHS
STEPHANIE	BAILEY	4/8/2014	04/08/1997	17	11	A124	HOWARD, KEN	DAHS
PAUL	VALDEZ	4/9/2014	04/09/1996	18	12	A121	BOYER, DOLORES	DAHS
MARIA	REILLY	4/9/2014	04/09/1996	18	11	6A	BRANCH, JEFFERY	DAHS
IVAN	CARLSON	4/9/2014	04/09/1997	17	11	5B	BRANCH, JEFFERY	DAHS
BRENT	MILES	4/10/2014	04/10/1999	15	09	5A	BRANCH, JEFFERY	DAHS
MELISSA	OLSON	4/10/2014	04/10/1997	17	11	6A	BRANCH, JEFFERY	DAHS
CARRIE	DELGADO	4/11/2014	04/11/1999	15	09	5A	BRANCH, JEFFERY	DAHS
BETTY	BARNETT	4/11/2014	04/11/1996	18	12	A126	WOOTEN, ROBERTO	DAHS
MARSHALL	STEVENS	4/11/2014	04/11/1995	19	12	A121	BOYER, DOLORES	DAHS
NANCY	FARRELL	4/14/2014	04/14/1997	17	11	5B	BRANCH, JEFFERY	DAHS
ERIKA	BRIDGES	4/14/2014	04/14/1997	17	11	A124	HOWARD, KEN	DAHS

16 Records Displayed [Back To Top](#)

### Updated Birthday List

## View Birthday Calendar

1. On the **Upcoming Birthdays** screen, in the drop-down list, select the school for which you want to view student birthdays.
2. Select the "Calendar" format.
3. Click **Submit**.

Home >> EZ Query >> Tools >> Upcoming Birthdays

### Upcoming Birthdays

DALTON HIGH SCHOOL  List  Calendar

### View Birthday Calendar

The screen displays a calendar showing birthdays of all active students for the current month.

4. Optional: To display the previous or next month's birthday calendar, click  or , respectively.

Home >> EZ Query >> Tools >> Upcoming Birthdays Advanced Search | Feedback | Mgmt | Help | Version | Print

**Upcoming Birthdays**

DALTON HIGH SCHOOL  List  Calendar

March 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	1 RUSSELL LEVY
2 MARILYN HOLMAN	3	4	5 ERIC GALLEGOS	6 AMY CHRISTIAN	7	8
9	10	11 ALFREDO FOSTER CLAIRE BRIDGES TONYA MORRIS	12	13 KATRINA MOON	14	15
16	17	18	19 ARTHUR FARRELL	20 RUBEN WHITAKER	21	22 GLEN SIMMONS
23	24 MARY FREDERICK	25 ARLENE MCINTOSH	26 DARYL MOLINA	27 REBECCA LOVE KAREN FARRELL	28	29
30 HERBERT JACOBS	31 HAZEL SHAFFER	1	2	3	4	5

**Birthday Calendar**

The screen refreshes to display the birthdays for the selected month.

Home >> EZ Query >> Tools >> Upcoming Birthdays							Advanced Search   Feedback   Mgmt   Help   Version   Print
Upcoming Birthdays							
DALTON HIGH SCHOOL							List <input type="radio"/> Calendar <input checked="" type="radio"/> Submit
April 2014							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
30	31	GUY RAMIREZ CAROLYN SIMS	1	2	VICTOR CALLAHAN	3	
PHILIP SPENCER	6	7	STEPHANIE BAILEY	8	PAUL VALDEZ IVAN CARLSON MARIA REILLY	9	
13	NANCY FARRELL ERIKA BRIDGES	14	CALVIN MCLAUGHLIN CHRISTINA MIRANDA CASEY FOSTER	15	HOWARD MULLEN MISTY LEVY WILMA KLEIN	16	
17	ANITA CHAN ASHLEY JOSEPH	18	19	20	BETH PAUL	21	
27	CONSTANCE VALENCIA	28	SUSAN REILLY	29	FELICIA CAMACHO VICKI LEON	30	
4	5	6	7	8	9	10	

Updated Birthday Calendar

# Reports

EZ Query reports provide multiple ways to display and download student data. For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

**Note:** *If you do not have access to these screens on the site map, these options do not display. If you do, you can access all students regardless of your job function and without using staff impersonations. For more information, see *ProgressBook StudentInformation Security Guide*.*

Refer to the appropriate topic as follows:

- [“Absence Graph”](#)
- [“Battelle For Kids Download”](#)
- [“Download Class List”](#)
- [“Download Student Address”](#)
- [“Download Student Medical History”](#)
- [“Medicaid Eligibility Rate \(MER\) Download”](#)
- [“SIS Student Search”](#)
- [“Student Membership/Services Search”](#)
- [“List of Students Without Disciplinary Incidents”](#)
- [“Weekday Attendance Percentage”](#)

---

## Absence Graph

### Navigation: Home – EZ Query – Reports – Absence Graph

You can view absences or tardies for the current school year in graph or list format.

1. On the **Absence Graph** screen, in the drop-down list, select the school for which you want to view absences or tardies.
2. Optional: Select a **Grade** and/or **Gender** to filter results by those criteria.
3. For the **Absence Type** option, select whether to display “Absent” or “Tardy” records.
4. Select how you want to view the absence or tardy data as follows:
  - **Display Graph** – Displays in graphical format
  - **Display Data** – Displays in list format

Home » EZ Query » Reports » Absence Graph

### Absence Graph

All Buildings  Grade  Gender

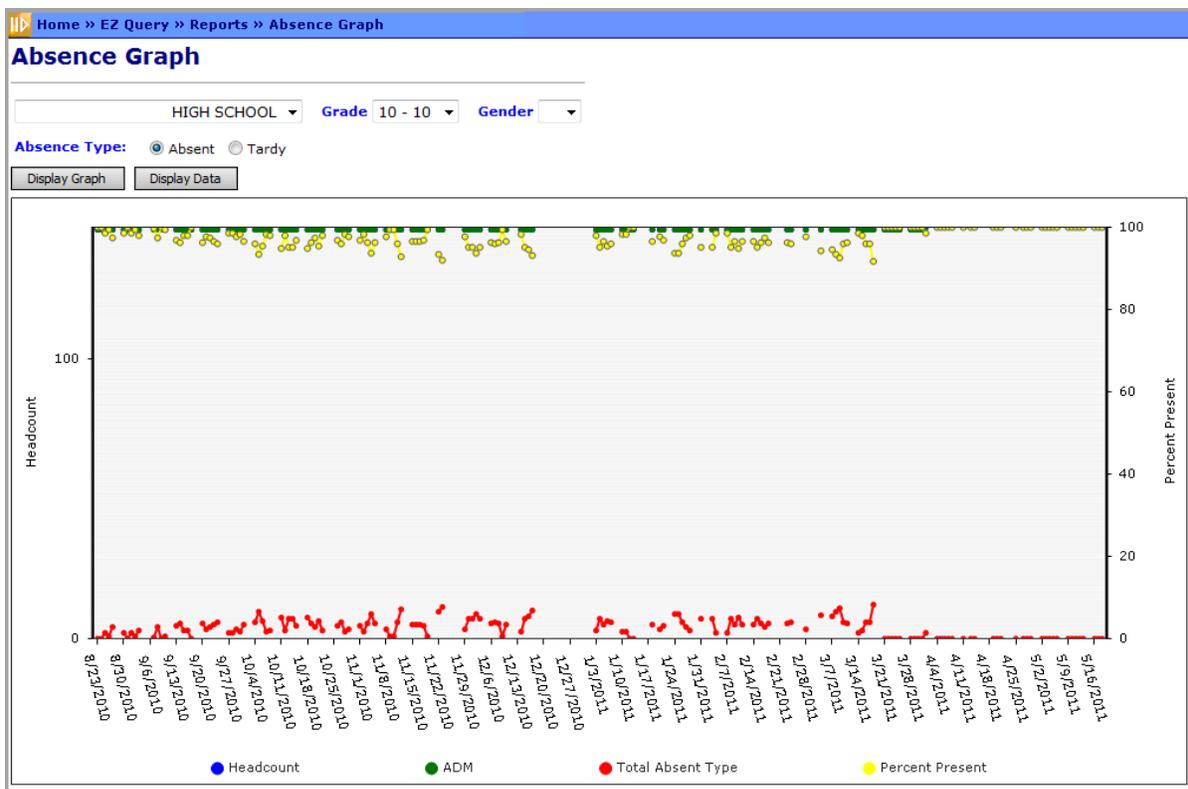
Absence Type:  Absent  Tardy

Display Graph Display Data

#### Absence Graph Selection Criteria

If you select “Display Graph,” the absence or tardy data from the beginning of the school year until the current date displays in graphical format using the following data points:

- **Headcount** – Total number of active status students
- **ADM** – Average daily membership
- **Total Absent Type** – Total number of absences or tardies
- **Percent Present** – Percent of students present

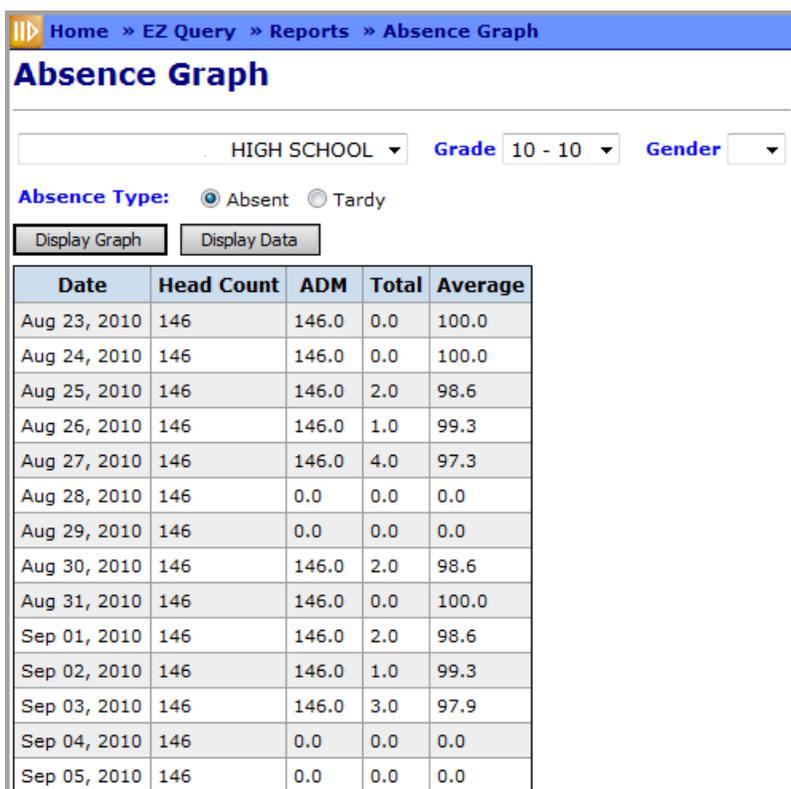


Absences in Graphical Format

If you select “Display Data,” the absence or tardy data from the beginning of the school year until the current date displays in list format by date using the following data points:

- **Date** – Date of the school day for which absence or tardy data is reported
- **Head Count** – Total number of active status students
- **ADM** – Average daily membership
- **Total** – Total number of absences or tardies
- **Average** – Average attendance

**Note:** Averages for the entire date range display at the bottom of the list.



**Absences in List Format**

## Battelle For Kids Download

**Navigation: Home – EZ Query – Reports – Battelle For Kids Download**

This report creates an Excel file with the necessary Battelle for Kids data. It includes proficiency, achievement, OGT and off-year proficiency test results.

In the drop-down list, select a school district, and click **Create Download File**.

Home » EZ Query » Reports » Battelle For Kids Download

## Battelle For Kids Download

DA - DASL Local SD
Create Download File

### Battelle For Kids Download

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	District ID	School ID	Test Date	SID	Last	First	Middle	AssessmentName	Version	Form	Grade	ScaledScoreTotalReading	ScaledScoreTotalMath	ScaledScoreScience	ScaledScoreSocialStudies
2	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	0	195	0	0
3	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	186	170	0	195
4	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	197	179	0	179
5	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	194	189	0	197
6	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	0	197	0	0
7	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	168	189	0	0
8	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	192	199	0	193
9	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	165	172	0	169
10	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	0	0	0	195
11	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	194	0	0	184
12	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	0	0	0	197
13	43877	33084	10/1/1995		LastName	FirstNm		OPT	9	9	9	173	179	0	186

	P	Q	R	S	T	U	V	W	X	Y	Z
1	ScaledScoreLanguageArts	ScaledScoreReading	ScaledScoreMath	Alternate SID	BirthDate	Gender	Ethnicity	Special Ed	LimitedEnglishProficiency	District Enroll. Date	TotalDaysAttended
2	0			207967410	7/24/1980	F					
3	3			208787447	2/27/1980	M					
4	0			217880524	4/26/1980	F					
5	0			217966554	6/28/1980	F					
6	0			226701798	5/29/1980	M					
7	0			227943448	7/4/1979	F					
8	0			228742707	10/16/1979	F					
9	2			228784839	5/12/1980	M					
10	0			228849090	6/26/1981	M					
11	0			237887554	4/14/1981	F					
12	0			237945788	1/9/1981	F					
13	0			237988638	10/18/1979	M					

	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF
1	BirthDate	Gender	Ethnicity	Special Ed	LimitedEnglishProficiency	District Enroll. Date	TotalDaysAttended	TotalExcusedAbsences	TotalUnexcusedAbsences	SES/Lunch	Title 1	Building Enroll. Date	
2	7/24/1980	F											
3	2/27/1980	M											
4	4/26/1980	F											
5	6/28/1980	F											
6	5/29/1980	M											
7	7/4/1979	F											
8	10/16/1979	F											
9	5/12/1980	M											
10	6/26/1981	M											
11	4/14/1981	F											
12	1/9/1981	F											
13	10/18/1979	M											

### Battelle For Kids Download File

## Download Class List

Navigation: Home – EZ Query – Download Class List

**Note:** If you do not have the job function of teacher in StudentInformation security, to use this option, you must have the permission to **Allow Staff Member to view all Students in EZ Query**. For more information, see ProgressBook StudentInformation Security Guide.

This report displays a list of the school's students and their schedules that you can further process and include in other applications.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	SchoolCode	StudentId	StateStudentId	FirstName	LastName	Gender	GradeLevelCode	HomeSchoolIRN	HomeSchool	ProgramCode	ProgramName	Status	StudentStatusCode	CourseCode
2	ASHS	6.8E+08		Max	Able	M	11					ACTIVE RES	A	39
3	ASHS	6.8E+08		Max	Able	M	11					ACTIVE RES	A	62
4	ASHS	696244	GC5806968	HUGH	ANDREWS	M	12			9	Cognitively Delayed	RES A/ELSE	R	0003B
5	ASHS	493047	QV8854511	ROSE	BALL	F	9					ACTIVE RES	A	0003A
6	ASHS	790340	GB9810212	ALBERTO	SALAZAR	M	12					NON-RES	N	39

O	P	Q	R	S	T	U	V	W	X	
1	CourseName	CourseTypeCode	CourseTypeDescription	SectionNumber	TermCode	TermName	LocationEx	TeacherCode	CalendarPeriodCode	RotationDays
2	ENGLISH 9	C	Class	1	ALYR	All Year	124	HALH		1 M T W R F
3	CONCERNS OF MOD SOCIETY	C	Class	21	1SEM	1st Sem Only	120	HBDS		2 M T W R F
4	ENGLISH III	C	Class	21	1SEM	1st Sem Only	300	HSMG		2 M T W R F
5	ENGLISH III	C	Class	12	1SEM	1st Sem Only	300	HSMG		1 M T W R F
6	ENGLISH 9	C	Class	1	ALYR	All Year	124	HALH		1 M T W R F

Download Class List

**Note:** The State Student ID only appears in the output file if you have the proper security in **Extra System Permissions – EMIS – View/Update State Student ID**. For more information, see *ProgressBook StudentInformation Security Guide*.

## Download Student Address

Navigation: Home – EZ Query – Reports – Download Student Address

This report displays a list of students and their addresses that you can further process and include in other applications. You can download all contact addresses for each student or just the primary address.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
School	SSN	Student	St	StudentName	AddressLine	City	State	Postal	TelephoneT	IsUnliste	Gr	IsPri	Add	AddressTypeNam	ContactName	TelephoneN
DAEL	887675680	70	A	BROWN, JOLENE JANEA	546 S METCALF	LIMA	OH	45805	Home Phone	FALSE	KG	Yes	0	PRIMARY	BROWN, HENRY	4192287292
DAEL	897600546	14002	A	ROBERTS, JENNIFER LYNNE	742 FENCE ROW LANE	LIMA	OH	45801		FALSE	2	Yes	0	PRIMARY	ROBERTS, MINN	
DAEL	908655973	12003	A	NOTT, ALAN ROBERT	7170 GREENLAWN	LIMA	OH	45804		FALSE	4	Yes	0	PRIMARY	NOTT, ALVIN	
DAHS	98898907	7002	A	PERRY, RICHARD MATTHE (RICH)					Home Phone	FALSE	9	No	23	DENTIST	STREET	9873874629
DAHS	98898907	7002	A	PERRY, RICHARD MATTHE (RICH)					Home Phone	FALSE	9	No	23	F1	AREOPOSTALE	2455266145
DAHS	98898907	7002	A	PERRY, RICHARD MATTHE (RICH)					Home Phone	FALSE	9	No	23	ORTHODONTIST	HELPS	2453254548
DAHS	98898907	7002	A	PERRY, RICHARD MATTHE (RICH)	684376 GREEN DR.	LIMA	OH	45805		FALSE	9	No	23	ONE PARENT	PERRY, DAN	
DAHS	98898907	7002	A	PERRY, RICHARD MATTHE (RICH)	775 BROADWAY BLVD	LIMA	OH	45801		FALSE	9	Yes	0	PRIMARY	PERRY, MATTHEW	
DAHS	123098654	4005	A	WELLS, JOBETH					Home Phone	FALSE	12	No	23	DOCTOR	WEIRD	4253569872
DAHS	123098654	4005	A	WELLS, JOBETH					Home Phone	FALSE	12	No	23	ORTHODONTIST	LASER	4652565487
DAHS	123098654	4005	A	WELLS, JOBETH	375786 CUTE DR.	LANSING	MI	39947		FALSE	12	No	23	ONE PARENT	WELL, ELIZABETH	
DAHS	123098654	4005	A	WELLS, JOBETH	843 NORTHWALD DR	LIMA	OH	45801		FALSE	12	Yes	0	PRIMARY	WELLS, MITCH	
DAHS	123654123	122445	A	EYE, PRIVA	123 SECRET AVE	LIMA	OH	45804	Home Phone	FALSE	11	Yes	0	PRIMARY	EYE, BLU	4192228888
DAHS	123768453	6005	A	MAY, DAISY LEE					Home Phone	FALSE	10	No	23	F1	SEARS	3985746394
DAHS	123768453	6005	A	MAY, DAISY LEE	49577 MALL ST.	LIMA	OH	45805		FALSE	10	No	23	ONE PARENT	MAY, JOHN	
DAHS	123768453	6005	A	MAY, DAISY LEE	600 BLOOM DRIVE	LIMA	OH	45801		FALSE	10	Yes	0	PRIMARY	LEE, SHARON	
DAHS	134876456	7005	A	WILLIAMSON, RYAN SETH					Home Phone	FALSE	9	No	23	DOCTOR	WEIRD	3252598884

Download Student Address – All Addresses

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Schoo	SSN	Student	St	StudentName	AddressLine	City	State	Postal	TelephoneT	IsUnliste	Gr	IsPri	Add	Address	ContactName	Telephone
DAEL	488098762	1007	A	BREWER, SEAN CONORY	200 E KIBBY STREET	LIMA	OH	45804	Home Phone	FALSE	1	Yes	0	Primary	BROWN, MARY	4192256546
DAEL	48753424	14001	A	LAWSON, SHERRI ROSE	412 LAKESIDE DR	LIMA	OH	45801		FALSE	2	Yes	0	Primary	LAWSON, KEVIN	
DAEL	763241567	12002	A	NELSON, AMBER NICOLE	715 KINGSWOOD	LIMA	OH	45804		FALSE	4	Yes	0	Primary	NELSON, ADRIAN	
DAEL	756667477	13005	A	WHITE, ANTHONY JAMES	217 CIRCULAR	LIMA	OH	45804		FALSE	3	Yes	0	Primary	WHITE, CHRISTOPHER	
DAHS	458769300	4003	A	JOHNSON, GEORGE EVAN	597 STATE STREET	LIMA	OH	45801		FALSE	12	Yes	0	Primary	JOHNSON, HOWARD	
DAHS	589098456	6001	A	EYE, CORY ROBERT	12 NORTH ST	LIMA	OH	45801		FALSE	10	Yes	0	Primary	EYE, EDWARD	
DAHS	555444334	7003	A	RING, NICOLE SUZANNE	9065 BLISS RD	LIMA	OH	45801		FALSE	9	Yes	0	Primary	RING, NICHOLAS	
DAHS	678956677	1224	A	LEE, HARPER (LEE)	23 MOCKINGBIRD LANE	LIMA	OH	45804	Home Phone	FALSE	9	Yes	0	Primary	FINCH, ATTICUS	4193452345
DAHS	369852369	7001	A	CONTRARY, JASON WILLIAM	90 ELM STREET	LIMA	OH	45801		FALSE	9	Yes	0	Primary	CONTRARY, MARION	
DAHS	453123789	5004	A	SPRAT, JACK JOSEPH	890 BACON TRAIL	LIMA	OH	45801	Home Phone	FALSE	9	Yes	0	Primary	TREECE, JOLENE	4192287417
DAHS	278654738	6002	A	FONT, MICHELLE LYNN	345 N FRONT ST	LIMA	OH	45801		FALSE	10	Yes	0	Primary	FONT, JANE	
DAHS	267874612	4001	A	EYE, MAGNUM P.	122 NORTH STPO Box 678	LIMA	OH	45801	Home Phone	FALSE	12	Yes	0	Primary	EYE, EDWARD	4195551234
DAHS	908987876	6004	A	LINE, TROY AARON	665 SUGAR STREET	LIMA	OH	45801		FALSE	10	Yes	0	Primary	LINE, BOB	
DAHS	376873245	5001	A	CONTRARY, MARY M.	90 ELM STREET	LIMA	OH	45801	Home Phone	FALSE	11	Yes	0	Primary	CONTRARY, MARION	4192287417
DAHS	564789874	5002	A	PERRY, MICHAEL JAY	776 BROADWAY BLVD	LIMA	OH	45801		FALSE	11	Yes	0	Primary	PERRY, MATTHEW	
DAHS	98898907	7002	A	PERRY, RICHARD MATTHE (RICH)	775 BROADWAY BLVD	LIMA	OH	45801		FALSE	9	Yes	0	Primary	PERRY, MATTHEW	

Download Student Address – Primary Address Only

---

## Download Student Medical History

For information on this report, see *ProgressBook StudentInformation Student Medical Guide*.

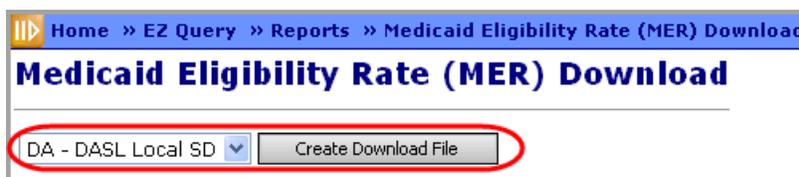
---

## Medicaid Eligibility Rate (MER) Download

### Navigation: Home – EZ Query – Reports – Medicaid Eligibility Rate (MER) Download

You can use this download to collect and report Medicaid eligibility information from the previous school year. This report creates a file that includes all students eligible for Medicaid who were enrolled at some point during reporting week of the school year in context.

1. Select the correct school to put it in context.
2. Select the correct year to be in context. This should be the year designated by your third-party billing agent.
3. On the **Medicaid Eligibility Rate (MER) Download** screen, in the drop-down list, select the school district, and click **Create Download File**.



### Medicaid Eligibility Rate (MER) Download

StudentInformation generates a fixed length export file using spaces for padding. The file includes the following fields (with starting position and length indicated in parentheses):

- Student First Name (1, 20)
- Student Last Name (21, 30)
- Student Residence Zip Code (51, 5)
- Student Birth Date (56, 8) – in mmddyyyy format
- District IRN (64, 6)
- Special Education Eligibility (70, 1) – in Y/N format

BETTY	FLYNN	4461808102005050542Y
TIM	RICHARDSON	4461805292006050542Y
TARA	SLATER	4461806142006050542N
BRADLEY	MCFARLAND	4461806082005050542N
ALBERTO	FOSTER	4461802152006050542N
DANNY	SALAZAR	4461806142007050542N
HERBERT	MCFARLAND	4461802022007050542N
TROY	FERGUSON	4461807282005050542N
THELMA	ROMAN	4461805122006050542N
DORIS	FINLEY	4461811172005050542Y
ALLEN	FLYNN	4460605032005050542Y
DAVID	ASHLEY	4461802282006050542N
JOSE	BERG	4461805192005050542Y
JEREMY	HOLLOWAY	4461803052008050542N
WILLIE	WOODARD	4461805132006050542N
SHANE	ALEXANDER	4461802282006050542N
RUSSELL	PATRICK	4461811012005050542N
TODD	ROBERSON	4461803122006050542N
MATHEW	PETERS	4461804052006050542N
KATIE	CANNON	4466705172006050542N
KRISTEN	CANNON	4461807182005050542N
JEANETTE	MARKS	4461804202006050542N
SALVADOR	STEVENS	4461805042005050542N
RONNIE	MCKNIGHT	4461805212006050542N
KRISTINA	MORRISON	4463611292005050542N
KAY	WALL	4460611112005050542N
JORGE	PRICE	4461803242006050542N
PAULINE	BRADFORD	4460609242005050542N
NORMAN	FLYNN	4461806172005050542N
JUAN	BAILEY	4461803202006050542Y

**Medicaid Eligibility Rate (MER) Download File**

## SIS Student Search

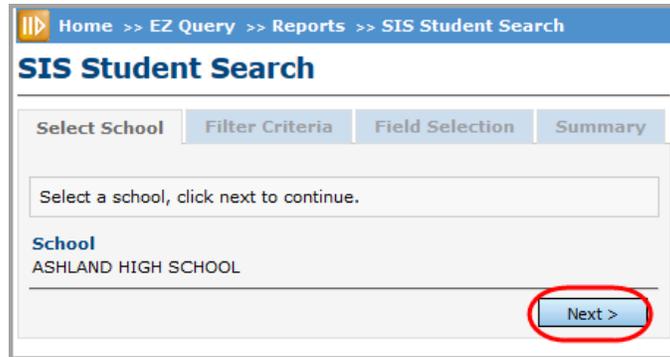
### Navigation: Home – EZ Query – Reports – SIS Student Search

**Note:** If you do not have the job function of teacher in StudentInformation security, to use this option, you must have the permission to **Allow Staff Member to view all Students in EZ Query**. For more information, see ProgressBook StudentInformation Security Guide.

On the **SIS Student Search** screen, you can search for students using a variety of filter criteria and download the results with numerous output field options. This screen is available at both the district level and the building level.

**Note:** StudentInformation uses the current date as the effective date when searching EMIS records. Before the school year begins, it uses the maximum calendar master start date; after the school year ends, it uses the minimum calendar master stop date.

1. Select your search criteria as you tab through each of the options and subtabs.



### SIS Student Search

Following are important notes regarding the **SIS Student Search** options.

- **Filter Criteria** tab's **Ad Hoc** subtab – If you select an ad-hoc membership as part of your search criteria, StudentInformation ignores all other filters on all other subtabs.
  - **Filter Criteria** tab's **Students** subtab:
    - To enter only part of the name in any of the name fields, enter the first couple letters followed by %. (For example, to see all names starting with “Sa,” enter **sa%**.)
    - Enter **Student Numbers**, **Social Security Number** and **EMIS ID** separated by commas.
  - **Filter Criteria** tab's **EMIS** subtab – Enter **SSID**, **District of Residence IRN**, **Sent To IRN**, **How Received IRN**, **Attending Building IRN**, **Admitted From IRN** and **Withdrawn to IRN** separated by commas.
  - **Field Selection** tab's **EMIS** subtab – The **State Student ID** and **Free/Reduced Lunch Status** check boxes only display if you have the proper security permissions. (For more information, see *ProgressBook StudentInformation Security Guide*.)
2. On the **Summary** tab, review the summary of your selection criteria.
  3. Select your file download options and click **Finish**.

Home >> EZ Query >> Reports >> SIS Student Search

### SIS Student Search

Select School | Filter Criteria | Field Selection | **Summary**

Click Finish To Begin The Download.

**Gender:** All  
**Homeroom Date:** 4/1/2014  
**Enrollment Date:** 4/1/2014  
**Enrollment Types Returned:** All  
**Contact State:** OH  
**Effective Date:** 4/1/2014  
**Student Alert Date:** 4/1/2014  
**Fields:** First Name, Middle Name, Last Name, Student Number, Homeroom

**File Download Options**

CSV | Download

**1178 Students Returned.**

< Back | **Finish**

### SIS Student Search – Summary Tab

The output file returns the students and fields matching your selection criteria.

	A	B	C	D	E
1	FirstName	MiddleName	LastName	StudentNumber	Homeroom
2	Max		Able	680073371	4-103
3	BILLIE		ALEXANDER	490203	
4	DARRYL		ALEXANDER	390281	
5	ERIK		ALEXANDER	490316	6-127
6	Holmvik		Anders	194063	5-106
7	DORA		ANDREWS	696429	
8	GUY		ANDREWS	696283	4-202
9	HUGH		ANDREWS	696244	3-206
10	MARLENE		ANDREWS	590242	
11	MAX		ANDREWS	190470	
12	JAY		AVERY	280016	
13	JOHNNY		AVERY	190436	
14	KELLY		AVERY	490246	5-105
15	MIGUEL		AVERY	270016	
16	SANDRA		AVERY	196066	6-145
17	DAISY		AYALA	149045	4-103
18	ALICE		BALL	790489	6-145
19	CHERYL		BALL	268294	6-135E
20	CLYDE		BALL	159024	5-208
21	DUSTIN		BALL	390290	
22	JUDITH		BALL	159015	5-213
23	JULIE		BALL	390262	6-143
24	KATHERINE		BALL	595049	
25	LEWIS		BALL	495044	5-132
26	MAURICE		BALL	496057	6-156
27	ROSE		BALL	493047	
28	AARON		BALLARD	696448	
29	DANNY		BALLARD	592052	
30	PHILLIP		BALLARD	280001	6-124

### SIS Student Search Results

## Student Membership/Services Search

Navigation: Home – EZ Query – Reports – Student Membership/Services Search

You can search for specific memberships and services and the students who are associated with them.

On the **Student Membership/Services Search** screen, select your criteria, and click **View List**.

**Note:** The **Special Education Services** multiselect list only displays if FY13 or later is in context. For prior years, you enter special education services on the **Edit Student Memberships** screen and select them for this report in the **Membership Code** multiselect list.

### Student Membership/Services Search

A list of memberships/services and associated students displays at the bottom of the screen.

Membership Group	Membership Code ^	Membership Name	School Code	Student ID	Last Name	Given Name	Grade	School Year	Term
	215002	Aide Services	ASHS	149037	JACOBS	EVERETT	11	2012	
	215007	Medical Services	ASHS	190264	MADDEN	ANNA	11	2012	
	215011	Reader Services	ASHS	696238	KANE	IAN	10	2012	

### Student Membership/Services Search Results

## List of Students Without Disciplinary Incidents

### Navigation: Home – EZ Query – Reports – Students Without Disciplinary Incident

You can view and download a list of all students without any disciplinary incidents.

1. On the **List Of Students Without Disciplinary Incidents** screen, in the drop-down list, select the school.
2. Select whether you want to view only “Active Students” or “All Students.”
3. Optional: Select your file download options.

**Note:** If you do not select any file download options, the list displays at the bottom of the screen.

4. Click **View Summary**.

Home » EZ Query » Reports » Students Without Disciplinary Incident

### List Of Students Without Disciplinary Incidents

DASL HIGH SCHOOL ▾  Active Students  All Students

File Download Options

Select A File Type ▾ Select A Download Method ▾

View Summary

### List of Students Without Disciplinary Incidents

The students with no disciplinary incidents who match your search criteria display in a report or on screen, based on your selections.

Home » EZ Query » Reports » Students Without Disciplinary Incident

### List Of Students Without Disciplinary Incidents

DASL HIGH SCHOOL  Active Students  All Students

**File Download Options**

Select A File Type  Select A Download Method

Student ID	School Code	First Name	Last Name ^	Grade
48652258	DAHS	Hannah	Banana	11
6001	DAHS	CORY ROBERT	EYE	10
6002	DAHS	MICHELLE LYNN	FONT	10
4002	DAHS	ELLA JANE	FONT	12
4003	DAHS	GEORGE EVAN	JOHNSON	12
48652419	DAHS	Raymond	Jones	09
6003	DAHS	WHITNEY ANN	JONES	10
1224	DAHS	HARPER	LEE	09
6004	DAHS	TROY AARON	LINE	10
6005	DAHS	DAISY LEE	MAY	10
5002	DAHS	MICHAEL JAY	PERRY	11
4004	DAHS	JORDAN DANIEL	POTTS	12
5003	DAHS	IAN MICHAEL	POTTS	11
7003	DAHS	NICOLE SUZANNE	RING	09
7004	DAHS	LEANN JEAN	SARGENT	09
4008	DAHS	THOMAS	SAWYER	11
4005	DAHS	JOBETH	WELLS	12
5005	DAHS	JONA RENEE	WELLS	11
7005	DAHS	RYAN SETH	WILLIAMSON	09

19 Records Displayed [Back To Top](#)

**Students Without Disciplinary Incidents – Viewed on Screen**

	A	B	C	D	E
1	<b>StudentID</b>	<b>Code</b>	<b>Lastname</b>	<b>FirstName</b>	<b>Grade</b>
2	1224	DAHS	LEE	HARPER	9
3	4002	DAHS	FONT	ELLA JANE	12
4	4003	DAHS	JOHNSON	GEORGE EVAN	12
5	4004	DAHS	POTTS	JORDAN DANIEL	12
6	4005	DAHS	WELLS	JOBETH	12
7	4008	DAHS	SAWYER	THOMAS	11
8	5002	DAHS	PERRY	MICHAEL JAY	11
9	5003	DAHS	POTTS	IAN MICHAEL	11
10	5004	DAHS	SPRAT	JACK JOSEPH	11
11	5005	DAHS	WELLS	JONA RENEE	11
12	6001	DAHS	EYE	CORY ROBERT	10
13	6002	DAHS	FONT	MICHELLE LYNN	10
14	6003	DAHS	JONES	WHITNEY ANN	10
15	6004	DAHS	LINE	TROY AARON	10
16	6005	DAHS	MAY	DAISY LEE	10
17	7003	DAHS	RING	NICOLE SUZANNE	9

**Students Without Disciplinary Incidents –  
Download File**

## Weekday Attendance Percentage

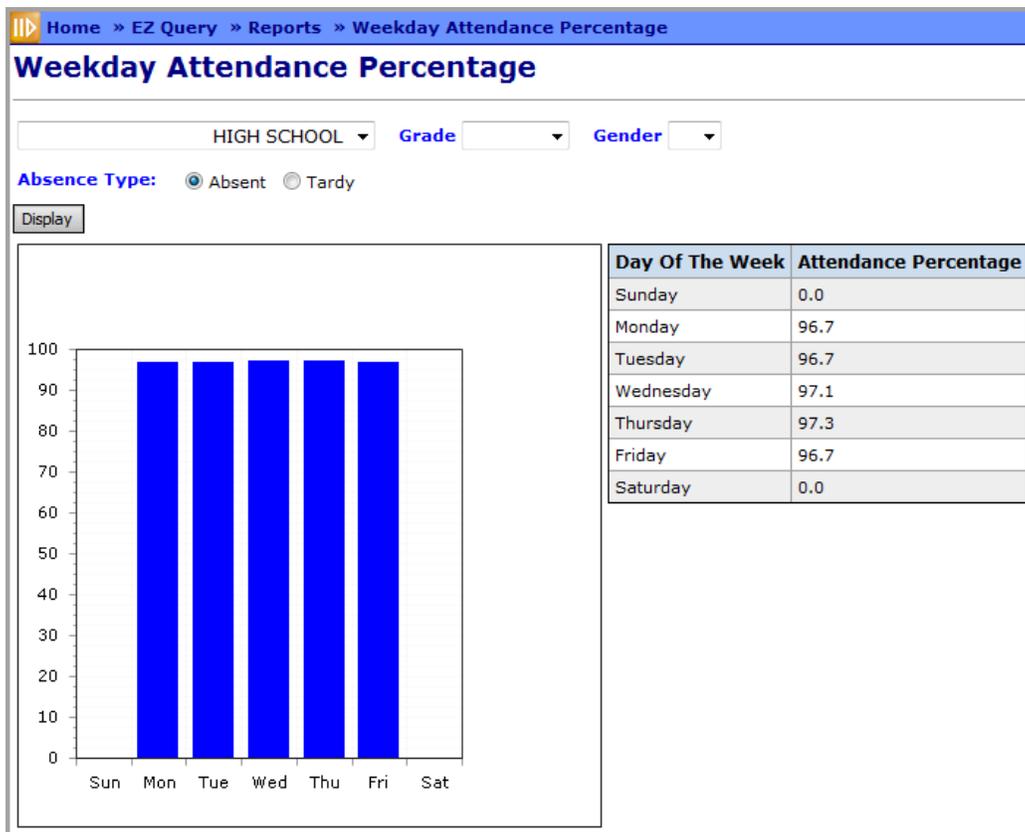
**Navigation: Home – EZ Query – Reports – Weekday Attendance Percentage**

You can view a school’s absence and tardy percentages broken out by day of the week so you can track student absence trends.

1. On the **Weekday Attendance Percentage** screen, in the drop-down list, select the school for which you want to view absence or tardy percentages.
2. Optional: Select a **Grade** and/or **Gender** to filter results by those criteria.
3. For the **Absence Type** option, select whether to display “Absent” or “Tardy” percentages.
4. Click **Display**.

**Weekday Attendance Percentage Selection Criteria**

The absence or tardy percentages for the school and school year in context display in a bar graph and chart showing each day of the week and the attendance or tardy percentage.



**Weekday Attendance Percentage Bar Graph and Chart**

---

# ProgressBook StudentInformation Import Export Guide



# **ProgressBook StudentInformation Import Export Guide**

(This document is current for v14.7.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Software Answers, Inc.  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)  
[www.software-answers.com](http://www.software-answers.com)

## Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Import Export Guide* have been made.

Product Version	Heading	Page	Reason
14.7.0	Entire Guide	N/A	Removed/updated references to the retired <i>ProgressBook StudentInformation General Use Guide</i> .
14.6.7	<i>"Preident for Science and Social Studies"</i>	111	Updated procedure and image to show new option to <b>Create Separate Files for AASWD and OCBA</b> and new <b>File Download Options</b> section.
14.6.5	<i>"Preident for PARCC"</i>	106	Added note indicating which courses display in the multi-select lists.
14.6.5	"Preident for PARCC Student Registration File"	N/A	Removed section.
14.6.4	<i>"Preident for Science and Social Studies"</i>	111	Added section.
14.6.2	"Preident for PARCC Student Registration File"	N/A	Added section.
14.5.2	<i>"Preident for KRA"</i>	109	Added section.
14.5.0	<i>"STUFEES Export"</i>	121	Updated image to show renamed multiselect lists.
14.4.3	<i>"Home School Import – Course History"</i>	12	Corrected file format errors.
14.4.3	<i>"Special Education Import (SpS)"</i>	24	Removed <b>Reporting Period</b> field description and updated image.
14.4.3	<i>"Home School Export – Course History"</i>	49	Corrected file format errors.
14.3.0	<i>"Home School Import – Course History"</i>	12	Added <b>IsDualCredit</b> and <b>IsCollegePrep</b> rows to file layout.
14.3.0	<i>"Home School Export – Course History"</i>	49	Added <b>IsDualCredit</b> and <b>IsCollegePrep</b> rows to file layout.
14.3.0	<i>"eTranscripts"</i>	155	Updated image and procedure to reflect change in menu structure.  Added sections for new <b>GPA Set Options (FJ)</b> screen and <b>Graduation Core Summary Record (GC)</b> screen.
14.2.2	<i>"Preident for Ohio Online Field Test"</i>	107	Added section.
14.2.1	<i>"Pre-Identification Export"</i>	86	Added general explanation of pre-identification exports.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.2.1	<i>"PreIdent for PARCC"</i>	106	Added section.
14.2.0	Global	N/A	Updated Heading 1, 2 and 3 formats to match ProgressBook Suite formatting.  Removed outline numbers to conform to heading format of the ProgressBook Suite.  Removed import/export icons to match ProgressBook Suite formatting.
14.2.0	"Import/Export Documentation Key"	N/A	Removed section because the icons are no longer included in the guide.
14.2.0	<i>"Pre-Identification Export"</i>	86	Updated Riverside ITBS export section to reflect new screen shots and rewrote section as procedural steps.
14.2.0	<i>"eTranscripts"</i>	155	Added section.
14.0.0	<i>"Special Education Import (SpS) – Student Attributes (FD)"</i>	27	Updated section to include Section 504 information.

# Table of Contents

Change Log.....	i
Table of Contents.....	iii
Import/Export Overview.....	1
Understanding the Import/Export Module.....	1
Import Formats.....	2
ATT2SIS Import.....	2
State Student ID Import.....	5
LOAGRADE Import.....	7
Home School Import.....	12
Home School Import – Course History.....	12
Home School Import – Attendance.....	17
Home School Import – Students.....	19
Special Education Import (SpS).....	24
Special Education Import – Header and Trailer Records.....	26
Special Education Import (SpS) – Student Attributes (FD).....	27
Special Education Import (SpS) – Student Program (GQ).....	28
Special Education Import (SpS) – Student Special Education (GE).....	29
Special Education Import (SpS) – Student Special Education Graduation Requirement (FE).....	30
Special Education Import (SpS) – Student Achievement Test (FA, GA Record Type) .....	30
Special Education Import (SpS) – Student Ohio Graduation Test (FA, GX Record Type).....	31
Special Education Import (SpS) – Student Kindergarten Readiness Assessment (FA, GO Record Type).....	31
Export Formats.....	32
State Student ID Export.....	32
INFOhio Export.....	36
Discipline Letter Export (DISCDT).....	39
Gradebook Export.....	43

Original Gradebook Export.....	44
Extended Gradebook Export.....	46
Home School Export.....	49
Home School Export – Course History.....	49
Home School Export – Attendance.....	53
Findlay Dialer Export.....	56
Edulog Export.....	59
Elida Edulog.....	60
BATH Edulog.....	62
Wayne Trace/Lima City Edulog.....	64
General Edulog Format.....	67
Lunch Export.....	69
Lunch Export for WAPAK City Schools.....	70
Meals Plus Point of Sale Version 1.....	72
Meals Plus Point of Sale Version 2.....	74
WIN-MCM Lunch Program.....	76
Excelsior Export.....	77
Pre-Identification Export.....	86
Riverside ITBS Pre-Identification Export.....	87
Preident for Pearson Educational Measurement Export.....	89
Preident for OTELA Export.....	99
Preident for OLSAT.....	104
Preident for PARCC.....	106
Preident for Ohio Online Field Test.....	107
Preident for KRA.....	109
Preident for Science and Social Studies.....	111
Photo Export.....	114
Fostoria Life Touch Photo Export.....	115
Lange Photo Export.....	116
Lima Life Touch Photo Export.....	119
STUFEES Export.....	121

AIR Export .....	123
AIR Export – Home School District in Context .....	123
AIR Export – JVS District in Context .....	128
Terra Nova Export .....	133
SAS Pre-Identification Export .....	142
WebXam Export .....	144
DataMap Export.....	147
District Roster for Medicaid Billing Export.....	153
Battelle For Kids Export.....	154
eTranscripts.....	155

This page intentionally left blank.

---

## Import/Export Overview

StudentInformation needs to be able to exchange data in order to provide both import and export capabilities. The method of data exchange selected for each import/export will be based on the best method for the task to be accomplished. The following methods are ways that data can be exchanged using StudentInformation.

### File Upload – Import

End user can use their web browser to upload a file from their computer into StudentInformation. The file can then either be processed immediately or made available to an ITC staff member for processing.

An example of this would be where a school uses an electronic grade book package. The school uses the mechanism provided by the grade book package to generate a text file containing student marks in the LOAGRADE format. Once this file is created, the user would go into StudentInformation and navigate to the import student marks page. They would be prompted to upload their file. StudentInformation would take the uploaded file then process it and load the marks. The user would be provided with a report of the completed process.

### File Download – Export

The end user can download a file directly to their computer from StudentInformation. This action requires no interaction from an ITC staff member.

An example of this could be that a user needs to have student demographic data information to use in a customized report they are creating. They would navigate to the student demographic data page, use the filters to select the desired students, specify the format of the file and specify the fields to be included in the download file.

---

## Understanding the Import/Export Module

StudentInformation will support the following export formats:

- Comma Separated
- Tab delimited
- Excel (HTML)
- Fixed Length
- XML

**COMMA SEPARATED** is usually used as a delimited character to separate each field in a file. With this format, the default option is to place quotes around fields that contain text values. These files will end with the extension of CSV as the default but the user may change the extension to his/her specification.

**TAB DELIMITED** formatted files use a TAB character to separate each field within the file. These files end in the extension TXT as the default but the user may change the extension to one of their own choosing.

**NEW VERSIONS of Microsoft Excel** can successfully import data stored in an HTML table format. For this reason and greater flexibility, the Excel export format will be done using HTML table tags. These files will end with the extension XLS. If deemed necessary at a later time, this option can be revisited and additional formats such as XML or native Excel formats can be added to the list of available download options.

**FIXED LENGTH** export format is used for a number of legacy applications expecting to import and export data in a fixed length format. In this format each line of the file is the same length (padded with spaces if necessary) and each field in the file has a designated starting position and length. The padding will default to spaces being used but the user may choose a different character/number to be used as padding. The padding will be on the right by default but the user may change it to default to the left if needed. If the data in StudentInformation exceeds the available length for the field, then the data is truncated. These files will end with the extension SEQ as the default but the extension may be changed by the user to the user's specification. Many of the EMIS data files are formatted in this way.

**XML** format produces a file with the necessary XML tags.

### **Miscellaneous Items**

Data in many of the exported data fields may contain carriage return and/or line feed characters. In addition apostrophes and commas may be present in data fields as well. The presence of any of these characters may cause problems in the importation of data by a third party and/or external application. Therefore, any such characters must be removed in these instances, as they conflict with the file format and will result in errors for the application processing the file or the vendor receiving the file.

### **Specific Export File Formats**

Several file formats that have been used in SIS and DSL in the past will continue to be supported. Those file formats have specific fields, and formatting for their particular needs. Those formats that have been included at the time of the release will be listed here, but the list will continue to grow as StudentInformation continues development.

---

## **Import Formats**

### **ATT2SIS Import**

**Navigation: Home – Management – Import/Export – ATT2SIS Import**

The ATT2SIS Import format will be used to load data from a sequential file to attendance records. Schools take attendance in a variety of ways outside of the existing StudentInformation application. Therefore there needs to be a way available to import the attendance information from those outside applications. If the applications can

produce a file in the following format, then the file can be imported into StudentInformation.

The file needs to be of fixed width, left justified with spaces for padding. The user needs to be able to assign the filename of ATT2SIS.TXT to the file. The import will include all records found in the external application. The ATT2SIS Import accepts the following format with the starting points and lengths of fields in parentheses.

- Student ID (1, 9)
- Absence Date (10, 8) (format is yyymmdd)
- Absence Type (18, 4) (up to four-letter Absence Type Code, defined in StudentInformation)
- Absence Time (22, 8) (format is HH:MM followed by a space and AM or PM)
- Absence A.M./P.M. (30, 1) (valid values are A [a.m.], P [p.m.] and space [full day])
- Absence Reason (31, 1) (only importing if Absence Reason Code is one letter)
- Absence Note (32, 1) (one-letter Absence Note Code, defined in StudentInformation)

The ATT2SIS Import also accepts the following format:

- Student ID (1, 9)
- Absence Date (10, 8) (format is yyymmdd)
- Absence Type (18, 1) (one-letter Absence Type Code, defined in StudentInformation)
- Absence Time (19, 8) (format is HH:MM followed by a space and AM or PM)
- Absence A.M./P.M. (27, 1) (valid values are A [a.m.], P [p.m.] and space [full day])
- Absence Reason (28, 1) (only importing if Absence Reason Code is one letter)
- Absence Note (29, 1) (one-letter Absence Note Code, defined in StudentInformation)

## Step One

**Daily Absence Only – Please note that this import can only be run for daily absence file. Attempting to process this import for period absence records will result in invalid records.**

**File Name:/Browse** – Browse to the location of the File Name to be imported.

**Next>** – Process the file selected and go to Step Two.

### Step Two

In Step Two, you will be presented with the List of Errors on Import. If no errors are found, you will skip Step Two and proceed directly to Step Three.

Type	Value
No Absence Type Found	4

**Type** – Indicates the Type of error. Step Two will check for valid data for Student ID, Absence Date, Absence Type, Absence Time and Absence Reason. Error Types include:

- No Student Number Found
- No Absence Type Found
- No Absence Reason Found

**Value** – Value of Student ID, Absence Date, Absence Type, Absence Time or Absence Reason that is causing the error.

**Start Over** – Start Over and go back to Step One. You must correct the errors in the ATT2SIS.txt file before you can go to Step Three of the ATT2SIS Import.

### Step Three

Step three will show you the attendance record(s) that have been processed.

The screenshot shows the 'ATT2SIS Import' interface. At the top, there is a breadcrumb trail: Home » Management » Import/Export » ATT2SIS Import. Below this is the title 'ATT2SIS Import'. There are three tabs: 'Step One', 'Step Two', and 'Step Three', with 'Step Three' being the active tab. Below the tabs is a table with the following data:

Process Code	Student ID	Student Name	Student Telephone	Date	Type	Time	AMPM	Reason	Note
A	048652304	Smith, Jenna	4191234567	11/16/2004	E			I	P

At the bottom right of the interface is a 'Start Over' button.

**Start Over** – Start Over and go back to Step One to process another ATT2SIS.txt file.

Attendance records processed through the ATT2SIS Import process will be notated as “Record created by data import process” in the Student’s School Absences.

The screenshot shows the 'Student's School Absences' interface. At the top, there is a breadcrumb trail: Home » SIS » Student » Attendance » School Absences. Below this is the title 'Student's School Absences' and a sub-header: 'From this screen, you can display, add, change and delete data pertaining to student absences.' There are two date pickers: 'Start Date: 8/24/2004' and 'End Date: 11/17/2004', with a 'Go' button. Below the date pickers are two tabs: 'Daily Attendance' and 'Period Attendance'. There is an 'Add Absence' button. Below the tabs is a table with the following data:

	Date ^	Time	Absence Level	Absence Type	Reason	Note	Comment
✗	Oct 01, 2004	11:13 AM	0.50	S	FIELD TRIP		
✗	Nov 15, 2004	07:45 AM	1.00	E			Record created by data import process
✗	Nov 16, 2004	07:45 AM	1.00	E	ILL	PRNT CALL	Record created by data import process

## State Student ID Import

### Navigation: Home – Management – Import/Export – State Student ID Import

All students in the state of Ohio must have a state assigned unique identifier number to facilitate anonymous reporting when districts report data to the state EMIS reporting system. The state wide ID provided by a third party system reports an existing ID for a student if one exists and creates new identifiers for students that cannot be matched to existing records in its system.

StudentInformation will create an export file (see section 2A. State Student ID Export for the file format) to be sent to the third party for processing. The vendor processes the file, provides the student with a State Student ID in the original file and returns the file for importing. The State Student ID is appended at the first position in the file for each student row.

The file layout is a comma delimited file, left justified. The default name given to the file by the third party vendor will be in the format of: (ITC name OR School District IRN) (Date as yyyyymmdd). An example of the filename would be NOACSC20040203.TXT.

The user can then import this file and the State Student IDs from the third party vendor will be imported into StudentInformation.

## FS Records and Missing SSIDs

Students could have multiple FS records with missing SSIDs. The State Student ID Import will update multiple FS records if:

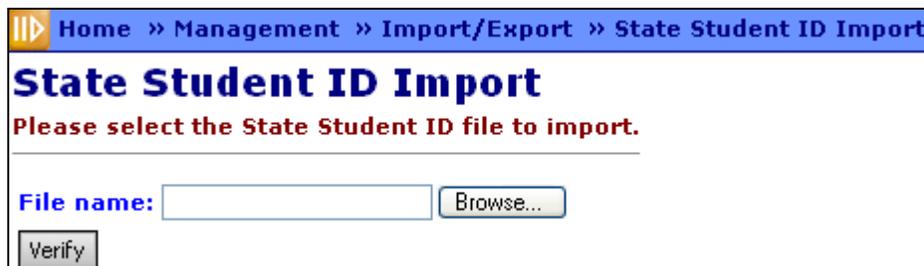
- The most recent FS record is missing SSID.
- The record prior to the most recent FS record is also missing an SSID.
- All records prior to the most recent record missing an SSID until it finds a record with a non-blank value for SSID.

*Example 1:* In this example, the 8/1 FS record and 7/15 FS record would get the SSID loaded when the import is processed:

- 8/1/2008 FS record – no SSID
- 7/15/2008 FS record – no SSID
- 7/1/2008 FS record – SSID

*Example 2:* In this example, only the 8/1 FS record would get the SSID loaded when the SSID Import is processed because the 7/15 FS record already has an SSID. The 7/1 FS record is missing an SSID, however the SSID that should be filled in there is the one from the 7/15 record. This will need to be corrected manually.

- 8/1/2008 FS record – no SSID
- 7/15/2008 FS record – SSID
- 7/1/2008 FS record – no SSID



The screenshot shows a web browser window with a blue header containing the navigation path: Home » Management » Import/Export » State Student ID Import. Below the header, the main heading is "State Student ID Import" in large blue font. Underneath, a red instruction reads "Please select the State Student ID file to import." A horizontal line separates this from the input area. The input area includes a label "File name:" followed by a text box and a "Browse..." button. Below the text box is a "Verify" button.

**File name:/Browse** – Browse to the location of the File Name to be imported.

**Verify** – Execute the Import. The verification messages will include a Result Code (translation shown in the following table). The most current result codes can be found in the SSID User Manual located at [https://www.ohiossid.com/ssid\\_help\\_control.asp](https://www.ohiossid.com/ssid_help_control.asp) .

Result Code	Description	Possible Reason for Outcome
<b>A</b>	No Match Exists – New SID Assigned	Attributes provided do not match existing record.
<b>B</b>	One Match Exists – SID Returned	Attributes provided match one existing record.
<b>C</b>	Multiple Matches Exist – New SID Not Assigned	Attributes provided match two or more existing records and uniqueness cannot be determined.
<b>D</b>	SID and 4 attributes Do Not Exist – No Records Updated	Attributes provided do not match existing record.
<b>E</b>	One Match Exists – SID Record Updated	Attributes provided match one existing record and attributes are updated.
<b>F</b>	Missing or Invalid Data	One or more edit check failures.
<b>M</b>	SID Inactive – Correct SID Returned	SID submitted is inactive and valid SID is returned.
<b>N</b>	Attributes of the Valid SID do not match the Inactive SID	SID submitted is inactive and valid SID exists; however, last name, first name, date of birth or gender in the file do not match the attributes of the active (Valid SID).
<b>P</b>	No Match Exists – SID Not Returned	Attributes provided do not match existing record for those records with an Existing Student Code of Y.
<b>R</b>	New SID <u>not</u> assigned – Invalid Admission Reason Code.	Attributes provided do not match existing record; however new SID is not assigned because invalid Admission Reason Code submitted (6 or 7).
<b>X</b>	SID Inactivated	SID provided has been inactivated.

## LOAGRADE Import

### Navigation: Home – Management – Import/Export – LOAGRADE Import

Schools use a variety of third party grade book packages external to the StudentInformation application. Data may be transferred to StudentInformation if the grade book program can create a file in the following format. This process was called LOAGRADE in SIS and was used to convert the file created by the external grade book package into the CLIS records.

The file needs to be of fixed width and left justified with spaces for padding. The import will include all records found in the external application. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Marks – Course ID (1, 15)
- Marks – Course Section (16, 2)
- Filler – (18, 2)
- Marks – Student ID (20, 9)
- Marks – Comment One (29, 3)
- Marks – Comment Two (32, 3)
- Marks – Attendance (35, 3)
- Mark – One (38, 3)
- Mark – Two (41, 3)
- Mark – Three (44, 3)
- Mark – Four (47, 3)
- Marks – Work Habit (50, 1)
- Marks – Citizenship (51, 1)

### Step One – Reporting Term and File Name

**Reporting Term** – Choose the correct Reporting Term from the drop-down list. The Reporting Terms are defined by building.

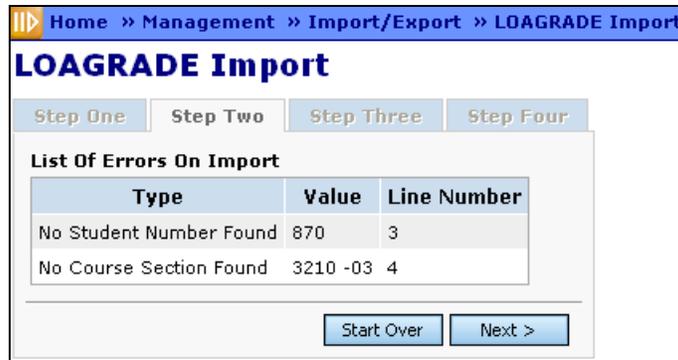
**File name:/Browse** – Browse to the location of the File Name to be imported. The file does not need a specific file name or extension.

**Ignore Load Errors** – If checked, the import process will display errors in Step Two and allow you to continue (which will load any records in the import file that do not have errors). If unchecked, the import process will not allow you to continue past Step Two if any records in the import file have errors.

**Next>** – Process the file selected and go to Step Two (or Step Three, if no errors are found).

### Step Two – Errors

In Step Two, you will be presented with the List of Errors on Import. If no errors are found, you will skip Step Two and proceed directly to Step Three.



**Type** – Indicates the Type of error. Step Two will check for valid data for Course Sections, Course Section Marking Patterns, Students, Mark Values, Teacher Comments and Work Habits.

Error Type	Cause
No Course Section Found	The course section listed is not a valid, active course section in the current building and school year <b>OR</b> The course listed is not a valid, active course in the current building and school year.
No Student Number Found	The student number listed is not enrolled in the current building and school year.
No Student Course Section Assignment Found	The student number listed is not enrolled in the course section listed
No Mark Found	The mark listed is not a valid, active mark in the current building.
No General Comment One Found	The Comment listed is not a valid, active General Comment in the current building.
No General Comment Two Found	The Comment listed is not a valid, active General Comment in the current building.

**Value** – Indicates the value which caused the listed error.

**Line Number** – Indicates which line in the file included the listed value.

**Please Note** – If you did not check Ignore Load Errors, these errors must be fixed in the input file before you can proceed to Step Three. If you did check Ignore Load Errors, any errors listed will cause those records not to be loaded. Records without errors will be loaded.

**Start Over** – Start Over and go back to Step One

**Next>** – Ignore the records containing the listed errors, and process the remaining records. This button is only visible if you checked Ignore Load Errors in Step One.

## Step Three – Marking Patterns

In Step Three, you will be asked to verify the Marking Patterns and make adjustments as necessary.

Marking Pattern	Course Section Count	Mark One	Mark Two	Mark Three	Mark Four
AY - All Year Course	1	1st Quarter Interim	1st Quarter Mark	-- Not Imported --	-- Not Imported --

Import marks for dropped assignments

Reporting Term for Comments: Qtr1

Mark Type for Comments: [ ]

Start Over Next >

**Marking Pattern** – The Marking Pattern assigned to the Course Sections that are being imported. There could be multiple Marking Patterns present in a single LOAGRADE Import – All Year courses, Semester courses, Quarter courses, etc.

**Course Section Count** – The number of Course Sections listed in the import file which are linked to this particular Marking Pattern

**Mark One** – Import the first Mark in the import file into the selected Mark for the listed Marking Pattern.

**Mark Two** – Import the second Mark in the import file into the selected Mark for the listed Marking Pattern.

**Mark Three** – Import the third Mark in the import file into the selected Mark for the listed Marking Pattern.

**Mark Four** – Import the fourth Mark in the import file into the selected Mark for the listed Marking Pattern.

***Note:** The Mark One, Mark Two, Mark Three, and Mark Four can be changed as needed by choosing the correct mark from the dropdown list (this list is populated by default from the Marking Patterns defined in StudentInformation; see the ProgressBook StudentInformation Marks Guide for details).*

**Import marks for dropped assignments** (optional) – If checked, marks will be imported for students' dropped course section assignments. **Note:** Marks for removed course section assignments are not imported.

**Reporting Term for Comments** (optional) – Select a Reporting Term from this pull-down. Comments included in the LOAGRADE Import file will be loaded as Comments linked to the selected Reporting Term.

**Mark Type for Comments** (required) – Select the proper Mark Type for Comments. The Mark Type for Comments drop down will be populated with values that correspond with the chosen Reporting Term for Comments.

**Start Over** – Start Over and go back to Step One

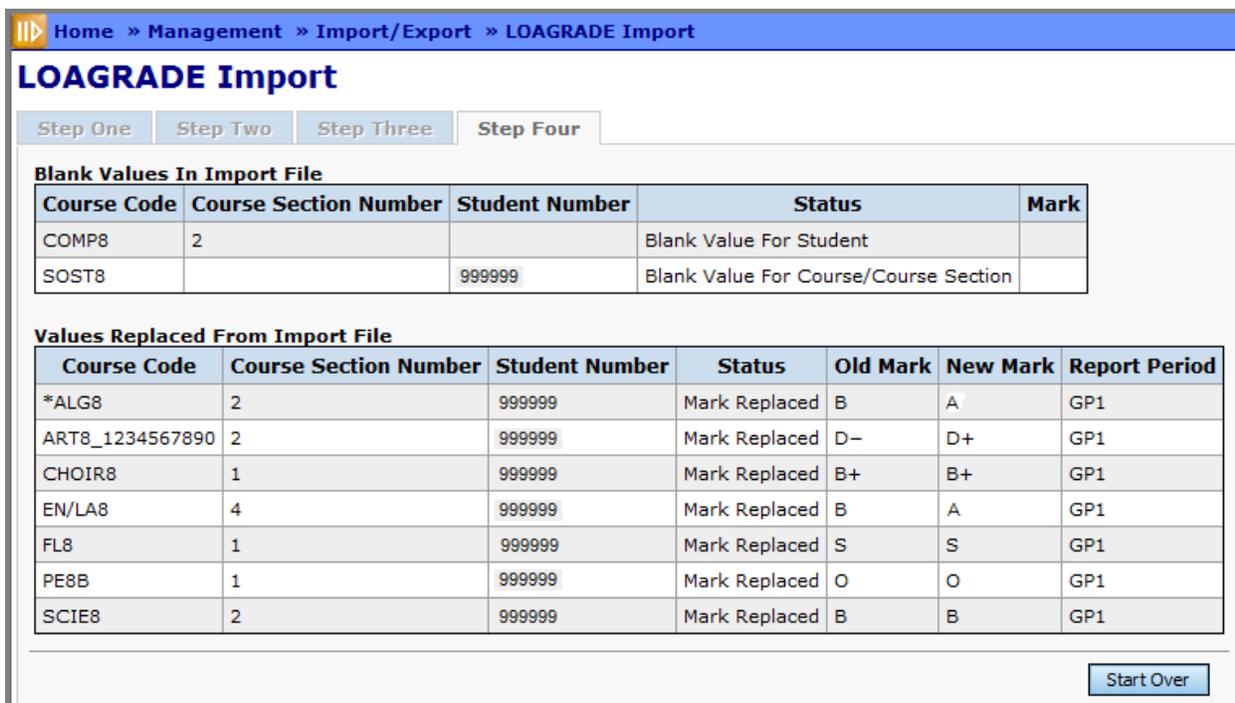
**Next** – Process the file selected and go to Step Four. The processing step may take a few minutes – please notice the progress bar.

### Step Four – Results

While the Import is processing, the user will see the following screen:



Once processing is complete, the user will be presented with on-screen results of the import. These results will also be stored in a log file that the ITC will be able to access if needed.



**Blank Values in Import File** – This area will display any records that contained blank values for student or course section. If marks selected for import are blank, they will be imported as blank marks in StudentInformation.

**Values Replaced From Import File** – Will display the records that were processed and marks updated. This will display any old marks that were replaced by the new marks, and the reporting period to which those marks were imported.

## **Start Over** – Start Over and go back to Step One

Once the LOAGRADE Import has run successfully, the specific marks are updated on the student records. You can now proceed with any or all of the following: R703 Verification Sheets, Required Marks Entry, R702 Transcripts, R700 Report Cards, viewing grades on student records, etc.

***Note:** If the LOAGRADE process imports marks for a student who has been withdrawn from a particular course section, StudentInformation will not prevent those marks from being applied to that student and that course section.*

## **Home School Import**

### **Navigation: Home – Management – Import/Export – Home School Import**

Home School Import is used to transfer Course History, Attendance and Students data from a JVS to a Home School. Any school (not just Home Schools) can use the Home School Import.

StudentInformation will create an export file that can be imported to StudentInformation (see Home School Export), or a SIS extract can be performed and imported to StudentInformation. The file layouts are fixed width files with a header row (if exporting from StudentInformation). Note that some programs that generate files in these formats may use “@” as Filler instead of a space. Filler can consist of any character, so this will still work correctly.

Before beginning the import make sure you have a clear understanding of which marks are in the file. Open the file from the JVS and compare the file’s content to the file layout so you know marks are contained in the file before importing the file.

Important note to Home School districts with multiple high schools: If a district has several high school buildings, the export file sent by the JVS will need to be separated into a separate file for each building. The file sent by the JVS is already sub-divided by building, so all you need to do is cut and paste into separate files.

### **Home School Import – Course History**

#### **Navigation: Home – Management – Import/Export – Home School Import – Course History Tab**

The Course History file layout must be as follows with the starting point of that field and the length in parenthesis. Default names are likely to be StudentMarks000000.SEQ (DASL) or ALIEN\_MARK\_XXXX.SEQ (JVSGRADASL), where 000000 is the Home School District IRN or XXXX is the home school four-letter code.

## File Format

Field Name	Position	Description
StudentNumber	1 - 9	
GradeLevelCode	10 - 11	
LastName	12 - 29	
FirstName	30 - 43	
CalledName	44 - 51	
SSIDOrEMISID	52 - 60	
HomeSchoolCode	61 - 64	
SchoolYear	65 - 68	
Abbreviation	69 - 76	
SectionNumber	77 - 78	
CourseShortName	79 - 93	
CompletionDate	94 - 99	[Date, formatted yyyyymm]
SchoolCode	100 - 103	
-- BLANK --	104 - 109	[Filler Field for School Abbreviation]
CourseGradeLevelCode	110 - 111	
-- BLANK --	112	[Filler Field for Course Grade Level Count]
InCumGPA	113	[Boolean, Y or N]
InCumCredit	114	[Boolean, Y or N]
-- BLANK --	115	[Filler Field for Language Code]
-- BLANK --	116 - 118	[Filler Field for Hours of Instructions]
-- BLANK --	119	[Filler Field for Level of Difficulty]
AreaOfStudy	120 - 122	
SubjectArea	123 - 125	
TransferCode	126	
MarkAlpha1	127 - 129	
MarkNumeric1	130 - 135	
AttemptedCredit1	136 - 146	[Decimal, formatted ###0.000000, right justified]
EarnedCredit1	147 - 157	[Decimal, formatted ###0.000000, right justified]
MarkAlpha2	158 - 160	
MarkNumeric2	161 - 166	
AttemptedCredit2	167 - 177	[Decimal, formatted ###0.000000, right justified]
EarnedCredit2	178 - 188	[Decimal, formatted ###0.000000, right justified]
MarkAlpha3	189 - 191	
MarkNumeric3	192 - 197	
AttemptedCredit3	198 - 208	[Decimal, formatted ###0.000000, right justified]
EarnedCredit3	209 - 219	[Decimal, formatted ###0.000000, right justified]

Field Name	Position	Description
MarkAlpha4	220 - 222	
MarkNumeric4	223 - 228	
AttemptedCredit4	229 - 239	[Decimal, formatted ###0.000000, right justified]
EarnedCredit4	240 - 250	[Decimal, formatted ###0.000000, right justified]
-- BLANK --	251 - 253	[Filler Field for Cumulative Mark]
-- BLANK --	254 - 256	[Filler Field for Exam Mark]
-- BLANK --	257 - 259	[Filler Field for Average Mark]
MarkAlpha5	260 - 262	
MarkNumeric5	263 - 268	
AttemptedCredit5	269 - 279	[Decimal, formatted ###0.000000, right justified]
EarnedCredit5	280 - 290	[Decimal, formatted ###0.000000, right justified]
LevelOfDifficulty	291 - 298	
CourseCode	299 - 314	
EMISSubject	315 - 320	
-- BLANK --	321 - 322	Filler
EMISSubjectAreaCredit	323 - 325	
-- BLANK --	326 - 330	Filler
CORESubjectArea	331 - 333	
-- BLANK --	334 - 341	Filler
CourseCredit	342 - 349	[Decimal, formatted 0.000000, right justified]
-- BLANK --	350 - 357	Filler
CreditRatioDenominator	358 - 360	[Integer, formatted ###0, right justified]
CreditFlex	361	
IsDualCredit	362	"Y" = 1 "N" = 0 "*" = null (blank)
IsCollegePrep	363	"Y" = 1 "N" = 0 "*" = null (blank)

Home » Management » Import/Export » Home School Import Advanced Search | F

## Import Data from Students' Vocational Schools

This screen will import files from students' vocational schools

Course History Attendance **Students**

The file can contain up to five term marks. Please select student marks information for each of the term marks that will be imported.

Mark	Term	Mark Type	Credit Type
Term 1 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --
Term 2 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --
Term 3 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --
Term 4 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --
Term 5 Mark	-- Not Imported --	-- Not Imported --	-- Not Imported --

**Import Mode:**

Perform Import and Create Verification File  
 Create Verification File Only, Do Not Perform Import  
 Perform Student Identifier Check Only, Do Not Perform Import Or Create Verification File

**Primary Student Identifier for Import:**  State Student ID (SSID)  EMIS ID

**Marks Import Options:**

Ignore Area Of Study If No Match To Existing Values  
 Ignore Subject Area If No Match To Existing Values  
 Remove Pluses And Minuses From Imported Alpha Marks

**Sending School IRN:**  -

**Import File:**

Select Reporting Term, Mark Type and Credit Type to use for each marks record imported. Note that when importing files created by the JVSGRADASL program in SIS/POISE, there is only rarely a Term 3 or Term 4 mark, and the Final is Term 5.

**Import Mode** (required) – You must choose one of the following Import Mode options:

- **Perform Import and Create Verification File** – Processing will import all valid records and also create the import verification file. The verification file will be named StudentMarksVerificationFile\_XXXX.txt where XXXX is your building code.
- **Create Verification File Only, Do Not Perform Import** – Processing will only create the import verification file and not actually do any imports. The verification file will be named StudentMarksVerificationFile\_XXXX.txt where XXXX is your building code. This option allows you to view the errors in the file and correct the errors before performing the actual import. **IMPORTANT!** It is strongly suggested that you run this option first to check for errors. This option will also perform the student identifier check.
- **Perform Student Identifier Check Only, Do Not Perform Import or Create Verification File** – Processing will only check the import records for a student match and show any students that did not match onscreen. It will not produce a verification file or import any records.

Student	Student Name	Error Message
088761	EVAN	Student not found
		Nothing will be imported

**Primary Student Identifier for Import** (required) – Choose State Student ID (SSID) or EMIS ID. The default is SSID. If the user chooses SSID, then the import will first try to match the student on SSID and if no match is found, it will try to find a match on the EMIS ID. If the user chooses EMIS ID, then the import will first try to match the student on EMIS ID and if not match is found, it will try to find a match on the SSID. If no SSID or EMIS ID match is found, the record is not imported, and an error record is added to the onscreen summary or verification file, depending on which option the user has chosen. **IMPORTANT!** Your selection will be determined by which ID the JVS used in the export file. You will want to import on the same selection that the JVS exported.

**Marks Import Option** (optional) – You may select one or more (or none) of these options:

- **Ignore Area of Study If No Match To Existing Values** – If selected, records with no match on Area of Study will still be imported, Area of Study will be left blank and an import verification message will be included. If not selected, records with no match on Area of Study will not be imported and an import verification message will be included.
- **Ignore Subject Areas If No Match To Existing Values** – If selected, records with no match on Subject Areas will still be imported, Subject Area will be left blank and an import verification message will be included. If not selected, records with no match on Subject Area will not be imported and an import verification message will be included.
- **Remove Pluses and Minuses from Imported Alpha Marks** – if selected, the import will “strip” the + or – from any imported alpha marks. For example, an A+ will become an A

**Sending School IRN** (required) – Enter the IRN of the school providing the Marks data to be imported. The entity name associated with the IRN will show in the adjacent

disabled textbox. Click  to open the ODE IRN Search page to browse for an IRN at ODE’s website.

**Import File** (required) – Browse to the location of the file that you received from the JVS and save to your computer.

**Import** – Import Marks data from the import file. You must confirm (click **OK**) that you really want to import this information before the import completes.

Error Message	Cause/Resolution
Student not found	<p>This is most frequently due to an EMIS ID or SSID mismatch between the JVS and home school. Change the incorrect EMIS ID or SSID at the incorrect building and re-export (or change the EMIS ID or SSID in the import file and re-import).</p> <p><b>Note:</b> <i>If you ignore this error and continue on with the import, this student’s marks will not be imported</i></p>

Error Message	Cause/Resolution
No matching mark found: X-	This is most frequently due to a JVS using plus and minus marks, and the home school using only letter marks. The usual resolution is to change the mismatched mark to a valid mark for the home school.
No matching Subject Area found: XYZ	This is most frequently due to a JVS having a subject area that the home school does not. The usual resolution for this is for the home school to add this subject area, and only use it in Home School Import for that JVS.
Could not calculate credit ratio for term #	This error means that the credit ratios cannot be calculated for the listed Terms. You may need to place these lines in a different file for importing into a single reporting term.

**Note:** If the grades imported from the JVS are numeric marks, the export file from the JVS will contain the numeric mark and alpha equivalent according to the Marks Maintenance scale set up at the JVS. So, if a student receives a numeric grade of 90.00 at the JVS and a 90.00 is equivalent to a mark of A at the JVS but a mark of B+ at the Home School, the 90.00 will be imported into the Home School equivalent to an A. In other words, the Home School Marks Maintenance scale is ignored.

**Note:** The Home School Import will now match on course code and abbreviation when determining whether an incoming record matches an existing record.

## Home School Import – Attendance

### Navigation: Home – Management – Import/Export – Home School Import – Attendance Tab

The Attendance file layout must be as follows with the starting point of that field and the length in parenthesis. Default names are likely to be StudentAttendance000000.SEQ (DASL) or ALIEN\_ATTENDANCE\_XXXX.SEQ (JVSGRADASL), where 000000 is the Home School District IRN or XXXX is the home school four-letter code.

- State Student ID (SSID) or EMIS ID – depending on ‘Primary Student Id for Export’ option selected (1, 9)
- School Year (10, 4)
- Report Term Code or Report Term Export Code – depending on ‘Home School Term Format’ option selected (14, 3)
- Absence Type (17, 1)
- Full Day Absences (18, 3)
- Half Day Absences (21, 3)
- Tardies (24, 3)
- Filler (27,12)
- Student Name (39, 30)

Home » Management » Import/Export » Home School Import Advanced Search | F

## Import Data from Students' Vocational Schools

This screen will import files from students' vocational schools

Course History Attendance **Students**

No additional information is needed to import attendance data

**Import Mode:**

- Perform Import and Create Verification File
- Create Verification File Only, Do Not Perform Import
- Perform Student Identifier Check Only, Do Not Perform Import Or Create Verification File

**Primary Student Identifier for Import:**  State Student ID (SSID)  EMIS ID

**Sending School IRN:**  -

**Import File:**

**Import Mode** (required) – You must choose one of the following Import Mode options:

- **Perform Import and Create Verification File** – Processing will import all valid records and also create the import verification file. The verification file will be named StudentAttendanceVerificationFile\_XXXX.txt where XXXX is your building code.
- **Create Verification File Only, Do Not Perform Import** – Processing will only create the import verification file and not actually do any imports. The verification file will be named StudentAttendanceVerificationFile\_XXXX.txt where XXXX is your building code. **IMPORTANT!** It is strongly suggested that you run this option first to check for errors. This option will also perform the student identifier check.
- **Perform Student Identifier Check Only, Do Not Perform Import or Create Verification File** – Processing will only check the import records for a student match and show any students that did not match onscreen. It will not produce a verification file or import any records.

Student	Student Name	Error Message
088761	EVAN	Student not found
		Nothing will be imported

**Primary Student Identifier for Import** (required) – Choose State Student ID (SSID) or EMIS ID. The default is SSID. If the user chooses SSID, then the import will first try to match the student on SSID and if no match is found, it will try to find a match on the EMIS ID. If the user chooses EMIS ID, then the import will first try to match the student on EMIS ID and if not match is found, it will try to find a match on the SSID. If no SSID or EMIS ID match is found, the record is not imported, and an error record is added to the onscreen summary or verification file, depending on which option the user has chosen.



**Your selection will be determined by which ID the JVS used in the export file. If the JVS exported by SSID, then you will need to do the import by SSID.**

**Sending School IRN** (required) – Enter the IRN of the school providing the Attendance data to be imported. The entity name associated with the IRN will show in the adjacent disabled textbox. Click  to open the ODE IRN Search page to browse for an IRN at ODE’s website.

**Import File** (required) – Browse to the location of the File Name to be imported.

**Import** – Import Attendance data from the import file. You must confirm (click **OK**) that you really want to import this information before the import completes.

Error Message	Cause/Resolution
Student not found	<p>This is most frequently due to an EMIS ID or SSID mismatch between the JVS and home school. Change the incorrect EMIS ID or SSID at the incorrect building and re-export (or change the EMIS ID or SSID in the import file and re-import).</p> <p><b>Note:</b> <i>If you ignore this error and continue on with the import, this student’s attendance will not be imported.</i></p>

### Home School Import – Students

**Navigation: Home – Management – Import/Export – Home School Import – Students Tab**

The Students file layout must be as follows in tab-delimited (.txt file) format.

Column Title	Characters	Comments
Social Security number		Numeric, xxxxxxxx format
Filler		
Last name	40	Required, alphanumeric
First name	40	Required, alphanumeric
Filler		
Filler		
Sex	1	Required, valid options are M or F
Birth date		Required, MM/DD/YYYY format
Local ethnicity	40	Alphanumeric, must match ethnicity name of receiving school
Grade		Required, XX format
Filler		
Filler		
Street address	40	Required, alphanumeric
City	40	Required, alphanumeric
State	2	Required, alphabetic, XX format, must be capital letters
Zip code	9	Required, numeric, 5 or 9 numbers
Phone	10	Numeric, (xxxxxxxxxx) or (xxx)xxx-xxxx format
Filler		
Contact type	40	Alphanumeric, must match contact type name of receiving school
Filler		
Contact name	40	Alphanumeric, will load into Last Name field only
Contact title		Valid options are Mr., Mrs., Ms. or Dr.
Filler		

Column Title	Characters	Comments
Filler		
Filler		
Contact street address	40	Alphanumeric
Contact city	40	Alphanumeric
Contact state	2	Alphabetic, must be capital letters
Contact Zip code	9	Numeric, 5 or 9 numbers can be used
State student ID	9	2 alphabetic and 7 numeric, must be capital letters
Filler		
Filler	6	
Filler		
Native language		XXX format, must be capital letters
Disadvantagement		Valid options are **, 1, 2 or 3
Filler		
Filler	6	Required, enter 123456
Filler		
Disability Code		Required; valid options are **, 01, 02, 03, 04, 05, 06, 08, 09, 10, 12, 13, 14, 15, or 16
Filler		
Home Language	4	XXX format, must be capital letters
Hispanic/Latino	1	Y or N; case sensitive
Race White	5	True or False, case sensitive
Race Black	5	True or False, case sensitive
Race Asian	5	True or False, case sensitive
Race American Indian	5	True or False, case sensitive
Race Pacific Islander	5	True or False, case sensitive
Summative Race	1	Required; valid options are H, M, W, B, A, I, or P; case sensitive

Home » Management » Import/Export » Home School Import Advanced Search | Feedback | M

## Import Data from Students' Vocational Schools

This screen will import files from students' vocational schools

Course History Attendance Students

No additional information is needed to import Student data

**Import Mode:**

Perform Import and Create Verification File  
 Create Verification File Only, Do Not Perform Import

---

**Admission Date:** 7/1/2011

**Admission Reason:** 6 - Transferred from other Ohio public district/community school

**Student Status:**

**EMIS Situation:** 5 - Resident attending Full Time

**Admitted From IRN:**

---

**District Relationship:** 1 - Stud. rcvg instr. in whole/part from rep. dist

**District of Residence:** 043505 - Ashland City SD

**How Received:** \* - Not Applicable

**How Received IRN:** \*\*\*\*\*

**Percent of Time:** 100 - Percent of Time must be greater than 0 and less than or equal to 100

**Tuition Type:** N - Non-tuition student (default)

**Attending Building IRN:** [ Select Attending Building IRN ]

**Assigned Building IRN:** \*\*\*\*\*

---

**Sent To 1:** Reason: NA - Not sent to another district

**Sent To 2:** Reason: NA - Not sent to another district (default)

**IRN:** \*\*\*\*\*

**Percent of Time:**

---

**Import File:** Browse... Import

Smart Logic has been built into the page to perform checks on the field values based on the selected EMIS Situation. SMART Logic is indicated by a light colored background and the text "(changed by SMART)" and it assists the user in providing the correct field data.

**Import Mode** (required) – You must choose one of the following Import Mode options:

- **Perform Import and Create Verification File** – Processing will import all valid records and also create the import verification file. The verification file will be named StudentVerificationFile\_XXXX.txt where XXXX is your building code.
- **Create Verification File Only, Do Not Perform Import** – Processing will only create the import verification file and not actually do any imports. The verification file will be named StudentVerificationFile\_XXXX.txt where XXXX is your building code.



**IMPORTANT!** It is strongly suggested that you run this option first to check for errors. This option will also perform the student identifier check.

*Note: Changes made to EMIS Situation and the remaining fields on this tab are saved to the profiles of the imported students.*

**Admission Date** (required) – Choose the date the students will be admitted. This date must be between the first and last day of the school calendar year in context.

**Admission Reason** (required) – Select the reason the students will be admitted. If you select one of the following codes, you must enter a value in the Admitted From IRN field per EMIS requirements:

- 3 – Student transferred from nonpublic school in Ohio
- 6 – Transferred from other Ohio public district/community school
- 7 – Not newly enrolled in this school district

Otherwise, the Admitted From IRN field is not editable and defaults to \*\*\*\*\*.

**Student Status** (required) – Choose the appropriate status for the students.

**EMIS Situation** (required) – Choose from a drop-down list (or use the EMIS situation Wizard) validated against EMIS options file of all valid EMIS situations. Both the EMIS

Situation number and description are displayed. If necessary, click  to use the EMIS Situation Decision Tree Wizard to choose the correct situation. EMIS Situation defaults to the EMIS situation specified in the registration defaults for the building in context. If a district is in context, EMIS situation defaults to the EMIS situation specified in the registration defaults for the district. If no registration defaults are available, EMIS situation defaults to situation 5 (for regular districts or nonpublic schools), 302 (for JVS schools), 386 (for ESCs) or 258 (for community schools).

**Admitted From IRN** – If you selected 3, 6 or 7 in the Admission Reason field, enter the district in which the students were previously enrolled. Otherwise, if you selected any other value in the Admission Reason field, the Admitted From IRN field is not editable and defaults to \*\*\*\*\*.

Click  to open the ODE IRN Search page. SMART logic will be invoked to help determine the correct value.

**District Relationship** (optional) – Select the appropriate educational relationship between the students being imported and the district. SMART logic will be invoked to help determine the correct value.

**District of Residence** (optional) – Enter the district of the legal residence of the students being imported. Click  to open the ODE IRN Search page. SMART logic will be invoked to help determine the correct value.

**How Received** (optional) – Select how the students being imported arrived at the district. Smart validation requires that How Received be selected.

**How Received IRN** (optional) – Enter the district from which the students being imported are received. SMART logic will be invoked to help determine the correct value.

**Percent of Time** (optional) – Enter the average percent of time, for the week, that the students being imported participate in any instruction provided by a certified/licensed employee.

**Tuition Type** (optional) – Select the appropriate manner in which the students being imported are paying tuition to the reporting district. SMART logic will be invoked to help determine the correct value.

**Attending Building IRN** (required) – Enter the IRN of the building within the district that the students being imported attend between the effective dates, inclusive, of the record being reported. Click  to open the ODE IRN Search page. SMART logic will be invoked to help determine the correct value. The Attending Building IRN can be a District IRN only when the value of How Received is one of the following:

- 6 – Non-Public (Services Only)
- F – Career Assessment Only
- I – Non-instructional, Supplementary, or Related Services
- P – Court Placed Students, Excluding foster Care
- T – Students Placed in Institutions, Non-Court Ordered
- V – Pre-school, Evaluated Only, Found Ineligible

**Assigned Building IRN** (optional) – Enter the IRN of the building the students being imported would normally attend according to the standard district attendance policy.

Click  to open the ODE IRN Search page. SMART logic will be invoked to help determine the correct value.

**Sent To 1 Reason** (optional) – Select the reason the students being imported are sent to another district. SMART logic will be invoked to help determine the correct value.

**Sent To 1 IRN** (optional) – Enter the district to which the students being imported are sent. Click  to open the ODE IRN Search page. SMART logic will be invoked to help determine the correct value.

**Sent To 1 Percent of Time** (optional) – Enter the average percent of time for the week that the students being imported participate in any instruction provided by an employee at a non-EMIS reporting entity.

**Sent To 2 Reason** (optional) – Select the reasons the students being imported are sent to another district if the student is sent to a second district.

**Sent To 2 IRN** (optional) – Enter the district to which the students being imported are sent if the student is simultaneously being sent to a second district. Click  to open the ODE IRN Search page. SMART logic will be invoked to help determine the correct value.

**Sent To 2 Percent of Time** (optional) – Enter the average percent of time for the week that the student participates in any instruction provided by an employee at a non-EMIS reporting entity.

**Import File** (required) – Browse to the location of the File Name to be imported.

**Import** – Import Attendance data from the import file. You must confirm (click **OK**) that you really want to import this information before the import completes.

A list of all students in the import file that could not be imported is displayed. Trying to import students whose SSN or EMIS ID already exist in the school or district causes the import of those students to fail.

## Special Education Import (SpS)

**Navigation: Home – Management – Import/Export – Special Education Import (SpS)**

The Special Education Import program will load data, extracted from a special services application, into StudentInformation. The Special Education Import will be processed primarily by the EMIS coordinator in each district. The special services application will provide one file that contains the records as outlined in the following figures – the file bundles all of the records together. The special services application will use the EMIS Import file layouts from Chapter 5 of the *ODE EMIS Manual* to construct each portion of the import file. The Special Education Import will check for a valid effective date and if there is no valid effective date, an error will be issued and the invalid record will be rejected.

Home >> Management >> Import/Export >> Special Education Import (SpS)

### Special Education Import (SpS)

Please select the SpS file to import.

**District:** Dalton Local Schools

**School Year:** 2013-2014

**File name:**  No file selected.

**Run Options:**

- Student Attributes (FD)
- Student Program (GQ)
- Student Special Education Events (GE)
- Student Special Education Graduation Requirement (FE)
- Student Achievement Test
- Student Ohio Graduation Test
- Student Kindergarten Readiness Assessment

**District** – Defaults to the district in context. Only districts can perform the Special Education Import function. You will receive the following message if a district is not in context:

**This page can only be accessed for Districts**

**School Year** – Defaults to the school year in context.

**File name** (required) – Browse to the Special Education Import file to be imported.

**Run Options** (required) – Choose one or more Special Education Import file options. The Special Education Import will process the Special Education Import files that are checked. See the following sections for detailed explanation and file layouts of each Run Option:

- Student Attributes (FD)
- Student Program (GQ)
- Student Special Education (GE)
- Student Special Education Graduation Requirement (FE)
- Student Achievement Test
- Student Ohio Graduation Test
- Student Kindergarten Readiness Assessment

If no Run Options are selected, you will receive the following message:

**At least one run option must be selected**

**Import** – Import the checked Special Education Import files. The Special Education Import will display the following message if the import file is successfully loaded to StudentInformation without errors.

**The file has been loaded without errors**

If errors are found in the import file, the Special Education Import will display the following message and the specific error records with errors. The Special Education Import will not stop when an error is encountered – it will continue and load all records except those with errors.

**The file has been loaded except for the following records**

Record Number	Record Status	Sort Type	EMIS StudentID Number	Issue
@@@@@@@@	A	GI	11111111	Student EMIS ID not found

Typical error messages displayed would include:

- Student EMIS ID not found.
- Student EMIS ID not found; not able to match student achievement test record in StudentInformation.
- Not able to match student achievement test record in StudentInformation.
- Membership already exists for student, not saved.

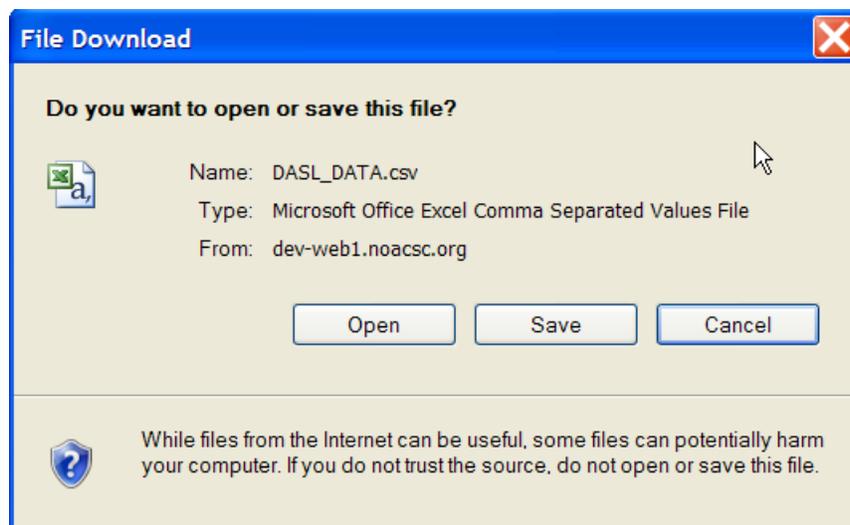
### File Download Options

**Select a File Type** – Choose from CSV (.csv), HTML (.html) and TAB (.txt).

**Select A Download Method** – Choose from Download or Email. Download will create a dasl\_data.xls, dasl\_data.csv or dasl\_data.txt file depending on the file type you choose.

You may save this file to any location available. Email will send the selected File Type as an email attachment to the email address specified for this StudentInformation user.

Click **Download Error List** to create the error list.



Save the file to your hard drive or network drive for further processing.

	A	B	C	D	E	F	G
1	RecordNumber	RecordStatus	SortType	Student	ErrorMessage		
2	@@@@@	A	GI	11111111	Student EMIS ID not found		

## Special Education Import – Header and Trailer Records

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – any Run Option**

### Header Record

10.3.0 .16150 and later, the Special Education Import will no longer expect a header record at the top of the import file. The import will now expect the first line of import files to be a valid record.

Prior to 10.3.0.16150, the first record in the file will be a header record. This record contains specific attributes of the file that must be validated before proceeding with the processing of the rest of the file. Each file (batch) that is transmitted to a designated Information Technology Center must contain a header and trailer record. These records assist the Information Technology Center in validating the reporting district and batch of records.

The information in the Header record must match the EMIS Reporting Period the data is being loaded into. If no match exists, an error will appear indicating that the EMIS Reporting Periods do not match and the import will not continue any further.

The import file layout of the Header record will be formatted in the EMIS file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

**NOTE:** The Filler size at the end of the record depends on the record size of the records included in the batch. The size of the header record must match the size of the records being reported in the batch.

## Trailer Record

The Trailer record will contain a record count of all the records in the file. The Trailer record will be ignored.

The import file layout of the Trailer record will be formatted in the EMIS file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

**NOTE:** The Filler size at the end of the record depends on the size of the records included in the batch. The size of the trailer record must match the size of the records being reported in the batch.

## Special Education Import (SpS) – Student Attributes (FD)

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – Student Attributes Run Option**

### Student Attributes Record – Sort Type FD

The Student Attributes import differs from other areas of the import in that no complete student record is imported. Only specific fields from the Student Attributes record are updated. Other fields in the Student Attributes record are filled with @. When the import encounters this character in any field, the field value is ignored and not imported.

All files are in the Chapter 5 format.

### Student Attributes FD Record – Special Education Import Logic

1. If the import file contains an FD record with the same disability condition and the same effective start date as the open FD record in StudentInformation, the StudentInformation import does not load the record.
2. If the import file contains an FD record with the same disability condition as the open FD record in StudentInformation but a different effective start date, the StudentInformation import does not load the record and flags an error on the Import screen.
3. If the import file contains an FD record with a different disability condition than the open FD record in StudentInformation, regardless of start date, the StudentInformation import loads the imported disability condition over the existing disability using the imported effective start date (closing any appropriate records as needed).

4. If the import file contains an FD record with a different Section 504 value than the open FD record in StudentInformation, regardless of start date, the StudentInformation import loads the imported Section 504 value over the existing value using the imported effective start date (closing any appropriate records as needed).

You should import student attribute records for EMIS Reporting Periods K and N.

### **Special Education Import (SpS) – Student Program (GQ)**

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – Student Program Run Option**

#### **Student Program Record – Sort Type GQ**

For the purpose of this section, program codes will equate to membership codes in StudentInformation for the student membership import functionality.

The district/building will be responsible for making sure that the membership groups and codes are defined in StudentInformation prior to the import being processed. The building will also be responsible for assigning the proper EMIS code value to the membership code record prior to the Special Education Import. The memberships will work under the premise that the membership group will be equal to the first two digits of the program code. This standard was decided on by all ITCs.

The import file layout of the Student Program record will be formatted in the EMIS file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

The Student Program record import serves as both an import of new records if no match exists or an update if a match is found.

As of 10.2.0, new validations were implemented requiring each record to be in a certain format:

- Fiscal Year must be present and match the current school year in context.
- EMIS ID, Building IRN and Program Codes must be valid active values for the school/school year in context.
- Start and End Dates must be valid dates and be present in the file.
- End Date must be less than 1 full year past the Start Date.

#### **Student Program GQ Record – Special Education Import Logic**

1. If the import file contains a GQ record (any code) with effective start date in the next school year, StudentInformation will not load the record and flag an error on the Import screen.
2. If the import file contains a GQ record (215xxx), StudentInformation loads the records to the Services tab on the Special Education screen using the following logic:

- If the imported record has the same program code, effective start date and effective end date, StudentInformation will not load the record.
  - If the imported record has the same program code and same effective start date, but a different effective end date, StudentInformation updates the record.
  - If the imported record has the same program code and different effective start date, StudentInformation adds the record.
  - If the imported record has a different program code, regardless of effective start date, StudentInformation adds the record.
3. If the import file contains a GQ record (220100), StudentInformation loads the records to the Student Memberships screen using the following logic:
- If the imported record has the same program code and effective start date, StudentInformation does not load the record.
  - If the imported record has the same program code and different effective start date, StudentInformation updates the start date of the record.
  - If the imported record has a different program code (did not exist previously), regardless of effective start date, StudentInformation adds the record.

StudentInformation imports the end date for GQ records with a program code that begins with 215 or 220 if the end date falls outside of the fiscal year of the record. If the program code is 220100, or any other code, the end date is imported and saved to the student's record regardless of the fiscal year.

StudentInformation uses the enrollment end date during EMIS processing when determining what records are sent to EMIS for the reporting period.

\*Program codes should be imported for October (K) and Period (N) June.

## **Special Education Import (SpS) – Student Special Education (GE)**

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – Student Special Education Run Option**

### **Student Special Education Record – Sort Type GE**

The Student Special Education record import will serve as both an import of new records if no match exists or an update if a match is found.

The import file layout of the Student Special Education record will be formatted in the EMIS file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

### **Student Special Education GE Record – Special Education Import Logic**

1. If same date type and same event date, StudentInformation will load (update) the record with applicable fields.

2. If same date type and different event date, StudentInformation will load (add) the record with applicable fields.
3. If different date type (new record) regardless of date, StudentInformation will load (add) the record with applicable fields.

\*Special Education event records should be imported for Periods K and N. Imports may be done at any time during the school year.

### **Special Education Import (SpS) – Student Special Education Graduation Requirement (FE)**

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – Student Special Education Graduation Requirement (FE) Run Option**

#### **Student Special Education Graduation Requirement Record – Sort Type FE**

The Student Special Education Graduation Requirement record import will serve as an import of new records if no match exists or an update if a match is found.

The import file layout of the Student Special Education Graduation Requirement record will be formatted in the FE file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

#### **Student Special Education Graduation Requirement FE Record – Special Education Import Logic**

1. If the same date type, event date and assessment area code, StudentInformation will load (update) the record with applicable fields.
2. If an exact match of date type, event date and assessment area code is not found, StudentInformation will load (import) the record with applicable fields.

\*Student Special Education Graduation Requirement records should be imported for Periods K and N. Imports may be done at any time during the school year.

### **Special Education Import (SpS) – Student Achievement Test (FA, GA Record Type)**

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – Student Achievement Test Run Option**

#### **Student Achievement Test Record – Sort Type FA**

The Student Achievement Test record import will serve as an update if a match is found.

The import file layout of the Student Achievement Test record will be formatted in the FA file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

### **Student Achievement Test FA Record – Special Education Import Logic**

1. If the same test date, assessment area code, assessment type code (GA), required test type and existing accommodation equals No, StudentInformation will load (update) the record with the accommodation value from the import file.
  2. If no matching FA records exist, no records are imported.
- \* Imports may be done at any time during the school year.

### **Special Education Import (SpS) – Student Ohio Graduation Test (FA, GX Record Type)**

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – Student Ohio Graduation Test Run Option**

#### **Student Ohio Graduation Test Record – Sort Type FA**

The Student Ohio Graduation Test record import will serve as an update if a match is found.

The import file layout of the Student Ohio Graduation Test record will be formatted in the FA file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

### **Student Ohio Graduation Test FA Record – Special Education Import Logic**

1. If same test date, required test part, assessment type code (GX) and existing accommodation equals No, StudentInformation will load (update) the record with the accommodation value from the import file.
  2. If no matching FA records exist, no records are imported.
- \* Imports may be done at any time during the school year.

### **Special Education Import (SpS) – Student Kindergarten Readiness Assessment (FA, GO Record Type)**

**Navigation: Home – Management – Import/Export – Special Education Import (SpS) – Student Kindergarten Readiness Assessment Run Option**

#### **Student Kindergarten Readiness Assessment Record – Sort Type FA**

The Student Kindergarten Readiness Assessment record import will serve as an update if a match is found.

The import file layout of the Student Kindergarten Readiness Assessment record will be formatted in the FA file record layout as defined in Chapter 5 of the *ODE EMIS Manual*.

## **Student Kindergarten Readiness Assessment FA Record – Special Education Import Logic**

1. If the same test date, required test part, assessment type code (GO) and existing accommodation equals No, StudentInformation will load (update) the record with the accommodation value from the import file.
2. If no matching FA records exist, no records are imported.

\* Imports may be done at any time during the school year.

---

## **Export Formats**

### **State Student ID Export**

**Navigation: Home – Management – Import/Export – State Student ID Export**

All students in the state of Ohio are required to have a state assigned unique identifier number to facilitate anonymous reporting of student data to ODE for EMIS purposes. This statewide ID is provided by a third party system that reports an existing ID for a student if one exists and creates new identifiers for students that cannot be matched to existing records in the system.

This program/export will be processed once a year or as requested. There will also be the ability to initiate the program on a scheduled basis to run automatically. When run in batch it will include all buildings within an ITC.

Regardless of whether the ITC or a specific district is in context, the Ethnicity, Native Language and Legal Name values are pulled from the Live record from the Student EMIS Time Period table. The Live record from the Student EMIS Time Period table is the one for which the reporting period is equal to the Live reporting period for the student's district. The State Student ID Export uses a student's nearest future FS/FD record if no current FS/FD record exists for the selected school year.

Home » Management » Import/Export » State Student ID Export

## State Student ID Export

From this screen, you can export data for a specific file format.

**Header Fields**

IBM User ID:

Source Building IRN:

Source District IRN:

---

**Schools**

**Social Security Number:**

All Digits  
 Last 4 Digits  
 Leave Empty

**Existing Student Code:**

Y - Used to indicate that the student has already been enrolled in an Ohio public school and likely has an existing SID. If Y, record will not be updated.  
 N - Record will be updated  
 This Is A Practice Run

**Student Options:**

Send Only Students With No SSID  
 Send Only Students With SSID  
 Send All Students

**IBM User ID** (required) – Enter the IBM User ID of the person who will be submitting the file. This is used in the Header row of the file. **Important:** Do not use your StudentInformation User ID for this field.

**Source Building IRN** (required) – Enter the IRN of the Building used in the export. This field defaults to the IRN of the school building in context. This is used in the Header row of the file. If this is an ITC, enter the ITC’s IRN.

**Source District IRN** (required) – Enter the IRN of the District used in the export. This field defaults to the IRN of the district to which the school building in context belongs. This is used in the Header row of the file. If this is an ITC, enter the ITC’s IRN.

**Schools** (required) – If no Schools are selected, the report will not include any Schools. You can also filter by selecting specific Schools for your export.

**Social Security Number** (required) – Choose the format of SSN to be included in the Export.

**Existing Student Code** (required) – Choose how the Student Code should be generated. Note that the Y option indicates that a student code exists, and a new student code should not be generated.

**Student Options** (required) – Choose the students to export.

**Export** – Execute the Export process.

StudentInformation creates an export file to be sent to the third party vendor for processing. The file is comma delimited, and each data value is enclosed in double quotation marks. Each file record will be delimited by a carriage return and line feed. The first record of the file will contain a header row listing the following fields:

- IBM User ID entered
- Date and time the file was created, formatted as mm/dd/yyyy hh:mm:ss
- Source building IRN entered
- Source district IRN entered

The header row will conform to the same field layout as the rest of the file with the header row data fields mapping to the following primary data fields respectively:

- First Name
- Date of Birth
- Building IRN
- District IRN

The required state student id file has a large number of fields that are not actually submitted to the third party vendor. The following fields are the fields that are required to be included in this export.

- First Name
- Last Name
- Date of Birth
- Gender
- SSN (to be populated based on settings – entire SSN, last 4 digits, or blank)
- Existing Student Code (to be populated based on settings)
- Native Language
- Ethnicity (calculated from Local Ethnicity Category, Hispanic/Latino and Racial Groups field values; similar to Summative Race field value)
- Birthplace City
- Legal Middle Name
- Admission Reason (for students with no SSID)

The following additional fields will be included as well:

- Current Building IRN
- Current District IRN
- Vendor ID

If the Student is missing data in any of these fields, a warning page will display.

Home » Management » Import/Export » State Student ID Export Advanced Search | Feedback | Mg

### State Student ID Export

From this screen, you can export data for a specific file format.

The following students do not one of the following fields specified. These students will not be included in the export.  
 Legal First Name Birthdate Ethnicity  
 Legal Middle Name Gender Birthplace City  
 Legal Last Name Native Language Admission Reason  
 Click a student's name to correct this. Click "Continue" if you would like to create the export file without these students.

71 Records Displayed

District	Building	Student Number	Student Name	Issue
DA	DAEL	00013001	<a href="#">BOARD, NICHOLAS LEE</a>	Middle Name is not specified, Birthplace City is not specified, Admission Reason is not specified
DA	DAEL	00001007	<a href="#">BREWER, SEAN CONORY</a>	Middle Name is not specified, Birthplace City is not specified, Admission Reason is not specified
DA	DAEL	00001004	<a href="#">BROWN, AARON JAMES</a>	Middle Name is not specified, Birthplace City is not specified, Admission Reason is not specified
DA	DAHS	00005004	<a href="#">SPRAT, JACK JOSEPH</a>	Middle Name is not specified, Ethnicity is not specified, Birthplace City is not specified, Admission Reason is not specified
DA	DAHS	48652304	<a href="#">Vest, Rouge (Red)</a>	Middle Name is not specified, Ethnicity is not specified, Birthplace City is not specified, Admission Reason is not specified
DA	DAHS	00004005	<a href="#">WELLS, JOBETH</a>	Middle Name is not specified, Ethnicity is not specified, Birthplace City is not specified, Admission Reason is not specified
DA	DAHS	00005005	<a href="#">WELLS, JONA RENEE</a>	Middle Name is not specified, Ethnicity is not specified, Birthplace City is not specified, Admission Reason is not specified
DA	DAHS	00007005	<a href="#">WILLIAMSON, RYAN SETH</a>	Middle Name is not specified, Ethnicity is not specified, Birthplace City is not specified, Admission Reason is not specified

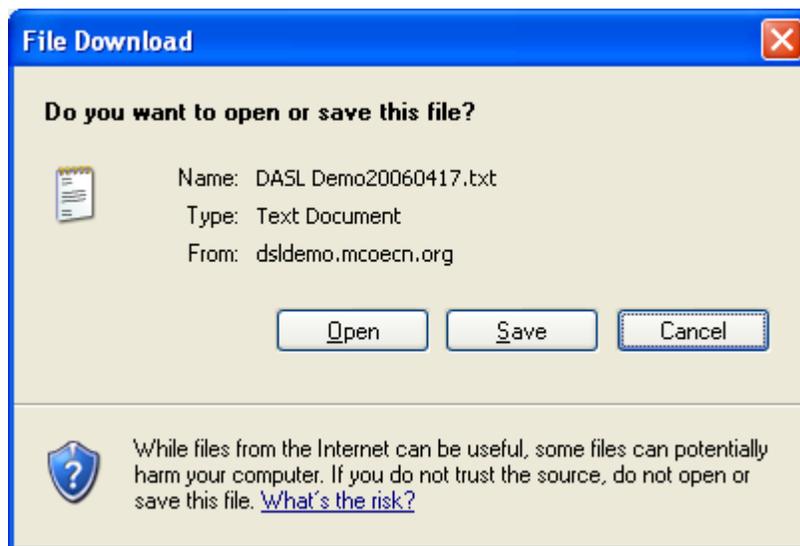
71 Records Displayed [Back To Top](#)

**Refresh** – Reload this page.

**Brewer, Sean Conory** – Click on the hyperlinked student names to open a new window with that student's Edit Profile page displayed, so you can enter any missing data.

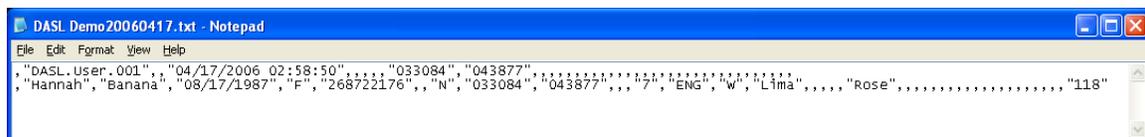
**Continue** – Process the export, without any of the listed students included.

**Cancel** – Do not process the export, and return to the State Student ID Export page.



**Save** – Save this file to your hard drive or network drive

### Sample Output



## INFOhio Export

### Navigation: Home – Management – Import/Export – INFOhio Export

INFOhio is the statewide library software system. The system maintains student records in order to track automated library resource sharing and materials checkout. The INFOhio system will receive a feed of student data from the StudentInformation application to populate its student information data store.

The INFOhio Export is usually performed on a nightly basis to send demographic data from StudentInformation to INFOhio for use in the Patron files in the library software. Most ITCs set up the exports to run automatically at night for each of their buildings. Three separate options are available in Options (INFOhio Export tab) for the homeroom assignment to include in the record for each building – administrative, period, or department. Please see the School Setup and Configuration End User Guide for the DASL Options – INFOhio Export details.

If the nightly extracts fail to complete, the file created from StudentInformation does not get loaded into the Library system. When no record comes over from StudentInformation for a student, regardless of the reason, the student automatically gets changed to Expired in INFOhio. If a new record is loaded for a student to correct the issue, the student's status will be updated automatically.

### ITC Considerations

ITC Staff should check the logs daily to ensure that the extracts and loads completed successfully. If logs are checked first thing in the morning and it is discovered that a load failed, once the issue is identified and the resolution found, extracts can be reprocessed and the files reloaded to quickly resolve the issue. Log files for the StudentInformation extractions reside in the \_Log direction on the Alpha.

StudentInformation Support staff should notify INFOhio support when a StudentInformation update is applied in case something changes that has an effect on the data extracted nightly. This would be an especially important time to check those nightly logs to make sure there are no problems as a result of the update.

For any of the homeroom options used, it is possible that the value of a student's homeroom may change at the end of the semester or quarter. Make sure the files are checked at that time to ensure all necessary homeroom information is there. If a student is missing homeroom information in the record, the student's homeroom will be changed to unknown in the library software. The INFOhio Export will only use the finalized schedule.

Home » Management » Import/Export » INFOHIO Export

## INFOHIO Export

From this screen, you can export data for a specific file format.

---

**Export Fields**

<input checked="" type="checkbox"/> Student Number	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Parent Name	<input checked="" type="checkbox"/> First Name
<input checked="" type="checkbox"/> Building IRN	<input checked="" type="checkbox"/> Zip	<input checked="" type="checkbox"/> Homeroom	<input checked="" type="checkbox"/> Called Name
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Teacher Name	<input checked="" type="checkbox"/> Middle Name
<input checked="" type="checkbox"/> Graduation/Withdrawal Date	<input checked="" type="checkbox"/> SSN	<input checked="" type="checkbox"/> Program Code	<input checked="" type="checkbox"/> Suffix
<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> Birthdate	<input checked="" type="checkbox"/> Home School	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> Grade	<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Status Code
<input checked="" type="checkbox"/> City			

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export. In the export file, each field will be enclosed in quotation marks, and separated from other fields by the | character. Check with your librarians to determine which fields they wish to have included in the export file.

**Homeroom checkbox** –The Homeroom checkbox can be configured to use Administrative Homeroom, Period Homeroom or Department Homeroom on the INFOhio Export tab of the DASL Options screen. See the *ProgressBook StudentInformation School Setup and Configuration Guide* for the DASL Options – INFOhio Export details.

**Annual Record Note:** In order for a student to be included in the file, the student must have an annual record in the current school year as well as a LIVE EMIS time period record. EMIS time period records are created for all students regardless of whether a district reports to EMIS or not. If a student is not included in the file and it is not because of the student’s status code, then the user should check the student’s admission history detail records to make sure that the student has a record for the current school year. Navigate to Home – SIS – Student – Admission History – Edit History Details and check for a record in the current school year.

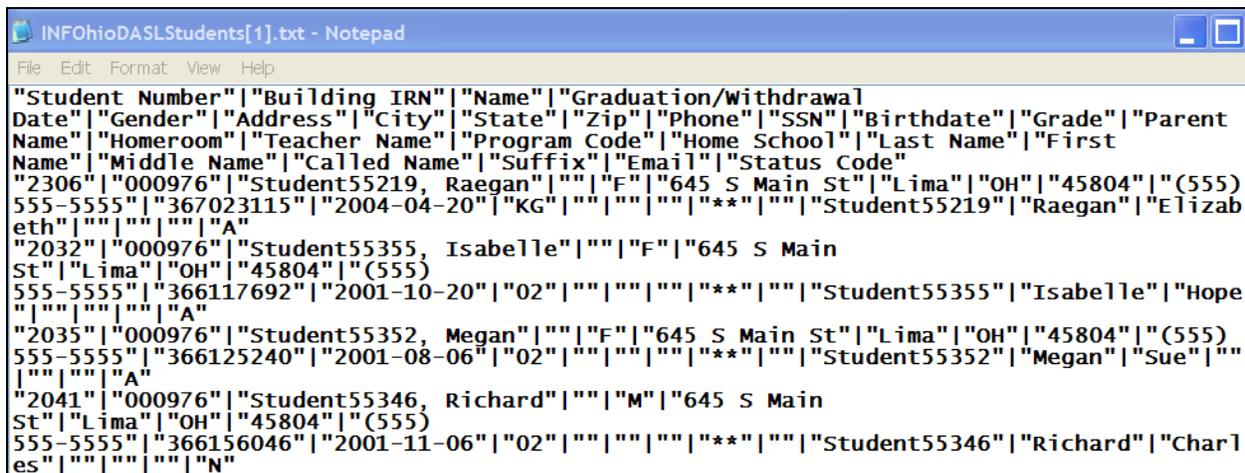
**Student Status Note:** Student status codes play a big part in which students get included in the file. On the student status code maintenance page, any status code defined with an internal status of Inactive or Delete will not be included in the file. This may include students who are residents attending elsewhere if they use a separate status code for these students and make them inactive internally. Navigate to Home – Management – School Administration – School Codes Administration – Student Status Codes to check to see how the status codes are configured.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive. Please send the file to the INFOhio support person for further processing.

The following figure shows an example of the INFOhio Export file.



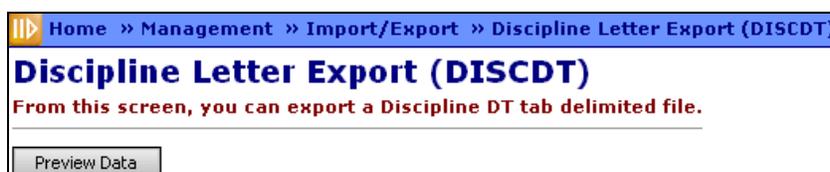
### Special Notes on the Export File

- The Name field is a combination of last name, first name, called name.
- The Middle Name field will show blank if a student has a middle name of \* because of a missing legal middle name.
- The Email field shows both the email address from the Student Profile and the email address from the Primary Contact, separated by a comma and a space.

## Discipline Letter Export (DISCDT)

**Navigation: Home – Management – Import/Export – Discipline Letter Export (DISCDT)**

This process will create an export file for students requiring Discipline letters. The Discipline Letter Export (DISCDT) will only look at the Year selected, and not include incidents from prior years. This tab-delimited export file can then be used with Microsoft Word as a mail merge document. The file can be loaded in Microsoft Word as a data file for a form letter. The first row in this file is a header row containing all field names.



**Preview Data** – Preview Discipline letter data. Students who have  Needs a Letter checked on any Discipline Incident(s) will have their Discipline records previewed as shown in the following figure.

Home » Management » Import/Export » Discipline Letter Export (DISCDT) Advanced Search | Feedback | Mgmt | Help | Version | Print

### Discipline Letter Export (DISCDT)

From this screen, you can export a Discipline DT tab delimited file.

Discipline Export Data

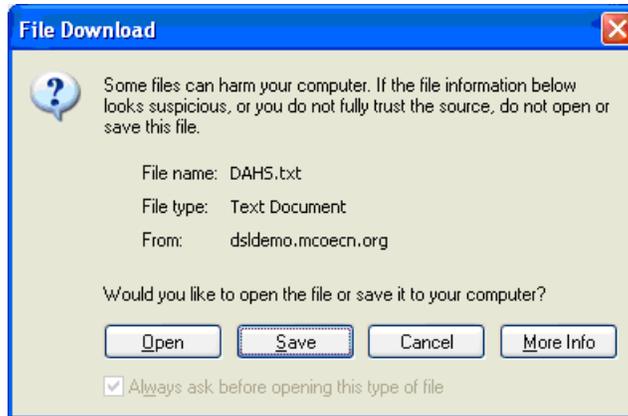
Student Number	LastName	Incident Date	Incident Description	Infraction Code	Infraction Description	Infraction Referrer	Action Code	Action Description	Number Of Days	Action Start	Action End	Demerits	Action Date	Policy Description
6001	EYE	10/20/2006 12:00:00 AM							2.00	12/20/2006 12:00:00 AM	12/22/2006 12:00:00 AM	0	12/20/2006 12:00:00 AM	
5004	SPRAT	11/20/2006 12:00:00 AM							1.00	12/20/2006 12:00:00 AM	12/20/2006 12:00:00 AM	0	12/20/2006 12:00:00 AM	
5004	SPRAT	10/20/2006 12:00:00 AM							2.00	12/20/2006 12:00:00 AM	12/22/2006 12:00:00 AM	0	12/20/2006 12:00:00 AM	
5004	SPRAT	2/14/2005 12:00:00 AM							0	1/1/1900 12:00:00 AM	1/1/1900 12:00:00 AM	0	1/1/1900 12:00:00 AM	
4001	EYE	10/20/2006 12:00:00 AM							2.00	12/20/2006 12:00:00 AM	12/22/2006 12:00:00 AM	0	12/20/2006 12:00:00 AM	
4008	SAWYER	10/20/2006 12:00:00 AM							2.00	12/20/2006 12:00:00 AM	12/22/2006 12:00:00 AM	0	12/20/2006 12:00:00 AM	

Export Update Cancel

**Export** – Execute the Export process.

**Update** – Reset the  Needs a Letter box as unchecked on each Discipline Incident.

**Cancel** – Cancel the Export process.



**Save** – Save this file to your hard drive or network drive for use in Microsoft Word mail merge.

The following figure shows an example of the Discipline Letter Export file.

Student Number	School Name	Student Last Name	Student First Name	Parent Name	Address	Address 2	City	State	Zip	Incident Date	Incident Description	Demerits	Action Start	Action End	Infraction Code	Infraction Description	Referrer	Action Code	Number		
6001	DASL HIGH SCHOOL	EYE	CORY ROBERT	M/M EDWARD EYE	12 NORTH ST	LIMA	OH	45801	10/20/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	
5004	DASL HIGH SCHOOL	SPRAT	JACK JOSEPH	Mary Sprat	890 BACON TRAIL	LIMA	OH	45801	11/20/2006	12:00:00 AM	1.00	12/20/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	
5004	DASL HIGH SCHOOL	SPRAT	JACK JOSEPH	Mary Sprat	890 BACON TRAIL	LIMA	OH	45801	10/20/2006	12:00:00 AM	2.00	12/20/2006	12:00:00 AM	0	12/22/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	
5004	DASL HIGH SCHOOL	SPRAT	JACK JOSEPH	Mary Sprat	890 BACON TRAIL	LIMA	OH	45801	2/14/2005	12:00:00 AM	0	1/1/1900	12:00:00 AM	0	1/1/1900	12:00:00 AM	0	1/1/1900	12:00:00 AM	0	
4001	DASL HIGH SCHOOL	EYE	MAGNUM P.	EDWARD EYE	122 NORTH ST	PO Box 678	LIMA	OH	45801	10/20/2006	12:00:00 AM	2.00	12/20/2006	12:00:00 AM	0	12/22/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0
4008	DASL HIGH SCHOOL	SAWYER	THOMAS MARK TWAIN	89 MISSISSIPPI RD	LIMA	OH	45804	10/20/2006	12:00:00 AM	12:00:00 AM	2.00	12/20/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	12/20/2006	12:00:00 AM	0	

## Creating the form letters in Word using Mail Merge

If you need to create the initial form letter, use the following instructions:

1. Open Word.
2. Click on Tools.
  - Mail Merge
  - Create
  - Form Letters
  - Active Window
  - Get Data
  - Open Data Source
  - Check the box labeled Select Method
  - Down arrow in the box labeled Files of type:
  - Text Files
3. Open the Export file (such as DAHS.txt).

4. In the Confirm Data Source box, select Text Files (\*.txt) and click OK
5. Click on Edit Main Document

You should now be back to your blank document with a mail merge tool bar across the top.

Begin typing your letter.

At locations where you would like to use data from the DAHS.txt file, place your cursor in the appropriate position and click Insert Merge Field. This will list all fields available (listed in the following table). Click on the field you want and a token will be placed in your letter. Continue to type letter and place tokens until the letter is finished.

Click on Mail Merge Helper (the icon on your mail merge tool bar that looks like two documents and + sign).

If you would like to use just specific records from the file (for example expulsions only) or sort the data, click on Query Options.

To use only specific records, select Filter Records. In the first Field, click the down arrow and select the field you want to use. Fill in the Comparison field and the Compare to value.

For example, if your letter is specific to Expulsions, define the filter as follows.

ActionCode Equal to 1

To sort the records, select the field you want to use for sorting by clicking the down arrow.

Finally, click on OK.

To merge your letter and discipline data, click on Merge. I suggest you merge to new document (so you can look over the results before printing), merge all records and do not print blank lines when data fields are empty (this keeps an empty line from printing for address line 2 if it is blank). Click Merge again. Your merged letter will be displayed on the screen. Scroll through to check it and then print.

When you click X to close out of the letters, it will ask if you want to save the file. If you have already printed the letters and/or do not have a need to save the merged letters, click No. If there is some reason you want to save the merged letters, click Yes.

When you are back at the letter containing tokens, use Save As to save the document and name as you wish.

If your form letter has already been defined, use the following instructions to create letters with student discipline data:

- Open Word.
- Click on File.
- Click on Open.
- Click on (or open) the document you wish to use.
- Click on Merge to New Document. (You will find the icon on your top menu bar. It will show two small documents with a right arrow pointing to a larger single document.)
- Check and print.

The following fields are in the Export file (such as DAHS.TXT) and available for use in your letters. Reminder – if an incident contains multiple actions, the file will contain one record per action.

<b>DISCDT Field Names</b>	<b>Description of Field Names</b>
StudentID	Student SIS ID
Bldg	Building from Discipline Record
LastName	Student Last Name
FirstName	Student First Name
ParentName	Parent Name
Addr1	Address Line 1
Addr2	Address Line 2
City	City
State	State
Zip	Zip
IncidentDate	Date incident occurred (format YYYYMMDD – example: 20000927)
IncidentDateFull	Full date incident occurred (format Month DD, YYYY – example:  September 27, 2000)
IncidentDesc	Description of incident
IncidentPeriod	Period
InfractionCodes	Infraction codes separated by comma, up to seven
InfractionDescs	Description of infraction codes separated by comma, up to 7
InfractionTeacs	Names of those referring infraction, up to seven
ActionCode	Action code – You may want to use this field in the Filter if you have action specific letters.
ActionDesc	Description of action code
ActionDays	Number of days assigned for action
ActionStart	Full action starting date (format Month DD, YYYY – example: September 27, 2000)
ActionEnd	Full action ending date (format Month DD, YYYY – example: September 27, 2000)
ActionDemerits	Demerits (includes decimal point)
ActionOnDate	Full action on date (format Month DD, YYYY – example: September 27, 2000)
PolicyDescs	Description of policies separated by comma, up to four

## **Gradebook Export**

### **Navigation: Home – Management – Import/Export – Gradebook Export**

In SIS (McSIS/Poise), the GRBK screen is used to create an export file for grade book packages such as Grade Machine and GradeQuick. This export file is used to import and populate these programs for grade reporting. Building-level personnel produce the file and then FTP the file to their server so that the file can then be imported into the grade book program.

The only limitations placed on users is that their Grade Book software must be able to import the SIS\_GRBK export file and that their Grade Book software can export a file in the designated format and naming convention for use as an import file for the LOAGRADE program.

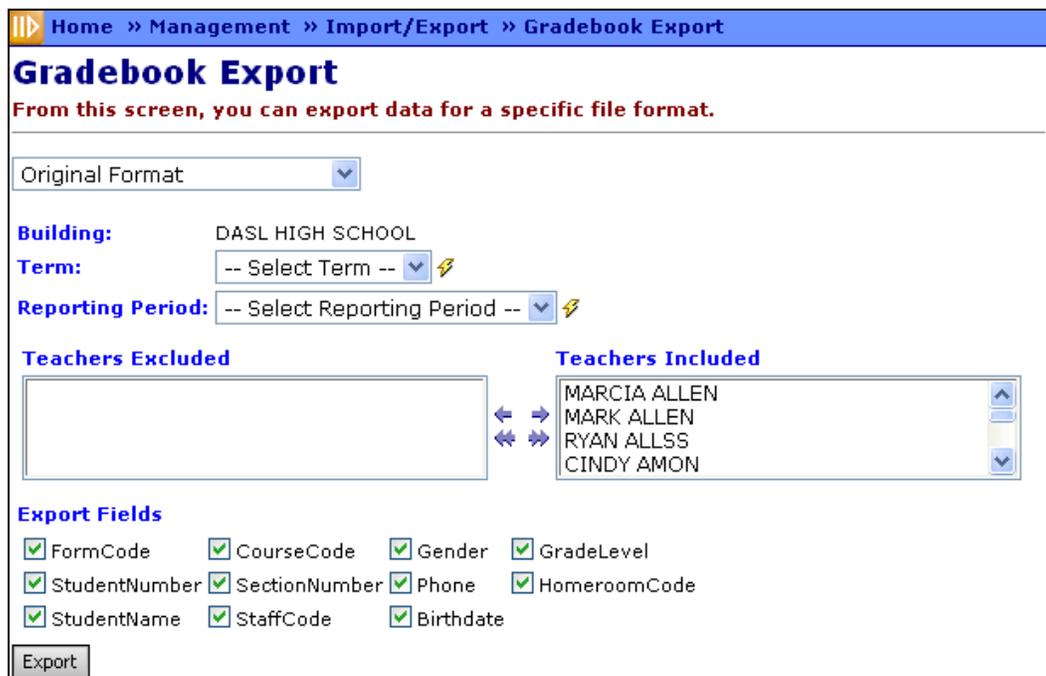
There are two Gradebook exports available in StudentInformation, Original Format and Extended Format.



### Original Gradebook Export

**Navigation: Home – Management – Import/Export – Gradebook Export**

Select Original Format from the drop-down menu.



**Building** – Will default to current building

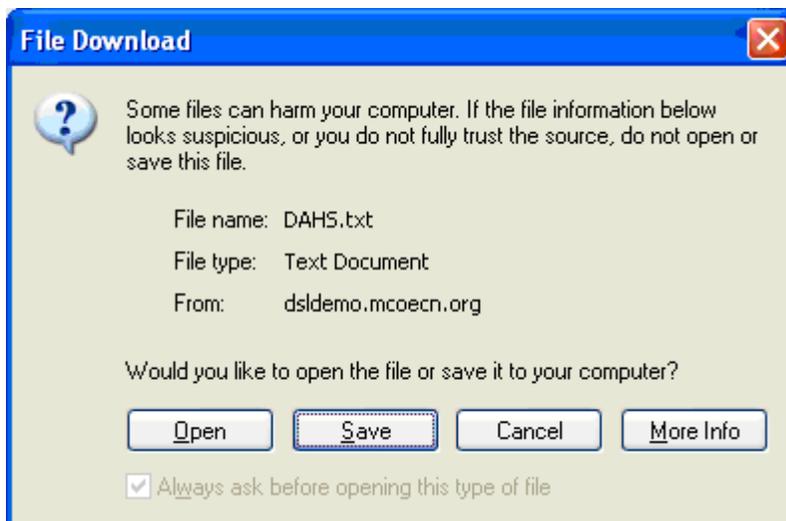
**Term** (required) – Choose the Term for which the Export is to be created.

**Reporting Period** (required) – Choose the Reporting Period for which the Export is to be created.

**Teachers Excluded / Teachers Included** (required) – Choose the teachers to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



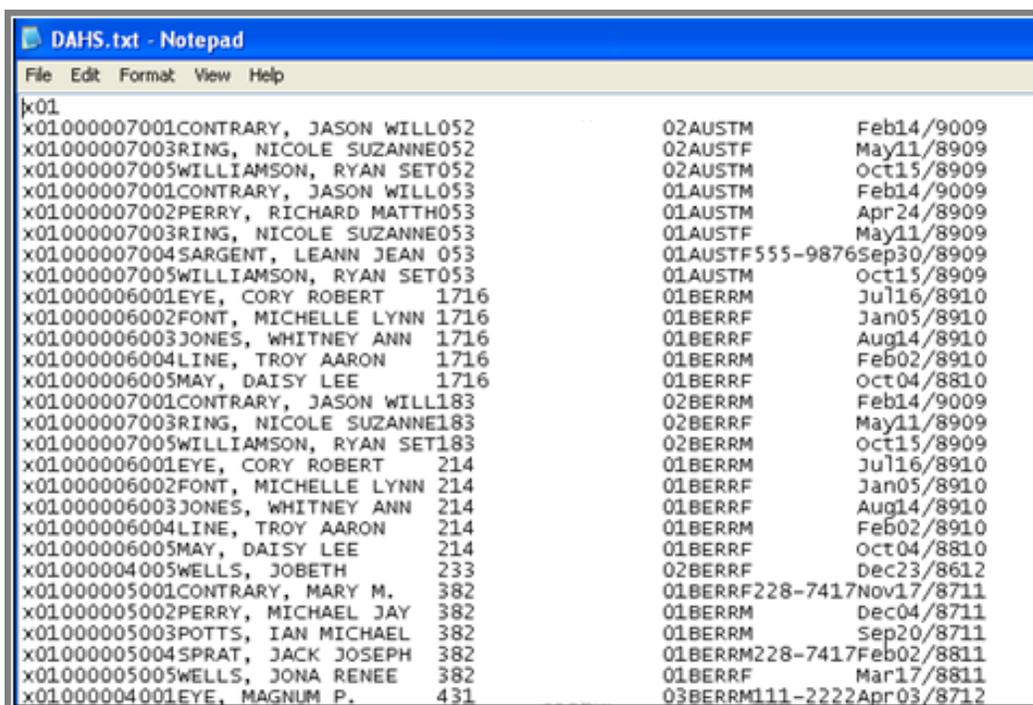
**Save** – Save this file to your hard drive or network drive.

The export file is of fixed width columns, is left justified and uses spaces for padding. All students in the working school for the current school year are included in the export if they have class list records. Following are the fields included (starting position and field length are in parentheses).

- Form Code (1, 3) (Always x01)
- Student ID (4, 9)
- Student Name (13, 20)
- Course ID (33, 15)
- Course Section Number (48, 2)
- Teacher ID (50, 4)
- Student Gender (54, 1)
- Phone (55, 8) (formatted as nnn-nnnn)
- Birthdate (63, 8) (formatted as mm/dd/yy)
- Grade (71, 2)
- Homeroom (73, 4)

This export file then will be imported into the grade book packages mentioned above. When grades are ready to be submitted for grade card processing, the grade book package will create an export file with the grades and/or attendance to be imported back into the StudentInformation application. That import process is covered in 1C. LOAGRADE Import.

The following figure shows an example of the Original Gradebook Export file.



## Extended Gradebook Export

Navigation: Home – Management – Import/Export – Gradebook Export

Select Extended Format from the drop-down menu.

The screenshot shows the 'Gradebook Export' web interface with the following elements:

- Navigation: Home » Management » Import/Export » Gradebook Export
- Section: **Gradebook Export**
- Instruction: From this screen, you can export data for a specific file format.
- Extended Format: [Dropdown menu]
- Building: DASL HIGH SCHOOL
- Term: [Dropdown menu: -- Select Term --]
- Reporting Period: [Dropdown menu: -- Select Reporting Period --]
- Teachers Excluded: [Empty list box]
- Teachers Included: [List box containing: MARCIA ALLEN, MARK ALLEN, RYAN ALLSS, CINDY AMON]
- Export Fields:
  - FormCode
  - Gender
  - Counselor
  - FirstName
  - StudentNumber
  - Phone
  - SSN
  - LastName
  - StudentName
  - Birthdate
  - Address
  - CreditUnits
  - CourseCode
  - GradeLevel
  - City
  - Period
  - SectionNumber
  - HomeroomCode
  - State
  - CourseName
  - StaffCode
  - ParentName
  - Zip
- Export: [Button]

**Building** – Will default to current building.

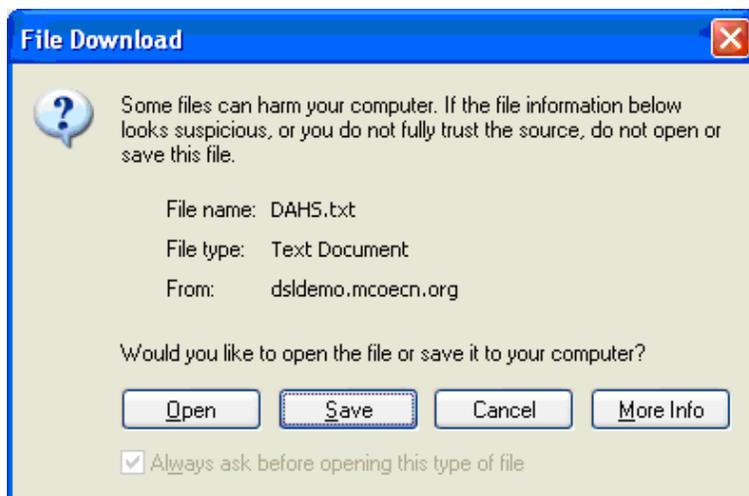
**Term** (required) – Choose the Term for which the Export is to be created.

**Reporting Period** (required) – Choose the Reporting Period for which the Export is to be created.

**Teachers Excluded / Teachers Included** (required) – Choose the teachers to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

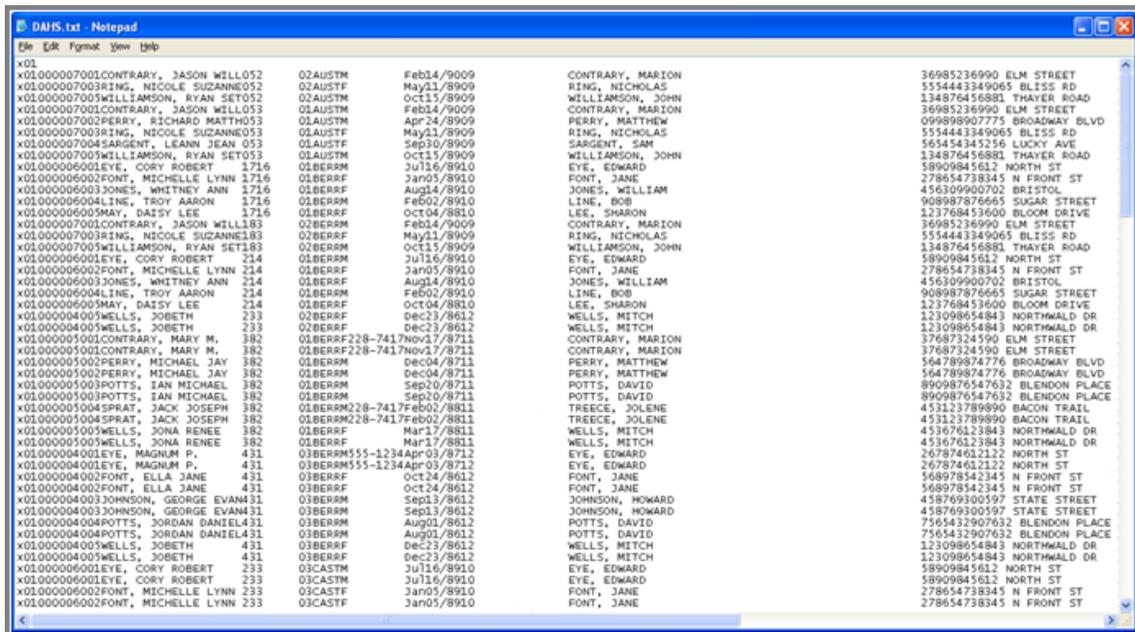
The export file is of fixed width columns, is left justified and uses spaces for padding. All students in the working school for the current school year are included in the export if they have class list records. Following are the fields included (starting position and field length are in parentheses).

- Form Code (1, 3) (Always x01)
- Student ID (4, 9)
- Student Name (13, 20)
- Course ID (33, 15)
- Course Section Number (48, 2)
- Teacher ID (50, 4)
- Student Gender (54, 1)
- Phone (55, 8) (formatted as nnn-nnnn)
- Birthdate (63, 8) (formatted as mm/dd/yy)
- Grade (71, 2)
- Homeroom (73, 4)
- Parent Name (77, 25)

- Counselor (102, 25)
- Student SSN (127, 9)
- Student Address (136, 30)
- Student City (161, 18)
- Student State (179, 4)
- Student Zip Code (183, 9)
- Student First Name (192, 9)
- Student Last Name (201, 22)
- Credit Units (223, 4)
- Period of the Day (227, 2)
- Course Name (229, 15)

This export file then will be imported into the grade book packages mentioned above. When grades are ready to be submitted for grade card processing, the grade book package will create an export file with the grades and/or attendance to be imported back into the StudentInformation application. That import process is covered in 1C. LOAGRADE Import.

The following figures show an example of the Extended Gradebook Export file.



Name	Address	City	State	Zip	School	Teacher	Course
ARION	36985236990 ELM STREET	LIMA	OH	45801	SHARRI	AUSTIN	1.009 LANGUAGE ARTS
LAS	5554443349065 BLISS RD	LIMA	OH	45801	SHARRI	AUSTIN	1.009 LANGUAGE ARTS
JOHN	134876456881 THAYER ROAD	LIMA	OH	45801	SHARRI	AUSTIN	1.009 LANGUAGE ARTS
ARION	36985236990 ELM STREET	LIMA	OH	45801	SHARRI	AUSTIN	1.008 SOC STUD 9
HEW	099898907775 BROADWAY BLVD	LIMA	OH	45801	SHARRI	AUSTIN	1.008 SOC STUD 9
LAS	5554443349065 BLISS RD	LIMA	OH	45801	SHARRI	AUSTIN	1.008 SOC STUD 9
M	565454345256 LUCKY AVE	LIMA	OH	45801	SHARRI	AUSTIN	1.008 SOC STUD 9
JOHN	134876456881 THAYER ROAD	LIMA	OH	45801	SHARRI	AUSTIN	1.008 SOC STUD 9
	58909845612 NORTH ST	LIMA	OH	45801	DONALD	BERRY	1.009 ART 10
IAM	278654738345 N FRONT ST	LIMA	OH	45801	DONALD	BERRY	1.009 ART 10
	456309900702 BRISTOL	LIMA	OH	45801	DONALD	BERRY	1.009 ART 10
	908987876665 SUGAR STREET	LIMA	OH	45801	DONALD	BERRY	1.009 ART 10
ARION	123768453600 BLOOM DRIVE	LIMA	OH	45801	DONALD	BERRY	1.009 ART 10
LAS	36985236990 ELM STREET	LIMA	OH	45801	DONALD	BERRY	1.005 SPANISH I
JOHN	5554443349065 BLISS RD	LIMA	OH	45801	DONALD	BERRY	1.005 SPANISH I
	134876456881 THAYER ROAD	LIMA	OH	45801	DONALD	BERRY	1.005 SPANISH I
	58909845612 NORTH ST	LIMA	OH	45801	DONALD	BERRY	1.005 BAS ENGLISH 10
IAM	278654738345 N FRONT ST	LIMA	OH	45801	DONALD	BERRY	1.005 BAS ENGLISH 10
	456309900702 BRISTOL	LIMA	OH	45801	DONALD	BERRY	1.005 BAS ENGLISH 10
	908987876665 SUGAR STREET	LIMA	OH	45801	DONALD	BERRY	1.005 BAS ENGLISH 10
	123768453600 BLOOM DRIVE	LIMA	OH	45801	DONALD	BERRY	1.005 BAS ENGLISH 10
H	123098654843 NORTHWALD DR	LIMA	OH	45801	DONALD	BERRY	1.007 ANATOMY
ARION	123098654843 NORTHWALD DR	LIMA	OH	45801	DONALD	BERRY	1.008 ANATOMY
ARION	37687324590 ELM STREET	LIMA	OH	45801	DONALD	BERRY	1.003 FRENCH III
HEW	37687324590 ELM STREET	LIMA	OH	45801	DONALD	BERRY	1.003AFRENCH III
	564789874776 BROADWAY BLVD	LIMA	OH	45801	DONALD	BERRY	1.003 FRENCH III
D	564789874776 BROADWAY BLVD	LIMA	OH	45801	DONALD	BERRY	1.003AFRENCH III
	8909876547632 BLENDON PLACE	LIMA	OH	45801	DONALD	BERRY	1.003 FRENCH III
D	8909876547632 BLENDON PLACE	LIMA	OH	45801	DONALD	BERRY	1.003AFRENCH III
ENE	453123789890 BACON TRAIL	LIMA	OH	45801	DONALD	BERRY	1.003 FRENCH III
ENE	453123789890 BACON TRAIL	LIMA	OH	45801	DONALD	BERRY	1.003AFRENCH III
H	453676123843 NORTHWALD DR	LIMA	OH	45801	DONALD	BERRY	1.003 FRENCH III
H	453676123843 NORTHWALD DR	LIMA	OH	45801	DONALD	BERRY	1.003AFRENCH III
	267874612122 NORTH ST	LIMA	OH	45801	DONALD	BERRY	1.007 PHYSICS
	267874612122 NORTH ST	LIMA	OH	45801	DONALD	BERRY	1.008 PHYSICS
	568978542345 N FRONT ST	LIMA	OH	45801	DONALD	BERRY	1.007 PHYSICS
WARD	568978542345 N FRONT ST	LIMA	OH	45801	DONALD	BERRY	1.008 PHYSICS
WARD	458769300597 STATE STREET	LIMA	OH	45801	DONALD	BERRY	1.007 PHYSICS
D	458769300597 STATE STREET	LIMA	OH	45801	DONALD	BERRY	1.008 PHYSICS
D	7565432907632 BLENDON PLACE	LIMA	OH	45801	DONALD	BERRY	1.007 PHYSICS
D	7565432907632 BLENDON PLACE	LIMA	OH	45801	DONALD	BERRY	1.008 PHYSICS
H	123098654843 NORTHWALD DR	LIMA	OH	45801	DONALD	BERRY	1.007 PHYSICS
H	123098654843 NORTHWALD DR	LIMA	OH	45801	DONALD	BERRY	1.008 PHYSICS
	58909845612 NORTH ST	LIMA	OH	45801	RONALD	CASTLE	1.001 ANATOMY
	58909845612 NORTH ST	LIMA	OH	45801	RONALD	CASTLE	1.002 ANATOMY
	278654738345 N FRONT ST	LIMA	OH	45801	RONALD	CASTLE	1.001 ANATOMY
	278654738345 N FRONT ST	LIMA	OH	45801	RONALD	CASTLE	1.002 ANATOMY

## Home School Export

**Navigation: Home – Management – Import/Export – Home School Export**

The Home School Export is the process used by the JVS to export the marks and attendance data out of the JVS to the home schools. This process will create export files to be processed in SIS.

### Home School Export – Course History

**Navigation: Home – Management – Import/Export – Home School Export – Course History Tab**

This is commonly referred to as the JVS Grades Export. Any school (not just JVSes) can use the Home School Export. The Home School Export will only export students with marks in courses with a Course Type of Class, Post-Secondary Course, or Vocational as defined on the Courses – Miscellaneous tab.

Home » Management » Import/Export » Home School Export Advanced Search | F

## Export Data to Provide to Students' Home Schools

This screen will create export files for students' home schools

Course History **Attendance**

For each marking pattern, select the marking pattern rules to use for the exported marks

Marking Pattern	Term 1 Mark	Term 2 Mark	Term 3 Mark	Term 4 Mark	Final Mark
All Year Course	-- Blank --				
1st Semester	-- Blank --				
2nd Semester	-- Blank --				

Primary Student Id for Export:  State Student ID (SSID)  EMIS ID

Home District: -- Select School --

If the selected Home District contains multiple high schools, then the Export file will contain a separate section for each high school in the district. The district Export file must be manually separated in order to create an Export file for each high school.

**Marking Pattern Mark Types** - For each Marking Pattern active in StudentInformation, enter up to five Term Mark Types (based on the Marking Pattern Rules) to use for the exported marks. The dropdowns will be filled in according to the Marking Pattern Rules at the JVS. Please consult the Home School to determine which marks they want sent over. Since a separate export file is created for each Home School, the JVS can tailor each file to the Home School's specific needs.

**NOTE:** When you Import, you will be selecting a single Reporting Term, Mark Type and Credit Type for each Term that will apply to all Marking Patterns, so be sure to use marks that will have the same Mark Type and Credit Type regardless of Marking Pattern.

**NOTE:** Marking patterns with no rules selected will not export.

**NOTE:** An error message will display reminding users that at least one mark must be selected for one row (or they will get an empty file).

**Please correct the following errors:**  
**- At least one mark must be selected**

**Primary Student Id for Export** (required) – Choose State Student ID (SSID) or EMIS ID. The default is the SSID. If SSID is chosen and a student does not have an SSID, then the EMIS ID will be included in the export record. If EMIS ID is chosen and a student does not have an EMIS ID, then the SSID will be included in the export record. If the student does not have an SSID or an EMIS ID, then the SSID/EMIS ID field will be left blank in the export record.

Whenever possible choose to export by SSID versus EMIS ID. A student in multiple districts must have the same SSID but can have varying EMIS IDs at each district. An exception to this would be if the home school is a non-public school and does not use SSIDs – the JVS would want to do the export by EMIS ID. If they chose SSID for the export file, then nothing would be imported to the non-public school since they do not use SSIDs.

**Home District** (required) – Choose the IRN of the Home School district to which this data applies. The Home District drop-down list is populated based on the building Home School IRN field on the Student Profile – General tab.

**Note for Home Districts with multiple high schools:** The export creates a single export file for the district selected for exporting, which includes all records for each building in the selected district where one or more students had their home school set to that building. If the selected Home District contains multiple high schools then the Export file will contain a separate section for each high school in the district. The district Export file must be manually separated in order to create an Export file for each High School.

**Export** – A file is created. After opening this file and verifying the date, email the file to the Home School if necessary.

The Course History file layout will be as follows with the starting point of that field and the length in parenthesis. The output file defaults to the name StudentMarks000000.SEQ, where 000000 is the Home School District IRN. The file is a fixed width file with a header row.

### File Format

Field Name	Position	Description
StudentNumber	1 - 9	
GradeLevelCode	10 - 11	
LastName	12 - 29	
FirstName	30 - 43	
CalledName	44 - 51	
SSIDOrEMISID	52 - 60	
HomeSchoolCode	61 - 64	
SchoolYear	65 - 68	
Abbreviation	69 - 76	
SectionNumber	77 - 78	
CourseShortName	79 - 93	
CompletionDate	94 - 99	[Date, formatted yyyyymm]
SchoolCode	100 - 103	
-- BLANK --	104 - 109	[Filler Field for School Abbreviation]
CourseGradeLevelCode	110 - 111	
-- BLANK --	112	[Filler Field for Course Grade Level Count]
InCumGPA	113	[Boolean, Y or N]
InCumCredit	114	[Boolean, Y or N]
-- BLANK --	115	[Filler Field for Language Code]
-- BLANK --	116 - 118	[Filler Field for Hours of Instructions]
-- BLANK --	119	[Filler Field for Level of Difficulty]
AreaOfStudy	120 - 122	
SubjectArea	123 - 125	
TransferCode	126	
MarkAlpha1	127 - 129	
MarkNumeric1	130 - 135	
AttemptedCredit1	136 - 146	[Decimal, formatted ###0.000000, right justified]
EarnedCredit1	147 - 157	[Decimal, formatted ###0.000000, right justified]
MarkAlpha2	158 - 160	
MarkNumeric2	161 - 166	

Field Name	Position	Description
AttemptedCredit2	167 - 177	[Decimal, formatted ###0.000000, right justified]
EarnedCredit2	178 - 188	[Decimal, formatted ###0.000000, right justified]
MarkAlpha3	189 - 191	
MarkNumeric3	192 - 197	
AttemptedCredit3	198 - 208	[Decimal, formatted ###0.000000, right justified]
EarnedCredit3	209 - 219	[Decimal, formatted ###0.000000, right justified]
MarkAlpha4	220 - 222	
MarkNumeric4	223 - 228	
AttemptedCredit4	229 - 239	[Decimal, formatted ###0.000000, right justified]
EarnedCredit4	240 - 250	[Decimal, formatted ###0.000000, right justified]
-- BLANK --	251 - 253	[Filler Field for Cumulative Mark]
-- BLANK --	254 - 256	[Filler Field for Exam Mark]
-- BLANK --	257 - 259	[Filler Field for Average Mark]
MarkAlpha5	260 - 262	
MarkNumeric5	263 - 268	
AttemptedCredit5	269 - 279	[Decimal, formatted ###0.000000, right justified]
EarnedCredit5	280 - 290	[Decimal, formatted ###0.000000, right justified]
LevelOfDifficulty	291 - 298	
CourseCode	299 - 314	
EMISSubject	315 - 320	
-- BLANK --	321 - 322	Filler
EMISSubjectAreaCredit	323 - 325	
-- BLANK --	326 - 330	Filler
CORESubjectArea	331 - 333	
-- BLANK --	334 - 341	Filler
CourseCredit	342 - 349	[Decimal, formatted 0.000000, right justified]
-- BLANK --	350 - 357	Filler
CreditRatioDenominator	358 - 360	[Integer, formatted ###0, right justified]
CreditFlex	361	
IsDualCredit	362	"Y" = 1 "N" = 0 "" = null (blank)
IsCollegePrep	363	"Y" = 1 "N" = 0 "" = null (blank)

## Home School Export – Attendance

### Navigation: Home – Management – Import/Export – Home School Export – EMIS Attendance tab

The JVS typically exports attendance at midyear and at the end of the year. When the JVS attendance is imported into the Home School an entry is created on the student's External Absences page in StudentInformation. As of 10.3.0.16150, the Attendance export function includes Days Attended and will split absences into excused and unexcused.

Home » Management » Import/Export » Home School Export

### Export Data to Provide to Students' Home Schools

This screen will create export files for students' home schools

Marks Attendance

No information is needed to export attendance data

Primary Student Id for Export:  State Student ID (SSID)  EMIS ID

Home District: -- Select School --

Student Status

A - ACTIVE RES  
D - DELETED  
I - INACTIVE  
N - NON-RES

Ad-hoc: -- Select an Ad-Hoc Membership --

Public And Private

Export

If the selected Home District contains multiple high schools, then the Export file will contain a separate section for each high school in the district. The district Export file must be manually separated in order to create an Export file for each high school.

**Primary Student Id for Export** (required) - Choose State Student ID (SSID) or EMIS ID. The default is the SSID. If SSID is chosen and a student does not have an SSID, then the EMIS ID will be included in the export record. If EMIS ID is chosen and a student does not have an EMIS ID, then the SSID will be included in the export record. If the student does not have an SSID or an EMIS ID, then the SSID/EMIS ID field will be left blank in the export record.

Whenever possible choose to export by SSID versus EMIS ID. A student in multiple districts must have the same SSID but can have varying EMIS IDs at each district. An exception to this would be if the home school is a non-public school and does not use SSIDs – the JVS would want to do the export by EMIS ID. If they chose SSID for the export file, then nothing would be imported to the non-public school since they do not use SSIDs.

**Home District** (required) – Choose the IRN of the Home School district this data applies to. The Home District dropdown list is populated based on the building Home School IRN field on the Student Profile – General tab.

Note for Home Districts with multiple high schools: The export creates a single export file for the district selected for exporting, which includes all records for each building in the selected district where one or more students had their home school set to that building. If the selected Home District contains multiple high schools then the Export file will contain a separate section for each high school in the district. The district Export file must be manually separated in order to create an Export file for each High School.

**Student Status** (optional) – Choose the Student Status of the students to include in the Home School Attendance Export. If no Student Status is selected, then students with all Student Statuses will be exported.

**Ad-hoc** (optional) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored.

Check the **Public and Private** checkbox to see Memberships created by other users in your drop-down list.

**Export** – Export Attendance data. After opening this file and verifying the date, email the file to the Home School if necessary.

10.3.0.16150 and after - The Attendance file layout will be as follows: The output file defaults to the name StudentAttendance000000.SEQ, where 000000 is the Home School District IRN. The file is fixed width files with a header row.

**NOTE:** *The Attended, Absence Excused, Absence Unexcused and Tardy values are right justified.*

Field	Start Position/End Position	Length	Comments
SSID / EMIS Id	1/9	9	State Student Id or EMIS Id. When user chooses to export SSID, the process will use the SSID if the SSID is present or the EMIS Id if the SSID is not present. When user chooses to export EMIS Id, the process will use the EMIS Id if the EMIS Id is present or the SSID if the EMIS Id is not present
Attended	10/19 right justified	10	The sum of the days attended as indicated on the student's calendar day actual days minus the absence level of any absences on the calendar day. Examples: 1. Student's calendar day indicates 1 actual day of attendance, student does not have an absence record on calendar day, and then the student will be given 1 actual day of attendance. 2. Student's calendar day indicates 0.5 actual days, and student does not have an absence record, student will be given 0.5 days attendance for the calendar day. 3. Student's calendar indicates 1 actual day of attendance, student has an absence record indicating 0.5 days absence then the student will be given 1 – 0.5 days attendance (or 0.5 days attendance) on the calendar day.
Absence Excused	20/29 right justified	10	Sum of the absence levels on all student absences marked as excused.
Absence Unexcused	30/39 right justified	10	Sum of the absence levels on all student absences marked as unexcused.
Tardy	40/49 right justified	10	The number of absence records marked tardy.
School Year	54/57	4	School year of absence data. This is not the fiscal year of the absence data.
Student Name	62	32	Student name. Last name, first name

The following figure shows an example of the Home School Export – Attendance file.

V2.0						
AY0681475	0.00	0.00	0.00	0.00	2010	WILLIAMS, E
AY8238783	0.00	0.00	0.00	0.00	2010	THOME, C
CY1342864	0.00	0.00	0.00	0.00	2010	FLORANCE, T
EP2413189	0.00	0.00	0.00	0.00	2010	Student81789, SAWYER
EP2477848	0.00	0.00	0.00	0.00	2010	Student81788, KIANA
EP2514748	0.00	0.00	0.00	0.00	2010	Student81787, PAUL
EP2541247	0.00	0.00	0.00	0.00	2010	Student81786, GARRETT
EP2545114	0.00	0.00	0.00	0.00	2010	Student81785, HALEY
EP2772454	0.00	0.00	0.00	0.00	2010	Student81781, JANICE
EP3015302	0.00	0.00	0.00	0.00	2010	Student81774, SCOTT

Prior to 10.3.0.16150, the Attendance file layout will be as follows with the starting point of that field and the length in parenthesis. The output file defaults to the name StudentAttendance000000.SEQ, where 000000 is the Home School District IRN. The file is fixed width files with a header row.

- State Student ID (SSID) or EMIS ID – depending on ‘Primary Student Id for Export’ option selected (1, 9)
- School Year (10, 4)
- Report Term Code or Report Term Export Code – depending on ‘Home School Term Format’ option selected (14, 3)
- Absence Type (17, 1)
- Full Day Absences (18, 3)
- Half Day Absences (21, 3)
- Tardies (24, 3)
- Filler (27,12)
- Student Name (39, 30)

**NOTE:** The Home School Import will accept either file layout (pre-10.3 or 10.3-after).

## Findlay Dialer Export

### Navigation: Home – Management – Import/Export – Findlay Dialer Export

This export is a specific format for schools that use an auto dialer program or third party program to dial home for students that are listed in the export file as absent for the current date.



There are two formats currently that are created for the district’s use.

## PHON Version 1

Home » Management » Import/Export » Findlay Dialer Export

### Auto Dialer Export For Findlay (Attendance)

From this screen, you can export data for a specific file format.

PHON version 1

**Absence Type**

E - EXCUSED  
O - OTHER  
T - TARDY  
test - test

**Export Fields**

Phone     Student Name     Period 2 Absence Type     Grade Level  
 Student ID     Period 1 Absence Type     Period 3 Absence Type

Export

PHON version 1 returns students absent any period of the date for the current processing date.

This file is comma delimited, left-justified, and contains the following fields:

- Area Code and Phone Number
- Student ID
- Student Last Name, First Name (Called Name)
- 1<sup>st</sup> Period Absence Type
- 2<sup>nd</sup> Period Absence Type
- 3<sup>rd</sup> Period Absence Type
- Grade Level

## PHON Version 2

Home » Management » Import/Export » Findlay Dialer Export

### Auto Dialer Export For Findlay (Attendance)

From this screen, you can export data for a specific file format.

PHON version 2

**Absence Type**

E - EXCUSED  
I - ISS  
O - OTHER  
P - PARENT/CP

**Export Fields**

Phone  Student Name  Period Absence Reason  Period Absence Note  
 Student ID  Period 1 Absence Type

Export

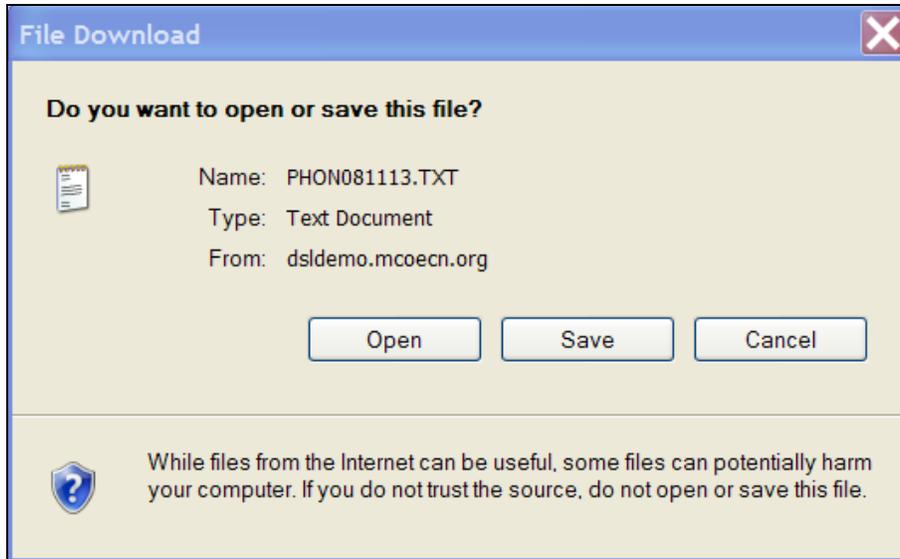
PHON version 2 returns students absent period 1 for the current processing date.

This file is comma delimited, left-justified, and contains the following fields:

- Phone Number
- Student ID
- Student Last Name, First Name (Called Name)
- 1<sup>st</sup> Period Absence Type
- Period Absence Reason
- Period Absence Note
- User Defined Field 1 (Data Flag 2)
- User Defined Field 2 (Data Flag 3)

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

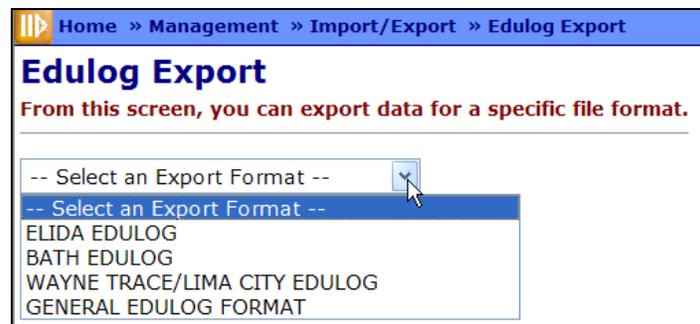
These exports are run daily, but are not automated. The export must be manually processed by the building. The file is comma delimited and left justified.

## EduLog Export

### Navigation: Home – Management – Import/Export – EduLog Export

Several districts use EduLog transportation software for bus routing. The file described in the following sections is the required format for import student data into EduLog. Each district using EduLog and importing student data from StudentInformation, presently has different requirements for address formatting and determining various codes in the file. The export will give the districts various selections for formatting of the export files. See also "Ad Hoc Reporting".

**Note:** As of DASL v10.0, when the EduLog Export is run before the first day of school, it uses the first day of school to look up the EMIS FS and FD data.



## Elida Edulog

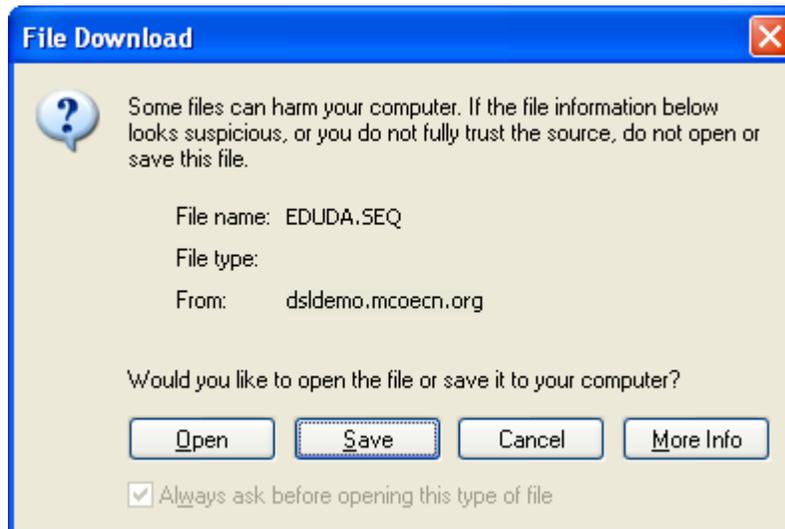
Navigation: Home – Management – Import/Export – Edulog Export – ELIDA EDULOG



The screenshot shows the 'Edulog Export' web page. At the top, there is a breadcrumb trail: Home » Management » Import/Export » Edulog Export. Below this, the title 'Edulog Export' is displayed in a large blue font. A red instruction reads: 'From this screen, you can export data for a specific file format.' A dropdown menu is set to 'ELIDA EDULOG'. Below the dropdown, the district is listed as 'DASL Local SD' and the school year as '2007-2008'. A note states: 'Please Note: For projections, change context to the new year.' Under the heading 'Action:', there are three options: 'All Students' (selected with a radio button), 'Student updated since last run date' (with a radio button and a date picker), and 'Include the deleted students since last school year' (with a checkbox). An 'Export' button is located at the bottom left of the form area.

**Action** (required) – Choose All Students or only Students updated since a specified last run date. Can also choose whether to include the deleted students since last school year.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The file is fixed width, left justified, with spaces for padding. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Student ID (1, 9)
- Student Last Name (10, 15)
- Student First Name (25, 14)
- School Code (39, 3) (Edulog school code, not StudentInformation school code)
- Grade Code (42, 3) (Edulog school code, not StudentInformation school code)
- Resident Address (45, 25)
- Mailing Address (70, 25)
- City (95, 18)
- Zip (113, 9)
- Parent (122, 25)
- Phone (147, 10)
- Date of Birth (157, 8) (formatted as mmddyyyy)
- Student Status (165, 1) (StudentInformation status code)
- Withdrawal Date (166, 8) (formatted as mmddyyyy)

Note that, for the Status code at position 165, any student on a non-attending calendar will have the code "D" listed, unless their Student Profile has Data Flag 3 set to "J".

The following figure shows an example of the ELIDA EDULOG Export file.

Student ID	Last Name	First Name	Address	City	Zip	Parent	Phone	Date of Birth	Student Status	Withdrawal Date
000001224LEE	HARPER		23 MOCKINGBIRD LANE	LINA	45804	ATTICUS FINCH	419345234519891030			
000004001EYE	MAGNUM P.		122 NORTH ST	LINA	45801	EDWARD EYE	55511222219870403			
000004002FONT	ELLA JANE		345 N FRONT ST	LINA	45801	JANE FONT	19861024			
000004003JOHNSON	GEORGE EVAN		597 STATE STREET	LINA	45801	HOWARD JOHNSON	19860913			
000004004POTTS	JORDAN DANIEL		7632 BLENDON PLACE	LINA	45801	DAVID POTTS	19860801			
000004005WELLS	JOBETH		843 NORTHWALD DR	LINA	45801	MITCH WELLS	19861223			
000004008SAWYER	THOMAS		89 MISSISSIPPI RD SUITE 100	LINA	45804	MARK TWAIN	419228742919891029			
000005001CONTRARY	MARY M.		90 ELM STREET	LINA	45801	MARION CONTRARY	419228741719871117			
000005002PERRY	MICHAEL JAY		776 BROADWAY BLVD	LINA	45801	MATTHEW PERRY	19871204			
000005003POTTS	IAN MICHAEL		7632 BLENDON PLACE	LINA	45801	DAVID POTTS	19870920			
000005004SPRAT	JACK JOSEPH		890 BACON TRAIL	LINA	45801	JOLENE TREECK	419228741719880202			
000005005WELLS	JONA PENEK		843 NORTHWALD DR	LINA	45801	MITCH WELLS	19880317			
000006001EYE	CORY ROBERT		12 NORTH ST	LINA	45801	EDWARD EYE	19890716			
000006003FONT	RICHELLE LYNN		345 N FRONT ST	LINA	45801	JANE FONT	19890105			
000006005JONES	WHITNEY ANN		702 BRISTOL	LINA	45801	WILLIAM JONES	19890814			
000006004LINE	TROY AARON		665 SUGAR STREET	LINA	45801	BOB LINE	19890202			
000006005MAY	DAISY LEE		600 BLOOM DRIVE	LINA	45801	SHARON LEE	19881004			
000007001CONTRARY	JASON WILLIAM		90 ELM STREET	LINA	45801	MARION CONTRARY	19900214			
000007002PERRY	RICHARD MATTHEW		775 BROADWAY BLVD	LINA	45801	MATTHEW PERRY	19890424			
000007003RING	NICOLE SUZANNE		9045 BLISS RD	LINA	45801	NICHOLAS RING	19890511			
000007004SARGENT	LEANN JEAN		123 Bigtop Street	LINA	45801	SAM SARGENT	419555987619890930			
000007005WILLIAMSON	RYAN SETH		881 THAYER ROAD	LINA	45801	JOHN WILLIAMSON	19891015			
000122445EYE	PRIVA		123 SECRET AVE	LINA	45804	BLU EYE	419222888819891112			
048652258Banana	Hannah		2117 Cherry Street	Lina	45804		19870817 20050110			
048652201Contrary	Jesse		645 S. Main	Lina	45804		20050404			
048652281Contrary	Jesse		645 S. Main	Lina	45804		20050404			

## BATH Edulog

Navigation: Home – Management – Import/Export – Edulog Export – Bath EDULOG



The screenshot shows the 'Edulog Export' web page. At the top, there is a breadcrumb trail: Home » Management » Import/Export » Edulog Export. Below this, the page title is 'Edulog Export' in a large blue font. Underneath the title, a red text line reads: 'From this screen, you can export data for a specific file format.' A dropdown menu is set to 'BATH EDULOG'. Below the dropdown, the district is listed as 'DASL Local SD' and the school year as '2007-2008'. A note states: 'Please Note: For projections, change context to the new year.' Under the heading 'Action:', there are three radio button options: 'All Students' (which is selected), 'Student updated since last run date' (with an adjacent date input field), and 'Include the deleted students since last school year' (with an adjacent checkbox). At the bottom left of the form area is an 'Export' button.

**Action** (required) – Choose All Students or only Students updated since a specified last run date. Can also choose whether to include the deleted students since last school year.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The file is fixed width, left justified, with spaces for padding. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Student ID (1, 9)
- Student Last Name (10, 15)
- Student First Name (25, 14)
- School Code (39, 3) (Edulog school code, not StudentInformation school code)
- Grade Code (42, 3) (Edulog school code, not StudentInformation school code)
- Resident Address (45, 25)
- Mailing Address (70, 25)
- City (95, 18)
- Zip (113, 9)
- Parent (122, 25)
- Phone (147, 10)
- Date of Birth (157, 8) (formatted as mmddyyyy)
- Student Status (165, 1) (StudentInformation status code)
- Withdrawal Date (166, 8) (formatted as mmddyyyy)

Note that, for the Status code at position 165, any student on a non-attending calendar will have the code D listed, unless their Student Profile has Data Flag 3 set to J.

The following figure shows an example of the BATH Edulog Export file.

The screenshot shows a WordPad window titled 'EDULOG.SQ WordPad' containing a fixed-width text file. The data is organized into columns representing different fields as defined in the list above. The text is left-justified within each field's width.

Student ID	Student Last Name	Student First Name	School Code	Grade Code	Resident Address	Mailing Address	City	Zip	Parent	Phone	Date of Birth	Student Status	Withdrawal Date
000001224	LEE	HARPER			23 MOCKINGBIRD LANE								
000004001	EYE	MAGNUS P.			122 NORTH ST								
000004003	JOHNSON	ELLA JANE			345 N FRONT ST								
000004004	POTTS	GEORGE EVAN			597 STATE STREET								
000004005	WELLS	JORDAN DANIEL			7632 BLENDON PLACE								
000004008	SAWYER	JOBETH			843 NORTHWALD DR								
000005001	CONTRARY	THOMAS			89 MISSISSIPPI RD	SUITE 100							
000005003	POTTS	MARY M.			90 ELM STREET								
000005004	SPRAT	MICHAEL JAY			776 BROADWAY BLVD								
000005005	WELLS	IAN MICHAEL			7632 BLENDON PLACE								
000006001	EYE	JACK JOSEPH			890 BACON TRAIL								
000006002	PERRY	JONA PENE			843 NORTHWALD DR								
000006003	FONT	CORY ROBERT			12 NORTH ST								
000006004	LINE	RICHARD HATTHE			345 N FRONT ST								
000006005	MAY	NICHELLE LYNN			702 BRISTOL								
000007001	CONTRARY	WHITNEY ANN			665 SUGAR STREET								
000007002	PERRY	TROY AARON			600 BLOOM DRIVE								
000007003	RING	DAISY LEE			90 ELM STREET								
000007004	SARGENT	JASON WILLIAM			775 BROADWAY BLVD								
000007005	WILLIAMSON	RICHARD HATTHE			9065 BLISS RD								
000122445	EYE	NICOLE SUZANNE			123 Bigtop Street								
048652258	Banana	LEANN JEAN			801 THAYER ROAD								
048652291	Contrary	RYAN SETH			123 SECRET AVE								
048652291	Contrary	PRIVA			2117 Cherry Street								
		Hannah			645 S. Main								
		Jesse			645 S. Main								
		Jesse			645 S. Main								

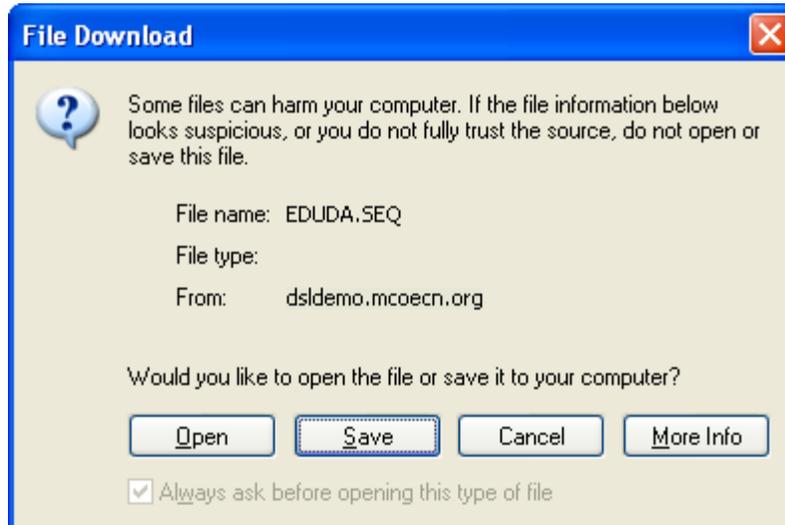
## Wayne Trace/Lima City Edulog

Navigation: Home – Management – Import/Export – Edulog Export – WAYNE TRACE/LIMA CITY EDULOG

The screenshot shows a web browser window with a blue header bar containing the navigation path: Home » Management » Import/Export » Edulog Export. Below the header, the title "Edulog Export" is displayed in large blue font. A red instruction reads: "From this screen, you can export data for a specific file format." A dropdown menu shows "WAYNE TRACE/LIMA CITY EDULOG". Below this, the district is listed as "DASL Local SD" and the school year as "2005-2006". A note states: "Please Note: For projections, change context to the new year." Under the heading "Action:", there are three options: "All Students" (selected with a radio button), "Student updated since last run date" (with a radio button and a date picker), and "Include the deleted students since last school year" (with a checkbox). An "Export" button is located at the bottom left of the form area.

**Action** (required) – Choose All Students or only Students updated since a specified last run date. Can also choose whether to include the deleted students since last school year.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The file is fixed width, left justified, with spaces for padding. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Student ID (1, 9)
- Student Last Name (10, 18)
- Student Given Name (28, 14)
- Student Called Name (42, 8)
- Resident Address (50, 25)
- Mailing Address (75, 25)
- City (100, 18)
- State (118, 4)
- Zip (122, 9)
- Area Code (131, 3)
- Phone (134, 7)
- Parent/Guardian (141, 25)
- Sex (166, 1)
- Birth Century (167, 2)
- Birth Year (169, 2)
- Birth Month (171, 2)
- Birth Day (173, 2)
- Social Security Number (175, 9)
- Counselor (184, 25)
- Student Status (209, 1)
- Grade Level (210, 2)
- School Year (212, 4)
- Homeroom (216, 4)
- Program Code (220, 2)
- Disability Code (222, 2)
- Locker (224, 4)
- Locker Combination (228, 8)
- Previous School (236, 4)
- Admission Century (240, 2)
- Admission Year (242, 2)
- Admission Month (244, 2)
- Admission Day (246, 2)
- Admission Code High (248, 1)
- Admission Code Low (249, 1)
- Withdrawal Century (250, 2)
- Withdrawal Year (252, 2)
- Withdrawal Month (254, 2)
- Withdrawal Day (256, 2)
- Withdrawal Code High (258, 1)
- Withdrawal Code Low (259, 1)
- Transfer to School (260, 4)
- Transfer Date (264, 8) (formatted as yyyyymmdd)
- Diploma Century (272, 2)
- Diploma Year (274, 2)
- Diploma Month (276, 2)
- Diploma Day (278, 2)
- Ethnic Code (280, 2)
- Filler (282, 23) (First 5 positions are data flags, next 10 positions are scheduling flags, last 8 positions are the last date the student's schedule was changed)
- Listed/Unlisted Code (305, 1)
- Parent/Guardian Relationship (306, 1)
- Filler (307, 2) (First position contains birth date verification code, second position contains the file received flag)
- Calendar (309, 1)
- Filler (310, 7) (First position contains file sent flag, second position contains graduation rule code, last 5 positions contain report flags)
- New Homeroom (317, 4)

- Residency Code (321, 4)
- Special Ed Code (325, 3)
- Attendance Code (328, 1)
- Filler (329, 22) (First 8 positions contain the last date the STUD record was modified, ninth position contains the scheduling priority code)
- Edulog School Code (351, 4) (StudentInformation School Code)

The following figures show an example of the Wayne Trace/Lima City Edulog export file.

EDUDA.SEQ	WordPad	File	Edit	View	Insert	Format	Help
048652258	Banana	Hannah	2117 Cherry Street	Lima	OH	45804	
000006005	RAY	DAISY LEE	600 BLOOM DRIVE	LIMA	OH	45801	SHARON LEE
000004005	WELLS	JOSEPH	843 NORTHWALD DR	LIMA	OH	45801	MITCH WELLS
000004003	JOHNSON	GEORGE EVAN	1597 STATE STREET	LIMA	OH	45801	HOWARD JOHNSON
000006001	EYE	CORY ROBERT	12 NORTH ST	LIMA	OH	45801	EDWARD EYE
000007003	RING	NICOLE SUZANNE	9065 BLISS RD	LIMA	OH	45801	NICHOLAS RING
000001224	LEE	HARPER LEE	23 MOCKINGBIRD LANE	LIMA	OH	45804	4193452345ATTICUS FINCH
000007001	CONTRARY	JASON WILLIAM	90 ELM STREET	LIMA	OH	45801	MARION CONTRARY
000005004	FRAT	JACK JOSEPH	890 BACON TRAIL	LIMA	OH	45801	4192287417JOLENE TREECE
000006002	FONT	MICHELLE LYNN	345 N FRONT ST	LIMA	OH	45801	JANE FONT
000004001	EYE	MAGNUM P.	122 NORTH ST	LIMA	OH	45801	555112222EDWARD EYE
000006004	LINE	TROY AARON	665 SUGAR STREET	LIMA	OH	45801	BOB LINE
000005001	CONTRARY	MARY M.	90 ELM STREET	LIMA	OH	45801	4192287417MARION CONTRARY
000005002	PERRY	MICHAEL JAY	776 BROADWAY BLVD	LIMA	OH	45801	MATTHEW PERRY
000007002	PERRY	RICHARD MATTHEW	775 BROADWAY BLVD	LIMA	OH	45801	MATTHEW PERRY
000004008	WATER	THOMAS JACK	89 MISSISSIPPI RD SUITE 100	LIMA	OH	45804	4192287429MARK TWAIN
000005005	WELLS	JONIA RENEE	843 NORTHWALD DR	LIMA	OH	45801	MITCH WELLS
000004004	POTTS	JORDAN DANIEL	7632 BLENDON PLACE	LIMA	OH	45801	DAVID POTTS
000122445	EYE	PRIVA	123 SECRET AVE	LIMA	OH	45804	419228888BLU EYE
000006003	JONES	WHITNEY ANN	702 BRISTOL	LIMA	OH	45801	WILLIAM JONES
000007004	SARGENT	LEANN JEAN	123 Bigtop Street	LIMA	OH	45801	4195559876SAM SARGENT
000005003	POTTS	IAN MICHAEL	7632 BLENDON PLACE	LIMA	OH	45801	DAVID POTTS
000007005	WILLIAMSON	RYAN SETH	881 THAYER ROAD	LIMA	OH	45801	JOHN WILLIAMSON
000004002	FONT	ELLA JANE	345 N FRONT ST	LIMA	OH	45801	JANE FONT
048652281	Contrary	Jesse	848 S. Main	Lima	OH	45804	

EDUDA.SEQ	WordPad	File	Edit	View	Insert	Format	Help
F19870817268722176			2004	A013			U
F19881004123768453			2004				U
F19861223123098654			2004				U
M19860913458769300			2004A110				H
M19890716589098456			2004				U
F19890511555444334			2004	A218			U
F19891030678956677			2004	A219			U
M19900214369852369			2004	A011			U
M19880202453123789			2004	A020			U
F19890105278654738			2004				U
M19870403267874612			2004				U
M19890202908987876			2004				U
F19871117376873245			2004				U
M19871204564789874			2004				U
M19890424099898907			2004A106	A217			U
M19891029258741258			2004				U
F19880317453676123			2004				U
M19860801756543290			2004A110				U
F19891112123654123			2004				U
F19890814456309900			2004				B
F19890930565454345			2004A106	A242			B
M19870920890987654			2004				U
M19891015134876456			2004	A212			U
F19861024568978542			2004A110				U
M20050404			2004				U

EDUDA.SEQ	WordPad	File	Edit	View	Insert	Format	Help
176			2004	A013			U
453			2004				B 1
454			2004				B 1
900			2004A110				B 1
456			2004				B 1
334			2004	A218			B 1
877			2004	A219			B 1
369			2004	A011			B 1
789			2004	A020			B 1
738			2004				B 1
612			2004				B 1
876			2004				B 1
245			2004				B 1
874			2004				B 1
907			2004A106	A217			B 1
258			2004				B 1
123			2004				B 1
290			2004A110				B 1
123			2004				B 1
900			2004				B 1
345			2004A106	A242			B 1
654			2004				B 1
456			2004	A212			B 1
842			2004A110				B 1
			2004				1
							200504145
							DARES

## General Edulog Format

Navigation: Home – Management – Import/Export – Edulog Export – GENERAL EDULOG FORMAT

The screenshot shows the 'Edulog Export' configuration page. At the top, a breadcrumb trail reads 'Home » Management » Import/Export » Edulog Export'. The page title is 'Edulog Export' with a sub-header: 'From this screen, you can export data for a specific file format.' Below this is a dropdown menu set to 'GENERAL EDULOG FORMAT'. The 'District' is 'Local SD' and the 'School Year' is '2009-2010'. A note states: 'Please Note: For projections, change context to the new year.' The 'Effective/Homeroom Date' is set to '1/11/2010'. Under 'Action', 'All Students' is selected. There are also options for 'Student updated since last run date' and 'Include students withdrawn prior to Effective / Homeroom Date'. A large section titled 'Export Fields' contains a grid of 48 fields, all of which are checked. At the bottom left is an 'Export' button.

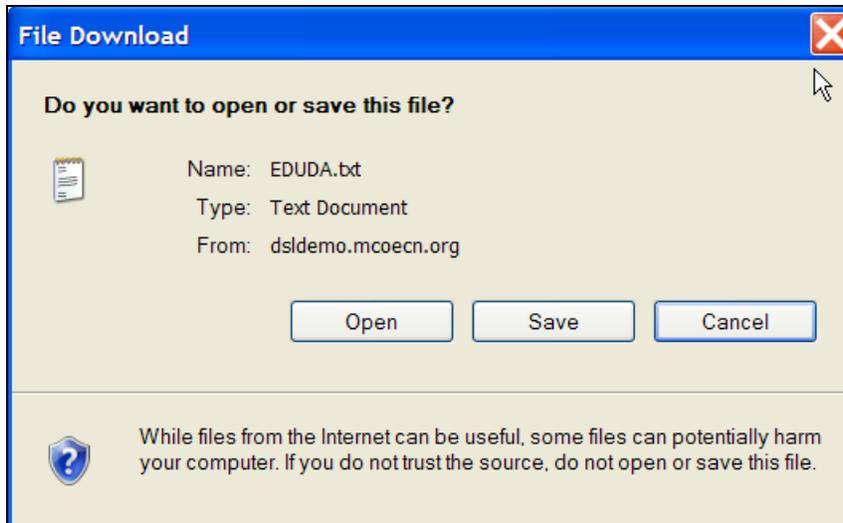
Export Fields			
<input checked="" type="checkbox"/> StudentNumber	<input checked="" type="checkbox"/> Flag2	<input checked="" type="checkbox"/> HomeroomName	<input checked="" type="checkbox"/> WithdrawalDay
<input checked="" type="checkbox"/> LastName	<input checked="" type="checkbox"/> Flag3	<input checked="" type="checkbox"/> ProgramCode	<input checked="" type="checkbox"/> TransferDate
<input checked="" type="checkbox"/> FirstName	<input checked="" type="checkbox"/> Flag4	<input checked="" type="checkbox"/> DisabilityCondition	<input checked="" type="checkbox"/> DiplomaCentury
<input checked="" type="checkbox"/> GradeLevelCode	<input checked="" type="checkbox"/> Flag5	<input checked="" type="checkbox"/> LockerNumber	<input checked="" type="checkbox"/> DiplomaYear
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> CalledName	<input checked="" type="checkbox"/> Combination	<input checked="" type="checkbox"/> DiplomaMonth
<input checked="" type="checkbox"/> Address2	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> PreviousSchool	<input checked="" type="checkbox"/> DiplomaDay
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> AreaCode	<input checked="" type="checkbox"/> TransferToSchool	<input checked="" type="checkbox"/> EthnicCode
<input checked="" type="checkbox"/> Zip	<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> SchoolCode	<input checked="" type="checkbox"/> EMISStatus
<input checked="" type="checkbox"/> ParentName	<input checked="" type="checkbox"/> IsUnlisted	<input checked="" type="checkbox"/> AdmissionCentury	<input checked="" type="checkbox"/> SpecialEducation
<input checked="" type="checkbox"/> HomePhone	<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> AdmissionYear	<input checked="" type="checkbox"/> EMISituationID
<input checked="" type="checkbox"/> Birthdate	<input checked="" type="checkbox"/> BirthCentury	<input checked="" type="checkbox"/> AdmissionMonth	<input checked="" type="checkbox"/> EMISituationDescription
<input checked="" type="checkbox"/> StudentStatus	<input checked="" type="checkbox"/> BirthYear	<input checked="" type="checkbox"/> AdmissionDay	<input checked="" type="checkbox"/> BirthdateVerificationCode
<input checked="" type="checkbox"/> WithdrawalDate	<input checked="" type="checkbox"/> BirthMonth	<input checked="" type="checkbox"/> AdmissionCode	<input checked="" type="checkbox"/> LastStudentModifiedDate
<input checked="" type="checkbox"/> AdmissionDate	<input checked="" type="checkbox"/> BirthDay	<input checked="" type="checkbox"/> WithdrawalCentury	<input checked="" type="checkbox"/> SchedulePriority
<input checked="" type="checkbox"/> WithdrawalCode	<input checked="" type="checkbox"/> SSN	<input checked="" type="checkbox"/> WithdrawalYear	<input checked="" type="checkbox"/> ContactTypeCode
<input checked="" type="checkbox"/> CalendarCode	<input checked="" type="checkbox"/> Counselor	<input checked="" type="checkbox"/> WithdrawalMonth	<input checked="" type="checkbox"/> ContactTypeName
<input checked="" type="checkbox"/> Flag1	<input checked="" type="checkbox"/> SchoolYear		

**Effective/Homeroom Date** (required) – This date tells the system what FS and FD records to look for and also what date to look up homerooms for.

**Action** (required) – Choose All Students or only Students updated since a specified last run date. Can also choose whether to include the deleted students since last school year.

**Export Fields** – Choose the export fields for your General Edulog Export. These fields include:

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The file is fixed width, left justified, with spaces for padding. The file layout is currently under development (bug 3743).

The following figures show an example of the General Edulog export file.

D48652258Banana	Hannah	Ray	2117 Cherry Street	Lima	OH 45804	
048652419Jones	Raymond		675 S Main St	Lima	OH 45804	9372725454
000004005HAY	DAISY LEE		600 BLOOM DRIVE	LIMA	OH 45801	SHARON LEE
000004005WELLS	JORETH		843 NORTHWALD DR	LIMA	OH 45801	MITCH WELLS
000004003JOHNSON	GEORGE EVAN		597 STATE STREET	LIMA	OH 45801	HOWARD JOHNSON
000006001EYE	CORY ROBERT		12 NORTH ST	LIMA	OH 45801	EDWARD EYE
000007003RING	NICOLE SUZANNE		9065 BLISS RD	LIMA	OH 45801	NICHOLAS RING
000001224LEE	HARPER LEE		23 MOCKINGBIRD LANE	LIMA	OH 45804	4193452345ATTICUS FINCH
000007001CONTRARY	JASON WILLIAM		90 ELM STREET	LIMA	OH 45801	MARION CONTRARY
000005004SPRAT	JACK JOSEPH		890 bacon trail	Lima	OH 45801	4192287417JOLENE TREECE
000006002FONT	MICHELLE LYNN		345 N FRONT ST	LIMA	OH 45801	JANE FONT
000004001EYE	MAGNUM P.		122 NORTH ST	LIMA	OH 45801	5551112222EDWARD EYE
000006004LINE	TROY AARON		665 SUGAR STREET	LIMA	OH 45801	BOB LINE
000005001CONTRARY	MARY M.		90 ELM STREET	LIMA	OH 45801	4192287417MARION CONTRARY
000005002PERRY	MICHAEL JAY		776 BROADWAY BLVD	LIMA	OH 45801	MATTHEW PERRY
000007002PERRY	RICHARD MATTHEW		775 BROADWAY BLVD	LIMA	OH 45801	MATTHEW PERRY
000004008SAWYER	THOMAS JACK		12 KIMMEY	LIMA	OH 45432	4192287429MARK TWAIN
000005005WELLS	JONA RENEE		111 E steet	Lima	OH 41434	MITCH WELLS
000004004POTTS	JORDAN DANIEL		7632 BLENDON PLACE	LIMA	OH 45801	DAVID POTTS
00012244SEYE	PRIVA		123 SECRET AVE	LIMA	OH 45804	4192228888BLU EYE
000006003JONES	WHITNEY ANN		702 BRISTOL	LIMA	OH 45801	WILLIAM JONES
000007004SARGENT	LEANN JEAN		123 Bigtop Street	LIMA	OH 45801	4195559876SAM SARGENT
000005003POTTS	JAN MICHAEL		7632 BLENDON PLACE	LIMA	OH 45801	DAVID POTTS
000007005WILLIAMSON	RYAN SETH		881 THAYER ROAD	LIMA	OH 45801	JOHN WILLIAMSON
000004002FONT	ELLA JANE		345 N FRONT ST	LIMA	OH 45801	JANE FONT
048652281Contrary	Jesse		645 S. Main	Lima	OH 45804	

F19870817268722176	112004A10805	A013411535	00000000	00000000	W	1
M19900427	092004A103**	A009	00000000	00000000	B	1
F19881004123768453	102004A105**		00000000	00000000	W	1
F19861223123098654	122004A109**		00000000	00000000	W	1
M19860913458769300	122004A10910		00000000	00000000	H	1
M19890716589098456	102004A105**		00000000	00000000	W	1
F1989051155544334	092004A103**		00000000	00000000	W	1
F19891030678956677	092004 **		00000000	00000000	W	1
M19900214369852369	092004A103**		00000000	00000000	W	1
M19880202453123789	112004A10704	A020	00000000	00000000	W	1
F19890105278654738	102004A105**		00000000	00000000	W	1
M19870403267874612	122004A109**		00000000	00000000	W	1
M19890202908987876	102004A105**		00000000	00000000	W	1
F1987117376873245	112004A10703		00000000	00000000	W	1
M19871204564789874	112004A107**		00000000	00000000	W	1
M19890424099898907	092004A103**		00000000	00000000	W	1
M19891029258741258	112004 **		00000000	00000000	W	1
F19880317453676123	112004A107**		00000000	00000000	W	1
M19860801756543290	122004A109**		00000000	00000000	W	1
F19891112123654123	112004A107**		00000000	00000000	W	1
F19890814456309900	102004A105**		00000000	00000000	B	1
F19890930565454345	092004A103**		00000000	00000000	B	1
M19870920890987654	112004A107**		00000000	00000000	W	1
M19891015134876456	092004A103**		00000000	00000000	W	1
F19861024568978542	122004A109**		00000000	00000000	W	1
M20050404	102004 **		00000000	00000000	W	1

Account ID	Account Name	Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8
112004A10805	A013411535	00000000	00000000	W	1		200502105		DAHS
092004A103**	A009	00000000	00000000	B	1		200511075		DAHS
102004A105**		00000000	00000000	W	1		100A200501205		DAHS
122004A109**		00000000	00000000	W	1		100A200511075		DAHS
122004A10910		00000000	00000000	H	1		100A200501205		DAHS
102004A105**		00000000	00000000	W	1		100A200501205		DAHS
092004A103**		00000000	00000000	W	1		100A200501205		DAHS
092004 **		00000000	00000000	U	B	1	100A200511085		DAHS
092004A103**		00000000	00000000	W	1		100A200503165		DAHS
112004A10704	A020	00000000	00000000	W	1		100A200511095		DAHS
102004A105**		00000000	00000000	W	1		100A200501205		DAHS
122004A109**		00000000	00000000	W	1		100A200511075		DAHS
102004A105**		00000000	00000000	W	1		100A200511085		DAHS
112004A10703		00000000	00000000	W	1		100A200511065		DAHS
112004A107**		00000000	00000000	W	1		100A200501205		DAHS
092004A103**		00000000	00000000	W	1		100A200501205		DAHS
112004 **		00000000	00000000	W	1		100A200511085		DAHS
112004A107**		00000000	00000000	W	1		100A200511075		DAHS
122004A109**		00000000	00000000	W	1		100A200501205		DAHS
112004A107**		00000000	00000000	W	1		100A200511075		DAHS
102004A105**		00000000	00000000	B	1		100A200511085		DAHS
092004A103**		00000000	00000000	B	1		100A200511085		DAHS
112004A107**		00000000	00000000	W	1		100A200511075		DAHS
092004A103**		00000000	00000000	W	1		100A200501205		DAHS
122004A109**		00000000	00000000	W	1		100A200501205		DAHS
102004 **		00000000	00000000	1			200504145		DAHS

## Lunch Export

**Navigation: Home – Management – Import/Export – Lunch Export**

This export is a specific format for four different cafeteria point of sales programs as shown in the following figure. The export information will be used to populate these programs for lunch cards and accounts.



## Lunch Export for WAPAK City Schools

Navigation: Home – Management – Import/Export – Lunch Export – Lunch Export for WAPAK City Schools

Home >> Management >> Import/Export >> Lunch Export

### Lunch Export

From this screen, you can export data for a specific file format.

Lunch Export For WAPAK City Schools

**Student Statuses Excluded**

- A - ACTIVE RES
- D - DELETED
- I - INACTIVE
- N - NON-RES

**Student Statuses Included**

**Export Fields**

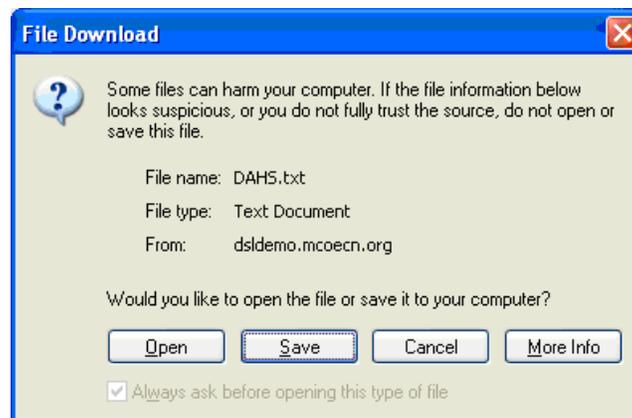
- Student Number
- City
- Phone
- Grade Code
- Last Name
- State
- Parent Name
- Teacher Code
- First Name (Middle)
- Zip
- Gender
- SSN
- Address
- Area Code
- Birthdate
- School Code
- Address 2

Export

**Student Statuses Excluded / Student Statuses Included** (required) – Choose the Student Statuses to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export. These export fields all refer to information found on the Student Profile. The Teacher Code refers to the student’s Homeroom Teacher Code.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive. The default name of this file is DAHS.txt – you may rename it when you save the file.

The file is fixed width, left justified, with spaces for padding. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Student ID (1, 9)
- Student Last Name (10, 18)
- Student First Name (Middle) (28, 14)
- Address 1 (42, 25)
- Address 2 (67, 25)
- City (92, 18)
- State (110, 4)
- Zip (114, 9)
- Area Code (123, 3)
- Phone (126, 7)
- Parent (133, 25)
- Sex (158, 1)
- Birthdate (159, 8) (formatted as yyymmdd)
- Grade (167, 2)
- Homeroom Teacher Code (169, 4) – will be blank if the student has no homeroom
- Student Social Security Number (173, 9)
- School Code (182, 4)

The following figure shows an example of the Lunch Export for WAPAK City Schools export file.

The screenshot shows a Notepad window titled 'DAHS[1].txt - Notepad'. The text inside is a fixed-width export file with the following columns: Student ID, Last Name, First Name (Middle), Address 1, Address 2, City, State, Zip, Area Code, Phone, Parent, Sex, Birthdate, Grade, Homeroom Teacher Code, Student Social Security Number, and School Code. The data is as follows:

Student ID	Last Name	First Name (Middle)	Address 1	Address 2	City	State	Zip	Area Code	Phone	Parent	Sex	Birthdate	Grade	Homeroom Teacher Code	Student Social Security Number	School Code
48652258	Banana	Hannah(Rose)	2117 Cherry Street		Lima	OH	45804									
F1987081709	WEBB	2687221760	DAHS		Ottawa	OH	45875									
48652327	James	Steven	PO Box 435													
M1990052512	WEBB	4564567890	DAHS													
48652557	Lester	Christine	111 street		Lima	OH	45822									
F1963081212	DAHS															
6005	MAY	DAISY LEE	600 BLOOM DRIVE		LIMA	OH	45801								SHARON LEE	
F1988100412	WEBB	1237684530	DAHS													
4005	WELLS	JOBBE TH	843 NORTHWALD DR		LIMA	OH	45801								MITCH WELLS	
F1986122310	COUS	1230986540	DAHS													
4003	JOHNSON	GEORGE EVAN	597 STATE STREET		LIMA	OH	45801								4195551212	HOWARD JOHNSON
M1986091310	COUS	4587693000	DAHS													
6001	EYE	CORY ROBERT	12 NORTH ST		LIMA	OH	45801									EDWARD EYE
M1989071611	WEBB	5890984560	DAHS													
7003	RING	NICOLE SUZANNE	9065 BLISS RD		LIMA	OH	45801									NICHOLAS RING
F1989051111	WALT	5554443340	DAHS													
1224	LEE	HARPER	23 MOCKINGBIRD LANE		LIMA	OH	45804								4193452345	ATTICUS FINCH
F1989103011	WALT	6789566770	DAHS													
7001	CONTRARY	JASON WILLIAM	90 ELM STREET		LIMA	OH	45801									MARION CONTRARY
M1990021411	WALT	3698523690	DAHS													

## Meals Plus Point of Sale Version 1

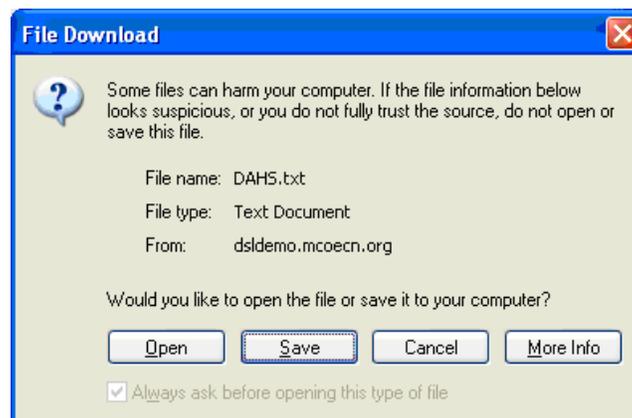
Navigation: Home – Management – Import/Export – Lunch Export – Meals Plus Point of Sale Version 1

The screenshot shows the 'Lunch Export' screen. At the top, there is a breadcrumb trail: Home » Management » Import/Export » Lunch Export. Below this, the title 'Lunch Export' is displayed in a large blue font. A red instruction reads: 'From this screen, you can export data for a specific file format.' Below the instruction is a dropdown menu currently set to 'Meals Plus Point Of Sale Version 1'. There are two columns of student status options: 'Student Statuses Excluded' and 'Student Statuses Included'. The 'Excluded' list contains: A - ACTIVE RES, D - DELETED, I - INACTIVE, and N - NON-RES. The 'Included' list is currently empty. Between these two lists are four arrows (two pointing left, two pointing right) for moving items between the lists. Below the status lists is the 'Export Fields' section, which contains a grid of checkboxes for various fields: Student Number, Last Name, Grade Code, Address 2, First Name, Birthdate, Parent Name, Address 3, Middle Name, and Homeroom Teacher Last Name. All checkboxes are checked. At the bottom left of the form is an 'Export' button.

**Student Statuses Excluded / Student Statuses Included** (required) – Choose the Student Statuses to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The file is fixed width, left justified, with spaces for padding. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Student ID (1, 9)
- Student First Name (10, 15)
- Student Middle Name (25, 15)
- Student Last Name (40, 15)
- Date of Birth (55, 8) (formatted as mmddyyyy)
- Teacher Last Name (63, 15)
- Student Grade (78, 2)
- Parent (80, 30)
- Student Address 1 (110, 30)
- Student Address 2 (140, 30)
- Student Address 3 (170, 30)

The following figure shows an example of the Meals Plus Point of Sale Version 1 export file.

Student ID	Student First Name	Student Middle Name	Student Last Name	Date of Birth	Teacher Last Name	Student Grade	Parent	Student Address 1	Student Address 2	Student Address 3
48652258	Hannah	Rose	Banana	08171987		11		2117 Cherry Street		
6005	DAISY LEE		MAY	10041988	Lima, OH	45804		600 BLOOM DRIVE		
4005	JOBETH		WELLS	12231986	LIMA, OH	45801		843 NORTHWALD DR		
4003	GEORGE EVAN		JOHNSON	09131986	LAYMAN	45801		597 STATE STREET		
6001	CORY ROBERT		EYE	07161989	LIMA, OH	45801		12 NORTH ST		
7003	NICOLE SUZANNE		RING	05111989	LIMA, OH	45801		9065 BLISS RD		
1224	HARPER		LEE	10301989	LIMA, OH	45801		23 MOCKINGBIRD LANE		
7001	JASON WILLIAM		CONTRARY	02141990	LIMA, OH	45801		90 ELM STREET		
5004	JACK JOSEPH		SPRAT	02021988	LIMA, OH	45801		890 BACON TRAIL		
6002	MICHELLE LYNN		FONT	01051989	LIMA, OH	45801		345 N FRONT ST		
4001	MAGNUM P.		EYE	04031987	LIMA, OH	45801		122 NORTH ST		
6004	TROY AARON		LINE	02021989	LIMA, OH	45801		665 SUGAR STREET		
5001	MARY M.		CONTRARY	11171987	LIMA, OH	45801		90 ELM STREET		
5002	MICHAEL JAY		PERRY	12041987	LIMA, OH	45801		776 BROADWAY BLVD		
7002	RICHARD MATTHE		PERRY	04241989	CASTLE	45801		775 BROADWAY BLVD		
4008	THOMAS		SAWYER	10291989	LIMA, OH	45804		89 MISSISSIPPI RD	SUITE 100	
5005	JONA RENEE		WELLS	03171988	LIMA, OH	45801		843 NORTHWALD DR		
4004	JORDAN DANIEL		POTTS	08011986	LAYMAN	45801		7632 BLENDON PLACE		
122445	PRIVA		EYE	11121989	LIMA, OH	45804		123 SECRET AVE		
6003	WHITNEY ANN		JONES	08141989	LIMA, OH	45801		702 BRISTOL		
7004	LEANN JEAN		SARGENT	09301989	CASTLE	45801		123 Bigtop Street		
5003	IAN MICHAEL		POTTS	09201987	LIMA, OH	45801		7632 BLENDON PLACE		
7005	RYAN SETH		WILLIAMSON	10151989	LIMA, OH	45801		881 THAYER ROAD		
4002	ELLA JANE		FONT	10241986	LAYMAN	45801		345 N FRONT ST		
48652281	Jesse		Contrary	04042005	Lima, OH	45804		645 S. Main		

## Meals Plus Point of Sale Version 2

Navigation: Home – Management – Import/Export – Lunch Export – Meals Plus Point of Sale Version 2

Home >> Management >> Import/Export >> Lunch Export

### Lunch Export

From this screen, you can export data for a specific file format.

Meals Plus Point Of Sale Version 2

**Student Statuses Excluded**

- A - ACTIVE RES
- D - DELETED
- I - INACTIVE
- N - NON-RES

**Student Statuses Included**

**Export Fields**

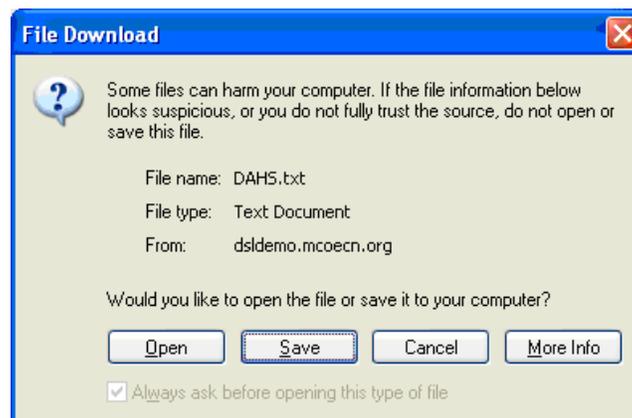
- Student Number
- Birthdate
- Homeroom Teacher Last Name
- Address
- First Name
- Gender
- Grade Code
- Address 2
- Middle Name
- Ethnicity
- Parent Name
- Address 3
- Last Name

Export

**Student Statuses Excluded / Student Statuses Included** (required) – Choose the Student Statuses to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The file is fixed width, left justified, with spaces for padding. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Student ID (1, 9)
- Student First Name (10, 15)
- Student Middle Name (25, 15)
- Student Last Name (40, 15)
- Date of Birth (55, 8) (formatted as mmddyyyy)
- Student Gender (63, 1)
- Student Race (64, 4)
- Teacher Last Name (68, 15)
- Student Grade Level (83, 2)
- Student Primary Contact (85, 30)
- Student Address 1 (115, 30)
- Student Address 2 (145, 30)
- Student Address 3 (175, 30)

The following figure shows an example of the Meals Plus Point of Sale Version 2 export file.

Student ID	Student First Name	Student Middle Name	Student Last Name	Date of Birth	Student Gender	Student Race	Teacher Last Name	Student Grade Level	Student Primary Contact	Student Address 1	Student Address 2	Student Address 3
48652258	Hannah	Rose	Banana	08171987FW				11		2117 Cherry Street	Lima, OH 45804	
6005	DAISY LEE		MAY	10041988FW				10	SHARON LEE	600 BLOOM DRIVE	LIMA, OH 45801	
4005	JOBETH		WELLS	12231986FW				12	MITCH WELLS	843 NORTHWALD DR	LIMA, OH 45801	
4003	GEORGE EVAN		JOHNSON	09131986MH				12	HOWARD JOHNSON	597 STATE STREET	LIMA, OH 45801	
6001	CORY ROBERT		EYE	07161989MW				10	EDWARD EYE	12 NORTH ST	LIMA, OH 45801	
7003	NICOLE SUZANNE		RING	05111989FW				09	NICHOLAS RING	9065 BLISS RD	LIMA, OH 45801	
1224	HARPER		LEE	10301989FW				09	ATTICUS FINCH	23 MOCKINGBIRD LANE	LIMA, OH 45804	
7001	JASON WILLIAM		CONTRARY	02141990MW				09	MARION CONTRARY	90 ELM STREET	LIMA, OH 45801	
5004	JACK JOSEPH		SPRAT	02021988MW				11	JOLENE TREECE	890 BACON TRAIL	LIMA, OH 45801	
6002	MICHELLE LYNN		FONT	01051989FW				10	JANE FONT	345 N FRONT ST	LIMA, OH 45801	
4001	MAGNUM P.		EYE	04031987MW				12	EDWARD EYE	122 NORTH ST	LIMA, OH 45801	
6004	TROY AARON		LINE	02021989MW				10	BOB LINE	665 SUGAR STREET	LIMA, OH 45801	
5001	MARY M.		CONTRARY	11171987FW				11	MARION CONTRARY	90 ELM STREET	LIMA, OH 45801	
5002	MICHAEL JAY		PERRY	12041987MW				11	MATTHEW PERRY	776 BROADWAY BLVD	LIMA, OH 45801	
7002	RICHARD MATTHEW		PERRY	04241989MW				09	MATTHEW PERRY	775 BROADWAY BLVD	CASTLE LIMA, OH 45801	
4008	THOMAS		SAWYER	10291989MW				11	MARK TWAIN	89 MISSISSIPPI RD	LIMA, OH 45804	
5005	JONA RENEE		SUITE 100 WELLS	03171988FW				11	MITCH WELLS	843 NORTHWALD DR	LIMA, OH 45801	
4004	JORDAN DANIEL		POTTS	08011986MW				12	DAVID POTTS	7632 BLENDON PLACE	LAYMAN LIMA, OH 45801	
122445	PRIVA		EYE	11121989FW				11	BLU EYE	123 SECRET AVE	LIMA, OH 45804	
6003	WHITNEY ANN		JONES	08141989FB				10	WILLIAM JONES	702 BRISTOL	LIMA, OH 45801	
7004	LEANN JEAN		SARGENT	09301989FB				09	SAM SARGENT	123 Bigtop Street	CASTLE LIMA, OH 45801	
5003	IAN MICHAEL		POTTS	09201987MW				11	DAVID POTTS	7632 BLENDON PLACE	LIMA, OH 45801	
7005	RYAN SETH		WILLIAMSON	10151989MW				09	JOHN WILLIAMSON	881 THAYER ROAD	LIMA, OH 45801	
4002	ELLA JANE		FONT	10241986FW				12	JANE FONT	345 N FRONT ST	LAYMAN LIMA, OH 45801	
48652281	Jesse		Contrary	04042005M				10		645 S. Main	Lima, OH 45804	

## WIN-MCM Lunch Program

Navigation: Home – Management – Import/Export – Lunch Export – WIN-MCM Lunch Program

Home >> Management >> Import/Export >> Lunch Export

### Lunch Export

From this screen, you can export data for a specific file format.

WIN-MCM Lunch Program

**Student Statuses Excluded**

- A - ACTIVE RES
- D - DELETED
- I - INACTIVE
- N - NON-RES

**Student Statuses Included**

Campus Number:

**Export Fields**

- Campus Number
- First Name
- Grade Level
- Homeroom Name
- Student Number
- Last Name

Export

**Student Statuses Excluded / Student Statuses Included** (required) – Choose the Student Statuses to be included or excluded in the Export.

**Campus Number** (optional) – The Campus Number expected by the WIN-MCM Lunch Program.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The file is fixed width, left justified, with spaces for padding. The file layout will be as follows with the starting point of that field and the length in parenthesis.

- Campus Number (1, 3)
- Student ID (4, 15)
- Student First Name (19, 16)
- Student Last Name (35, 16)
- Grade Level (51, 2)
- Home Room (53, 6)

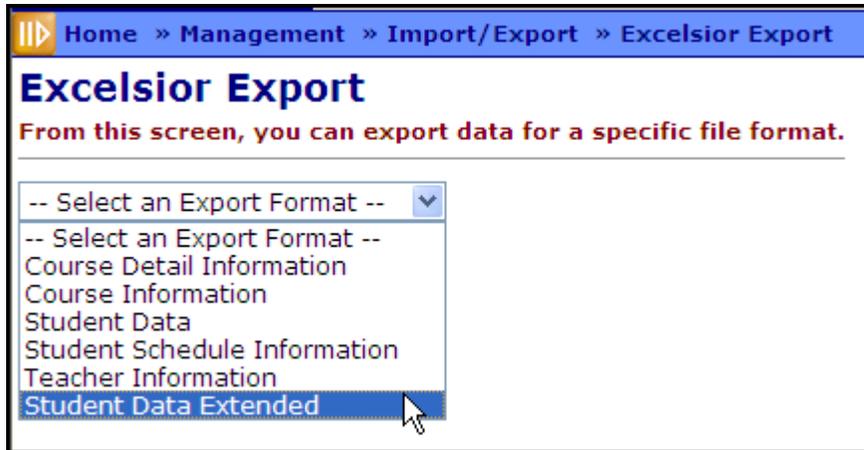
The following figure shows an example of the WIN-MCM Lunch Program export file.

Campus Number	Student ID	Student First Name	Student Last Name	Grade Level	Home Room
48652258		Hannah	Banana	11	
6005		DAISY LEE	MAY	10	
4005		JOBETH	WELLS	12	
4003		GEORGE EVAN	JOHNSON	12A110	
6001		CORY ROBERT	EYE	10	
7003		NICOLE SUZANNE	RING	09	
1224		HARPER	LEE	09	
7001		JASON WILLIAM	CONTRARY	09	
5004		JACK JOSEPH	SPRAT	11	
6002		MICHELLE LYNN	FONT	10	
4001		MAGNUM P.	EYE	12	
6004		TROY AARON	LINE	10	
5001		MARY M.	CONTRARY	11	
5002		MICHAEL JAY	PERRY	11	
7002		RICHARD MATTHE	PERRY	09A106	
4008		THOMAS	SAWYER	11	
5005		JONA RENEE	WELLS	11	
4004		JORDAN DANIEL	POTTS	12A110	
122445		PRIVA	EYE	11	
6003		WHITNEY ANN	JONES	10	
7004		LEANN JEAN	SARGENT	09A106	
5003		IAN MICHAEL	POTTS	11	
7005		RYAN SETH	WILLIAMSON	09	
4002		ELLA JANE	FONT	12A110	
48652281		Jesse	Contrary	10	

## Excelsior Export

### Navigation: Home – Management – Import/Export – Excelsior Export

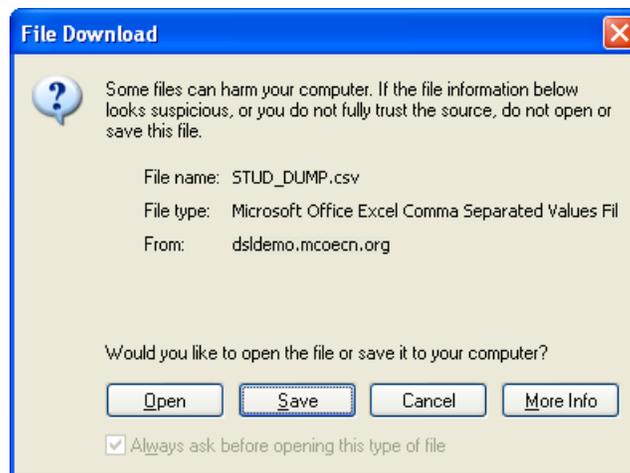
Many schools use a grade book package named Excelsior. Student records in the Excelsior application may be populated by importing data from the StudentInformation application. Six separate files are required for this export and those files then are used to populate the Excelsior grade book package with updated information on a daily basis. The six files (with their default name) are files that include data for the following:



Each file is a comma delimited file, left justified with a CSV extension. The files can be produced one at a time, by choosing the file export format from the dropdown list.

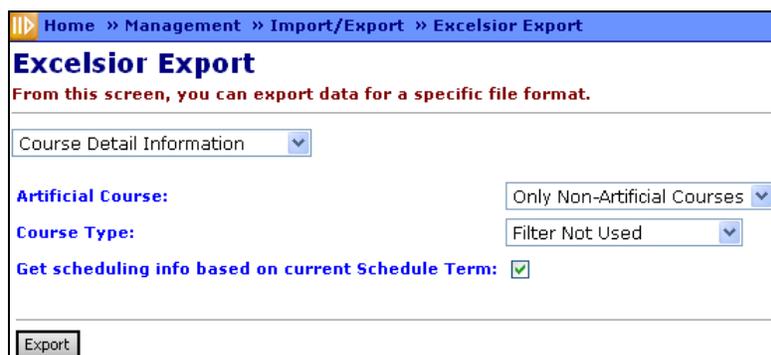


**Please Note: StudentInformation allows this export to be run on a scheduled basis. Please see the Maintaining StudentInformation section of the ITC documentation for further details.**



**Save** – Save this file to your hard drive or network drive for FTP to Excelsior as needed.

### Course Detail Information Format



**Artificial Course** – Filter exported data by artificial course status, or select Filter Not Used.

**Course Type** – Filter exported data by course type, or select Filter Not Used.

**Get scheduling info based on current Schedule Term** – Check this box to use the current Schedule Term’s scheduling information.

**Export** – Execute the Export process.

Fields included in the export are the following:

- Teacher ID
- Course ID
- Course Section Number
- Course From/To Period
- Course Room ID

The following figure shows an example of the Course Detail Information Excelsior Export file.

	A	B	C	D	E	F
1	HAND	1	2	2	261	
2	HAND	1	1	1	261	
3	HAND	1	2	2	261	
4	HAND	1	1	1	261	
5	LAYM	2	2	1	206	
6	LAYM	2	2	1	206	
7	LAYM	2	1	2	210	
8	LAYM	2	1	2	210	
9	BERR	3	1 9A		313S	
10	BERR	3	1 9A		313S	
11	BERR	4	1	1	314S	
12	BERR	4	2	1	314S	
13	BERR	4	2	1	314S	
14	BERR	4	1	1	314S	
15	BERR	5	3	6	314S	
16	BERR	5	3	6	314S	
17	BERR	5	2	2	314S	
18	BERR	5	1	2	314S	
19	BERR	5	2	2	314S	
20	BERR	5	1	2	314S	
21	HAND	6	3	9	208	
22	HAND	6	1	56	313S	
23	HAND	6	2	56	313S	
24	HAND	6	3	9	208	

## Course Information Format

**Artificial Course** – Filter exported data by artificial course status, or select Filter Not Used.

**Course Type** – Filter exported data by course type, or select Filter Not Used.

**Export** – Execute the Export process.

Fields included in the export are the following:

- Course ID
- Course Credit Units
- Course Hours of Instruction
- Course Short Text

The following figure shows an example of the Course Information Excelsior Export file.

	A	B	C	D	E
1	1	1000	120	CBI ENGLISH 10	
2	2	1000	120	CBI HISTORY 10	
3	3	3000	600	CBI 12 JOB	
4	4	1000	120	CBI 12 RELATED	
5	5	1000	120	CBI 12 MATH	
6	6	1000	120	CBI 12 ENG	
7	7	1000	120	CBI 12 HISTORY	
8	8	1000	120	CBI 11 MATH	
9	9	1000	120	CBI RELATED 10	
10	10	2000	240	CBI EMPLOYABILI	

## Student Data Format

Home >> Management >> Import/Export >> Excelsior Export

### Excelsior Export

From this screen, you can export data for a specific file format.

Student Data

**Student Statuses Excluded**

- A - ACTIVE RES
- D - DELETED
- I - INACTIVE
- N - NON-RES

**Student Statuses Included**

Export

**Student Statuses Excluded/Included** – Select the Student Statuses to be filtered on and move them to the Included box in the dual-select box. If no Student Statuses are moved, the export will not filter on Student Status, and all Student Statuses will be included.

**Export** – Execute the Export process.

Fields included in the export are the following:

- Student ID
- Student Name (30 characters, allows commas, formatted Last, First [Called])
- Student Grade Level
- Student Birthdate
- Student Gender
- Student Parent
- Student Address1
- Student City (this field is appended into one field with Province/State and Zip)
- Student Province/State (this field is appended into one field with City and Zip)
- Student Zip (this field is appended into one field with City and Province/State)
- Student Phone
- Student Program Code
- Student Previous School
- Student Social Security Number (formatted xxx-xx-xxxx)
- Student Admission Date (formatted mm/dd/yyyy)
- Student Withdrawal Date (formatted mm/dd/yyyy)

The following figure shows an example of the Student Data Excelsior Export file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	48652258	Banana, H	11	8/17/1987	F		2117 Cher	Lima, OH 45804				268-72-217	2/9/2005	2/10/2005
2	7001	CONTRAR	9	2/14/1990	M	MARION C	90 ELM S	LIMA, OH 45801				369-85-2369		00/00/0000
3	48652281	Contrary, J	10	4/4/2005	M		645 S. Ma	Lima, OH 45804					4/14/2005	00/00/0000
4	5001	CONTRAR	11	11/17/1987	F	MARION C	90 ELM S	LIMA, OH 228-7417				376-87-3245		00/00/0000
5	6001	EYE, COR	10	7/16/1989	M	EDWARD	12 NORTH	LIMA, OH 45801				589-09-845	8/1/2004	00/00/0000
6	4001	EYE, MAG	12	4/3/1987	M	EDWARD	122 NORTH	LIMA, OH 111-2222				267-87-4612		00/00/0000
7	122445	EYE, PRIN	11	11/12/1989	F	BLU EYE	123 SECR	LIMA, OH 222-8888				123-65-4123		00/00/0000
8	4002	FONT, ELI	12	10/24/1986	F	JANE FON	345 N FR	LIMA, OH 45801				568-97-8542		00/00/0000
9	6002	FONT, MIC	10	1/5/1989	F	JANE FON	345 N FR	LIMA, OH 45801				278-65-4738		00/00/0000
10	4003	JOHNSON	12	9/13/1986	M	HOWARD	597 STATE	LIMA, OH 45801		10		458-76-9300		00/00/0000
11	6003	JONES, W	10	8/14/1989	F	WILLIAM J	702 BRIS	LIMA, OH 45801				456-30-9900		00/00/0000
12	1224	LEE, HAR	9	10/30/1989	F	ATTICUS f	23 MOCK	LIMA, OH 345-2345				678-95-6677		00/00/0000

## Student Schedule Information Format

The screenshot shows a web interface for exporting data. At the top, there is a breadcrumb trail: Home » Management » Import/Export » Excelsior Export. Below this, the title "Excelsior Export" is displayed in blue. A red text instruction reads: "From this screen, you can export data for a specific file format." Underneath, there is a dropdown menu set to "Student Schedule Information". Below that, there are two filter options: "Artificial Course:" with a dropdown menu set to "Filter Not Used", and "Course Type:" with a dropdown menu set to "Class". A checkbox labeled "Get scheduling info based on current Schedule Term:" is checked. At the bottom left, there is an "Export" button.

**Artificial Course** – Filter exported data by artificial course status, or select Filter Not Used.

**Course Type** – Filter exported data by course type, or select Filter Not Used.

**Get scheduling info based on current Schedule Term** – Check this box to use the current Schedule Term’s scheduling information.

**Export** – Execute the Export process.

Fields included in the export are the following:

- Student ID
- Course ID
- Course Section Number
- Course Term (Calculated as the number of course terms for the current school year that ended before today - @EffDate date, PLUS 1.)

For instance, if a school has the following terms defined:

- Quarter 1
- Quarter 2
- Semester 1
- Quarter 3
- Quarter 4
- Semester 2
- All Year

In this example, the following CourseTerm values would be returned:

- During Quarter 1: CourseTerm = 1
- During Quarter 2: CourseTerm = 2
- During Quarter 3: CourseTerm = 4
- During Quarter 4: CourseTerm = 5

Notice that the 3rd and 4th quarters, the CourseTerm values seem to be 1 to high. This is because the Semester 1 course term has now ended, and it would be included in the count of previous terms that have ended.

For instance, if a school has the following terms defined:

- Semester 1
- Semester 2
- All Year

In this example, the following CourseTerm values would be returned:

- During Semester 1: CourseTerm = 1
- During Semester 2: CourseTerm = 2

The following figure shows an example of the Student Schedule Information Excelsior Export file.

	A	B	C	D
1	6001	37	2	2
2	6002	37	2	2
3	6003	37	2	2
4	6004	37	2	2
5	6005	37	2	2
6	7001	50	2	2
7	7002	50	2	2
8	7003	50	2	2
9	7004	50	2	2
10	7005	50	2	2
11	7001	52	2	2

## Teacher Information Format

This export format has no options and includes information about all teachers listing a Social Security Number in their staff member records.

**Export** – Execute the Export process.

Fields included in the export are the following:

- Teacher ID
- Teacher Social Security Number
- Teacher Last Name and Teacher Title/Initial
- Empty Field (“ ”, two spaces inside double quotes)
- Teacher Address
- Teacher City, State, Zip
- Empty Field (“ ”, one space inside double quotes)

The following figure shows an example of the Teacher Information Excelsior Export file.

	A	B	C	D	E	F	G
1	ALLE	390987900	ALLEN, MARCIA				
2	ALLM	890009876	ALLEN, MARK				
3	ALLS	876890987	ALLSS, RYAN				
4	AMON	876890986	AMON, CINDY				
5	ASHB	876564567	ASH, BRITTANY				
6	AUST	234567890	AUSTIN, SHARRI	645 MAIN STREET APT 1	LIMA, OH	419-722-8741	
7	BAER	876908765	BAER, JOHN				
8	BAUM	890987657	BAUM, SAM				
9	BELL	890987654	BELL, BILLY				
10	BERR	123456789	BERRY, DONALD	228900 RD 1-18	KALIDA, C	419-475-8900	
11	BOYE	908789065	BOYER, JEFF				
12	BRIG	890976789	BRIGGS, DEBRA				
13	CAST	456789012	CASTLE, RONALD	900 SUGAR STREET	LIMA, OH	419-225-8900	
14	CLAR	678901234	CLARK, SUSAN	800 WAYNE STREET	LIMA, OH	419-228-9340	
15	COUS	345678901	COUSINS, DAVID	400 4TH STREET	LIMA, OH	419-225-7890	
16	CROF	876569032	CROFT, LAURA				
17	DAIL	889908764	DAILY, TRISHA				
18	DRAK	987669087	DRAKE, LAURA				
19	EWIN	789009876	EWING, MOSES				
20	HAND	901234567	HANDLEY, MARK	7890 MAIN STREET	LIMA, OH	419-224-9000	
21	JOHN	12345678	JOHN, JEFFREY	6500 WEST STREET APT 100	LIMA, OH	419-228-9000	
22	JONM	309890987	Jones, Mary				
23	LAYM	890123456	LAYMAN, LAURA	8208 CANTERBURY DRIVE	LIMA, OH	419-225-8901	
24	WALT	567890123	WALTERS, LINDA	6500 HANOVER	LIMA, OH	419-225-4390	
25	WEBB	789012345	WEBBER, MICHAEL	300 VINE AVENUE	LIMA, OH	419-228-4890	

## Student Data Extended

Home » Management » Import/Export » Excelsior Export

### Excelsior Export

From this screen, you can export data for a specific file format.

Student Data Extended

Homeroom Date: 1/18/2008

Reporting Term: Qtr2

Marking Period GPA Set:

Cumulative GPA Set:

Student Statuses Excluded

- A - ACTIVE RES
- D - DELETED
- I - INACTIVE
- JVS - Student Attending

Student Statuses Included

Export

**Homeroom Date** – Enter the date to be used to determine the student’s homeroom.

**Reporting Term** - Determines the time range used for calculating Marking Period.

**Marking Period GPA Set** - Determines the Marking Period GPA and Marking Period Credits Earned.

**Cumulative GPA Set** - used to determine the Cum GPA and Cum GPA Credits Earned.

**Student Status Excluded/Included** – Select the students you wish to include

**Export** – Execute the Export process.

Fields included in the export include:

Student Data Extended Export has 10 additional fields compared to the Student Data Export. The index indicates the column position. Index is zero-based. Columns with index 0-14 are exactly the same as Student Data Export.

## Index Column

- 15 Homeroom
- 16 School Code
- 17 Marking Period Absence
- 18 Full Year Absence
- 19 Marking Period Tardy
- 20 Full Year Tardy
- 21 Marking Period GPA
- 22 Marking Period Credits Earned
- 23 Cum GPA
- 24 Cum Credits Earned

The following figure shows an example of the Student Data Extended Excelsior Export file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	8001		12	6/26/1989	F	EDMOND	1587	Ivy D Elida, OH		**			11	00/00/0000		H1	ELHS	1	1
2	11002		9	1/19/1993	F	EDMOND	1587	IVY ELIDA, OH			Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
3	9147		11	#####	F	BRIAN &	45817	Polin Elida, OH					8/29/2007	00/00/0000			ELHS	0	0
4	8124		12	8/2/1990	F	ROY & TE	3	Celia Pl Lima, OH					8/29/2007	00/00/0000			ELHS	0	0
5	11004		9	#####	F	ROY & TE	3	CELIA P LIMA, OH		G	Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
6	11439		9	1/12/1993	F	APRIL RUI	1837	ARLI LIMA, OH		**	Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
7	11191		9	6/4/1993	F	ALLLISON	2100	KIMELIMA, OH		**	Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
8	8003		12	9/2/1989	M	CYNTHIA	14901	Lobo Elida, OH		**			8/20/2007	00/00/0000			ELHS	0.5	0.5
9	8190		12	6/29/1990	M	MARK & T	1020	N Ea Elida, OH		**			14	00/00/0000			ELHS	0	0
10	10000		10	10/8/1991	F	ANDERS	2115	PRAELIDA, OH		**			15	00/00/0000			ELHS	0	0
11	8004		11	8/14/1990	M	JOHN & M	1561	Plain Lima, OH		**			8/29/2007	00/00/0000			ELHS	0	0
12	8502		12	7/15/1989	F	GLEN & C	4798	W. SELIDA, OH		**			12	00/00/0000			ELHS	0	0
13	11006		9	5/10/1993	M	ANTHONY	104	E. NO ELIDA, OH		G	Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
14	9001		11	10/3/1990	M	DOUGLAS	104	E. NO ELIDA, OH					8	00/00/0000			ELHS	0	0
15	8650		12	2/14/1990	F	DAVID SH	3100	N Co Lima, OH					13	00/00/0000			ELHS	0	0
16	8006		12	#####	M	MICHELLE	1012	W. Lima, OH		10			10	00/00/0000			ELHS	0	0
17	10558		10	4/19/1992	F	CHRYSTA	2061	EDG LIMA, OH					8/21/2007	00/00/0000			ELHS	0	0
18	10150		10	#####	F	DAVE ASI	2100	N. GELIDA, OH		**			10	00/00/0000			ELHS	0	0
19	9354		11	#####	M	ANTHONY	8845	BICELIMA, OH					17	00/00/0000			ELHS	0	0
20	9002		11	3/6/1991	F	RIC & DEE	4775	SYC ELIDA, OH					19	00/00/0000			ELHS	0	0
21	8503		12	4/20/1990	F	MARYANN	8495	LINC FT. JENNII		**			11	00/00/0000			ELHS	0	0
22	9353		11	#####	M	LISA YAH	1499	POWE LIMA, OH					12	00/00/0000			ELHS	0	0
23	8707		11	3/11/1991	M	MICHAEL	5650	Leat Elida, OH					5	00/00/0000			ELHS	0	0
24	10998		10	1/12/1992	M	ANGELA	1636	KARILIMA, OH					19	00/00/0000			ELHS	0	0
25	11007		9	#####	F	BALDRID	417	W. NCLIMA, OH		**	Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
26	8715		10	7/7/1991	F	CBENUA	11225	N. SILIMA, OH		**			1	00/00/0000			ELHS	0	0
27	10549		10	2/26/1990	F	KARI GRA	7590	BILL DELPHOS					11	00/00/0000			ELHS	0	0
28	8682		12	#####	F	ED & MAR	1175	BRO LIMA, OH						8/28/2007			ELHS	0	0
29	8793		12	1/26/1990	F	MARY FIS	1862	BRO LIMA, OH					10	00/00/0000			ELHS	0	0
30	8737		10	3/10/1992	F	VERONIC	531	BRO LIMA, OH		**			19	00/00/0000			ELHS	0	0
31	11413		9	9/7/1992	M	GINA BRC	1081	BRO LIMA, OH			Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
32	9003		11	#####	F	PAUL & L	5284	SHAJELIDA, OH					0	00/00/0000			ELHS	0	0
33	7005		12	6/23/1989	M	MATT & LI	120	E Maii Elida, OH		**			8/29/2007	00/00/0000			ELHS	0	0
34	10003		9	6/21/1992	F	MELISSA	3511	TOW ELIDA, OH		G	Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
35	7157		11	8/2/1989	M	DAVE BA	3511	TOW ELIDA, OH					8/29/2007	00/00/0000			ELHS	0	0
36	12458		9	5/20/1993	F	RUDIKA	12395	ALLE LIMA, OH			Elida Midd		8/29/2007	00/00/0000			ELHS	0	0
37	8678		12	2/15/1990	F	JOHN & T	17575	BLIS ELIDA, OH		15			7	00/00/0000			ELHS	0	0
38	9204		11	5/14/1991	F	SCOTT &	11360	N W Elida, OH					8/29/2007	00/00/0000			ELHS	0	0

## Pre-Identification Export

**Navigation: Home – Management – Import/Export – Pre-Identification Export**

Each pre-identification export includes properly formatted student data required by the assessment provider prior to the assessment. Providers later use this information to aggregate and interpret scores using meaningful breakdowns based on several criteria.

## Riverside ITBS Pre-Identification Export

Navigation: Home – Management – Import/Export – Pre-Identification Export – Riverside ITBS Pre-Identification Export dropdown

You can only run this export at the district level. The export file is comma delimited. There are two layout options:

### Long Layout

Home » Management » Import/Export » Pre-Identification Export

### Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

- DADA - DALTON ELEMENTARY
- DAHS - DALTON HIGH SCHOOL
- DAJH - DALTON INTERMEDIATE
- DAKI - KIDRON ELEMENTARY

**Selected Schools**

Export Format: Riverside ITBS Pre-Identification Export

Grade Level: 1st Grade

Building Name:

Layout:  Long  Short

Export

The long layout includes the following fields:

- Last Name
- First Name
- Birthdate
- Gender
- Grade
- Building (as you enter it in the **Building Name** field)

```
RiversidePreIdent. TestBuilding. 1202091133[1].txt - Notepad
File Edit Format View Help
LAST_NAME, FIRST_NAME, BIRTH_DATE, GENDER, GRADE, BUILD
Jones, John, 05/03/2002, M, 1, TestBuilding
Smith, Kristin, 08/13/2002, F, 1, TestBuilding
Miller, Olivia, 10/07/2002, F, 1, TestBuilding
```

## Short Layout

Home » Management » Import/Export » Pre-Identification Export

### Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

- DADA - DALTON ELEMENTARY
- DAHS - DALTON HIGH SCHOOL
- DAJH - DALTON INTERMEDIATE
- DAKI - KIDRON ELEMENTARY

**Selected Schools**

Export Format: Riverside ITBS Pre-Identification Export

**Grade Level:** 1st Grade

**Building Name:**

**Layout:**  Long  Short

**Logramos (ITBS) Form:**

**Logramos (ITBS) Level:**

**CogAT Form:**

**CogAT Level:**

Export

The short layout includes the following fields:

- Last Name
- First Name
- Birthdate
- Gender
- Grade
- Building (as you enter it in the **Building Name** field)
- Logramos Form
- Logramos Level
- CogAT Form
- CogAT Level

```
RiversidePreIdent.dasl.0305081149[1].txt - Notepad
File Edit Format View Help
LAST_NAME, FIRST_NAME, BIRTH_DATE, GENDER, GRADE, BUILD, LOGR, LOGR, COGA, COGA,
ELLERBROOK, TIMOTHY, 01/03/1994, M, 1, das 1, A, 05, 6, A
EITEMILLER, KENDELL, 03/04/1994, M, 1, das 1, A, 05, 6, A
ERIKSON, ERIC, 04/09/1994, M, 1, das 1, A, 05, 6, A
EICHER, KELSEY, 06/03/1995, F, 1, das 1, A, 05, 6, A
```

1. At the top of the screen, select the school(s) to include in the export by moving them from the **Available Schools in District** multi-select list to the **Selected Schools** list. A single export file will contain data for all selected schools.
2. In the **Export Format** drop-down list, select “Riverside ITBS Pre-Identification Export.”
3. Select the appropriate **Grade Level**.
4. Enter the **Building Name**.
5. For the **Layout** option, select a “Long” or “Short” layout format.
6. If you chose a “Short” layout, select the correct **Logramos (ITBS) Form**, **Logramos (ITBS) Level**, **CogAT Form** and **CogAT Level**.
7. Click **Export**, and save the file.

### **PreIdent for Pearson Educational Measurement Export**

**Navigation: Home – Management – Import/Export – Pre-Identification Export – PreIdent for Pearson Educational Measurement Export dropdown**

StudentInformation returns course information in the Ohio Achievement Assessment and Ohio Graduation Test export files based on the value in the EMIS Subject Code field on the EMIS Override tab for a course section, if defined; otherwise, StudentInformation returns course information based on the value in the EMIS Subject Code field on the EMIS tab for the course.

### **OAA (Ohio Achievement Assessment)**

The Ohio Achievement Pre-identification export process is performed whenever there is a need to create Pre-identification labels to submit to the testing company prior to a test administration.

The Achievement Pre-Ident will include the following students in the file:

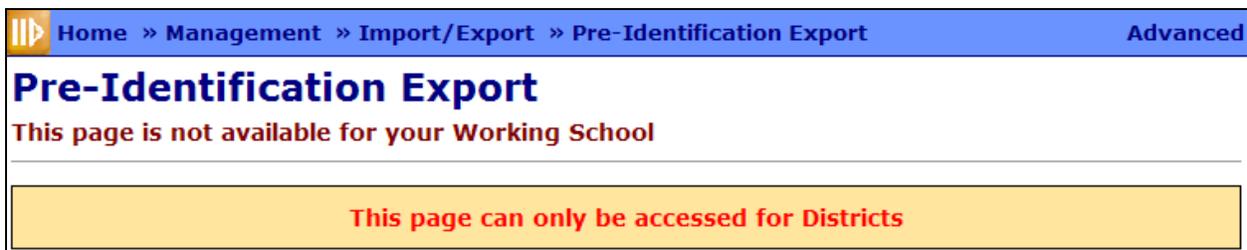
- Any student in 3<sup>rd</sup> grade through 8th grade who is actively enrolled and is attending the district.
- Any student in any other grade level that has an acceleration record for a test part in a specific grade level test other than their current grade level.

A student’s admission history records are checked to determine whether he is actively enrolled in the district or not.

The Pre-Identification file layout was changed this year with the addition of new fields to collect data to be used by the D3A2 project when test results are loaded into that application. Classroom information on subjects taken by the student, which are relevant to the Achievement Assessment subject areas, is included in the records along with Teacher information identifying the student's teacher for each of the subject areas. Because of this request, it was necessary to load the Staff Credential ID's into the StudentInformation Staff records for inclusion on the records. Because of this option, it is important that schools make sure that student schedules are up to date when they create the file so that the results will be returned to the correct teacher once the vendor sends the test results back to the districts.

Previously, Pre-Ident was only including students who had an overall internal student status of Active. This has been changed in the 8.2.0 release to now include actively enrolled students regardless of their status code. Therefore, it is no longer necessary to change the internal value of your status codes for students to be included in the file.

As of DASL 9.0.1.8507, the OAA Pre-Ident is only accessible by districts. If the OAA Pre-Ident is accessed with a building in context, the following message will be displayed.



The screenshot shows a web application interface. At the top, there is a blue navigation bar with the text "Home » Management » Import/Export » Pre-Identification Export" and a "Advanced" link on the right. Below the navigation bar, the page title "Pre-Identification Export" is displayed in a large, bold, blue font. Underneath the title, a red error message reads "This page is not available for your Working School". A yellow warning box at the bottom of the page contains the text "This page can only be accessed for Districts" in red.

As of 10.3.0.16150, students without SSIDs will display in a list at the bottom of the page and give the user the option to continue (excluded the students in this list from the export) or cancel. The user can also click on the student information and have a window pop-up with the Student Profile Edit screen.

Home » Management » Import/Export » Pre-Identification Export

## Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

Elementary School  
ELEMENTARY SCHOOL

← →  
 ⇐ ⇒

**Selected Schools**

HIGH SCHOOL

**Export Format:** PreIdent For Pearson Educational Measurement Export ▾

**Test:** Ohio Achievement Assessment ▾ ⚡

**Include the following grades:**

- 3rd Grade
- 4th Grade
- 5th Grade
- 6th Grade
- 7th Grade
- 8th Grade

**Return only these students:**

Comma separated Student Ids

**Available Schools in District** (required) – Select the schools that are to be included in the export file. One export file will be created that will contain data for all selected schools.

**Export Format** (required) – Select the PreIdent For Pearson Educational Measurement Export.

**Test** (required) – Select the Ohio Achievement Assessment.

**Include the following grades** (optional) – Select which grade levels should be included in the OAA Pre-Ident export file.

**Return Only These Students** (optional) – enter specific Student IDs (separated by commas) to return in the export. This can be used when creating pre-identification export files for alternate assessments.

Any 10th grade student who is actively enrolled and has not yet taken the OGT test.

### OGT (Ohio Graduation Test)

The OGT Pre-identification export process is performed whenever there is a need to create Pre-identification labels to submit to the testing company prior to a test administration.

The OGT Pre-Ident will include the following students in the file:

1. Include students who are actively enrolled at the time pre-ident is processed.
2. Include all 10<sup>th</sup> grade students with percent of time greater than zero except for:

- FTE = 0 or
  - FTE = 0 and Sent Reason on FS Student Standing = ES, JV, MR, PS, OS, PI, CI, NI
3. Students in grades 11,12,13
- a. FTE > 0 or
  - b. FTE = 0 and Sent Reason on FS Student Standing = ES, JV, MR, PS, OS, PI, CI, NI
  - c. Student does not have a passing score for at least one part of the OGT test on an existing test record. Non-passing scores are as follows:

Test Part	STR	ALT
Social Studies/Citizenship	400	120
Math	400	120
Reading	400	120
Science	400	130
Writing	400	120

4. If student's Grade level is UG, then examine the value in the State Equivalent Grade field on the latest Student FD record for the value of the student grade level.

As of 10.3.0.16150, JVS students are determined by saying that only students who had JVS as their Sent To or Alt Sent To reason AND had 0 for their attendance percentage were considered JVS for purposes of this selection. The same kind of logic was used for Contract Vocational Out students (with CT as the Sent To or Alt Sent To reason).

A student's admission history records are checked to determine whether he is actively enrolled in the district or not.

Course section information for the courses a student is enrolled, which are related to the test subject areas, is also included in the record. Previously, Pre-Ident was only including students who had an overall internal student status of Active. This has been changed in the 8.2.0 release to now include actively enrolled students regardless of their status code. Therefore, it is no longer necessary to change the internal value of your status codes for students to be included in the file.

As of DASL 9.0.1.8507, the OGT Pre-Ident is only accessible by districts. If the OGT Pre-Ident is accessed with a building in context, the following message will be displayed.

▶ Home » Management » Import/Export » Pre-Identification Export Advanced

## Pre-Identification Export

This page is not available for your Working School

---

This page can only be accessed for Districts

As of 10.3.0.16150, students without SSIDs will display in a list at the bottom of the page and give the user the option to continue (excluded the students in this list from the export) or cancel. The user can also click on the student information and have a window pop-up with the Student Profile Edit screen.

**Available Schools in District** (required) – Select the schools that are to be included in the export file. One export file will be created that will contain data for all selected schools.

**Export Format** (required) – Select the PreIdent For Pearson Educational Measurement Export.

**Test** (required) – Select the Ohio Graduation Test.

**Include only required students** (optional) – When this checkbox is checked, the export will only include those students in the file that still need to take the test or have yet to pass all parts of the OGT.

**Include the following grades** (optional) – Select which grade levels should be included in the OGT Pre-Ident export file.

**Include the following students** (optional) – Check those options that apply; indicates whether you wish to include students attending elsewhere as Contract Vocational – In, Contract Vocational – Out, or JVS Students in your file.

Contract Vocational-In – Students that are non-residents of your district attending as a contract vocational student.

Contract Vocational-Out – Students that are residents of your district attending another district as a contract vocational student.

If the district is testing these students and wishes to have the results returned to their district, then include these students in your file.

**Include CVI home school information** (optional):

Hint for non-Home Schools: If you're not the resident district and you want the information sent back to the home school AND you've checked to include Contract Vocational – In students, then you will need to check Include CVI Home School Information.

Hint for Home Schools: If you are the Home School, do not check the Include CVI Home School Information. If you do, any Contract Vocational – In students in your file will generate an error and you will not be able to upload the file.

**Include JVS home school information** (optional):

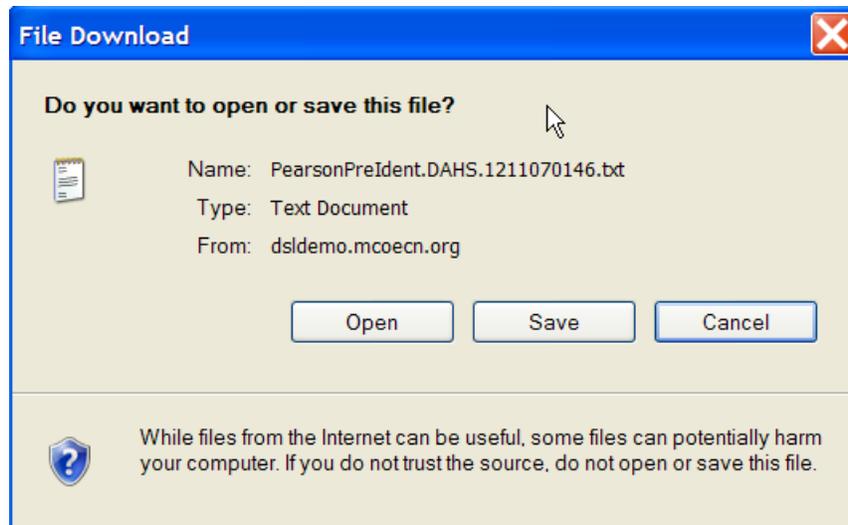
Hint for non-Home Schools: If you're not the resident district and you want the information sent back to the home school AND you've checked to include JVS students, then you will need to check Include JVS Home School Information.

Hint for Home Schools: If you are the Home School, do not check the Include JVS Home School Information. If you do, any JVS students in your file will generate an error and you will not be able to upload the file.

**Return Only These Students** (optional) – enter specific Student IDs (separated by commas) to return in the export. This can be used when creating pre-identification export files for alternate assessments. Please Note: When using this option, the grade level(s) of the students entered still need to be checked or the entered students will not be included in the file.

**Export** – Execute the Export process.

**Note:** *If any students are encountered without SSID's, a grid will display below the Export button listing the students with errors. If the students listed do not need to be included in the file you are creating, click the Continue button to create the file.*



**Save** – Save this file to your hard drive or network drive.

The export file is fixed-width, with spaces for padding. The file layout from ODE (District Test Coordinator Newsletter K-8 Assessments December 2007) is detailed in the following figure.



**In this export file, course codes longer than 10 characters are truncated to 10 characters by removing the necessary number of characters from the right side of the course code.**

**OHIO TESTS**  
**RECORD DESCRIPTION FOR**  
**STUDENT PRE-IDENTIFICATION FILE**

New fields are highlighted in blue. Home District IRN (position 488-493) and Home District Name (position 500-529) are required for JVS students.

Record Length: 569

Field Position					
Start	End	Field Length	Description	Comments/Acceptable values	Required/Optional
1	6	6	Attending District IRN	Six-digit District IRN; contains only numeric values (0-9). Testing materials and pre-ID labels will be shipped to the Attending District. Community schools, nonpublic schools may use the Attending School IRN to populate the Attending District IRN field. JVSs should populate the Attending District IRN with either the JVS IRN or the CTC school IRN, depending upon where they want pre-ID labels and testing materials shipped. If score reports should be made available to a different education agency, then the new optional field named "Home District IRN" must also be completed.	Required
7	12	6	Attending School IRN	Six-digit School IRN; contains only numeric values (0-9). If score reports should be made available to a different education agency, then the new optional field named "Home School IRN" must also be completed.	Required
13	42	30	Attending District Name	Alpha/numeric. Must correspond to Attending District IRN and be consistent with district name as listed in the Ohio Education Directory System (OEDS).	Required
43	72	30	Attending School Name	Alpha/numeric. Must correspond to Attending School IRN and be consistent with school name as listed in OEDS.	Required
73	92	20	Student Last Name	Alpha. This is the last name that will be used when reporting student assessment results.	Required
93	112	20	Student First Name	Alpha. This is the first name that will be used when reporting student assessment results.	Required
113	113	1	Student Middle Initial	Alpha. This is the middle initial that will be used when reporting student assessment results.	Required
114	115	2	Date of Birth Month (MM)	Two-digit numeric (01, 02, ..., 12)	Required
116	117	2	Date of Birth Day (DD)	Two-digit numeric (01, 02, ..., 31)	Required
118	121	4	Date of Birth Year (YYYY)	Four-digit numeric	Required
122	130	9	District Student ID Number (DSID)	District or School assigned Student ID only. A nine-character identifier; first character may be numeric 0-9 or alpha A-Z. All remaining characters must be numeric 0-9.	Optional
131	139	9	Statewide Student Identifier (SSID) assigned by ODE	State assigned Student ID only. A nine-character identifier; first two characters are alpha, all remaining characters are numeric 0-9.	Required for public school students
140	141	2	Enrolled Grade	Must be numeric. Valid values are: 01, 02, 03, 04, 05, ..., 12; 13 = Adult High School, 14 = Proficiency Only, 22 = Kindergarten.	Required
142	142	1	Gender	Valid values are: F = female, M = male; Blank = Missing/Unknown	Required
143	143	1	Ethnicity	Numeric 1-7 as listed below. 1 = American Indian 2 = Asian/Pacific Islander 3 = Black/African American 4 = Hispanic 5 = White 6 = Multi-racial 7 = Other/Unknown	Required
144	148	5	Room Number	Alpha/numeric	Optional
149	149	1	Migrant Student	Alpha: Y = Migrant Student, N = Not Migrant Student, Blank = Missing/Unknown	Required

Start	End	Field Length	Description	Comments/Acceptable values	Required/Optional
150	152	3	Filler		
153	162	10	Class Name/Course Name-Reading	Alpha/numeric. This field will be used to report the name of the class or course on reading teacher reports (e.g., Reading, English Literature). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
163	167	5	Section Number- Reading	Alpha/numeric. This field will be used to report the section number of the class or course on reading teacher reports (e.g., 01, 02, 3A).	Optional
168	187	20	Teacher Name-Reading	Alpha (last name, first name). This field will be used to report the teacher name on reading reports.	Optional
188	197	10	Class Name/Course Name-Writing	Alpha/numeric. This field will be used to report the name of the class or course on writing teacher reports (e.g., Writing, Composition, Creative Writing). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
198	202	5	Section Number- Writing	Alpha/numeric. This field will be used to report the section number of the class or course on writing teacher reports (e.g., 01, 02, 3A).	Optional
203	222	20	Teacher Name-Writing	Alpha (last name, first name). This field will be used to report the teacher name on writing teacher reports.	Optional
223	232	10	Class Name/Course Name-Mathematics	Alpha/numeric. This field will be used to report the name of the class or course on mathematics teacher reports (e.g., Mathematics, Algebra, Geometry). (Class Name/Course Name, Section Number, and teacher name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
233	237	5	Section Number-Mathematics	Alpha/numeric. This field will be used to report the section number of the class or course on mathematics teacher reports (e.g., 01, 02, 3A).	Optional
238	257	20	Teacher Name-Mathematics	Alpha (last name, first name). This field will be used to report the teacher name on mathematics teacher reports.	Optional
258	267	10	Class Name/Course Name-Social Studies	Alpha/numeric. This field will be used to report the name of the class or course on social studies teacher reports (e.g., Social Studies, History, Civics). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
268	272	5	Section Number-Social Studies	Alpha/numeric. This field will be used to report the section number of the class or course on social studies teacher reports (e.g., 01, 02, 3A).	Optional
273	292	20	Teacher Name-Social Studies	Alpha (last name, first name). This field will be used to report the teacher name on social studies teacher reports.	Optional
293	302	10	Class Name/Course Name-Science	Alpha/numeric. This field will be used to report the name of the class or course on science teacher reports (e.g., Science, Biology, Physics). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
303	307	5	Section Number-Science	Alpha/numeric. This field will be used to report the section number of the class or course on science teacher reports (e.g., 01, 02, 3A).	Optional
308	327	20	Teacher Name-Science	Alpha (last name, first name). This field will be used to report the teacher name on science teacher reports.	Optional
328	328	1	Accelerated Testing Indicator - Reading	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
329	330	2	Accelerated Testing Grade-Reading	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 03, 04, 05, 06, 07, and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.
331	331	1	Accelerated Testing Indicator - Writing	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
332	333	2	Accelerated Testing Grade-Writing	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 04 and 07. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.

Start	End	Field Length	Description	Comments/Acceptable values	Required/Optional
334	334	1	Accelerated Testing Indicator - Mathematics	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
335	336	2	Accelerated Testing Grade-Mathematics	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 03, 04, 05, 06, 07, and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.
337	337	1	Accelerated Testing Indicator - Social Studies	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
338	339	2	Accelerated Testing Grade- Social Studies	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 05 and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional
340	340	1	Accelerated Testing Indicator - Science	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
341	342	2	Accelerated Testing Grade-Science	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 05 and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.
343	351	9	Teacher Identification Number-Reading	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
352	360	9	Teacher Identification Number-Writing	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
361	369	9	Teacher Identification Number-Mathematics	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
370	378	9	Teacher Identification Number-Social Studies	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
379	387	9	Teacher Identification Number-Science	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
388	407	20	Course Code-Reading	Alpha/numeric. Districts may populate this field with the reading course code.	Optional
408	427	20	Course Code-Writing	Alpha/numeric. Districts may populate this field with the writing course code.	Optional
428	447	20	Course Code-Mathematics	Alpha/numeric. Districts may populate this field with the mathematics course code.	Optional
448	467	20	Course Code-Social Studies	Alpha/numeric. Districts may populate this field with the science course code.	Optional
468	487	20	Course Code-Science	Alpha/numeric. Districts may populate this field with the social studies course code.	Optional
488	493	6	Home District IRN	Six-digit District IRN; numeric 0-9. If this field is filled out, student score reports will be made available to the indicated district	Required for JVSD students. Optional for other students.
494	499	6	Home School IRN	Six-digit School IRN; numeric 0-9. If this field is filled out, student score reports will be made available to the indicated school.	Optional
500	529	30	Home District Name	Alpha/numeric. Must correspond to Home District IRN	Required for JVSD students. Optional for other students.
530	559	30	Home School Name	Alpha/numeric. Must correspond to Home School IRN	Optional

At this time, the export file will only contain one course section for each subject category. Note that courses are only included in the export file if their EMIS tab contains an EMIS Subject Code that matches an EMIS subject code for the listed subject. Reading and Writing courses will first look for matches on a Reading EMIS subject code (050102, 050104, 050106, 050119, 050300) or a Writing EMIS subject code (050014, 050220, 050400, 050403, 050500, 059920) as appropriate, and if there are no matches on these, the export will look for a match on a Reading/Writing EMIS subject code (050152, 050154, 050156, 050160, 050170, 050180, 050190, 050545, 051905, 059930, 059999) before leaving the course blank.

## PreIdent for OTELA Export

**Navigation: Home – Management – Import/Export – Pre-Identification Export – PreIdent for Otela Export Format**

Please use this export only for the OTELA (Ohio Test of English Language Acquisition) exports. This export can only be accessed by Districts and will not include withdrawn students. It will only include students whose FS record has a District Withdrawal Reason of \*\*.

**Note:** The export will check for the existence of an SSID on the student’s FS records so the correct students will be returned in the export.

**Available Schools in District** (required) – Select the schools that are to be included in the export file. One export file will be created that will contain data for all selected schools.

**Export Format** (required) – Select the Pre-Ident for OTELA Export.

**Grades Levels** (required) – Select the grade level(s) to include in the export.

**Export** – Execute the Export process.

If there are students that do not have SSIDs, they will be displayed.

Home » Management » Import/Export » Pre-Identification Export

## Pre-Identification Export

From this screen, you can export data for a specific file format.

PreIdent For Otela Export

The following students do not have Statewide Student Identifiers. Click *Continue* if you would like to create the export file without these students. Click the *Student Name* to go to the Student Profile Edit screen. Click *Refresh* to reload the list.

Refresh Continue Cancel

**27 Records Displayed**

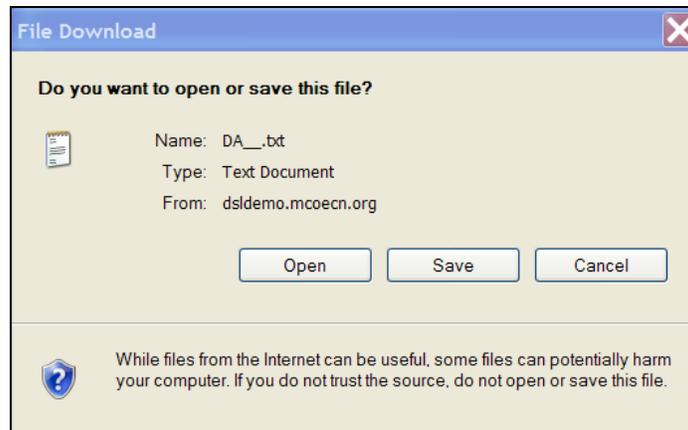
Grade	District	Building	Student Number	Student Name
09	DA	DAHS	00004001	<a href="#">EYE, MAGNUM P.</a>
09	DA	DAHS	00004003	<a href="#">JOHNSON, GEORGE EVAN</a>
09	DA	DAHS	48652419	<a href="#">Jones, Whitney</a>
09	DA	DAHS	00007002	<a href="#">PERRY, RICHARD MATTHE (RICH)</a>

Click the hyperlinked student name [EYE, MAGNUM P.](#) to go to the Student Profile Edit Screen for this student.

Click **Refresh** to reload the list.

Click **Cancel** to return to the Pre-Ident for OTELA Export selection screen.

Click **Continue** if you would like to create the export file without these students.



**Save** – Save this file to your hard drive or network drive.

The export file is fixed-width, with spaces for padding. The file layout from ODE (District Test Coordinator Newsletter K-8 Assessments December 2007) is detailed in the following figure.



**In this export file, course codes longer than 10 characters are truncated to 10 characters by removing the necessary number of characters from the right side of the course code.**

**OHIO TESTS**  
**RECORD DESCRIPTION FOR**  
**STUDENT PRE-IDENTIFICATION FILE**

New fields are highlighted in blue. Home District IRN (position 488-493) and Home District Name (position 500-529) are required for JVS students.

Record Length: 569

Field Position					
Start	End	Field Length	Description	Comments/Acceptable values	Required/Optional
1	6	6	Attending District IRN	Six-digit District IRN; contains only numeric values (0-9). Testing materials and pre-ID labels will be shipped to the Attending District. Community schools, nonpublic schools may use the Attending School IRN to populate the Attending District IRN field. JVSs should populate the Attending District IRN with either the JVS IRN or the CTC school IRN, depending upon where they want pre-ID labels and testing materials shipped. If score reports should be made available to a different education agency, then the new optional field named "Home District IRN" must also be completed.	Required
7	12	6	Attending School IRN	Six-digit School IRN; contains only numeric values (0-9). If score reports should be made available to a different education agency, then the new optional field named "Home School IRN" must also be completed.	Required
13	42	30	Attending District Name	Alpha/numeric. Must correspond to Attending District IRN and be consistent with district name as listed in the Ohio Education Directory System (OEDS).	Required
43	72	30	Attending School Name	Alpha/numeric. Must correspond to Attending School IRN and be consistent with school name as listed in OEDS.	Required
73	92	20	Student Last Name	Alpha. This is the last name that will be used when reporting student assessment results.	Required
93	112	20	Student First Name	Alpha. This is the first name that will be used when reporting student assessment results.	Required
113	113	1	Student Middle Initial	Alpha. This is the middle initial that will be used when reporting student assessment results.	Required
114	115	2	Date of Birth Month (MM)	Two-digit numeric (01, 02, ..., 12)	Required
116	117	2	Date of Birth Day (DD)	Two-digit numeric (01, 02, ..., 31)	Required
118	121	4	Date of Birth Year (YYYY)	Four-digit numeric	Required
122	130	9	District Student ID Number (DSID)	District or School assigned Student ID only. A nine-character identifier; first character may be numeric 0-9 or alpha A-Z. All remaining characters must be numeric 0-9.	Optional
131	139	9	Statewide Student Identifier (SSID) assigned by ODE	State assigned Student ID only. A nine-character identifier; first two characters are alpha, all remaining characters are numeric 0-9.	Required for public school students.
140	141	2	Enrolled Grade	Must be numeric. Valid values are: 01, 02, 03, 04, 05, ..., 12; 13 = Adult High School, 14 = Proficiency Only, 22 = Kindergarten.	Required
142	142	1	Gender	Valid values are: F = female, M = male; Blank = Missing/Unknown	Required
143	143	1	Ethnicity	Numeric 1-7 as listed below. 1 = American Indian 2 = Asian/Pacific Islander 3 = Black/African American 4 = Hispanic 5 = White 6 = Multi-racial 7 = Other/Unknown	Required
144	148	5	Room Number	Alpha/numeric	Optional
149	149	1	Migrant Student	Alpha: Y = Migrant Student, N=Not Migrant Student, Blank = Missing/Unknown	Required

Start	End	Field Length	Description	Comments/Acceptable values	Required/Optional
150	152	3	Filler		
153	162	10	Class Name/Course Name-Reading	Alpha/numeric. This field will be used to report the name of the class or course on reading teacher reports (e.g., Reading, English Literature). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
163	167	5	Section Number- Reading	Alpha/numeric. This field will be used to report the section number of the class or course on reading teacher reports (e.g., 01, 02, 3A).	Optional
168	187	20	Teacher Name-Reading	Alpha (last name, first name). This field will be used to report the teacher name on reading reports.	Optional
188	197	10	Class Name/Course Name-Writing	Alpha/numeric. This field will be used to report the name of the class or course on writing teacher reports (e.g., Writing, Composition, Creative Writing). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
198	202	5	Section Number- Writing	Alpha/numeric. This field will be used to report the section number of the class or course on writing teacher reports (e.g., 01, 02, 3A).	Optional
203	222	20	Teacher Name-Writing	Alpha (last name, first name). This field will be used to report the teacher name on writing teacher reports.	Optional
223	232	10	Class Name/Course Name-Mathematics	Alpha/numeric. This field will be used to report the name of the class or course on mathematics teacher reports (e.g., Mathematics, Algebra, Geometry). (Class Name/Course Name, Section Number, and teacher name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
233	237	5	Section Number-Mathematics	Alpha/numeric. This field will be used to report the section number of the class or course on mathematics teacher reports (e.g., 01, 02, 3A).	Optional
238	257	20	Teacher Name-Mathematics	Alpha (last name, first name). This field will be used to report the teacher name on mathematics teacher reports.	Optional
258	267	10	Class Name/Course Name-Social Studies	Alpha/numeric. This field will be used to report the name of the class or course on social studies teacher reports (e.g., Social Studies, History, Civics). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
268	272	5	Section Number-Social Studies	Alpha/numeric. This field will be used to report the section number of the class or course on social studies teacher reports (e.g., 01, 02, 3A).	Optional
273	292	20	Teacher Name-Social Studies	Alpha (last name, first name). This field will be used to report the teacher name on social studies teacher reports.	Optional
293	302	10	Class Name/Course Name-Science	Alpha/numeric. This field will be used to report the name of the class or course on science teacher reports (e.g., Science, Biology, Physics). (Class Name/Course Name, Section Number, and Teacher Name are optional. However no classroom level report will be generated if ALL the three fields are left blank)	Optional
303	307	5	Section Number-Science	Alpha/numeric. This field will be used to report the section number of the class or course on science teacher reports (e.g., 01, 02, 3A).	Optional
308	327	20	Teacher Name-Science	Alpha (last name, first name). This field will be used to report the teacher name on science teacher reports.	Optional
328	328	1	Accelerated Testing Indicator - Reading	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
329	330	2	Accelerated Testing Grade-Reading	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 03, 04, 05, 06, 07, and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.
331	331	1	Accelerated Testing Indicator - Writing	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
332	333	2	Accelerated Testing Grade-Writing	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 04 and 07. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.

Start	End	Field Length	Description	Comments/Acceptable values	Required/Optional
334	334	1	Accelerated Testing Indicator - Mathematics	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
335	336	2	Accelerated Testing Grade-Mathematics	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 03, 04, 05, 06, 07, and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.
337	337	1	Accelerated Testing Indicator - Social Studies	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
338	339	2	Accelerated Testing Grade- Social Studies	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 05 and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional
340	340	1	Accelerated Testing Indicator - Science	Alpha. Indicate whether the student will be administered a test in an accelerated grade level (a grade level higher than the student's enrolled grade). Y = Yes, student is being tested in an accelerated grade; N = No, student is being tested in enrolled grade; Blank = Not Indicated, assume student is being tested in enrolled grade.	Optional, unless student is participating in accelerated testing.
341	342	2	Accelerated Testing Grade-Science	Numeric. If accelerated testing flag is "Y", indicate the grade level at which the student is tested. Must be numeric. Valid values are: 05 and 08. Accelerated testing grade must be higher than student's enrolled grade.	Optional, unless student is participating in accelerated testing.
343	351	9	Teacher Identification Number-Reading	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
352	360	9	Teacher Identification Number-Writing	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
361	369	9	Teacher Identification Number-Mathematics	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
370	378	9	Teacher Identification Number-Social Studies	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
379	387	9	Teacher Identification Number-Science	Alpha/numeric. Districts may provide teacher credential ID numbers so that teacher level results can be tracked across test administrations.	Optional
388	407	20	Course Code-Reading	Alpha/numeric. Districts may populate this field with the reading course code.	Optional
408	427	20	Course Code-Writing	Alpha/numeric. Districts may populate this field with the writing course code.	Optional
428	447	20	Course Code-Mathematics	Alpha/numeric. Districts may populate this field with the mathematics course code.	Optional
448	467	20	Course Code-Social Studies	Alpha/numeric. Districts may populate this field with the science course code.	Optional
468	487	20	Course Code-Science	Alpha/numeric. Districts may populate this field with the social studies course code.	Optional
488	493	6	Home District IRN	Six-digit District IRN; numeric 0-9. If this field is filled out, student score reports will be made available to the indicated district	Required for JVSD students. Optional for other students.
494	499	6	Home School IRN	Six-digit School IRN; numeric 0-9. If this field is filled out, student score reports will be made available to the indicated school.	Optional
500	529	30	Home District Name	Alpha/numeric. Must correspond to Home District IRN	Required for JVSD students. Optional for other students.
530	559	30	Home School Name	Alpha/numeric. Must correspond to Home School IRN	Optional

At this time, the export file will only contain one course section for each subject category. Note that courses are only included in the export file if their EMIS tab contains an EMIS Subject Code that matches an EMIS subject code for the listed subject. Reading and Writing courses will first look for matches on a Reading EMIS subject code (050102, 050104, 050106, 050119, 050300) or a Writing EMIS subject code (050014, 050220, 050400, 050403, 050500, 059920) as appropriate, and if there are no matches on these, the export will look for a match on a Reading/Writing EMIS subject code (050152, 050154, 050156, 050160, 050170, 050180, 050190, 050545, 051905, 059930, 059999) before leaving the course blank.

**Note:** Prior to 10.3.016150, the OTELA Pre-Id Export was looking at courses and teachers by Subject Area For Credit, not EMIS Subject Type. As a result, since the Subject Area For Credit is always \*\* for non-high school courses, middle school and elementary courses were not getting picked up. As of 10.3.0.16150, the code was modified to match on EMIS Subject Type, not Subject Area for Credit.

### PreIdent for OLSAT

**Navigation: Home – Management – Import/Export – Pre-Identification Export – PreIdent for OLSAT dropdown**

Please use this export only for the OLSAT (Otis-Lennon School Ability Test) exports. This export can only be accessed for Districts.

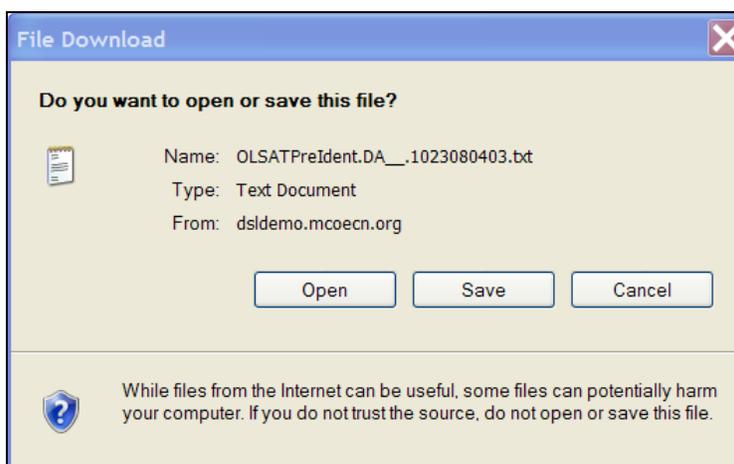
**Available Schools in District** (required) – Select the schools that are to be included in the export file. One export file will be created that will contain data for all selected schools.

**Export Format** (required) – Select the Pre-Ident for OLSAT.

**Grade Levels** (required) – Select the grade level(s) to include in the export.

**Return Only These Students** (optional) – enter specific Student IDs (separated by commas) to return in the export. This can be used when creating pre-identification export files for alternate assessments. Please Note: When using this option, the grade level(s) of the students entered still need to be checked or the entered students will not be included in the file.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

The export file is fixed-width, with spaces for padding. An example of the output is shown in the following figure.

DASL	LOCAL	SD	DA	DASL	HIGH	SCHOOL	DAHS		09BANANA	HANNAH	R	268722176	08171987F	1	1
		1	2												
DASL	LOCAL	SD	DA	DASL	HIGH	SCHOOL	DAHS		11CONTRARY	JASON	WIL	369852369	02141990M	1	1

## PreIdent for PARCC

Navigation: Home – Management – Import/Export – Pre-Identification Export – PreIdent For PARCC dropdown

You can only run this export at the district level. The export file is in .CSV format.

Home > Management > Import/Export > Pre-Identification Export

### Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

- DAJH - DALTON INTERMEDIATE
- DAKI - KIDRON ELEMENTARY
- DADA - DALTON ELEMENTARY

**Selected Schools**

- DAHS - DALTON HIGH SCHOOL

Export Format: PreIdent For PARCC

**English & Language Arts (ELA):**

**Subject Codes Available**

- DAHS - 002 - 03 - ENGLISH 10
- DAHS - 002 - 07 - ENGLISH 10
- DAHS - 002 - 08 - ENGLISH 10
- DAHS - 003 - 01 - ENGLISH 11

**Subject Codes Selected**

- DAHS - 001 - 08 - ENGLISH 9
- DAHS - 002 - 01 - ENGLISH 10

**Mathematics (MAT):**

**Subject Codes Available**

- DAHS - 020 - 03 - ALGEBRA I
- DAHS - 020 - 07 - ALGEBRA I
- DAHS - 030 - 04 - ALGEBRA II
- DAHS - 030 - 09 - ALGEBRA II

**Subject Codes Selected**

- DAHS - 020 - 02 - ALGEBRA I
- DAHS - 030 - 01 - ALGEBRA II

Test Taken: Online

Export Cancel

1. At the top of the screen, select the school(s) to include in the export by moving them from the **Available Schools in District** multi-select list to the **Selected Schools** list. A single export file will contain data for all selected schools.
2. In the **Export Format** drop-down list, select “PreIdent For PARCC.”
3. In both the **English & Language Arts (ELA)** and **Mathematics (MAT)** sections, select the course(s) to include in the export by moving them from the **Subject Codes Available** multi-select list to the **Subject Codes Selected** list.

**Note:** Courses with the following EMIS Subject Codes display in the lists:

- **ELA** – 05XXXX and 06XXXX
  - **MAT** – 11XXXX
4. In the **Test Taken** drop-down list, select the format of the test the students will take – either “Paper” or “Online.”
  5. Click **Export**, and save the file.

## PreIdent for Ohio Online Field Test

### Navigation: Home – Management – Import/Export – Pre-Identification Export – PreIdent For Ohio Online Field Test dropdown

You can only run this export at the district level. The export file is in .txt format.

StudentInformation includes students in the export based on the following rules:

- 04-08 graders:
  - included regardless of whether they are in an “SOC” or “SCI” course
  - course information included for “SOC” and “SCI” courses (otherwise left blank)
- High school students:
  - only included if they are currently taking a course with the specified EMIS Subject Codes: 150300, 150308, 159950, 150810, 152300, 132230, and 132220
  - course information always included

Home » Management » Import/Export » Pre-Identification Export

### Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

- E128 - BATAVIA ELEMENTARY
- E127 - Batavia High School
- E129 - BATAVIA MIDDLE SCHOOL

**Selected Schools**

**Export Format:** PreIdent For Ohio Online Field Test

**Include the following grades:**

- 04th Grade
- 05th Grade
- 06th Grade
- 07th Grade
- 08th Grade

**Include High School Students:**

**Include the following students:**

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

**Return only these students:**

Comma separated Student Ids

Export

1. At the top of the screen, select the school(s) to include in the export by moving them from the **Available Schools in District** multi-select list to the **Selected Schools** list. A single export file will contain data for all selected schools.
2. In the **Export Format** drop-down list, select “PreIdent For Ohio Online Field Test.”
3. Optional: In the **Include the following grades** option, select the check box beside each grade level to include in the export file.

4. Optional: To include high school students, select the **Include High School Students** check box.
5. Optional: In the **Include the following students** option, select any of the following options to include students with these conditions:
  - **Contract Vocational - In** – students that are non-residents of your district attending as a contract vocational student
  - **Contract Vocational - Out** – students that are residents of your district attending another district as a contract vocational student

***Note:** If your district is testing these students and you want to receive the results, you should include these students in your file.*
6. Optional: If you want to include contract vocational home school information on the export, select the **Include CVI home school information** check box.

***Note for non-home schools:** If you are not the resident district, you want the home school to receive the information and you selected to include Contract Vocational - In students in [step 5](#), you should select this check box.*

***Note for home schools:** If you are the home school, do not select this check box. If you do, any Contract Vocational - In students in your file will generate an error, and you will not be able to upload the file.*
7. Optional: If you want to include JVS students in the export, select the **JVS** check box.
8. Optional: If you want to include JVS home school information on the export, select the **Include JVS home school information** check box.

***Note for non-home schools:** If you are not the resident district, you want the home school to receive the information and you selected to include JVS students in [step 7](#), you should select this check box.*

***Note for home schools:** If you are the home school, do not select this check box. If you do, any JVS students in your file will generate an error, and you will not be able to upload the file.*

***Note:** The **Return only these students** feature is not currently functional.*
9. Click **Export**, and save the file.

## PreIdent for KRA

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

You can only run this export at the district level. Only students with state student IDs (SSIDs) are included in the export files. The files are in .csv format and contain the following information:

- Student export – Kindergarten students
- Teacher export – Teachers with students in their kindergarten reading course (EMIS subject code of 050102 Reading K-3) or kindergarten language arts course (EMIS subject code of 050152 Integrated English Language Arts K-3)
- Enrollment export – Students assigned to a kindergarten reading course (EMIS subject code of 050102 Reading K-3) or kindergarten language arts course (EMIS subject code of 050152 Integrated English Language Arts K-3), along with their teacher information

StudentInformation > Management > Import/Export > Pre-Identification Export

### Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

- DAHS - DALTON HIGH SCHOOL
- DAJH - DALTON INTERMEDIATE

**Selected Schools**

- DADA - DALTON ELEMENTARY
- DAKI - KIDRON ELEMENTARY

**Export Format:** PreIdent For KRA

**Choose KRA Pre-Id Type to Export:** Student

Export

1. At the top of the screen, select the school(s) to include in the export by moving them from the **Available Schools in District** multi-select list to the **Selected Schools** list. A single export file (for each type selected of “Student,” “Teacher” and “Enrollment”) will contain data for all selected schools.
2. In the **Export Format** drop-down list, select “PreIdent For KRA.”
3. In the **Choose KRA Pre-ID Type to Export** drop-down list, select “Student.”
4. Click **Export**.

If any kindergarten student does not have a state student ID (SSID), the student displays in a grid.

StudentInformation > Management > Import/Export > Pre-Identification Export

## Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

- DAHS - DALTON HIGH SCHOOL
- DAJH - DALTON INTERMEDIATE

**Selected Schools**

- DADA - DALTON ELEMENTARY
- DAKI - KIDRON ELEMENTARY

Export Format: PreIdent For KRA

The following students do not have Statewide Student Identifiers. Click *Continue* if you would like to create the export file without these students. Click the *Student Name* to go to the Student Profile Edit screen. Click *Refresh* to reload the list.

**48 Records Displayed**

Grade	District	Building	Student Number	Student Name
KG	DLTN	DAKI	00260240	<a href="#">ACEVEDO, MICHAEL</a>
KG	DLTN	DAKI	00260510	<a href="#">ALEXANDER, TIFFANY</a>
KG	DLTN	DAKI	00260150	<a href="#">BARNES, SONIA</a>
KG	DLTN	DAKI	00260295	<a href="#">BRIGHT, DUSTIN</a>

**4 Records Displayed** [Back To Top](#)

5. Optional: To add a missing SSID for a student so the student is included in the export:

- a. Click the student's name.
- b. On the **Edit Student Profile** screen **FS-Standing** tab, in the **State Student ID (SSID)** field, enter the student's SSID.
- c. Click **Save**.
- d. On the **Pre-Identification Export** screen, click **Refresh**.

The student name no longer displays in the list, and the student will now be included in the export.

- e. Repeat step 5 as needed to include all students in the export.

6. If any student displayed in the grid, click **Continue**.

**Note:** Any students remaining in the grid are excluded from the export file.

7. Save the .csv file.

8. If any student displayed in the grid, click **Cancel** to return to the main view.

9. In the **Choose KRA Pre-ID Type to Export** drop-down list, select "Teacher."

10. Repeat steps 4 through 8 to create and save the teacher export file.

11. In the **Choose KRA Pre-ID Type to Export** drop-down list, select "Enrollment."

12. Repeat steps 4 through 8 to create and save the enrollment export file.

## PreIdent for Science and Social Studies

### Navigation: StudentInformation – Management – Import/Export – Pre-Identification Export – PreIdent For AASWD and OCBA dropdown

This pre-identification export is for the following science and social studies assessments:

- Ohio Computer Based Assessments (OCBA) in Science and Social Studies
- Alternate Assessment for Students with Significant Cognitive Disabilities (AASCD/AASWD)

You can only run this export at the district level. You can choose to create a single export file containing students for both assessments, or you can create separate files for each assessment. The export files are in .txt (or “fixed”) format and only include students with state student IDs (SSIDs).

**Note:** *If you have students who will take the alternate assessment, you need to create an ad-hoc membership for them prior to running this export. (For more information on ad-hoc groups, see ProgressBook StudentInformation Getting Started Guide.)*

The screenshot shows the 'Pre-Identification Export' interface. At the top, the breadcrumb trail is 'StudentInformation > Management > Import/Export > Pre-Identification Export'. The main heading is 'Pre-Identification Export' with a sub-note: 'From this screen, you can export data for a specific file format.' Below this, there are two columns of school selection: 'Available Schools in District' (empty) and 'Selected Schools' (containing 'DAES - DALTON ELEMENTARY SCHOOL', 'DAHS - DALTON HIGH SCHOOL', and 'DAJH - DALTON INTERMEDIATE'). The 'Export Format' is set to 'PreIdent For AASWD and OCBA'. Under 'Include assessments:', several checkboxes are checked, including '4th Grade Social Studies', '6th Grade Social Studies', '5th Grade Science', '8th Grade Science', 'American Government', 'American History', and 'Physical Science'. There is an option to 'Include the Following Students as AASWD' with an 'Ad-Hoc Membership' dropdown set to '-- Select an Ad-Hoc Membership --'. Below this, there are checkboxes for 'Contract Vocational - In', 'Contract Vocational - Out', 'JVS', and 'Include CVI home school information', 'Include JVS home school information'. The 'Return only these students:' section has a 'Comma separated Student Ids' text area. The 'Paper / Online:' dropdown is set to 'Paper'. The 'Separate Files for AASWD and OCBA:' checkbox is unchecked. At the bottom, there are 'File Download Options' with a 'FIXED' dropdown and a 'Select A Download Method' dropdown, and an 'Export' button.

1. At the top of the screen, select the school(s) to include in the export by moving them from the **Available Schools in District** multi-select list to the **Selected Schools** list. A single export file will contain data for all selected schools.
2. In the **Export Format** drop-down list, select “PreIdent For AASWD and OCBA.”
3. In the **Include assessments** option, select the check box beside each grade level/subject to include in the export file.

**Note:** *Both regular and accelerated students are included in the grade-specific options.*

4. Optional: If you have students who will take the alternate assessment:
  - a. Select the **Include the Following Students as AASWD** check box.
  - b. In the **Ad-Hoc Membership** drop-down list, select the ad-hoc membership containing these students. This will update the testing value to Alternate for these students.
  - c. Optional: To make both public and private memberships display in the list, select the **Public And Private** check box.
5. Optional: In the **Include the following students** option, select any of the following options to include students with these conditions:
  - **Contract Vocational - In** – students who are non-residents of your district attending as a contract vocational student
  - **Contract Vocational - Out** – students who are residents of your district attending another district as a contract vocational student

**Note:** *If your district is testing these students and you want to receive the results, you should include these students in your file.*

6. Optional: If you want to include contract vocational home school information on the export, select the **Include CVI home school information** check box.

**Note for non-home schools:** *If you are not the resident district, you want the home school to receive the information and you selected to include Contract Vocational - In students, you should select this check box.*

**Note for home schools:** *If you are the home school, do not select this check box. If you do, any Contract Vocational - In students in your file will generate an error, and you will not be able to upload the file.*

7. Optional: If you want to include JVS students in the export, select the **JVS** check box.
8. Optional: If you want to include JVS home school information on the export, select the **Include JVS home school information** check box.

**Note for non-home schools:** *If you are not the resident district, you want the home school to receive the information and you selected to include JVS students, you should select this check box.*

**Note for home schools:** If you are the home school, do not select this check box. If you do, any JVS students in your file will generate an error, and you will not be able to upload the file.

- Optional: To include only specific students in the export file, in the **Return only these students** field, enter the student IDs separated by commas.

**Note:** When using this option, you still need to select the appropriate **Include assessments** grade/subject check boxes, or the students will not be included in the file.

- In the **Paper / Online** drop-down list, if students will take these assessments in paper booklet form, select “Paper.” If students are taking these assessments online, select “Online.”

- Optional: If you want to create separate export files for regular and alternate assessments, select the **Separate Files for AASWD and OCBA** check box.

- In the **File Download Options** section, select a download method.

**Note:** There is only one file type option, which is .txt or “FIXED.”

- Click **Export**.

If all students have a state student ID (SSID), the file download begins.

**Note:** If any student does not have an ID, the student displays in a grid. You can access the student’s profile from the grid and add the ID. If you do not, the student will be excluded from the export.

StudentInformation > Management > Import/Export > Pre-identification Export

### Pre-Identification Export

From this screen, you can export data for a specific file format.

**Available Schools in District**

**Selected Schools**

DAES - DALTON ELEMENTARY SCHOOL

DAHS - DALTON HIGH SCHOOL

DAJH - DALTON INTERMEDIATE

**Export Format:** PreIdent For AASWD and OCBA

The following students do not have Statewide Student Identifiers.  
 Click *Continue* if you would like to create the export file without these students.  
 Click the *Student Name* to go to the Student Profile Edit screen.  
 Click *Refresh* to reload the list.

Refresh
Continue
Cancel

**1 Record Displayed**

Grade	District	Building	Student Number	Student Name
09	DLTN	DAHS	00260150	<a href="#" style="color: #0056b3; text-decoration: none;">BARNES, SONIA</a>

14. Optional: To add a missing SSID for a student so the student is included in the export:

- a. Click the student's name.
- b. On the **Edit Student Profile** screen **FS-Standing** tab, in the **State Student ID (SSID)** field, enter the student's SSID.
- c. Click **Save**.
- d. On the **Pre-Identification Export** screen, click **Refresh**.

The student name no longer displays in the list, and the student will now be included in the export.

- e. Repeat as needed to include all students in the export.

15. If any student displayed in the grid, click **Continue**.

**Note:** Any students remaining in the grid are excluded from the export file.

16. Save the export file(s).

## Photo Export

**Navigation: Home – Management – Import/Export – Photo Export**

Several photo exports are available in StudentInformation. These photo exports are used by the photo companies to generate student photos on CD.



**Note:** StudentInformation State Support recommends using SIS Student Search in place of the Photo Exports to get the needed data out of StudentInformation.

## Fostoria Life Touch Photo Export

**Navigation: Home – Management – Import/Export – Photo Export – Fostoria Life Touch Photo**

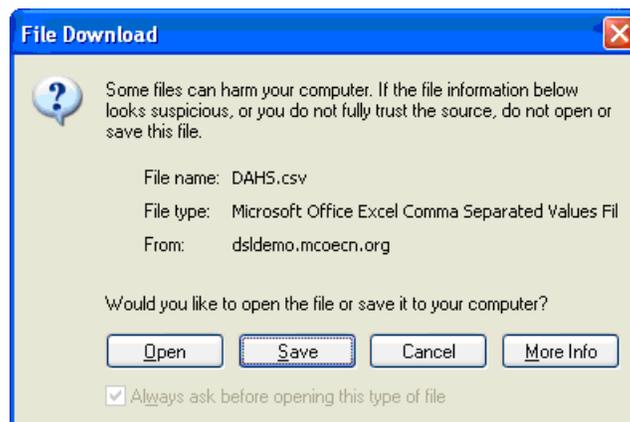
The Fostoria Life Touch Photo Export is shown in the following figures. They use this export file to generate bar codes for the schools and produce a CD containing the student pictures and associated student information.

The screenshot shows a web application interface for exporting photo data. At the top, a breadcrumb trail reads: Home » Management » Import/Export » Photo Export. Below this is a title bar 'Photo Export' and a red instruction: 'From this screen, you can export data for a specific file format.' A dropdown menu is set to 'Fostoria Life Touch Photo'. The interface is divided into two main sections: 'Student Statuses Excluded' and 'Student Statuses Included'. The 'Excluded' list contains: A - ACTIVE RES, D - DELETED, I - INACTIVE, and N - NON-RES. The 'Included' list is currently empty. Below these are 'Export Fields' with a grid of checkboxes, all of which are checked: Student Number, Student Last Name, Student First Name, Student Grade Level, Homeroom Name, Homeroom Teacher Last Name, Address, Address 2, City, State, Zip, Area Code, Phone Prefix, and Phone Number. An 'Export' button is located at the bottom left of the form.

**Student Statuses Excluded / Student Statuses Included** (required) – Choose the Student Statuses to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive

This file is comma delimited, left justified, with spaces as padding characters. Fields included in the export are the following:

- Student ID
- Student Last Name
- Student First/Given Name
- Student Grade
- Student Homeroom
- Homeroom Teacher Last Name
- Student Address 1
- Student Address 2
- Student City
- Student State
- Student Zip Code
- Student Area Code
- Student Phone 1
- Student Phone 2

The following figure shows an example of the Fostoria Life Touch Photo Export file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	48652258	Banana	Hannah	11			2117 Cherry Street	Lima	OH		45804			
2	7001	CONTRAR	JASON W	9			90 ELM STREET	LIMA	OH		45801			
3	48652281	Contrary	Jesse	10			645 S. Main	Lima	OH		45804			
4	5001	CONTRAR	MARY M.	11			90 ELM STREET	LIMA	OH		45801	419	228	7417
5	6001	EYE	CORY RO	10			12 NORTH ST	LIMA	OH		45801			
6	4001	EYE	MAGNUM	12			122 NORTH ST	NMA	OH		45801	555	111	2222
7	122445	EYE	PRIVA	11			123 SECRET AVE	LIMA	OH		45804	419	222	8888
8	4002	FONT	ELLA JAN	12	A110	LAYMAN	345 N FRONT ST	LIMA	OH		45801			
9	6002	FONT	MICHELLE	10			345 N FRONT ST	LIMA	OH		45801			
10	4003	JOHNSON	GEORGE	12	A110	LAYMAN	597 STATE STREET	LIMA	OH		45801			
11	6003	JONES	WHITNEY	10			702 BRISTOL	LIMA	OH		45801			
12	1224	LEE	HARPER	9			23 MOCKINGBIRD LA	LIMA	OH		45804	419	345	2345
13	6004	LINE	TROY AAF	10			665 SUGAR STREET	LIMA	OH		45801			
14	6005	MAY	DAISY LEI	10			600 BLOOM DRIVE	LIMA	OH		45801			
15	5002	PERRY	MICHAEL	11			776 BROADWAY BL	LIMA	OH		45801			
16	7002	PERRY	RICHARD	9	A106	CASTLE	775 BROADWAY BL	LIMA	OH		45801			
17	5003	POTTS	IAN MICHA	11			7632 BLENDON PLA	LIMA	OH		45801			
18	4004	POTTS	JORDAN C	12	A110	LAYMAN	7632 BLENDON PLA	LIMA	OH		45801			
19	7003	RING	NICOLE S	9			9065 BLISS RD	LIMA	OH		45801			
20	7004	SARGENT	LEANN JE	9	A106	CASTLE	123 Bigtop Street	LIMA	OH		45801	419	555	9876
21	4008	SAWYER	THOMAS	11			89 MISSIS SUITE 100	LIMA	OH		45804	419	228	7429
22	5004	SPRAT	JACK JOS	11			890 BACON TRAIL	LIMA	OH		45801	419	228	7417
23	4005	WELLS	JOBETH	12			843 NORTHWALD DF	LIMA	OH		45801			
24	5005	WELLS	JONA REN	11			843 NORTHWALD DF	LIMA	OH		45801			
25	7005	WILLIAMS	RYAN SE	9			881 THAYER ROAD	LIMA	OH		45801			

## Lange Photo Export

**Navigation: Home – Management – Import/Export – Photo Export – Lange Photo**

The Lange Photo Export is shown in the following figures. They use this export file to generate bar codes for the schools and then produce a CD containing the student pictures and associated student information.

Home » Management » Import/Export » Photo Export

## Photo Export

From this screen, you can export data for a specific file format.

Lange Photo

**Student Statuses Excluded**

- A - ACTIVE RES
- D - DELETED
- I - INACTIVE
- N - NON-RES

**Student Statuses Included**

**Export Fields**

Student Number   
  City   
  Phone Prefix   
  Birthdate  
 Student Last Name   
  State   
  Phone Number   
  Student Grade Level  
 Student First Name   
  Zip   
  Parent Name   
  Homeroom Name  
 Address   
  Area Code   
  Gender   
  Homeroom Teacher Last Name  
 Address 2

Export

**Student Statuses Excluded / Student Statuses Included** (required) – Choose the Student Statuses to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export**– Execute Export process.



**Save** – Save this file to your hard drive or network drive

This file is comma-delimited and left justified. The following fields are included in the export:

- Student ID
- Student Last Name
- Student First/Given Name
- Student Gender
- Student Birthdate
- Student Grade
- Student Homeroom
- Homeroom Teacher Last Name
- Student Address 1
- Student Address 2
- Student City
- Student State
- Student Zip Code
- Student Area Code
- Student Phone 1
- Student Phone 2
- Student Parent

The following figure shows an example of the Lange Photo Export file.

```
AVEL10.0.csv - Notepad
File Edit Format View Help
"5555", "SMITH", "SUE", "F", "8/1/2002 12:00:00 AM", "KG", "109", "TEACHER", "111 MAIN STREET", "", "ANYTOWN", "OH", "45555", "419", "555", "1212", "SUE & SAM SMITH"
"6666", "JONES", "JOE", "M", "7/15/1998 12:00:00 AM", "04", "100", "TEACHER", "222 MAIN STREET", "", "ANYTOWN", "OH", "45555", "419", "555", "1313", "BOB AND MARY JONES"
```

## Lima Life Touch Photo Export

**Navigation: Home – Management – Import/Export – Photo Export – Lima Life Touch Photo**

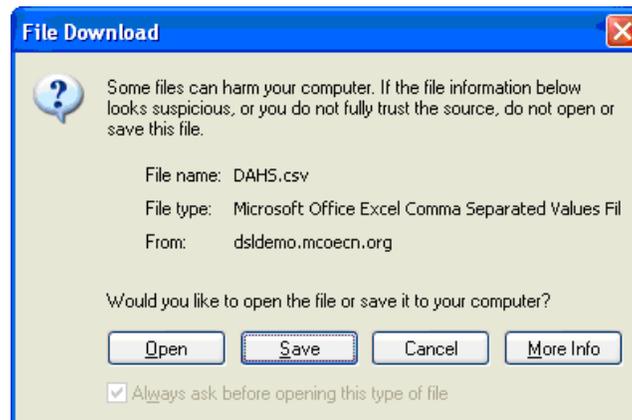
The Lima Life Touch Photo Export is shown in the following figure. They use this export file to generate bar codes for the schools and then produce a CD containing the student pictures and associated student information.

The screenshot shows a web application interface for 'Photo Export'. At the top, there is a breadcrumb trail: Home » Management » Import/Export » Photo Export. Below this is the title 'Photo Export' and a red instruction: 'From this screen, you can export data for a specific file format.' A dropdown menu is set to 'Lima Life Touch Photo'. There are two columns: 'Student Statuses Excluded' containing 'A - ACTIVE RES', 'D - DELETED', 'I - INACTIVE', and 'N - NON-RES'; and 'Student Statuses Included' which is currently empty. Below these is the 'Export Fields' section with a grid of checkboxes, all of which are checked: Student Number, Student Last Name, Student First Name, Student Grade Level, Homeroom Name, Homeroom Teacher Last Name, Address, Address 2, City, State, Zip, Area Code, Phone Prefix, Phone Number, and Parent Name. An 'Export' button is located at the bottom left of the form.

**Student Statuses Excluded / Student Statuses Included** (required) – Choose the Student Statuses to be included or excluded in the Export.

**Export Fields** – The Export Fields will be defaulted, uncheck those fields that you do not want to export.

**Export** – Execute the Export process.



**Save** – Save this file to your hard drive or network drive.

This file is comma delimited, left justified, with spaces as padding characters. Fields included in the export are the following:

- Student ID
- Student Last Name
- Student First/Given Name
- Student Grade
- Student Homeroom
- Homeroom Teacher Last Name
- Student Address 1
- Student Address 2
- Student City
- Student State
- Student Zip Code
- Student Area Code
- Student Phone 1
- Student Phone 2
- Student Parent Name

The following figure shows an example of the Lima Life Touch Photo Export file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	48652258	Banana	Hannah	11			2117 Cherry Street	Lima	OH	45804						
2	7001	CONTRAR	JASON W	9			90 ELM STREET	LIMA	OH	45801					MARION CONTRARY	
3	48652281	Contrary	Jesse	10			645 S. Main	Lima	OH	45804						
4	5001	CONTRAR	MARY M.	11			90 ELM STREET	LIMA	OH	45801	419	228		7417	MARION CONTRARY	
5	6001	EYE	CORY RO	10			122 NORTH ST	LIMA	OH	45801					EDWARD EYE	
6	4001	EYE	MAGNUM	12			122 NORTH ST	LIMA	OH	45801	555	111		2222	EDWARD EYE	
7	122445	EYE	PRIVA	11			123 SECRET AVE	LIMA	OH	45804	419	222		8688	BLU EYE	
8	4002	FONT	ELLA JAN	12	A110	LAYMAN	345 N FRONT ST	LIMA	OH	45801					JANE FONT	
9	6002	FONT	MICHELLE	10			345 N FRONT ST	LIMA	OH	45801					JANE FONT	
10	4003	JOHNSON	GEORGE	12	A110	LAYMAN	597 STATE STREET	LIMA	OH	45801					HOWARD JOHNSON	
11	6003	JONES	WHITNEY	10			702 BRISTOL	LIMA	OH	45801					WILLIAM JONES	
12	1224	LEE	HARPER	9			23 MOCKINGBIRD L	LIMA	OH	45804	419	345		2345	ATTICUS FINCH	
13	6004	LINE	TROY AAF	10			665 SUGAR STREET	LIMA	OH	45801					BOB LINE	
14	6005	MAY	DAISY LEI	10			600 BLOOM DRIVE	LIMA	OH	45801					SHARON LEE	
15	5002	PERRY	MICHAEL	11			776 BROADWAY BL	LIMA	OH	45801					MATTHEW PERRY	
16	7002	PERRY	RICHARD	9	A106	CASTLE	775 BROADWAY BL	LIMA	OH	45801					MATTHEW PERRY	
17	5003	POTTS	IAN MICH	11			7632 BLENDON PLA	LIMA	OH	45801					DAVID POTTS	
18	4004	POTTS	JORDAN E	12	A110	LAYMAN	7632 BLENDON PLA	LIMA	OH	45801					DAVID POTTS	
19	7003	RING	NICOLE S	9			9065 BLISS RD	LIMA	OH	45801					NICHOLAS RING	
20	7004	SARGENT	LEANN JE	9	A106	CASTLE	123 Bigtop Street	LIMA	OH	45801	419	555		9876	SAM SARGENT	
21	4008	SAWYER	THOMAS	11			89 MISSIS SUITE 100	LIMA	OH	45804	419	228		7429	MARK TWAIN	
22	5004	SPRAT	JACK JOS	11			890 BACON TRAIL	LIMA	OH	45801	419	228		7417	JOLENE TREECE	
23	4005	WELLS	JOBETH	12			843 NORTHWALD DF	LIMA	OH	45801					MITCH WELLS	
24	5005	WELLS	JONA REN	11			843 NORTHWALD DF	LIMA	OH	45801					MITCH WELLS	
25	7005	WILLIAMS	RYAN SE	9			881 THAYER ROAD	LIMA	OH	45801					JOHN WILLIAMSON	

## STUFEES Export

**Navigation: Home – Management – Import/Export – STUFEES Export**

The STUFEES Export is shown in the following figure. This export can be used to export student fees data for a specific file format.

StudentInformation > Management > Import/Export > STUFEES Export

### STUFEES Export

From this screen, you can export data for a specific file format.

Activity Start Date: 7/30/2014      Activity Stop Date: 7/30/2014

**Activity Type(s):**

**Payment Types Available**

- Amnesty
- Drop
- Misc Credit
- Payment
- Refund

**Payment Types Selected**

**Payment Type(s):**

**Payment Methods Available**

- Cash
- Check
- Credit
- Online Payment
- Transfer Payment

**Payment Methods Selected**

**Accounting Code(s):**

**Accounting Codes Available**

- ADV. BIO SUPPLIES
- ART SUPPLIES
- BIOLOGY SUPPLIES
- BIO DE COURSE COST
- BASKETBALL FEES, UNIFORM

**Accounting Codes Selected**

Export      Cancel

**Activity Start Date** (required) – Select the activity start date for the export process.

**Activity Stop Date** (required) – Select the activity stop date for the export process.

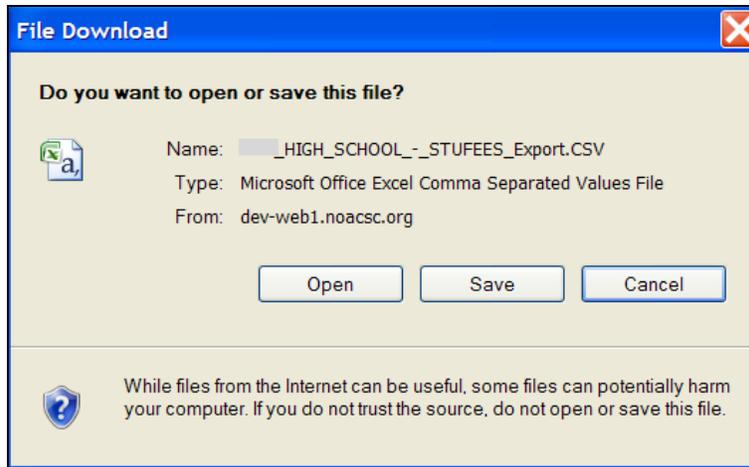
**Activity Type(s)** (optional) – Select available activity types to be included in the export process.

**Payment Type(s)** (optional) – Select available payment types to be included in the export process.

**Accounting Code(s)** (optional) – Select available accounting codes to be included in the export process. Please Note that these are the actual Allocation Codes as defined in Accounting Codes Maintenance, not the Accounting Codes.

**Export** – Execute the export process.

**Cancel** – Cancel the export process.

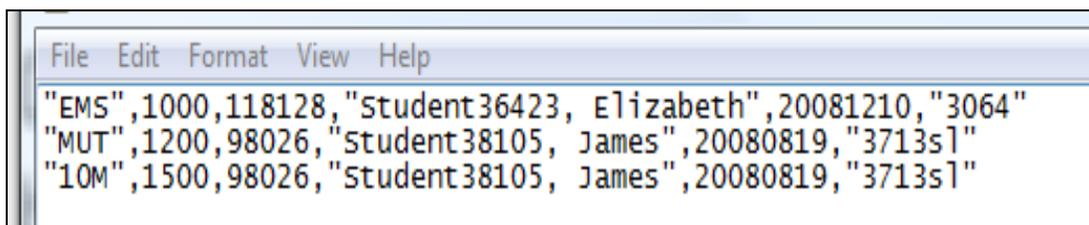


**Save** – Save this file to your hard drive or network drive

The file format is CSV (Comma Separated Values). The file layout is as follows:

- Accounting Code (enclosed in quotes) – Please note that the Accounting Code can be defined as up to 8 characters in Accounting Code Maintenance. However, the USAS STUFEES Import only accepts 6 character Accounting Codes. If you are using the StudentInformation STUFEES Export with the USAS STUFEES Import, you will want to change your Accounting Codes to a maximum of 6 characters in Accounting Code Maintenance.
- Amount
- Student Number
- Student Name (enclosed in quotes)
- Date – YYYYMMDD format
- Comments (enclosed in quotes)

The following figure shows an example of the STUFEES Export file.



## AIR Export

### Navigation: Home – Management – Import/Export – AIR Export

On August 22, 2007, a memorandum was sent by the Office of Career Technical and Adult Education stating the following: “The Ohio Department of Education is aware that JVSD’s must obtain OGT score data on incoming students as early as possible...ODE’s vendor for the OGT now has a provision to allow the American Institutes for Research (AIR) to share student OGT scores directly with JVSDs for students enrolled in a JVSD when permission is granted to share such data.. The process being developed requires written permission from the parent/guardian (or student if older than age 18).” An extraction is available in StudentInformation to provide this file to the JVSD for submission to AIR.

The AIR Export is processed at the district level. However, the AIR Export functions differently if the school in context is a JVSD versus a home school district.

### AIR Export – Home School District in Context

### Navigation: Home – Management – Import/Export – AIR Export (Home School District in context)

The screenshot shows the 'AIR Export' web interface. At the top, a breadcrumb trail reads 'Home » Management » Import/Export » AIR Export'. Below this, the title 'AIR Export' is displayed in blue, followed by the instruction: 'From this screen you can create an AIR export file.' A note states: 'A home district must choose the JVS district and JVS to include in the extract.' There are two dropdown menus: 'JVS District:' and 'JVS:'. Below these are three tabs: 'Choose students by filters' (selected), 'Choose students by student numbers', and 'Choose students by ad-hoc membership'. A sub-instruction reads: 'Use the filters below to choose the students within the district to include in the extract:'. There are three filter sections, each with an 'Available' list and a 'Chosen' list, connected by double-headed arrows. 1. 'Schools Available' contains 'ELEMENTARY' and 'HIGH SCHOOL'. 2. 'Grade Levels Available' contains 'PS - PS', 'KG - KG', '01 - 01', and '02 - 02'. 3. 'Student Statuses Available' contains 'A - ACTIVE RES', 'D - DELETED', 'I - INACTIVE', and 'N - NON-RES'. At the bottom, a note says: 'Students must have an SSID on their current FS record to be included in the extract.' and an 'Export' button is visible.

**JVS District** (required) – If the school in context is not a JVSD, a district IRN value for the JVS must be entered or selected from the dropdown list. If the file is being created by the home school because the students are not yet enrolled in the JVS, the home district will need to create a separate file for each JVS building students will be attending in the upcoming school year.

**JVS** (required) –If the school in context is not a JVSD, a building IRN value for the JVS must be entered or selected from the dropdown list. The dropdown will list all JVS school IRNs associated with the selected JVS District IRN.

### Choose students by filters

**Schools Available** (optional) – Move one or more schools from the Schools Available select box to the Schools Chosen select box. If no schools are moved to the Schools Chosen select box, all schools will be selected.

**Grade Levels Available** (optional) – Move one or more grade levels from the Grade Levels Available select box to the Grade Levels Chosen select box. If no grade levels are moved to the Grade Levels Chosen select box, all grade levels will be selected.

**Student Statuses Available** (optional) – Move one or more student statuses from the Student Statuses Available select box to the Student Statuses Chosen select box. If no student statuses are moved to the Student Statuses Chosen select box, all student statuses will be selected.

**IMPORTANT: Students must have an SSID on their current FS record to be included in the extract.**

## Choose students by student numbers

**Enter a comma separated list of student numbers to include in the extract** (required) – as in the example above, enter student numbers separated by a comma.

Click **Validate Student Numbers**.

You will receive the following message if any of the student numbers are invalid.

If the student numbers are valid, you will receive validation as follows.

Click **Edit Student Numbers** to further edit the student numbers before Export.

**IMPORTANT: Students must have an SSID on their current FS record to be included in the extract.**

## Choose students by ad-hoc membership

If the students have not been enrolled at the JVSD yet for the future school year, the home school can create a file using an ad-hoc membership group including students who are planning on attending the JVS in the next school year. The file would then be sent to the JVS staff for submission to AIR.

**Ad-Hoc Membership** (required) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored.

Click  to create a new ad-hoc membership. You will be taken to the Ad Hoc Memberships where you can create a new ad-hoc membership and return to the Air Export – Choose students by ad-hoc membership tab.

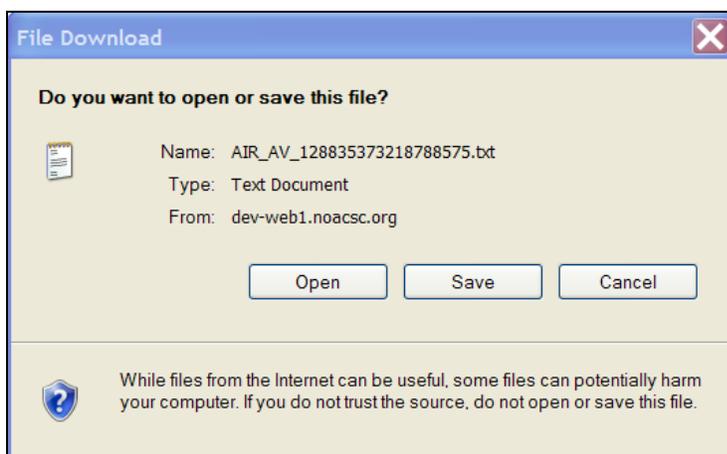
Check **Public and** to see Memberships created by other users in your drop-down list.

**IMPORTANT: Students must have an SSID on their current FS record to be included in the extract.**

## Export

**Export** – Execute the export process with the filters selected.

**Cancel** – Cancel the export process.



**Save** – Save this file to your hard drive or network drive.

The following figure shows an example of the AIR Export file when a home school district is in context.

AIR_AV_128836805718895066[1].txt - Notepad					
File	Edit	Format	View	Help	
050999050777Test	JVSD	Test Career Center	JVSD	045111000067Test	Vi11 SD
Student67557	FREDERICK	01181991MEW777777			Test High School
050999050777Test	JVSD	Test Career Center	JVSD	045111000067Test	Vi11 SD
Student68383	BILLIE JEAN	J04131992FER333333			Test High School
050999050777Test	JVSD	Test Career Center	JVSD	045111000067Test	Vi11 SD
Student68504	ANGELA	L03011995FEQ555555			Test High School

The file is a fixed length file. The following is the file layout for the extraction file:

<b>OHIO TEST</b>				
<b>Record Description for Student Data Files</b>				
<b>Start Position</b>	<b>End Position</b>	<b>Field Length</b>	<b>Field Name</b>	<b>Comments/Description</b>
1	6	6	JVSD IRN	Required field. Six-digit district IRN; contains only numeric values (0-9). Enter the IRN of the JVSD. Use the value specified in the JVS District IRN prompt selected on the requesting page.
7	12	6	JVS School IRN	Required field. Six-digit School IRN; contains only numeric values (0-9). Enter the IRN of the joint vocational school. Use the building IRN specified in the JVS school building selected on the requesting page.
13	42	30	JVSD Name	Optional field. Alpha/numeric. Must correspond to JVSD IRN. Use the name associated with the District JVS IRN selected on the requesting page.
43	72	30	JV School Name	Optional field. Alpha/numeric. Must correspond to JV School IRN. Use the name associated with the JVS school IRN selected on the requesting page.
73	78	6	Home District IRN	Required field. Six-digit District IRN; contains only numeric values (0-9). Enter the IRN of the school where the student was last tested for the OGT. Use the district IRN of the current district in context.
79	84	6	Home School IRN	Required field. Size-digit school IRN; contains only numeric values (0-9). Enter the IRN of the school where the student was last tested for the OGT. Use the value of the Attending IRN specified on the latest FS record for the student in the district in context.
85	114	30	Home district Name	Optional field. Alpha/numeric. Must correspond to home district IRN. Use the district name associated with the district IRN in context.
115	144	30	Home School Name	Optional field. Alpha/numeric. Must correspond to Home School IRN. Use the name of the school associated with the value of Attending building on the latest FS record.
145	164	20	Student Last Name	Required field. Alpha. The last name of the student.
165	184	20	Student First Name	Required field. Alpha. The given name of the student.
185	185	1	Student Middle Initial	Alpha; leave blank if the student does not have a middle name.
186	187	2	Date of Birth month	Required field. Two-digit numeric
188	189	2	Date of Birth Day (DD)	Required field. Two-digit numeric
190	193	4	Date of Birth Year (YYYY)	Required field. Four-digit numeric
194	194	1	Gender	Required field. Alpha F = female, M = Male

OHIO TEST				
Record Description for Student Data Files				
Start Position	End Position	Field Length	Field Name	Comments/Description
195	203	9	Statewide Student Identifier (SSID)	Required field between September 15 and April 30 <sup>th</sup> of every year. State assigned Student ID only. Combination of alpha and numeric; must start with two alphas followed by numeric 0-9. SSID of the student as specified on the latest FS record for the student.

**AIR Export – JVS District in Context**

**Navigation: Home – Management – Import/Export – AIR Export (JVS District in context)**

The screenshot shows the 'AIR Export' web interface. At the top, there is a breadcrumb trail: Home » Management » Import/Export » AIR Export. Below this is the title 'AIR Export' and a note: 'From this screen you can create an AIR export file.' There are three tabs: 'Choose students by filters' (selected), 'Choose students by student numbers', and 'Choose students by ad-hoc membership'. A instruction reads: 'Use the filters below to choose the students within the district to include in the extract:'. The interface is divided into four main filter sections, each with an 'Available' list and a 'Chosen' list, connected by double-headed arrows. 1. 'Schools Available' contains 'CAREER CENTER'. 2. 'Grade Levels Available' contains '07 - 07', '08 - 08', '09 - 09', and '10 - 10'. 3. 'Student Statuses Available' contains 'A - ACTIVE RES', 'D - DELETED', 'I - INACTIVE', and 'N - NON-RES'. 4. 'Home Schools Available' contains '000 High School', '000 East High School', '001 High School', and '003 ton High School'. Below these filters is a field for 'Include only students admitted after:'. At the bottom, there are two informational notes: 'Students must have an SSID on their current FS record to be included in the extract.' and 'Students must have a Home School IRN set on the student profile to be included in the extract.' An 'Export' button is located at the bottom left.

The extraction file created by the JVSD will select all students for the specified home school who are also enrolled in the JVSD.

## Choose students by filters

**Schools Available** (optional) – Move one or more schools from the Schools Available select box to the Schools Chosen select box. If no schools are moved to the Schools Chosen select box, all schools will be selected.

**Grade Levels Available** (optional) – Move one or more grade levels from the Grade Levels Available select box to the Grade Levels Chosen select box. If no grade levels are moved to the Grade Levels Chosen select box, all grade levels will be selected.

**Student Statuses Available** (optional) – Move one or more student statuses from the Student Statuses Available select box to the Student Statuses Chosen select box. If no student statuses are moved to the Student Statuses Chosen select box, all student statuses will be selected.

**Home Schools Chosen** (optional) – Move one or more home schools from the Home Schools Available select box to the Home Schools Chosen select box. If no home schools are moved to the Home Schools Chosen select box, all home schools will be selected.

**Include only students admitted after:** (optional) – Enter a date in order to include students only enrolled after this date. This allows the JVS to create a file periodically after the school year starts to only pick up newly enrolled students that may not have been in the original file uploaded.

**IMPORTANT: Students must have an SSID on their current FS record to be included in the extract. Students also must have a Home School IRN set on the student profile to be included in the extract.**

### Choose students by student numbers

Home » Management » Import/Export » AIR Export

### AIR Export

From this screen you can create an AIR export file.

Choose students by filters | **Choose students by student numbers** | Choose students by ad-hoc membership

Enter a comma separated list of student numbers to include in the extract:

00005743, 00005745, 123123123123123

Validate Student Numbers

Students must have an SSID on their current FS record to be included in the extract.  
Students must have a Home School IRN set on the student profile to be included in the extract.

**Enter a comma separated list of student numbers to include in the extract** (required) – as in the example above, enter student numbers separated by a comma.

Click **Validate Student Numbers**

You will receive the following message if any of the student numbers are invalid.

Home » Management » Import/Export » AIR Export

### AIR Export

From this screen you can create an AIR export file.

**Please correct the following errors:**  
- ' 123123123123' is an invalid student number

If the student numbers are valid, you will receive validation as follows.

Choose students by filters | **Choose students by student numbers** | Choose students by ad-hoc membership

Enter a comma separated list of student numbers to include in the extract:

00005743, 00005745

Edit Student Numbers

Students must have an SSID on their current FS record to be included in the extract.  
Students must have a Home School IRN set on the student profile to be included in the extract.

Click **Edit Student Numbers** to further edit the student numbers before Export.

**IMPORTANT: Students must have an SSID on their current FS record to be included in the extract. Students also must have a Home School IRN set on the student profile to be included in the extract.**

## Choose students by ad-hoc membership

Home » Management » Import/Export » AIR Export

### AIR Export

From this screen you can create an AIR export file.

Choose students by filters | Choose students by student numbers | **Choose students by ad-hoc membership**

Choose an ad-hoc membership containing students to include in the extract:

-- Select an Ad-Hoc Membership --

Public And Private

Students must have an SSID on their current FS record to be included in the extract.  
Students must have a Home School IRN set on the student profile to be included in the extract.

**Ad-Hoc Membership** (required) – Specify an Ad-Hoc Membership Group to limit the report to the students in this group. All other selection criteria will be ignored.

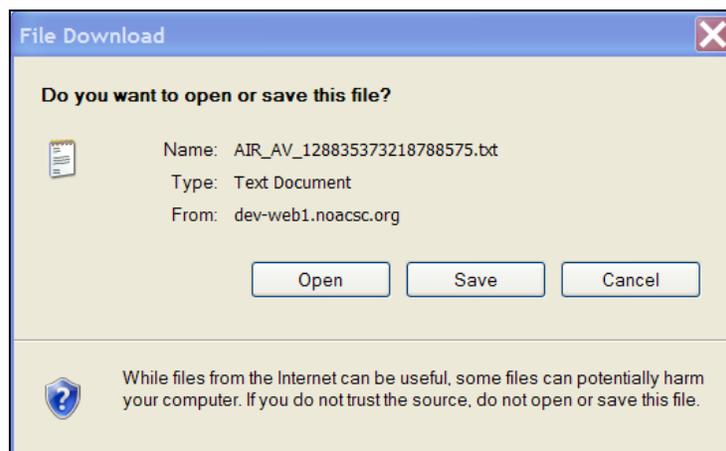
Click to create a new ad-hoc membership. You will be taken to the Ad Hoc Memberships where you can create a new ad-hoc membership and then return to the Air Export – Choose students by ad-hoc membership tab.

Check the **Public And Private** checkbox to see Memberships created by other users in your drop-down list.

**IMPORTANT: Students must have an SSID on their current FS record to be included in the extract. Students also must have a Home School IRN set on the student profile to be included in the extract.**

**Export** – Execute the export process with the filters selected.

**Cancel** – Cancel the export process.



**Save** – Save this file to your hard drive or network drive.

The following figure shows an example of the AIR Export file when a JVS district is in context.

AIR_AV_128836805718895066[1].txt - Notepad				
File	Edit	Format	View	Help
050999050777	Test JVSD	Test Career Center	JVSD	045111000067
Student67557	FREDERICK	01181991MEW777777		Test Vill SD
050999050777	Test JVSD	Test Career Center	JVSD	045111000067
Student68383	BILLIE JEAN	J04131992FER333333		Test Vill SD
050999050777	Test JVSD	Test Career Center	JVSD	045111000067
Student68504	ANGELA	L03011995FEQ555555		Test Vill SD

The file is a fixed length file. The following is the file layout for the extraction file:

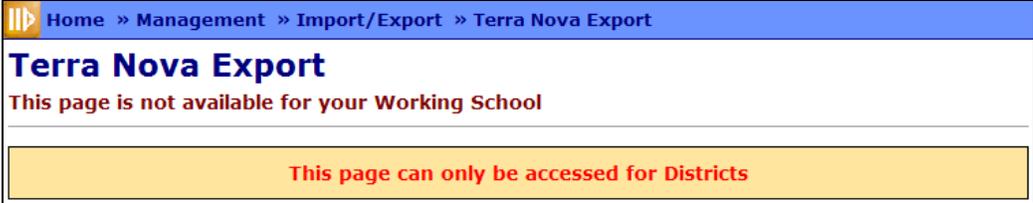
OHIO TEST				
Record Description for Student Data Files				
Start Position	End Position	Field Length	Field Name	Comments/Description
1	6	6	JVSD IRN	Required field. Six-digit district IRN; contains only numeric values (0-9). Enter the IRN of the JVSD. Use the district IRN from the JVS.
7	12	6	JVS School IRN	Required field. Six-digit School IRN; contains only numeric values (0-9). Enter the IRN of the joint vocational school. Use the building associated with the value of Attending building on the latest FS record.
13	42	30	JVSD Name	Optional field. Alpha/numeric. Must correspond to JVSD IRN. Use the name associated with the district IRN of the JVS in context.
43	72	30	JV School Name	Optional field. Alpha/numeric. Must correspond to JV School IRN. Use the name associated with the building specified in the attending building IRN field on the student's latest FS record.
73	78	6	Home District IRN	Required field. Six-digit District IRN; contains only numeric values (0-9). Enter the IRN of the school where the student was last tested for the OGT. Use the district IRN associated with the school IRN specified in the Home School IRN field on the Student Profile – General tab
79	84	6	Home School IRN	Required field. Size-digit school IRN; contains only numeric values (0-9). Enter the IRN of the school where the student was last tested for the OGT. Use the value of the Home School IRN field on the Student Profile – General tab.
85	114	30	Home district Name	Optional field. Alpha/numeric. Must correspond to home district IRN. Use the district IRN associated with the school IRN specified in the Home School IRN field on the Student Profile – General tab.
115	144	30	Home School Name	Optional field. Alpha/numeric. Must correspond to Home School IRN. Use the name associated with the School IRN specified in the Home School IRN field on the Student Profile – General tab.
145	164	20	Student Last Name	Required field. Alpha. The last name of the student.
165	184	20	Student First Name	Required field. Alpha. The given name of the student.
185	185	1	Student Middle Initial	Alpha. Leave blank if the student does not have a middle name.

OHIO TEST				
Record Description for Student Data Files				
Start Position	End Position	Field Length	Field Name	Comments/Description
186	187	2	Date of Birth month	Required field. Two-digit numeric
188	189	2	Date of Birth Day (DD)	Required field. Two-digit numeric
190	193	4	Date of Birth Year (YYYY)	Required field. Four-digit numeric
194	194	1	Gender	Required field. Alpha F = female, M = Male
195	203	9	Statewide Student Identifier (SSID)	Required field between September 15 and April 30 <sup>th</sup> of every year. State assigned Student ID only. Combination of alpha and numeric; must start with two alphas followed by numeric 0-9. SSID of the student as specified on the latest FS record for the student.

### Terra Nova Export

**Navigation: Home – Management – Import/Export – Terra Nova Export**

The Terra Nova Export is used to create a pre-identification export file for the Terra Nova assessments. The Terra Nova Export can be accessed only with a District in context. If you do not have a district in context, you will receive this message.



With a District in context, the Terra Nova Export will display the School/Grade Summary List. A single export file is created for the District based on the individual School/Grade Configurations in the School/Grade Summary List.



**Note:** The Terra Nova Export does not save School/Grade Configurations once you navigate away from the Terra Nova Export screen. The School/Grade Summary List will always be unpopulated when you enter the Terra Nova Export screen. You must add your specific School/Grade Configurations each time you run the Terra Nova Export. This is required to make sure the correct School/Grade Configurations are added each time for the export.

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

## Terra Nova Export – School/Grade Summary List

The screenshot shows the 'Terra Nova Export' page. At the top, there is a breadcrumb trail: Home » Management » Import/Export » Terra Nova Export. Below this, the title 'Terra Nova Export' is displayed in large blue font. Underneath, a red text message states: 'From this screen, you can export a Terra Nova pre-identification file'. A yellow banner below this contains the green text: 'The Grade Level was added successfully'. There is an 'Add New' button. Below the button is a table with the following data:

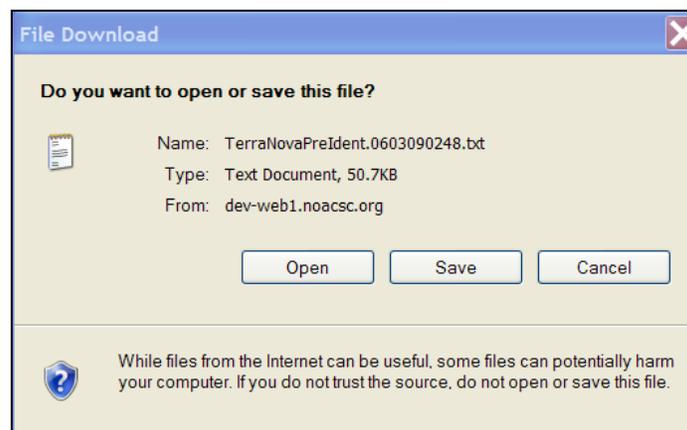
		School	Grade	Student Status Codes
		ELEMENTARY	01 - 01	N,A
		ELEMENTARY	02 - 02	A
		HIGH SCHOOL	09 - 09	A

At the bottom of the table area, there is an 'Export' button.

The School/Grade Summary List will show any School/Grade Configurations already added to the list. This page has standard add record, edit record and delete record controls.

Click Add **New** to enter a new School/Grade Configuration.

Click **Export** to process the export. A single District export file will be created for all of the School/Grade Configurations listed.



**Save** – Save this file to your hard drive or network drive.

**Terra Nova Export File Format (Cat/5, 1<sup>st</sup> Edition, 2<sup>nd</sup> Edition and 3<sup>rd</sup> Edition)**

1-13	District Name, alpha/numeric.
14-15	State Name, two-character postal abbreviation.
16-30	School Name, alpha/numeric.
31-32	Grade: numeric - fill leading space with zero, 05 for Grade 5 for example; for Kindergarten use 57, for Ungraded use 00.
33-34	Blank
35-49	Teacher's Name, alpha/numeric.
50-60	Student Last Name, alpha.
61-64	Blank.
65-71	Student First Name.
72-74	Blank.
75	Student Middle Initial.
76-77	Blank.
78-83	Birth Date: numeric format, as for example: 010364 for January 3, 1964.
84	Sex: F for Female, M for Male.
85-94	Student ID Number.
95-104	<p>Special Codes field, numeric or blank. The customer specifies which (if any) Special Codes are to be considered critical. Critical Special Codes must be numeric; others can be numeric or blank. The number of codes used depends on the test. Note the following:</p> <p>NOTE: To include the district IRN in the export file, enter the district IRN in the Special Code field.</p> <p><b>Test -- No. of Codes – Positions</b>            CAT/5 – 9 – 95-103            SABE/2 – 8 – 95-102            Terra Nova – 10 – 95-104            Terra Nova 2<sup>nd</sup> Edition – 10 – 95-104            Terra Nova Algebra – 10 – 95-104            InView – 10 – 95-104</p> <p>Note: If you order the CAT/5 MAP report, and you use the CAT/5 Listening and Speaking Checklist, you may have teachers encode Listening and Speaking scores on each student's CAT/5 answer document (answer sheet, Student Information Form, or the biographical data page of a machine-scorable booklet) and have this score reported on the MAP.</p> <p>To reserve a column for this score, specify that the column must be blank in your precoding file. The normal column for this score is column S (byte 103); however you can reserve any column in the range K through S (bytes 95-103) for this purpose.</p>
105-110	Blank
111-113	<p>Test ID, numeric            The test ID codes are as follows:            CAT/5 Survey- 028            CAT/5 Survey with TCS/2* - 029            CAT/5 Complete Battery - 030            CAT/5 Complete Battery with TCS/2* - 031            CAT/5 Short Form - 032            CAT/5 Short Form with TCS/2* - -033            SABE/2 Levels 1-6 - 034            SISS Student Information &amp; Score Sheet - 039</p>

	<p>Terra Nova Complete Battery - 040  Terra Nova Complete Battery TCS/2 - 041  Terra Nova Complete Battery Plus - 042  Terra Nova Complete Battery Plus TCS/2 – 043  Terra Nova Survey – 044  Terra Nova Survey TCS/2 – 045  Terra Nova Survey Plus – 046  Terra Nova Survey Plus TCS/2 – 047  Terra Nova Multiple Assessments – 048  Terra Nova M.A. TCS/2 – 049  Terra Nova M.A. Plus – 051  Terra M.A. TCS/2 &amp; Plus – 052  Supera Multiple Assessments – 053  Supera Multiple Assessments with Plus – 054  Terra Nova Supera Survey – 055  Terra Nova Super Plus – 056  Terra Nova Supera with Plus – 057  Terra Nova Complete Battery 2<sup>nd</sup> Edition – 058  Terra Nova Complete Battery Plus 2<sup>nd</sup> Edition – 059  Terra Nova Complete Battery InView 2<sup>nd</sup> Edition – 060  Terra Nova Complete Battery Plus InView 2<sup>nd</sup> Edition – 061  Terra Nova Survey 2<sup>nd</sup> Edition – 062  Terra Nova Survey Plus 2<sup>nd</sup> Edition – 063  Terra Nova Survey InView 2<sup>nd</sup> Edition – 064  Terra Nova Survey Plus InView 2<sup>nd</sup> Edition – 065  Detroit Terra Nova Survey 2<sup>nd</sup> Edition Level 13 – 076  Missouri Slip Sheet – 079  Spanish Star Sabe – 080  South Carolina TN Survey – 081  Washoe NV. TN Level 13 – 082  Kentucky CTBS / 5 – 083  Terra Nova Algebra 2<sup>nd</sup> Edition – 084  Terra Nova Multiple Assessments 2<sup>nd</sup> Edition – 091  Terra Nova M.A. with InView 2<sup>nd</sup> Edition – 092  Terra Nova M.A. Plus 2<sup>nd</sup> Edition – 093  Terra Nova M.A. InView &amp; Plus 2<sup>nd</sup> Edition – 094  InView Terra Nova 2<sup>nd</sup> Edition – 095  Terra Nova 3<sup>rd</sup> Edition Complete Battery – 097  Terra Nova 3<sup>rd</sup> Edition Complete Battery Plus– 098  Terra Nova 3<sup>rd</sup> Edition Complete Battery InView – 099  Terra Nova 3<sup>rd</sup> Edition Complete Battery Plus with InView – 100  Terra Nova 3<sup>rd</sup> Edition Survey – 101  Terra Nova 3<sup>rd</sup> Edition Survey Plus – 102  Terra Nova 3<sup>rd</sup> Edition Survey with InView – 103  Terra Nova 3<sup>rd</sup> Edition Survey Plus with InView – 104  Terra Nova 3<sup>rd</sup> Edition Multiple Assessments – 105  Terra Nova 3<sup>rd</sup> Edition Multiple Assessments with InView – 106  Terra Nova 3<sup>rd</sup> Edition Multiple Assessments Plus – 107  Terra Nova 3<sup>rd</sup> Edition Multiple Assessments Plus with InView - 108</p>
114-122	Blank
123	<p>Test Form  Cat/5 – “A”  Terra Nova 1<sup>st</sup> Edition – “A”  Terra Nova 2<sup>nd</sup> Edition – “C”  Terra Nova 3<sup>rd</sup> Edition – “G”</p>

124-128	Achievement Test Level, for instance Level 11 for grade 1, 12 for grade 2, 13 for grade 3, etc.
129	InView or TCS/2 Level – 1, 2, 3, 4, or 5
130	A scorable booklet? Y or N  This response determines whether the answer document is a scorable booklet (Y) with a pre-coded Student Information Sheet, or an answer sheet or folder (N) which does not require a Student Information Sheet
131-132	Sort type: numeric  All tapes are first sorted according to scorable booklets (Y or N), by test ID, and by sort type in order to separate the input into homogeneous processing sets.  Within this order, one of seven sort orders must be specified: 01 – UNSORTED – output is same sequence as input 02 – NAME within GRADE within SCHOOL 03 – NAME within TEACHER within SCHOOL 04 – NAME within TEACHER within GRADE within SCHOOL 05 – NAME within LEVEL within GRADE within SCHOOL 06 – NAME within LEVEL within TEACHER within SCHOOL 07 – NAME within LEVEL within SCHOOL
133-138	Blank
139	Blank
140	Bypass bubbling of name: Y or blank
141-142	Blank
143	Y: student will take Performance Assessment. Thus, a pre-coded SISS for Performance Assessment is required
144	Blank
145	Y: Student will take Writing Assessment, and the Writing score will appear on the CAT/5 MAP report. A pre-coded SISS is required for the Writing Assessment.
146	Terra Nova 2 <sup>nd</sup> Edition AA IEP, Y = Yes, Blank = No
147	Terra Nova 2 <sup>nd</sup> Edition AA 504, Y = Yes, Blank = No
148	Terra Nova 2 <sup>nd</sup> Edition AA LEP, Y = Yes, Blank = No
149	Terra Nova 2 <sup>nd</sup> Edition BB RLA, Blank, 1, 2, or 3
150	Terra Nova 2 <sup>nd</sup> Edition BB MA, Blank, 1, 2, or 3
151	Terra Nova 2 <sup>nd</sup> Edition BB SC, Blank, 1, 2, or 3
152	Terra Nova 2 <sup>nd</sup> Edition BB SS, Blank, 1, 2, or 3
153	Terra Nova 2 <sup>nd</sup> Edition BB InView, Blank, 1, 2, or 3
154	Terra Nova 2 <sup>nd</sup> Edition BB Algebra, Blank, 1, 2, or 3
155-250	Blank, for CTB use only

### Terra Nova Export File Format (3rd Edition Barcode Layouts)

1-13	District Name, alpha/numeric
14-23	Blank, for CTB use only
24-25	State Name, two-character postal abbreviation
26-40	School Name, alpha/numeric
41-50	School Number, alpha/numeric or blank
51-52	Grade: numeric - fill leading space with zero, 05 for Grade 5 for example; for Kindergarten use KG, for Ungraded use 00
53-67	Teacher's Name, alpha/numeric or blank
68-87	Student Last Name, alpha
88-102	Student First Name, alpha

103	Student Middle Initial alpha or blank
104-111	Birth Date: numeric format, as for example: 010364 for January 3, 1964
112	Gender: F for Female, M for Male
113-122	Student ID Number, alpha/numeric or blank
123-128	Special Codes field, numeric or blank. To include the district IRN in the export file, enter the district IRN in the Special Code field
129	Program IEP, Y = yes, blank = no
130	Program 504, Y = yes, blank = no
131	Program LEP/ELL, Y = yes, blank = no
132-134	Test ID, numeric The test ID codes are as follows: Terra Nova 3 <sup>rd</sup> Edition Complete Battery – 097 Terra Nova 3 <sup>rd</sup> Edition Complete Battery Plus– 098 Terra Nova 3 <sup>rd</sup> Edition Complete Battery InView or PTCS – 099 Terra Nova 3 <sup>rd</sup> Edition Complete Battery Plus with InView or PTCS – 100 Terra Nova 3 <sup>rd</sup> Edition Survey – 101 Terra Nova 3 <sup>rd</sup> Edition Survey Plus – 102 Terra Nova 3 <sup>rd</sup> Edition Survey with InView – 103 Terra Nova 3 <sup>rd</sup> Edition Survey Plus with InView – 104 Terra Nova 3 <sup>rd</sup> Edition Multiple Assessments – 105 Terra Nova 3 <sup>rd</sup> Edition Multiple Assessments with InView or PTCS – 106 Terra Nova 3 <sup>rd</sup> Edition Multiple Assessments Plus – 107 Terra Nova 3 <sup>rd</sup> Edition Multiple Assessments Plus with InView or PTCS – 108
135-136	Test Form Terra Nova 3 <sup>rd</sup> Edition Barcode Layout – “G”
137-138	Achievement Test Level: Level 10 for grade K, Level 11 for grade 1, Level 12 for grade 2, Level 13 for grade 3, Level 14 for grade 4, Level 15 for grade 5, Level 16 for grade 6, Level 17 for grade 7, Level 18 for grade 8, Level 19 for grade 9, Level 20 for grade 10, Level 21 for grades 11 and 12
139-143	Blank, for CTB use only
144	Ethnicity: 1 = American Indian, 2 = African American or Black (and not Hispanic), 3 = Asian, 4 = Pacifica Islander, 5 = Hispanic or Latino, 6 = White (and not Hispanic), 7 = Multiethnic, 8 = Other
145-146	Home Language Code, numeric or blank
147	InView or PTCS Level. The InView or PTCS level will only be used if the test code selected is for a combination test. Numeric or blank.
148	Blank, for CTB use only
149-150	Blank, for CTB use only
151	Blank, for CTB use only
152	Accom R 1, Y = yes, blank = no
153	Accom R 2, Y = yes, blank = no
154	Accom R 3, Y = yes, blank = no
155	Accom L 1, Y = yes, blank = no
156	Accom L 2, Y = yes, blank = no
157	Accom L 3, Y = yes, blank = no
158	Accom MA 1, Y = yes, blank = no
159	Accom MA 2, Y = yes, blank = no
160	Accom MA 3, Y = yes, blank = no
161	Accom SC 1, Y = yes, blank = no
162	Accom SC 2, Y = yes, blank = no
163	Accom SC 3, Y = yes, blank = no
164	Accom SS 1, Y = yes, blank = no

165	Accom SS 2, Y = yes, blank = no
166	Accom SS 3, Y = yes, blank = no
167	Accom InView 1, Y = yes, blank = no
168	Accom InView 2, Y = yes, blank = no
169	Accom InView 3, Y = yes, blank = no
170-250	Blank, for CTB use only

## Terra Nova Export – School/Grade Configuration

Home	SIS	Teacher Menu	EZ Query	Management	EMIS	My Account	ITC	Local	Develop	Sitemap	
<b>DASL</b>		This Screen does not use a Selected Student Data on this screen applies to the current school district					Local SD	2010-2011 (N)			
Amy Recker							[Find Students]	Find	[<<]	[>>]	[Go To] [GO]

Home » Management » Import/Export » Terra Nova Export Advanced Search | Feedback | Mgmt | Help | Version | Print

### Terra Nova Export

From this screen, you can export a Terra Nova pre-identification file

Choose the school and student statuses to include in the extract.

**School:**  
[Select school]

**Available Student Statuses** **Selected**

A - ACTIVE RES D - DELETED I - INACTIVE N - NON-RES	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>								
--	--	--	--	--	--	--	--	--	--	--

Select the grade level formatting options for the extract file.

Formatting options for the Terra Nova

**Grade Level:** [Select grade]

**Achievement Test Level:** [Select]

**Test Form:** CAT/5

**Test Id:** CAT/5 Survey

**Sort Order:** UNSORTED

**Testing Date:**

**Teacher:**  Homeroom Teacher  Homeroom Name  Period Teacher

**Student Number:**  SSID  SSN  EMIS Id

**Special Code:**

**Inview:**

**Scorable Booklet:**

**ByPass Bubbling of Name:**

**Performance Assessment:**

**Writing Assessment:**

Formatting options for the Terra Nova 2nd Edition

**AA IEP:**

**AA 504:**

**AA LEP:**

**BB RLA:**

**BB MA:**

**BB SC:**

**BB SS:**

**BB Inview:**

**BB Algebra:**

Formatting options for the Terra Nova 3rd Edition Barcode Label Layout

**Program IEP:**

**Program 504:**

**Program LEP:**

**Accom R:**

**Accom L:**

**Accom MA:**

**Accom SC:**

**Accom SS:**

**Accom InView:**

[Save] [Save & New] [Cancel]

## Filters

**School** (required) – Select the school from the district in context to include in the export file.

**Available Student Statuses** (required) – Select one or more student statuses to include in the export file.

## Formatting Options for the Terra Nova

**Grade Level** (required) – Select the grade level for this Terra Nova configuration.

**Achievement Test Level** (required) – Select the achievement test level for this Terra Nova configuration.

**Test Form** (required) – Select the test form that this School/Grade Level will be taking. Choices include CAT/5, Terra Nova 1<sup>st</sup> edition, Terra Nova 2<sup>nd</sup> edition, Terra Nova 3<sup>rd</sup> edition or Terra Nova 3<sup>rd</sup> edition Barcode Layout. Defaults to CAT/5.

**Test Id** (required) – Select the specific test ID that this School/Grade Level will be taking. There are multiple choices available. Defaults to CAT/5 Survey.

**Sort Order** (required) – Select the sort order for the export file. Options are:

- UNSORTED – Output is same sequence as input (default)
- Name within Grade within School
- Name within Teacher within School
- Name within Teacher within Grade within School
- Name within Level within Grade within School
- Name within Level within Teacher within School
- Name within Level within School

**Testing Date** (required) – Enter the date on which the test will be administered in MMDDYY format.

**Teacher** (required) – Choose Homeroom Teacher, Homeroom Name or Period Teacher for the Teacher value in the export file.

**Testing Period** (required only if Period Teacher is selected above) – Select a class period to use for extracting the Teacher value in the export file.

**Student Number** (required) – Choose SSID, SSN or EMIS Id for the Student Number value in the export file.

**Special Code** (optional) – Please see the previously outlined Terra Nova Export File Format for details on this parameter. To include the district IRN in the export file, enter the district IRN in the Special Code field.

**Inview** (optional) – Please see the previously outlined Terra Nova Export File Format for details on this parameter.

**Scorable Booklet** (optional) – Please see the previously outlined Terra Nova Export File Format for details on this parameter.

**ByPass Bubbling of Name** (optional) – Please see the previously outlined Terra Nova Export File Format for details on this parameter.

**Performance Assessment** (optional) – Please see the previously outlined Terra Nova Export File Format for details on this parameter.

**Writing Assessment** (optional) - Please see the previously outlined Terra Nova Export File Format for details on this parameter.

### **Formatting Options for the Terra Nova 2<sup>nd</sup> Edition**

Please see the previously outlined Terra Nova Export File Format for details on these parameters.

### **Formatting Options for the Terra Nova 3<sup>rd</sup> Edition Barcode Label Layout**

Please see the previously outlined Terra Nova Export File Format for details on these parameters.

**Save** – Save this Terra Nova School/Grade Configuration and return to the Terra Nova School/Grade Summary List. You will receive the following message. Please note that the School/Grade Configurations are only saved until you navigate away from the Terra Nova Export screen. You will need to enter the proper School/Grade Configurations each time you execute the Terra Nova Export.



The screenshot shows a web interface with a blue header bar containing the breadcrumb: Home » Management » Import/Export » Terra Nova Export. Below the header, the title "Terra Nova Export" is displayed in large blue font. Underneath the title, a red text message reads: "From this screen, you can export a Terra Nova pre-identification file". At the bottom of the page, a yellow box contains the green text: "The Grade Level was added successfully".

**Save & New** – Save this Terra Nova School/Grade Configuration and enter an additional Terra Nova School/Grade Configuration. Please note that the School/Grade Configurations are only saved until you navigate away from the Terra Nova Export screen. You will need to enter the proper School/Grade Configurations each time you execute the Terra Nova Export.

**Cancel** – Do not save this Terra Nova School/Grade Configuration and return to the Terra Nova School/Grade Summary List.

## SAS Pre-Identification Export

**Navigation: Home – Management – Import/Export – SAS Pre-Identification Export**

The SAS Pre-Identification Export fulfills ODE’s request for a pre-identification file for districts participating in the SAS Project. The designated contact person at each ITC will send one file to ODE containing the information for their designated districts participating in the SAS Project. The SAS Pre-Identification Export can only be processed at the ITC level. Students enrolled in multiple schools are only reported by the school at which they spend the largest percentage of time. If the reason a student is attending multiple schools is AU, ES, JV, MR or PS, then the student is reported by the attending school specified on the FS-Standing tab of the Edit Student Profile screen.

The SAS Pre-Identification Export may also be known as the EVAAS Extraction.

The SAS Pre-Identification Export returns all students in all grade levels enrolled in the current school year.

Home » Management » Import/Export » SAS Pre-Identification Export

**WARNING: You are working with a Past School Year**

### SAS Pre-Identification Export

From this screen, you can export the SAS Project pre-ID information for one or more districts

**Include Districts:**

Select All Districts  Clear All Districts

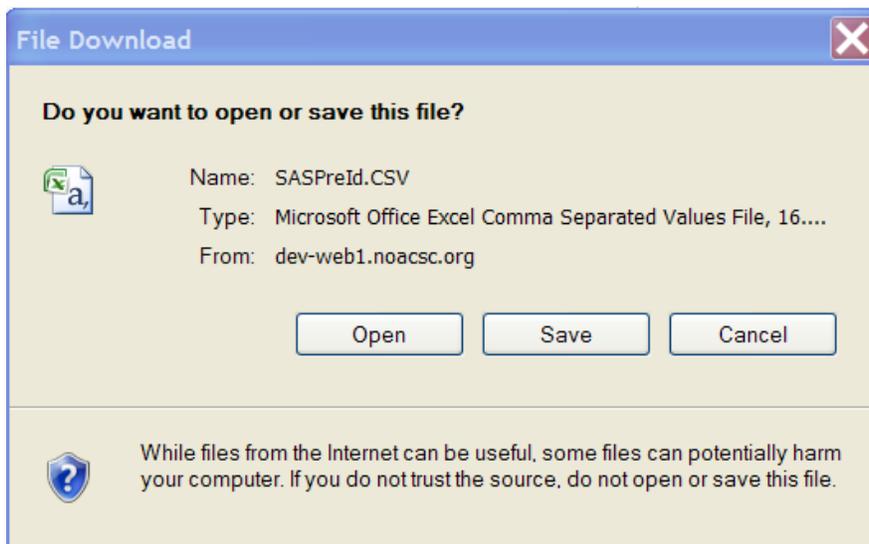
<input type="checkbox"/> AC - Allen Educ Serv Cntr	<input type="checkbox"/> FN - Findlay City SD	<input type="checkbox"/> PG - Pandora-Gilboa Local SD
<input type="checkbox"/> AD - Arcadia Local SD	<input type="checkbox"/> FR - Fort Recovery Local SD	<input type="checkbox"/> PM - Putnam Educ Serv Cntr-District Level
<input type="checkbox"/> AE - Allen East Local SD	<input type="checkbox"/> HC - Hancock Educ Serv Cntr	<input type="checkbox"/> PV - Paulding Ex Vill SD
<input type="checkbox"/> AG - Arlington Local SD	<input type="checkbox"/> JN - Jennings Local SD	<input type="checkbox"/> PW - Parkway Local SD
<input type="checkbox"/> AP - Apollo JVSD	<input type="checkbox"/> KA - Kalida Local SD	<input type="checkbox"/> QA - QUEST ACADEMY COMMUNITY ELEM SCHOOL-DIST
<input type="checkbox"/> AV - Ada Ex Vill SD	<input type="checkbox"/> LB - Liberty-Benton Local SD	<input type="checkbox"/> SH - St Henry Consolidated Local SD
<input type="checkbox"/> AW - Antwerp Local SD	<input type="checkbox"/> LC - Lima Catholic School District	<input type="checkbox"/> SM - St Marys City SD
<input type="checkbox"/> BA - Bath Local SD	<input type="checkbox"/> LD - LIMA DIGITAL ACADEMY	<input type="checkbox"/> SP - Springfield Local SD
<input type="checkbox"/> BF - Bluffton Ex Vill SD	<input type="checkbox"/> LM - Lima City SD	<input type="checkbox"/> SV - Spencerville Local SD
<input type="checkbox"/> BG - Bowling Green SD	<input type="checkbox"/> LP - Leipsic Local SD	<input type="checkbox"/> SW - Shawnee Local SD
<input type="checkbox"/> CE - Celina City SD	<input type="checkbox"/> LV - Lincolnview Local SD	<input type="checkbox"/> VB - Van Buren Local SD
<input type="checkbox"/> CG - Columbus Grove Local SD	<input type="checkbox"/> MA - Marion Local SD	<input type="checkbox"/> VL - Vanlue Local SD
<input type="checkbox"/> CN - Continental Local SD	<input type="checkbox"/> MB - McComb Local SD	<input type="checkbox"/> VM - Van Wert St. Marys
<input type="checkbox"/> CR - Cory-Rawson Local SD	<input type="checkbox"/> MC - Mercer Educ Serv Cntr	<input type="checkbox"/> VT - Vantage JVSD
<input type="checkbox"/> CV - Crestview Local SD	<input type="checkbox"/> ML - Miller City-New Cleveland Local	<input type="checkbox"/> VW - Van Wert City SD
<input type="checkbox"/> CW - Coldwater Ex Vill SD	<input type="checkbox"/> NB - North Baltimore Local SD	<input type="checkbox"/> WB - WESTERN BUCKEYE ESC (District)
<input type="checkbox"/> DL - Delphos City SD	<input type="checkbox"/> OG - Ottawa-Glandorf Local SD	<input type="checkbox"/> WC - West Central Learning Academy - District
<input type="checkbox"/> DS - Delphos St. Johns	<input type="checkbox"/> OH - Ohio Virtual Academy - District	<input type="checkbox"/> WK - Wapakoneta City SD
<input type="checkbox"/> EL - Elida Local SD	<input type="checkbox"/> OV - Ottoville Local SD	<input type="checkbox"/> WT - Wayne Trace Local SD
<input type="checkbox"/> FD - Findlay Digital Academy	<input type="checkbox"/> PE - PERRY LOCAL SD	

**Include Districts** - Choose Select All Districts to check all districts in the ITC. Choose Clear All District to uncheck all districts in the ITC.

**Districts** (required) – All districts for the ITC are listed. Check one or more individual district checkboxes to process only for those districts.

Click **Cancel** to cancel the SAS Pre-Identification Export.

Click **Export** to create a single SAS Pre-Identification Export file for all districts checked.



**Save** – Save this file to your hard drive or network drive.

The SAS Pre-Identification Export creates an Excel file including the following fields:

- Ohio District IRN (current year in context)
- School IRN (current year in context)
- Student Grade (current year in context)
- Student SSID

The following figure shows an example of the SAS Pre-Identification Export file.

	A	B	C	D
1	Ohio District IRN (2011-2012)	School IRN (2011-2012)	Student Grade (2011-2012)	Student SSID
2	43505	1081	10	AG7184259
3	43505	1081	11	AN8671225
4	43505	1081	10	AO2601895
5	43505	1081	10	AX1374287
6	43505	1081	11	BB1398506
7	43505	1081	10	BB5920251
8	43505	1081	11	BB6377509
9	43505	1081	9	BB6378630
10	43505	1081	11	BH9474506
11	43505	1081	11	BH9475969
12	43505	1081	10	BL4075112
13	43505	1081	10	CG6317309
14	43505	1081	9	CR9422663
15	43505	1081	9	CS2370459
16	43505	1099	7	CT3760451
17	43505	1099	8	CZ4748571

## WebXam Export

**Navigation: Home – Management – Import/Export – WebXam Export**

At different points in the school year, the JVS has the need to create a pre-identification file to send to the vendor containing the students who are scheduled to take an exam. Previously there was a program on the Alpha provided by SSDT that created the file based on the student subject records and staff class master record data on the Alpha. Since the Alpha is no longer being used, the program is no longer available. The WebXam Export is available in StudentInformation for this use.

**Note:** A WebXam report listing the details of the students included in the export file will be available in a future StudentInformation release.

The WebXam Export is only available for districts. You will receive the following message if you do not have a district in context.

The screenshot shows the navigation path: Home » Management » Import/Export » WebXam Export. Below the path, the title "WebXam Export" is displayed. A red error message states: "This page is not available for your Working School". Below this, a yellow box contains the text: "This page can only be accessed for Districts".

You can choose to filter using the Ad-Hoc Selection tab or the Filter Selection tab.

### Ad-Hoc Selection Tab

The screenshot shows the navigation path: Home » Management » Import/Export » WebXam Export. Below the path, the title "WebXam Export" is displayed. A red message states: "From this screen, you can export data for a specific file format." Below this, there are two tabs: "Ad-Hoc Selection" (selected) and "Filter Selection". A blue information box contains the text: "Export file will include only students in grades 09, 10, 11, 12, 13, and 23 who are in selected Ad-Hoc Membership." Below this, the "Ad-Hoc Membership:" label is followed by a dropdown menu showing "-- Select an Ad-Hoc Membership --" and a blue button with "...". Below the dropdown, there is a checkbox labeled "Public And Private". Another blue information box contains the text: "For selected students without a CTE Program of Concentration, use the following CTE Program of Concentration and Assessment Coordinator when generating the WebXam Export Record." Below this, there are two dropdown menus: "CTE Program Area:" and "CTE Program of Concentration:". Below the dropdowns, there is a "Preview" button.

**Ad-Hoc Membership** (required) – Specify an Ad-Hoc Membership Group to limit the WebXam Export to the students in this group.

Click  to create a new ad-hoc membership. You will be taken to the Ad Hoc Memberships screen where you can create a new ad-hoc membership and then return to the WebXam Export.

Check the **Public And Private** checkbox to see Ad-Hoc Memberships created by other users in your drop-down list.

**CTE Program Area** (required) – Choose a Program area for the CTE Program of Concentration element.

**CTE Program of Concentration** (required) – Choose a default element that designates the program of concentration for a CTE concentrator that will be assigned to any student that does not have a CTE Program of Concentration set on their Period N record. The list of available values in the CTE Program of Concentration dropdown is dependent on the value selected for the CTE Program Area.

**Preview** - A Preview button is available that will display all the students that will be included in the export prior to creating the export file. The students Legal Last, First and Middle Name will be used if provided for the student. Records in the Preview grid will be flagged if a Default Assessment Coordinator has not been chosen on the WebXam Assessment Coordinator Records page; however those records will still be included in the export file. Once the Preview button is clicked and Preview grid displays, an Export button is available. Clicking the Export button will create a precta.seq file in the proper file layout which can be saved.

### Filter Selection Tab

Home » Management » Import/Export » WebXam Export

## WebXam Export

From this screen, you can export data for a specific file format.

Ad-Hoc Selection | **Filter Selection**

Export file will include only students in grades 09, 10, 11, 12, 13, and 23 who are in selected filter criteria.

**Schools:**

ASHS - ASHLAND HIGH SCHOOL  
ASJH - ASHLAND MIDDLE SCHOOL  
ASED - EDISON ELEMENTARY SCHOOL  
ASLI - LINCOLN ELEMENTARY

**CTE Program of Concentration:**

A0 - Agribusiness and Production System  
A1 - Agricultural and Industrial Power Technology  
A2 - Animal Science and Management  
A3 - Biotechnology for Food Plant and Animal

**Assessment Coordinator:**

Use Default Assessment Coordinator for Program of Concentration  
 Use Teacher of Record from applicable courses

Include Tech Prep Completer Students without CTE Program of Concentration:

Preview

**Schools** (required) – All schools for the district are listed. Select one or more schools by moving the school from the left dual select box to the right dual select box.

**CTE Program of Concentration** (required) – Choose a default element that designates the program of concentration for a CTE concentrator that will be assigned to any student that does not have a CTE Program of Concentration set on their Period N record.

**Assessment Coordinator** (required) – Choose the Use Default Assessment Coordinator for Program of Concentration or Use Teacher of Record from applicable courses.

If the Use the Default Assessment Coordinator for Program of Concentration is selected, the Default Assessment Coordinator that was chosen on the WebXam Assessment Coordinator Records screen is exported as the Assessment Coordinator.

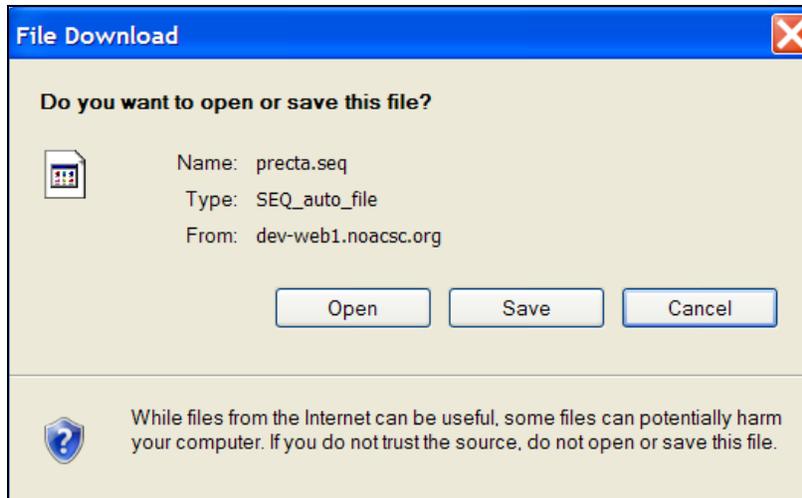
If the Use Teacher of record from applicable courses is selected, the teacher of record for the course section is exported as the Assessment Coordinator. To determine the course section from which to extract the teacher of record, StudentInformation checks for valid values in the Curriculum Code (begins with “V”) and the EMIS Subject Code fields on the EMIS Override tab for the course section, if defined; otherwise, StudentInformation checks for valid values in the Curriculum Code and EMIS Subject Code fields on the EMIS tab for the course.

**Include Tech Prep Completer Students without CTE Program of Concentration** (optional) – If this option is selected, you will be able to set the default CTE Program of Concentration. This will be used for any student that has their Tech Prep Completer flag set to ‘Y’ on their Period N record, but does not have a CTE Program of Concentration saved.

**Preview** - A Preview button is available that will display all the students that will be included in the export prior to creating the export file. The students Legal Last, First and Middle Name will be used if provided for the student. Records in the Preview grid will be flagged if a Default Assessment Coordinator has not been chosen on the WebXam Assessment Coordinator Records page or if the student is not in a course that matches the filter criteria; however those records will still be included in the export file. Once the Preview button is clicked and Preview grid displays, an Export button is available.

Student EMIS ID	Student First Name	Student Mid Name	Student Last Name	Building IRN	Grade	Summative Race	Gender	CTE Program Of Concentration	Staff ID	Assessment Coordinator
28		MARIE		028910	11	W	F	A0 - Agribusiness and Production Systems		

Clicking the Export button will create a precta.seq file in the proper file layout which can be saved.



**Save** – Save this file to your hard drive or network drive.

### Export File Format

The pre-ident file is named precta.seq with the following fixed length format:

Position	Field
1 - 5	Record number incremented by 1
6 - 15	StudentInformation SIS Student ID
16 - 44	Student Given Name
45 - 74	Middle Name
75 - 104	Last Name
105 - 110	School IRN
111 - 116	District of Residence IRN
117 - 118	Grade Level
119	Ethnicity
120	Gender
121 - 128	Filler
129 - 134	EMIS Subject Code
135 - 143	Staff Local ID
144 - 164	Teacher LastName, FirstName, MiddleInitial

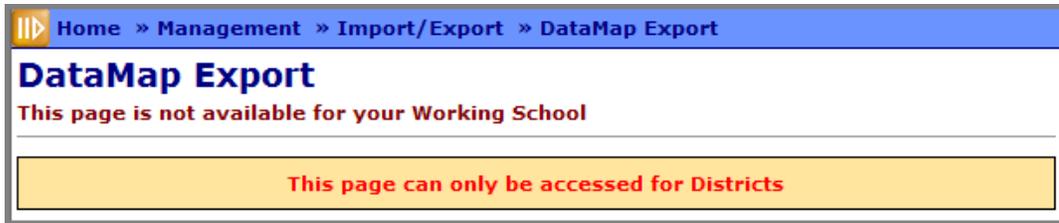
The following figure shows an example of the WebXam Export file.

File	Edit	Format	View	Help
000012	CHE	MARIE	BU	02891004937911WF A0

### DataMap Export

#### Navigation: Home – Management – Import/Export – DataMap Export

This export is specifically for use by the DataMap application. The DataMap application performs in-depth analysis of this export data and student assessment data. The DataMap Export function can be accessed only with a district in context. If you do not have a district in context, you will receive the following message.



With a district in context, the DataMap Export will create an export file for each of the export options (Class List, Staff List, Student List and KRA-L List).

Home » Management » Import/Export » DataMap Export

## DataMap Export

From this screen you can create an DataMap export file.

[Select All Exports](#)

Class List

Staff List

Student List

KRA-L List

**Schools**

BRES - BLACK RIVER ELEMENTARY SCHOOL  
 BRHS - BLACK RIVER HIGH SCHOOL  
 BRJH - BLACK RIVER MIDDLE SCHOOL

**Grade**

PS  
 KG  
 01  
 02

**School Year**

2011-2012  
 2010-2011  
 2009-2010  
 2008-2009

**Select All Exports** (optional) – Selects all four exports to be created. Individual export files are created with the names DataMap\_Class.csv, DataMap\_Staff.csv, DataMap\_Student.csv and DataMap\_Kral.csv.

**Schools** (optional) – Choose the schools to be included in or excluded from the export

**Grade** (optional) – Choose the grades to be included in or excluded from the export. This option is used by Class List, Staff List and Student List exports only.

**School Year** (optional) – Choose the school years to be included in or excluded from the export. This option is used by the KRA-L List export only.

**Export** – Execute the export process.

## **Class List**

The Class List option creates the DataMap\_Class.csv export file.

StudentInformation returns records for the DataMap\_Class.csv export file based on the value in the EMIS Subject Code field on the EMIS Override tab for the course section, if defined; otherwise, StudentInformation returns records based on the value in the EMIS Subject Code field on the EMIS tab for the course.

The DataMap\_Class.csv export includes the following columns:

- Subject Area
- School Code
- Student ID
- Student State ID
- First Name
- Last Name
- Gender
- Grade Level Code
- Home School IRN
- Home School
- Program Code
- Program Name Code
- Status
- Student Status Code
- Course Code
- Course Name
- Course Type Code
- Course Type Description
- Section Number
- Term Code
- Term Name
- Location Ex
- Teacher Code
- Calendar Period Days
- Rotation Days

- Teacher's First Name
- Teacher's Last Name

The following figure shows an example of the Class List output file.

	A	B	C	D	E	F	G	H	I	J	K
1	Subject Area	School Code	Student Id	State Student Id	First Name	Last Name	Gender	Grade Level Code	Home School Irn	Home School	Program Code
2	Math	ASED	XXXX85	QT346XXXX	JUSTIN	dXXXX	M	4			
3	Math	ASED	XXXX00	PS487XXXX	AARON	FXXXX	M	4			
4	Math	ASED	XXXX89	PS495XXXX	RYAN	HXXXX	M	4			
5	Math	ASED	XXXX68	OW272XXXX	CODY	MCCXXXX	M	4			
6	Math	ASED	XXXX07	PS519XXXX	LUKE	MCXXXX	M	4			
7	Math	ASED	XXXX35	ON121XXXX	JOSEF	MXXXX	M	5			
8	Math	ASED	XXXX02	SG648XXXX	CHRISTOPHER	SXXXX	M	4			
9	Math	ASED	XXXX34	PS559XXXX	MICHAEL	UXXXX	M	4			
10	Math	ASED	XXXX15	ON974XXXX	ANTHONY	HXXXX	M	5			
11	Math	ASED	XXXX28	ON118XXXX	SUSAN	KXXXX	F	5			

## Staff List

The Staff List option creates the DataMap\_Staff.csv export file.

The DataMap\_Staff.csv export file contains the following columns:

- Staff Name
- Staff Code
- State Staff ID
- Job Function
- Address
- Address Line 2
- City
- State
- ZipCode
- Telephone

The following figure shows an example of the Staff List output file.

	A	B	C	D	E	F	G	H	I	J
1	Staff Name	Staff Code	State Staff ID	Job Function	Address	Address Line 2	City	State	Zip Code	Telephone
2	LASTR, FIRSTR	HJRB		Teacher						
3	LASTS, FIRSTS	HTJB		Teacher						
4	LASTT, FIRSTT	DKJC		Teacher						
5	LASTU, FIRSTU	DMAC		Not Specified						
6	LASTV, FIRSTV	TLLC		Teacher						
7	LASTW, FIRSTW	DCAC		Not Specified						
8	LASTX, FIRSTX	HKXR		Teacher						
9	LASTY, FIRSTY	HRAD		Teacher						
10	LASTZ, FIRSTZ	HTJF		Teacher						

## **Student List**

The Student List option creates the DataMap\_Student.csv export file.

The DataMap\_Student.csv export file contains the following columns:

- First Name
- Middle Name
- Last Name
- First Name
- Called Name
- Student Number
- SSN
- Birth Date
- Ethnicity
- Gender
- Locker
- Locker Combination
- Status
- Special Education
- Grade
- Address
- Address 2
- City
- State
- ZipCode
- Telephone
- Primary Contact Type
- Primary Contact First Name
- Primary Contact Last Name
- State Student ID
- District Admission Date
- Disability Condition
- Free/Reduced Lunch

- Building IRN
- District IRN
- State Reporting ID

The following figure shows an example of the Student List output file.

	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name	Middle Name	Last Name	Called Name	Student Number	SSN	BirthDate	Ethnicity	Gender	Locker	Locker Combination	Status
2	Test	defect	MMM		XXXX73360		7/3/2002	W	M			A
3	Test	defect	NNN		XXXX73361		6/5/2002	W	M			A
4	test	defect	OOO		XXXX01		4/7/2004	W	M			A
5	testing	defect	PPP		XXXX08		6/27/2008	W	M			A
6	AAA	FFF	QQQ		XXXX78		4/1/2000	W	M			A
7	BBB	GGG	RRR		XXXX76		12/29/1997	W	F	1		A
8	CCC	HHH	SSS		XXXX47		7/29/1993	W	M			J
9	DDD	JJJ	TTT		XXXX81		12/25/1995	W	F	677		A
10	EEE	LLL	TTT		XXXX94		4/20/1998	W	F			A

### KRA-L List

The KRA-L List option creates the DataMap\_Kral.csv export file.

The DataMap\_Kral.csv export file contains the following columns:

- Last Name
- First Name
- Middle Name
- State ID
- Test Date
- Score
- Score Not Reported
- Accommodations
- School Year

The following figure shows an example of the KRA-L List output file.

	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	Middle Name	StudentId	TestDate	Score	Score Not Reported	Accommodations	School Year
2	Axxxxx	Axxxxx	Cnnnnn	1ac05fdb-.....	#####	18	*	NO	2009
3	Fxxxxx	Bxxxxx	Mnnnnn	84d992ad-.....	#####	24	*	NO	2009
4	Rxxxxx	Cxxxxx	Jnnnnn	c576ec12-.....	#####	29	*	NO	2009
5	Fxxxxx	Dxxxxx	Annnnn	4fb67611-.....	#####	21	*	NO	2009
6	Kxxxxx	Exxxxx	Ennnnn	e92ba0ac-.....	#####	28	*	NO	2009
7	Bxxxxx	Fxxxxx	Jnnnnn	7c2d775c-.....	#####	21	*	NO	2009
8	Mxxxxx	Gxxxxx	Jnnnnn	b65a8989-.....	#####	24	*	NO	2009
9	Wxxxxx	Hxxxxx	Jnnnnn	d5e5a7e4-.....	#####	J		**	2009
10	Cxxxxx	Ixxxxx	Annnnn	88d83684-.....	#####	27	*	NO	2009

## District Roster for Medicaid Billing Export

**Navigation: Home – Management – Import/Export – District Roster for Medicaid Billing Export**

This export creates a file that includes all students in a district that are eligible for Medicaid and only includes students enrolled at some point during the reporting week for the school year in context. This export is used when collecting and reporting Medicaid eligibility information from the previous school year.

To collect pertinent Medicaid eligibility information from the previous school year:

1. Place a school (Xxxxxxx High School for example) in context that is within the school district (ABCD – Xxxxxxx City Schools for example) for which the Medicaid billing export is being run.
2. Change the school year in context from the current school year (2011/2012 for example) to the previous school year (2010/2011 for example).
3. Select **Management > Import/Export > District Roster for Medicaid Billing**.
4. Select the school district for which the Medicaid billing export is being run in the District Roster for Medicaid Billing screen.



5. Click **Create Download File**.
6. Click **Save** in the File Download window.



7. Select the appropriate directory and click **Save** in the Save As window.

This file contains comma separated values and has a CSV file extension. The fields included in this file are:

- Student Last Name
- Student First Name (does not include middle name or initial)
- Student ID Number
- Birthday (in mm/dd/yyyy format)
- Social Security Number (without dashes or spaces between numbers)
- Address 1 (house number and street name, can include apartment number or building name)
- Address 2 (apartment number or building name)
- City
- State
- ZIP Code
- Grade Level (includes preschool, kindergarten and out-of-district)
- School Building Name
- School Building Code
- School Building IRN

The following figure shows an example of DASL\_DistrictRoster-MedicaidBilling\_Download.csv

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Student12698	LEVI	14456	#####	7.16E+08	645 S Main St		Lima	OH	45804-124	3	Elida Elem	ELEE	36350			
2	Student12786	BRANDEN	14417	#####	7.16E+08	645 S Main St		Lima	OH	45804-124	10	ELIDA HIG	ELHS	10199			
3	Student13639	KERSTEIN	13395	#####	7.13E+08	645 S Main St		Lima	OH	45804-124	11	ELIDA HIG	ELHS	10199			
4	Student13359	MAX	14015	#####	7.13E+08	645 S Main St		Lima	OH	45804-124	10	ELIDA HIG	ELHS	10199			
5	Student14116	TYLER	13015	#####	7.1E+08	645 S Main St		Lima	OH	45804-124	10	ELIDA HIG	ELHS	10199			

## Battelle For Kids Export

### Navigation: Home – Management – Import/Export – Battelle For Kids Export

The Battelle For Kids Export extracts the data for reporting to Battelle For Kids. The Battelle For Kids Export produces the following four extract files in Microsoft Excel format:

- **School Information** – Exports information about each school in the district
- **Employee Information** – Exports information about every employee in the district
- **Student Information** – Exports information about every student in the district regardless of whether they are withdrawn or actively enrolled

- **Class Roster Information** – Exports information about each course section assignment—including dropped course sections—for the students in the district for the school year. Only the latest instance of a single course section is reported for a student



## eTranscripts

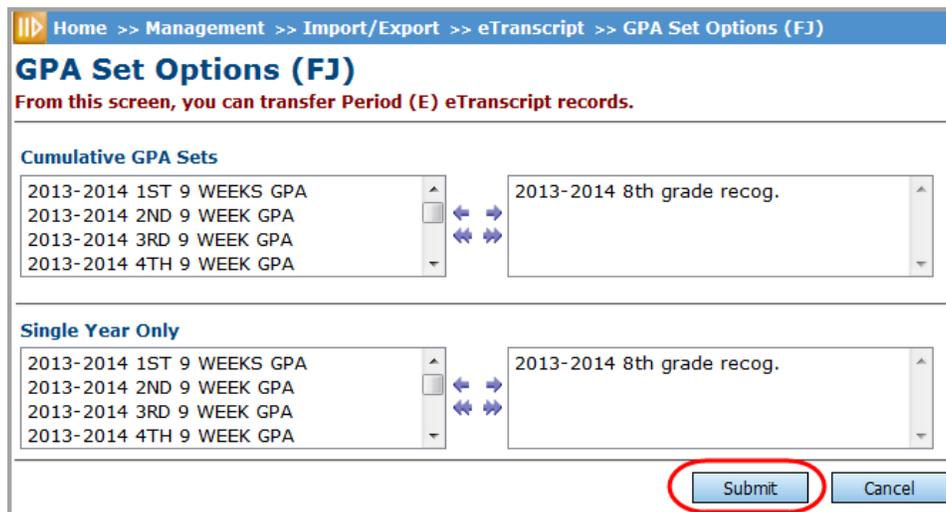
The eTranscript Transfer extracts students' high school transcript data that you can then submit electronically to U.S. colleges and universities participating in the eTranscript initiative.

When preparing to transfer eTranscript data, you can use the following screens to select options and see the data you are sending before you send it:

### GPA Set Options (FJ) Screen

**Navigation: Home – Management – Import/Export – eTranscript – GPA Set Options (FJ)**

If you plan to send Student Academic Performance Summary (FJ) records in the transfer, in the **Cumulative GPA Sets** and **Single Year Only** multi-select lists, select the cumulative and/or single year GPA sets you want to include in the FJ transfer, and click **Submit**.



## Graduation Core Summary Record (GC) Screen

**Navigation: Home – Management – Import/Export – eTranscript – Graduation Core Summary Record (GC)**

If you plan to send Student Core Summary (GC) records in the transfer, you can view each student's GC record information on this screen.

**Note:** If you have not yet created GC records, you must click **Update** to create these records to include in the eTranscript transfer. A grid displays a list of students with GC records created.

To view a student's GC record, in the row of the student, click **Details**.

EMIS Id	Student Name
<a href="#">Details</a> A10074595	JONES, MARK

The student's GC record details display. To view credit information for a particular CORE area, in the row of the area, click **Select**.

Jones, Mark

	CORE Area Code	CORE Area Count	Credits Courses In-Progress	Credit Amount Projected Courses	Credits Deficient*
<a href="#">Select</a>	CTA	1.000000	1.000000	0.000000	99.990000
<a href="#">Select</a>	ELE	1.000000	0.000000	0.000000	4.000000
<a href="#">Select</a>	ENG	2.000000	1.000000	0.000000	1.000000
<a href="#">Select</a>	FAR	1.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	FLR	2.000000	1.000000	0.000000	99.990000
<a href="#">Select</a>	HTH	0.500000	0.000000	0.000000	0.000000
<a href="#">Select</a>	MTA	1.000000	1.000000	0.000000	0.000000
<a href="#">Select</a>	MTO	2.000000	0.000000	0.000000	1.000000
<a href="#">Select</a>	SCA	0.000000	1.000000	0.000000	0.000000
<a href="#">Select</a>	SCL	2.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	SCP	1.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	SOG	0.000000	0.500000	0.000000	0.000000
<a href="#">Select</a>	SOH	1.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	SOO	1.000000	0.000000	0.000000	1.000000
	<b>N/A</b>	<b>15.5</b>	<b>5.5</b>	<b>0</b>	<b>7</b>

Values of 99.99 are not required for graduation and are not included in total.

At the bottom of the window is a listing of courses by CORE area code that the student has taken, is taking or is scheduled to take, along with their credit values.

Jones, Mark

	CORE Area Code	CORE Area Count	Credits Courses In-Progress	Credit Amount Projected Courses	Credits Deficient*
<a href="#">Select</a>	CTA	1.000000	1.000000	0.000000	99.990000
<a href="#">Select</a>	ELE	1.000000	0.000000	0.000000	4.000000
<a href="#">Select</a>	ENG	2.000000	1.000000	0.000000	1.000000
<a href="#">Select</a>	FAR	1.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	FLR	2.000000	1.000000	0.000000	99.990000
<a href="#">Select</a>	HTH	0.500000	0.000000	0.000000	0.000000
<a href="#">Select</a>	MTA	1.000000	1.000000	0.000000	0.000000
<a href="#">Select</a>	MTO	2.000000	0.000000	0.000000	1.000000
<a href="#">Select</a>	SCA	0.000000	1.000000	0.000000	0.000000
<a href="#">Select</a>	SCL	2.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	SCP	1.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	SOG	0.000000	0.500000	0.000000	0.000000
<a href="#">Select</a>	SOH	1.000000	0.000000	0.000000	0.000000
<a href="#">Select</a>	SOO	1.000000	0.000000	0.000000	1.000000
	<b>N/A</b>	<b>15.5</b>	<b>5.5</b>	<b>0</b>	<b>7</b>

Values of 99.99 are not required for graduation and are not included in total.

**CORE Area Count:**

Course Name	CORE Area Count	GradeLevelCourseTaken	Manually Entered
0002-41-SPEECH COMMUNICATIONS	0.500000	09	No
0160-71-HEALTH AND NUTRITION TOPICS	0.500000	09	No

**Credits Courses In-Progress:**

No Records for this Student

**Credit Amount Projected Courses:**

No Records for this Student

## eTranscript Transfer

Navigation: Home – Management – Import/Export – eTranscript – eTranscript Transfer

1. On the **Request Type** tab, click **Next**.

Home >> Management >> Import/Export >> eTranscript >> eTranscript Transfer

### eTranscript - Transfer Period (E)

From this screen, you can transfer Period (E) eTranscript records.

Request Type    Program Selection

Transfer eTranscript Data (E)

**Next >**    Cancel

2. On the **Program Selection** tab, select the check box beside each student and/or staff record you want to include in the transfer. Or, to include all records, select the **Select all transfers** check box.
3. In the **Transfer Type** section, select a file transfer type as follows:
  - **Flat file transfer** – Creates a flat file that you must manually load into the Data Collector

- **Flat file transfer for Data Collector** – Creates a flat file, moves the flat file into the Data Collector and stores it in a subdirectory named with your district's unique district code. (This is the most commonly selected option.)
4. Click **Submit**.

Home >> Management >> Import/Export >> eTranscript >> eTranscript Transfer

### Transfer eTranscript Data (E)

From this screen, you can transfer Period (E) eTranscript records.

**Request Type** | Program Selection

Select all transfers

- eTranscript - Staff Contact (CD)
- eTranscript - Staff Relationship (CH)
- eTranscript - Student Academic Performance Summary (FJ)
- eTranscript - Student Assessment (FA)
- eTranscript - Student Attendance Summary (FK)
- eTranscript - Student Attribute – no date (FN)
- eTranscript - Student Attributes (FD)
- eTranscript - Student Contact Address (FG)
- eTranscript - Student Contact Record (FF)
- eTranscript - Student Core Summary (GC)
- eTranscript - Student Course Academic Performance History (FH)
- eTranscript - Student Demographics (GI)
- eTranscript - Student Special Ed Graduation (FE)
- eTranscript - Student Standing (FS)

**Transfer Type:**

Flat file transfer

Flat file transfer for Data Collector

< Back | **Submit** | Cancel

A confirmation message displays, indicating the eTranscript job has been submitted.

---

# ProgressBook StudentInformation Report Builder User Guide



# ProgressBook StudentInformation Report Builder User Guide

(This document is current for ProgressBook StudentInformation v13.3.1 or later.)

© 2013 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation Report Builder User Guide* have been made.

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
13.3.1	<i>“Period G Student Core Summary Report”</i>	N/A	Removed section. (Moved to <i>ProgressBook StudentInformation EMIS Guide</i> .)
13.3.1	<i>“Period K Non-Graduate Core Summary Report”</i>	N/A	Removed section. (Moved to <i>ProgressBook StudentInformation EMIS Guide</i> .)
13.3.1	<i>“Class Master Schedule with Disabilities (R407) Report”</i>	N/A	Removed section. (Moved to <i>ProgressBook StudentInformation Scheduling Guide</i> .)
13.3.1	<i>“Outstanding Fee Balances by Account Code”</i>	N/A	Removed section. (Moved to <i>ProgressBook StudentInformation Fees Guide</i> .)
13.3.1	<i>“Report Builder Reports”</i>	1	Added text.
13.1.1	<i>“Period G Student Core Summary Report”</i>	11	Added new section about running the Period G Student Core Summary report.
13.1.1	<i>“Period K Non-Graduate Core Summary Report”</i>	13	Added new section about running the Period K Non-Graduate Core Summary report.
13.1.0	<i>“Save Reports”</i>	6	Added new section for saving a report.
13.1.0	<i>“Class Master Schedule with Disabilities (R407) Report”</i>	7	Removed substeps for saving a report and added reference to <i>“Save Reports.”</i>
13.1.0	<i>“Outstanding Fee Balances by Account Code”</i>	9	Added new section about running the Outstanding Fee Balances by Account Code report.
12.6.0	Entire Guide	N/A	Created guide.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Report Builder Reports</b>	<b>1</b>
Report Builder Screen.....	1
StudentInformation Report Viewer Screen.....	2
Update Report Headers Area.....	3
Select Required Parameters Area .....	3
Set Optional Filters Area .....	3
Add & Remove Columns Area .....	6
Save Reports .....	6
Report Builder Reports Available Features.....	7

---

This page intentionally left blank.

# Report Builder Reports

Report Builder reports are available from the Report Builder screen if they have been enabled for your district and you have the appropriate user privileges. You can select required parameters and numerous optional filters and columns for displaying desired report results. Once you have selected the desired settings, you can save the report with those settings to use in the future.

For more information about running a specific Report Builder report, refer to the guide for that module.

For information on managing Report Builder reports and users' access to the reports, as well as guidelines for creating custom reports in Microsoft SQL Server Report Builder 2.0 for use in StudentInformation, refer to the *ProgressBook Report Builder Management Guide*.

---

## Report Builder Screen

The Report Builder screen lists the reports available to you and any reports the you have previously saved. You can access the Report Builder screen using the following path.

Home > Local > Report Builder > Report Builder Reports

On the Report Builder screen, Regular Reports are those Report Builder reports available for you to run based on the school building in context and the StudentInformation role assigned to you. To hide the Regular Reports list, click Hide Regular Reports.

User Reports are those reports you have previously saved. For more information on saving a report, refer to "Save Reports." To hide the User Reports list, click Hide User Reports.

The screenshot shows the Report Builder interface. At the top, there is a breadcrumb trail: Home » Local » Report Builder. To the right of the breadcrumb are links for Advanced Search, Feedback, and Mgmt. Below the breadcrumb is the title "Report Builder" and a sub-header: "From this screen, you can manage Regular and User Reports created in ProgressBook Report Builder". There are two expandable sections: "[ Hide Regular Reports ]" and "[ Hide User Reports ]". The "Available Reports" section contains one report with the following details:

Name	Description	View Report
Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)	

The "Saved User Reports" section contains one report with the following details:

Name	Description	View Report
Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.	

Red arrows point from the labels "Available Reports" and "Saved User Reports" to their respective report lists.

### Report Builder Screen

When you click the View Report button in the row of a report, the StudentInformation Report Viewer screen displays.

Each report has a different set of parameters, available filters and columns to select or remove from the report. You can save the report with the most frequently used parameters, and it will display in the User Reports section of the Report Builder screen. You can then run the user-defined report directly from the Report Builder screen without having to complete the parameters before running the report.

Click to save selected report parameters.

The screenshot shows the StudentInformation Report Viewer interface. At the top, there is a blue header with the ProgressBook logo and 'StudentInformation' text. To the right of the header is 'Report Viewer' and a close button. Below the header is a toolbar with three buttons: 'Hide Setup', 'Save Setup As...', and 'View Report'. The 'View Report' button is highlighted with a red arrow and a red line pointing to the text above it. The main content area is divided into four sections: 'Update Report Headers' (No headings are available to set), 'Select Required Parameters' (School Year: 2012 - 2013, Course Term: 1SEM, 2SEM, ALYR, Staff Name: ALLISON , KELLY), 'Set Optional Filters' (a table with columns Field Name, Operation, and Value), and 'Add & Remove Columns' (No columns are available to add or remove). A 'View Report' button is located at the bottom center.

**StudentInformation Report Viewer Screen**

---

## StudentInformation Report Viewer Screen

All Report Builder Reports are run from StudentInformation Report Viewer screen, which displays when you click a the View Report button for a report on the Report Builder screen. Though each report has its own parameters, filters and columns, the Report Viewer screen is composed of the following four areas:

- Update Report Headers
- Select Required Parameters
- Set Optional Filters
- Add & Remove Columns

## Update Report Headers Area

Some reports display the Report Header field in the Update Report Headers area of the StudentInformation Report Viewer screen. The Report Header defines the value that displays in the report header at the top of the report. The header, by default, is set with a value. You can change the value in the Report Header field to display the text you want.

The screenshot shows a window titled "Update Report Headers". Inside, there is a label "Report Header:" followed by a text input field containing the text "Class Master Schedule with Disabilities (R407)".

Update Report Headers Area

## Select Required Parameters Area

Each report has unique parameters in the Select Required Parameters area of the StudentInformation Report Viewer screen depending on the information the report will display. Required parameters may display as text entry fields, drop-down selection lists, radio buttons or check boxes. You have to complete the Select Required Parameters area to run the report.

The screenshot shows a window titled "Select Required Parameters". It contains three drop-down menus:
 

- School Year: 2011 - 2012
- Course Term: 1SEM, 2SEM, ALYR
- Staff Name: ALLISON , KELLY, BUDD , SHERYL

Select Required Parameters Area

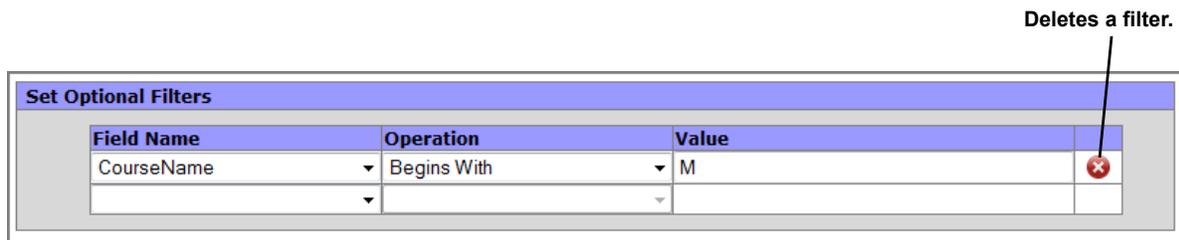
## Set Optional Filters Area

In the Set Optional Filters area of the StudentInformation Report Viewer screen, you can define filters to further narrow the report results. The Set Optional Filters area consists of the following three fields:

- **Field Name** – Lists the fields by which you can filter the report.
- **Operation** – Lists the available operations you can perform on the field. The values that appear in this list depend on the type of values the field you selected in the Field Name list contains.
- **Value** – Enables you to enter or select a value, if applicable to the selected value in the Operation list. For example, if the field you selected in the Field Name list is a date, you could type a date or select a date from the calendar that displays when you click in the Value field. This field is not available when Has A Value or Does Not Have A Value is selected in the Operation list.

You can add multiple filters; however, StudentInformation applies all of the filters you enter to the report. If you create too many filters, the report will become too specific and, therefore, the generated report may not display any records.

To delete a filter, click . The line that contains the filter is removed.



**Set Optional Filters Area**

### Operation List Options

The following table describes the available options in the Operations list.

#### Operation List Options

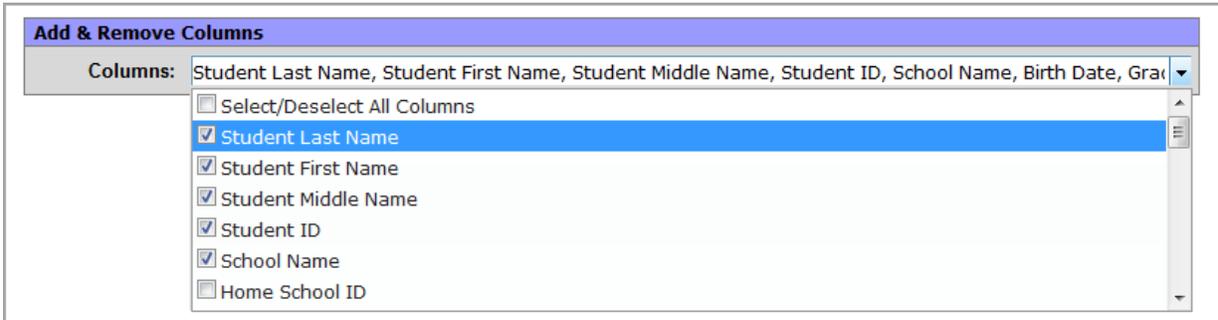
Operation	Description
Is Equal To	Returns records on the report where the values exactly match the value entered in the Value field.
Is Not Equal To	Returns records on the report where the values do not match the value entered in the Value field.
Is Before	Returns records on the report where the date is before the date entered in the Value field. This option is only available when a date field is selected in the Field Name list.
Is Before or On	Returns records on the report where the date matches or is before the date entered in the Value field. This option is only available when a date field is selected in the Field Name list.
Is After	Returns records on the report where the date is after the date you select in the Value field. This option is only available when a date field is selected in the Field Name list.
Is After or On	Returns records on the report where the date matches or is after the date entered in the Value field. This option is only available when a date field is selected in the Field Name list.
Is Greater Than	Returns records on the report where the value is greater than the value entered in the Value field. This option is only available when a numeric field is selected in the Field Name list.
Is Greater Than or Equal To	Returns records on the report where the value matches or is greater than the value entered in the Value field. This option is only available when a numeric field is selected in the Field Name list.
Is Less Than	Returns records on the report where the value is less than the value entered in the Value field. This option is only available when a numeric field is selected in the Field Name list.
Is Less Than or Equal To	Returns records on the report where the value matches or is less than the value entered in the Value field. This option is only available when a numeric field is selected in the Field Name list.
Is One Of	Returns records on the report where the value matches the value(s) selected from a list in the Value field. This option is only available for certain fields you select in the Field Name list.

### Operation List Options

Operation	Description
Begins With	Returns records on the report where the beginning part of the value matches the characters entered in the Value field. For example, if you are filtering the Class Master Schedule with Disabilities (R407) report by the CourseName field, and you type <b>geo</b> in the Value field, StudentInformation will return all records where the course name begins with "geo" such as <b>Geology</b> , <b>Geometry</b> and <b>Geography</b> . This option is only available when an alphanumeric field is selected in the Field Name list.
Does Not Begin With	Returns records on the report where the beginning part of the value does not match the characters entered in the Value field. For example, if you are filtering the Class Master Schedule with Disabilities (R407) by the CourseName field, and you type <b>geo</b> in the Value field, StudentInformation will return all records where the course name does not begin with "geo" such as Biology, Algebra and English Literature. This option is only available when an alphanumeric field is selected in the Field Name list.
Ends With	Returns records on the report where the end part of the value matches the characters entered in the Value field. For example, if you are filtering the Class Master Schedule with Disabilities (R407) report by the CourseName field, and you type <b>logy</b> , StudentInformation will return all records where the course name ends with "logy" such as Geology, Biology and Mythology. This option is only available when an alphanumeric field is selected in the Field Name list.
Does Not End With	Returns records on the report where the end part of the value does not match the characters entered in the Value field. For example, if you are filtering the Class Master Schedule with Disabilities (R407) report by the CourseName field, and you type <b>logy</b> , StudentInformation will return all records where the course name does not end with "logy" such as Chemistry, Algebra and English Literature. This option is only available when an alphanumeric field is selected in the Field Name list.
Contains	Returns records on the report where any part of the value contains the characters entered in the Value field. For example, if you are filtering the Class Master Schedule with Disabilities (R407) report by the CourseName field, and you type <b>art</b> , StudentInformation will return all records where the course name contains "art" such as Arts & Crafts, Industrial Arts and Earth Science. This option is only available when an alphanumeric field is selected in the Field Name list.
Does Not Contain	Returns records on the report where any part of the value does not contain the characters entered in the Value field. For example, if you are filtering the Class Master Schedule with Disabilities (R407) report by the CourseName field, and you type <b>art</b> , StudentInformation will return all records where the course does not contain "art" such as Biology, Mathematics and Mythology. This option is only available when an alphanumeric field is selected in the Field Name list.
Has a Value	Returns records on the report where the field selected in the Field Name list contains a value. When this operation is selected, the Value field is not editable.
Does Not Have a Value	Returns records on the report where the field selected in the Field Name list does not contain a value. When this operation is selected, the Value field is not editable.

## Add & Remove Columns Area

Some reports enable you to select the columns you want to display on the report in the Add & Remove Columns area of the StudentInformation Report Viewer screen. Fields are selected, by default, in the Columns field; however, additional fields may be available. If available, select the fields you want include, or deselect the fields you want to exclude in the Columns field.

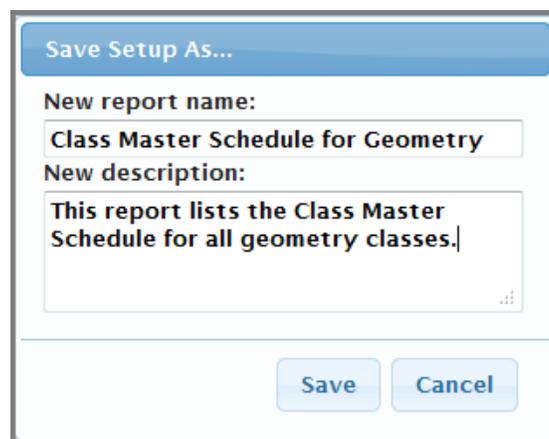


**Add & Remove Columns Area**

## Save Reports

You can save reports you frequently run to bypass completing the Update Report Headers, Select Required Parameters, Set Optional Filters and/or Add & Remove Columns sections of the Report Viewer every time you want to run a specific report. When you save a report, the saved report displays in the User Reports section of the Report Builder screen, and you can then run it directly from that link.

1. With the report you want to save displayed on the StudentInformation Report Builder screen and the parameters completed that you want to save, click **Save Setup As**.
2. Enter a unique **report name** in the New report name field.
3. Enter the **description** of the report in the New description field. The description will display in the Description field in the User Reports grid on the Report Builder screen.



**Save Setup As Screen**

4. Click **Save**.

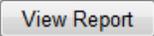
The following message displays at the bottom of the screen: "Report setup saved successfully."

The report is saved. You can now run it directly from the User Reports area on the Report Builder screen.

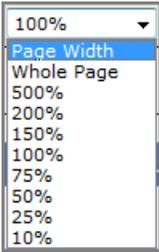
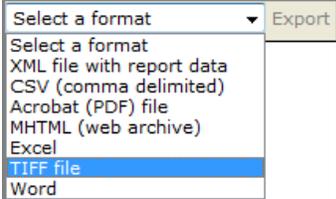
## Report Builder Reports Available Features

On the StudentInformation Report Viewer screen, once you have selected required parameters and optional filters to create customized reports, you can save the report with those settings to use in the future. Once you have generated the report, numerous features are available as shown in the following table.

**Features for Report Builder Reports**

Feature	Description
	Click this icon to view the report.
	Click this button to view the report.
	Click this icon to show report headers, required parameters, optional filters and columns.
	Click this icon to hide report headers, required parameters, optional filters and columns.
	Click this icon to save the report with the selected parameters, filters and columns; type the unique report name in the New report name field; and click Save.
	Click this icon to navigate to the next page in the report.
	Click this icon to navigate to the last page in the report.
	Click this icon to navigate to the previous page.
	Click this icon to navigate to the first page.
	Type the page number in the field, and then press Enter.

### Features for Report Builder Reports

Feature	Description
	<p>Select the desired percentage in the list that represents the display size. This feature is only available when using Internet Explorer.</p>
	<p>Type the word or phrase in the blank field next to Find, and click Find. Click Next to search for next instance of the word or phrase. This feature is only available when using Internet Explorer.</p>
	<p>Select the desired format in the list, and click Export. When prompted, click either Open or Save. If you select Open, the report opens in the software application associated with the file format you selected. You must have the appropriate application installed on your computer to read and modify the report file. The following file formats are available:</p> <ul style="list-style-type: none"> <li>• XML File with report data - Extensible Markup Language file format viewed in a Web browser with only data; there is no page formatting, headers, footers, lines or graphic images.</li> <li>• CSV - Comma-separated values file format in plain text format.</li> <li>• Acrobat (PDF) file - Portable document file format than can be viewed in Adobe Reader but not edited.</li> <li>• MHTML (Web archive) - Short for MIME HTML file format and also referred to as MHT. This is a Web page archive format used to bind images, Flash animations, Java applets, audio files, etc., together with HTML code into a single file. This file format can be viewed in a Web browser and is supported in the following browser versions: Internet Explorer 5.5 and later, Firefox 1.5 and later and Safari 3.0 and later.</li> <li>• Excel - Format provides full functionality of Microsoft Excel.</li> <li>• TIFF - Large graphic file format that may take longer to open than other file types and cannot be edited.</li> <li>• Word - Format provides full functionality of Microsoft Word.</li> </ul>
	<p>Click this icon to print the report. If prompted to install SQL Server Reporting Services 2008 ActiveX control, continue to install it on the computer, so you can print the report. The print feature is only available when using Internet Explorer. If you are not able to install the ActiveX control, proceed to export the report to an acceptable file format, and then print the report from that software application.</p>
	<p>Click this icon to sort the columns in ascending or descending order.</p>
	<p>Click this icon to close the StudentInformation Report Viewer window.</p>
	<p>Click this icon to view Help for Report Builder reports if available.</p>

---

# ProgressBook StudentInformation EMIS Guide



# **ProgressBook StudentInformation EMIS Guide**

(This document is current for v14.9.0 or later.)

© 2015 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation EMIS Guide* have been made.

Product Version	Heading	Page	Reason
14.9.0	<i>"Verify Assessment Data"</i>	133	Updated image to show newly enabled ELA, OTELA, and KRA verifies.
14.9.0	<i>"Verify EMIS Run Requests for Assessment Data"</i>	134	Updated image to show that all required transfers and verifies are now enabled.
14.9.0	<i>"Transfer Assessment Data"</i>	137	Updated image to show multiple newly enabled transfers.
14.9.0	<i>"Graduate Reporting Period (G)"</i>	163	Updated text in several areas to reflect the change in the criteria by which StudentInformation includes students in Period G reporting.
14.9.0	<i>"Verify Graduate Demographic / Attributes"</i>	164	Updated image of verify results screen to crop out obsolete FNG05E error.
14.7.0	<i>"Maintain EMIS Term Dates"</i>	16	Added section.
14.7.0	<i>"Verify Student Data"</i>	111	Updated all images of <b>Student Verify/Update - Collection (S)</b> screen to show renamed "Verify/Update - Student Attendance (ATTUPEMIS) option and reordering of options.
14.7.0	<i>"Update Student Attendance"</i>	127	Added section.
14.6.7	<i>"View Student Discipline Records"</i>	22	Added section.
14.6.7	<i>"Verify Student Data"</i>	111	Updated all images of <b>Student Verify/Update - Collection (S)</b> screen to show newly enabled "Verify - Discipline (DISCEMIS)" option.
14.6.7	<i>"Verify EMIS Run Requests for Student Data"</i>	111	Updated image of <b>EMIS Run Requests (CHECK_EMIS)</b> screen to show newly activated Discipline (DISCEMIS) verify process and District Testing (DT), Student Acceleration (FB), Student Discipline (GD) and Student Gifted Education (GG) transfer processes in the <b>Required</b> section.
14.6.7	<i>"Verify Discipline Information"</i>	115	Added section.
14.6.7	<i>"Transfer Student Data"</i>	130	Updated image of <b>Program Selection</b> tab to show newly enabled "Transfer - District Testing (DT)," "Transfer - Student Acceleration (FB)," "Transfer - Student Discipline (GD)" and "Transfer - Student Gifted Education (GG)" options.
14.6.7	<i>"Verify Assessment Data"</i>	133	Update image of <b>Verify Assessment</b> screen to show "Verify - KRA (GO)" option temporarily disabled.

---

## Change Log

Product Version	Heading	Page	Reason
14.6.7	<a href="#">“Verify EMIS Run Requests for Course Data”</a>	139	Updated image of <b>Program Selection</b> tab to show newly enabled “Verify - Reportable Courses” and “Verify - Subject Codes (INVSUBJ)” options. Also updated image of <b>EMIS Run Requests (CHECK_EMIS)</b> screen to show these newly activated verify processes in the <b>Required</b> section.
14.6.7	<a href="#">“Verify Reportable Courses”</a>	142	Added section.
14.6.7	<a href="#">“Verify Subject Codes”</a>	146	Added section.
14.6.7	<a href="#">“Verify/Update Course and Class List”</a>	148	Updated image of <b>Program Selection</b> tab to show newly enabled “Verify - Reportable Courses” and “Verify - Subject Codes (INVSUBJ)” options.
14.6.7	<a href="#">“Reporting Collection S”</a>	189	Added <b>C_STUEEPOL</b> attribute to <b>Organization General Information Record (DN)</b> table. Added <b>SOES Transportation (FP)</b> table.
14.6.7	<a href="#">“Reporting Collection C”</a>	202	Added <b>Organization General Information Record (DN)</b> table.
14.6.4	<a href="#">“Maintain District Organization Info (DN) Records”</a>	7	Updated image to show new <b>SOES only</b> section.
14.6.4	<a href="#">“Maintain Mapped Local Classroom Codes”</a>	17	Added section.
14.6.4	<a href="#">“Maintain Vocational Correlated Records”</a>	31	Added section.
14.6.4	<a href="#">“View Course Records”</a>	45	Added section.
14.6.4	<a href="#">“View a Student’s Subject Records”</a>	46	Added section.
14.6.4	<a href="#">“View Student Subject Records by Class”</a>	47	Added section.
14.6.4	<a href="#">“Add Special Education Events”</a>	50	Added note for NIEP event type.
14.6.4	<a href="#">“Transfer Student Data”</a>	130	Updated topic and image to show new “Transfer - Student Transportation (FP)” option, which is for community schools only. Added NIEP event to the table.
14.6.4	<a href="#">“Staff/Course Reporting Collection (L)”</a>	139	Added chapter.
14.6.4	<a href="#">“Calendar Reporting Collection (C)”</a>	151	Added note about updating subcalendar start and end dates.
14.6.0	“EMIS Verify Programs”	N/A	Removed chapter.
14.6.0	<a href="#">“Bulk Update Courses”</a>	90	Updated topic title, procedure and images to reflect renamed screen and addition of <b>I want to update</b> option.
14.6.0	<a href="#">“Bulk Update Manual Courses”</a>	94	Updated topic title, procedure and images to reflect renamed screen and addition of <b>I want to update</b> option and new <b>Dual Credit</b> column on the <b>View courses and update records</b> tab.
14.6.0	<a href="#">“Verify Student Data”</a>	111	Added section.
14.6.0	<a href="#">“Transfer Student Data”</a>	130	Updated procedure and image of <b>Request Type</b> tab to reflect addition of “Verify Student Data” option.

Product Version	Heading	Page	Reason
14.6.0	<a href="#">“Verify Assessment Data”</a>	133	Added section.
14.6.0	<a href="#">“Verify EMIS Run Requests for Assessment Data”</a>	134	Added section.
14.6.0	<a href="#">“Transfer Assessment Data”</a>	137	Updated procedure and image of <b>Request Type</b> tab to reflect addition of “Verify Assessment Data” option. Updated image of <b>Program Selection</b> tab to reflect newly enabled transfer options for the OGT, Preschool ASQ/SE, Preschool ECO and Preschool GGG assessments.
14.6.0	<a href="#">“Verify EMIS Run Requests for Calendar Data”</a>	158	Added section.
14.6.0	<a href="#">“Transfer Calendar Data”</a>	160	Updated procedure and image of <b>Request Type</b> tab to reflect addition of “Verify Calendar Data” option. Updated procedure and image of <b>Program Selection</b> tab to reflect addition of “Select all transfers” option.
14.6.0	<a href="#">“Verify Graduate Demographic / Attributes”</a>	164	Removed table of <b>LCE Checks</b> since the errors are self-explanatory.
14.5.0	N/A	N/A	Updated “reporting period” references for Assessment Reporting Collection A and Calendar Reporting Collection C to “reporting collection” and updated associated images.
14.5.0	<a href="#">“Overview”</a>	1	Added reference to new “Assessment Reporting Collection (A)” chapter.
14.5.0	<a href="#">“EMIS Maintenance”</a>	3	Added reference to new “Maintain Attendance Patterns” section.
14.5.0	<a href="#">“Maintain Attendance Patterns”</a>	40	Added section
14.5.0	<a href="#">“Assessment Reporting Collection (A)”</a>	133	Added chapter.
14.5.0	<a href="#">“Calendar Reporting Collection (C)”</a>	151	Added reference to new “Maintain Manual Exception Days” section.
14.5.0	<a href="#">“Maintain Manual Exception Days”</a>	151	Added section.
14.5.0	<a href="#">“Transfer Graduate Data”</a>	170	Update image of <b>Program Selection</b> tab to show renamed “Transfer - Student Assessment” option.
14.4.3	N/A	N/A	Rewrote guide for FY15 and later to reflect change in ODE reporting requirements to year-round reporting model.

This page intentionally left blank.

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>Overview</b>	<b>1</b>
<b>EMIS Maintenance</b>	<b>3</b>
Maintain District and Building Information.....	3
Maintain District Testing - Year End (DT) Records.....	3
Maintain District Organization Info (DN) Records.....	7
Maintain Building Organization Info (DN) Records.....	9
Maintain EMIS Term Dates.....	16
Maintain Mapped Local Classroom Codes.....	17
Understand Mapped Local Classroom Codes.....	18
View Mapped Local Classroom Codes.....	18
Add Mapped Local Classroom Codes.....	19
Edit Mapped Local Classroom Codes.....	20
Delete Mapped Local Classroom Codes.....	21
View Student Discipline Records.....	22
Maintain Student Missing Override Records.....	22
View Student Missing Override Records.....	22
Add Student Missing Override Records.....	23
Edit Student Missing Override Records.....	24
Delete Student Missing Override Records.....	25
Maintain Teacher History Records.....	26
Edit Teacher History Dates.....	26
Recreate Teacher History Records.....	28
Add Missing Teacher History Records.....	30
Maintain Vocational Correlated Records.....	31
View Vocational Correlated Records.....	32
Add Vocational Correlated Records.....	32
Edit Vocational Correlated Records.....	33
Delete Vocational Correlated Records.....	35
Maintain Student Acceleration (FB) Records.....	36
View FB Records.....	37
Add FB Records.....	37
Edit FB Records.....	38

---

Delete FB Records.....	39
Maintain Attendance Patterns.....	40
View Attendance Patterns.....	41
Add Attendance Patterns.....	41
Edit Attendance Patterns.....	43
View Course Records.....	45
View a Student's Subject Records.....	46
View Student Subject Records by Class.....	47
<b>Special Education</b>	<b>49</b>
Maintain Special Education Events.....	49
View Special Education Events.....	49
Add Special Education Events.....	50
Edit Special Education Events.....	53
Delete Special Education Events.....	55
Maintain Special Education Graduation Requirements.....	56
View Special Education Graduation Requirements.....	56
Add Special Education Graduation Requirements.....	57
Edit Special Education Graduation Requirements.....	59
Delete Special Education Graduation Requirements.....	60
Maintain Special Education Services.....	62
Set Up Special Education Service Defaults.....	62
Inactivate Special Education Service Defaults.....	64
View Special Education Services.....	65
Add Special Education Services.....	65
Edit Special Education Services.....	67
Delete Special Education Services.....	68
<b>Gifted Education</b>	<b>71</b>
Maintain Gifted Rules.....	71
View Gifted Rules.....	72
Add Gifted Rules.....	73
Edit Gifted Rules.....	75
Delete Gifted Rules.....	77
Mass Update Student Gifted Records.....	78
Maintain Student Gifted Records.....	82
Copy Served Values to Next School Year.....	84
Run Gifted Student Reports.....	85

Gifted Area Students Report .....	85
Gifted Student Courses Report .....	86
Gifted Student Detail Report .....	87
Gifted Students Missing Records Report .....	87
<b>Ad-Hoc Updates</b>	<b>89</b>
Bulk Update Graduation Date .....	89
Bulk Update Diploma Type .....	89
Copy Student Memberships .....	89
Bulk Update Courses .....	90
Bulk Update Manual Courses .....	94
Bulk Update Fall Initialization Blocks .....	100
<b>Highly Qualified Teacher</b>	<b>103</b>
Run Highly Qualified Teacher Report.....	103
Print Highly Qualified Teacher Worksheet .....	104
Update Highly Qualified Teacher Definitions.....	105
Add HQT Definitions .....	106
Edit HQT Definitions .....	108
Delete HQT Definitions .....	109
<b>Student Reporting Collection (S)</b>	<b>111</b>
Verify Student Data .....	111
Verify EMIS Run Requests for Student Data.....	111
Verify Discipline Information.....	115
Verify Membership Programs.....	117
Verify Special Education Services.....	119
Verify Non-reportable Students .....	121
Verify Student Demographic .....	123
Verify Student Special Education .....	125
Update Student Attendance .....	127
Transfer Student Data .....	130
<b>Assessment Reporting Collection (A)</b>	<b>133</b>
Verify Assessment Data.....	133
Verify EMIS Run Requests for Assessment Data .....	134
Transfer Assessment Data.....	137
<b>Staff/Course Reporting Collection (L)</b>	<b>139</b>

Verify Course Data.....	139
Verify EMIS Run Requests for Course Data .....	139
Verify Reportable Courses .....	142
Verify Subject Codes.....	146
Verify/Update Course and Class List .....	148
Transfer Course Data.....	149
<b>Calendar Reporting Collection (C)</b>	<b>151</b>
Maintain Manual Exception Days.....	151
View Manual Exception Days.....	151
Add Manual Exception Days.....	152
Edit Manual Exception Days .....	154
Delete Manual Exception Days.....	156
Verify EMIS Run Requests for Calendar Data .....	158
Transfer Calendar Data.....	160
<b>Graduate Reporting Period (G)</b>	<b>163</b>
Verify and Update Graduate Data.....	163
Verify Graduate Demographic / Attributes .....	164
Verify Student Ohio Graduation Test.....	166
Verify/Update Graduate CORE Summary.....	167
Transfer Graduate Data .....	170
Review Period G Process Runs.....	175
Maintain Graduate CORE Summary Records .....	177
Add Graduate CORE Summary Records .....	178
Edit Graduate CORE Summary Records.....	179
Delete Graduate CORE Summary Records .....	180
Run Period G Student Core Summary Report.....	181
<b>Power Withdraw</b>	<b>185</b>
Mass Withdraw Graduated Students .....	185
<b>Appendix A – StudentInformation Crosswalk</b>	<b>189</b>
Reporting Collection S .....	189
Reporting Collection A .....	197
Reporting Period L.....	200
Reporting Collection C .....	202
Reporting Period R .....	203
Reporting Period G .....	204

---

Non Reporting Period Specific.....	204
------------------------------------	-----

---

This page intentionally left blank.

# Overview

This guide explains how to use StudentInformation at the district level to gather student-related EMIS data and transfer the data to the Ohio Department of Education (ODE) to complete your district's EMIS reporting requirements.

**Note:** For specific details regarding your EMIS reporting requirements, refer to the EMIS Manual on ODE's website. If you have questions, please contact your ITC.

**Note:** Users at other levels in StudentInformation perform different EMIS functions. For example, at the school level, users can maintain EMIS information within each student's profile. For more information, see ProgressBook StudentInformation Student and Registration Guide. Additionally, users at the ITC level have processes available to perform data cleanups and maintain EMIS codes. For information on ITC-level EMIS functions, see ProgressBook StudentInformation ITC EMIS Guide.

Refer to the appropriate section as follows:

- To maintain EMIS records, see [“EMIS Maintenance.”](#)
- To maintain special education records, see [“Special Education.”](#)
- To maintain student gifted records, see [“Gifted Education.”](#)
- To make bulk updates of EMIS information, see [“Ad-Hoc Updates.”](#)
- For Highly Qualified Teacher reporting, see [“Highly Qualified Teacher.”](#)
- For information on Student Reporting Collection (S), see [“Student Reporting Collection \(S\).”](#)
- For information on Assessment Reporting Collection (A), see [“Assessment Reporting Collection \(A\).”](#)
- For information on Calendar Reporting Collection (C), see [“Calendar Reporting Collection \(C\).”](#)
- For information on Graduate Reporting Period (G), see [“Graduate Reporting Period \(G\).”](#)
- To mass withdraw graduated students, see [“Power Withdraw.”](#)
- For a list of EMIS elements and where they reside in StudentInformation, see [“Appendix A – StudentInformation Crosswalk.”](#)

This page intentionally left blank.

# EMIS Maintenance

You can view and maintain records in StudentInformation for EMIS reporting purposes. Refer to the appropriate section as follows:

- [“Maintain District and Building Information”](#)
- [“Maintain EMIS Term Dates”](#)
- [“Maintain Mapped Local Classroom Codes”](#)
- [“View Student Discipline Records”](#)
- [“Maintain Student Missing Override Records”](#)
- [“Maintain Teacher History Records”](#)
- [“Maintain Vocational Correlated Records”](#)
- [“Maintain Student Acceleration \(FB\) Records”](#)
- [“Maintain Attendance Patterns”](#)
- [“View Course Records”](#)
- [“View a Student's Subject Records”](#)
- [“View Student Subject Records by Class”](#)

---

## Maintain District and Building Information

To view and maintain district and building EMIS records, refer to the appropriate section as follows:

- [“Maintain District Testing - Year End \(DT\) Records”](#)
- [“Maintain District Organization Info \(DN\) Records”](#)
- [“Maintain Building Organization Info \(DN\) Records”](#)

## Maintain District Testing - Year End (DT) Records

You can maintain district testing - year end (DT) records in the following ways:

- To view DT records, see [“View DT Records.”](#)
- To add a new DT record, see [“Add DT Records.”](#)
- To edit an existing DT record, see [“Edit DT Records.”](#)
- To delete a DT record, see [“Delete DT Records.”](#)

### View DT Records

**Navigation: Home – EMIS – Maintenance – District and Building Information**

On the **District and Building Information** screen **District Testing - Year End (DT)** tab, you can review the DT record information.

Home >> EMIS >> Maintenance >> District and Building Information

**District and Building Information**  
From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Add Information

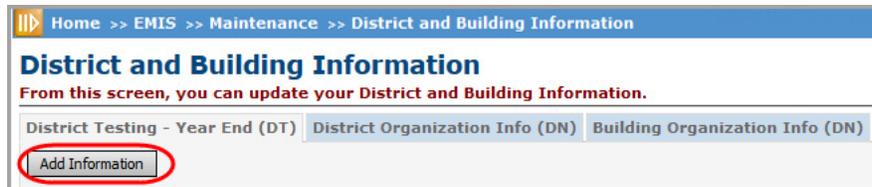
	Grade Level	Local Assessment Nbr	Nbr. of Students Assessed	Nbr. Students with Disabilities	Admin. with Accom/Mod	Nbr. with Accom/Mod	Alt. Assessment Provided	Nbr. Alt. Assessment
X	02	7	95	15	N	0	N	0

**View DT Records**

**Add DT Records**

Navigation: Home – EMIS – Maintenance – District and Building Information

1. On the **District and Building Information** screen **District Testing - Year End (DT)** tab, click **Add Information**.



**Add DT Records**

The add version of the screen displays.

2. Enter information in the appropriate fields.
3. Click **Save**.

Home >> EMIS >> Maintenance >> District and Building Information

**District and Building Information**  
From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

**Grade Level Assessed:** Second Grade

**Local Assessment Number:** 7

**Number Of Students Taking Assessment:** 95

**Assessed Students With Disabilities Headcount:** 15

**Administered with Accommodations/Modifications:** No, Accomodations were not available

**Accommodations/Modifications Headcount:** 0

**Alternate Assessments Provided:** No, Alternate Assessments Were not Available

**Alternate Assessment Headcount:** 0

Save Cancel

**District Testing - Year End (DT) Record Information**

A confirmation message displays, and the DT record displays in the list.

Home >> EMIS >> Maintenance >> District and Building Information

Advanced Search | Feedback | Mgmt | Help | Version | Print

### District and Building Information

From this screen, you can update your District and Building Information.

The District Testing - Year End DT was successfully saved

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Add Information

	Grade Level	Local Assessment Nbr	Nbr. of Students Assessed	Nbr. Students with Disabilities	Admin. with Accom/Mod	Nbr. with Accom/Mod	Alt. Assessment Provided	Nbr. Alt. Assessment
X	02	7	95	15	N	0	N	0

### DT Record Added

## Edit DT Records

Navigation: Home – EMIS – Maintenance – District and Building Information

1. On the **District and Building Information** screen **District Testing - Year End (DT)** tab, in the row of the record you want to edit, click .

Home >> EMIS >> Maintenance >> District and Building Information

Advanced Search | Feedback | Mgmt | Help | Version | Print

### District and Building Information

From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Add Information

	Grade Level	Local Assessment Nbr	Nbr. of Students Assessed	Nbr. Students with Disabilities	Admin. with Accom/Mod	Nbr. with Accom/Mod	Alt. Assessment Provided	Nbr. Alt. Assessment
X	02	7	95	15	N	0	N	0

### Edit DT Records

The edit version of the screen displays.

2. Make any desired changes, and click **Save**.

Home >> EMIS >> Maintenance >> District and Building Information

### District and Building Information

From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Grade Level Assessed: Second Grade

Local Assessment Number: 7

Number Of Students Taking Assessment: 93

Assessed Students With Disabilities Headcount: 15

Administered with Accommodations/Modifications: No, Accomodations were not available

Accommodations/Modifications Headcount: 0

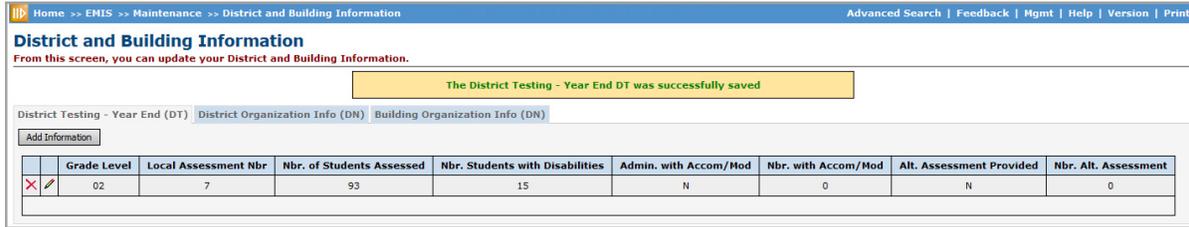
Alternate Assessments Provided: No, Alternate Assessments Were not Available

Alternate Assessment Headcount: 0

Save Cancel

### Edit DT Record

A confirmation message displays, and the edited DT record displays in the list.



**Confirmation of Edited DT Record**

**Delete DT Records**

Navigation: Home – EMIS – Maintenance – District and Building Information

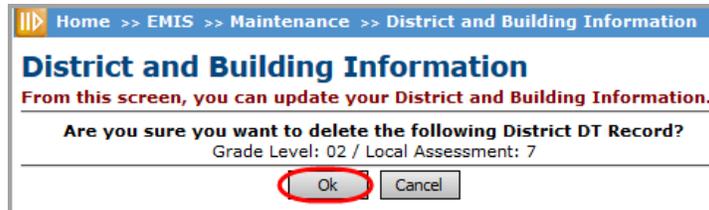
1. On the **District and Building Information** screen **District Testing - Year End (DT)** tab, in the row of the record you want to delete, click **X**.



**Delete DT Record**

A message displays, asking if you are sure you want to delete the record.

2. Click **Ok**.



**Confirm Delete**

The DT record no longer displays in the list.



**DT Record Deleted**

## Maintain District Organization Info (DN) Records

**Navigation: StudentInformation – EMIS – Maintenance – District and Building Information**

On the **District and Building Information** screen **District Organization Info (DN)** tab, you can view and edit DN record information about your district.

1. In the **Reporting ITC IRN** drop-down list, confirm or select the correct ITC.
2. Review the information on the screen.

StudentInformation > EMIS > Maintenance > District and Building Information

### District and Building Information

**From this screen, you can update your District and Building Information.**

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Information Technology Center Group

Reporting ITC IRN: 086504 - TCCSA

Student Group

Date student is required to be five years old to be admitted into kindergarten:

Count of home schooled resident students:

Amount of time a student is required to attend district to be eligible for extracurricular activities:

Count of resident and non-resident nonpublic students within district boundaries eligible for special education services but not being served by the district:

Count of resident and non-resident nonpublic students within district boundaries evaluated and determined ineligible for special education services:

Count of preschool transition conferences held by 3rd birthday, no disability suspected, no additional evaluation:

Count of preschool transition conferences held after 3rd birthday, no disability suspected, no additional evaluation:

Local Wellness Policy

Local Wellness Policy:

Preschool Special Education Agreements

District IRN	District Name	Authorized	Attribute
There are no records to display			

District Transportation

Count of qualified riders:

Miles students are transported:

Comprehensive Eye Exams

Number of students with an IIEP written within the stated timeframe:

Number of students with an IIEP written within the stated timeframe who received an eye exam within three months of beginning services:

Number of students with an IIEP written within the stated timeframe who received an eye exam more than three months after beginning services:

Number of students with an IIEP written within the stated timeframe who received an eye exam within nine months immediately prior to being identified with disabilities:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to withdrawing within three months of beginning services:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the student's hospitalization:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to parent refusal:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the lack of a conveniently available provider:

Number of students with an IIEP written within the stated timeframe who have not received an eye exam and are still within three months of beginning services:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to a reason not accounted for by another attribute name:

SOES only

Early Entrance for KG:

**District Organization Info (DN) Record Information**

## 3. Optional: Make any needed updates as follows:

- To add information, in the correct field(s) or drop-down list(s), enter or select the information.
- To add preschool special education agreement information:
  - i. In the **Preschool Special Education Agreements** section, click **Add New**.

District IRN	District Name	Authorized	Attribute
There are no records to display			

**Add Preschool Special Ed Agreements**

- ii. Enter the IRN information, using the search tool if needed.
- iii. Click **Add**.

**Add Preschool Special Ed Agreement**

- To edit information, clear it from the field or drop-down list, and then enter or select the correct information.
  - To delete information, clear it from the field or drop-down list.
4. Click **Save**.

A confirmation message displays.

**Confirmation of Edited District DN Record****Maintain Building Organization Info (DN) Records**

You can maintain building organization information (DN) records in the following ways:

- To view building DN records, see [“View Building DN Records.”](#)
- To add a new building DN record, see [“Add Building DN Records.”](#)
- To edit a building DN record, see [“Edit Building DN Records.”](#)
- To delete a building DN record, see [“Delete Building DN Records.”](#)

## View Building DN Records

Navigation: Home – EMIS – Maintenance – District and Building Information

1. On the **District and Building Information** screen **Building Organization Info (DN)** tab, in the row of the record you want to view, click  .



Home >> EMIS >> Maintenance >> District and Building Information

### District and Building Information

From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Add New

	School IRN	School Name	Feeder School
	008003	DALTON HIGH SCHOOL	066845

### View Building DN Records

The edit version of the screen displays.

2. Review the information on the screen.

**Note:** Values in the **Teacher Group** and **Calamity Group** sections should be blank as these are no longer reported from this screen. Instead they are included in calendar reporting. [See [“Calendar Reporting Collection \(C\).”](#)]

Home >> EMIS >> Maintenance >> District and Building Information Advanced Search | Feedback | Mgmt | Help | Version | Print

### District and Building Information

From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

School: 008003 - DALTON HIGH SCHOOL

Feeder School Group

Feeder School: 066845 - Dalton Intermediate Middle Sch

Teacher Group

Professional Teacher Meetings FTE:  Parent/Teacher conference FTE:

Only community schools whose contracts are in hours, not days, should report the Professional Teacher Meetings hours and the Parent/Teacher conference hours.

Professional Teacher Meetings hours:  Parent/Teacher conference hours:

Calamity Group

Calamity days taken:  Calamity days made up:

Shortened days due to weather:  Shortened days, non-weather:

First Day Next Year Group

First Day Next Year:

PE Performance Measures

Enter counts for grade bands that are needed. Enter zeroes for the remaining fields in the grade band if no values apply. If the building being reported does not have any students in a specific grade band, leave all fields for that grade band blank. Only enter a value for "Evaluation not conducted at this grade band for the building" if a building in the district includes one or more of the grades in a band, but the students are not evaluated at that building.

KG-02 Total students scoring limited:	<input type="text"/>	06-08 Total students scoring limited:	<input type="text"/>
KG-02 Total students scoring proficient:	<input type="text"/>	06-08 Total students scoring proficient:	<input type="text"/>
KG-02 Total students scoring advanced:	<input type="text"/>	06-08 Total students scoring advanced:	<input type="text"/>
KG-02 Total students not evaluated:	<input type="text"/>	06-08 Total students not evaluated:	<input type="text"/>
KG-02 Evaluation not conducted at this grade band for the building:	<input type="text"/>	06-08 Evaluation not conducted at this grade band for the building:	<input type="text"/>
03-05 Total students scoring limited:	<input type="text"/>	09-12 Total students scoring limited:	<input type="text"/>
03-05 Total students scoring proficient:	<input type="text"/>	09-12 Total students scoring proficient:	<input type="text"/>
03-05 Total students scoring advanced:	<input type="text"/>	09-12 Total students scoring advanced:	<input type="text"/>
03-05 Total students not evaluated:	<input type="text"/>	09-12 Total students not evaluated:	<input type="text"/>
03-05 Evaluation not conducted at this grade band for the building:	<input type="text"/>	09-12 Evaluation not conducted at this grade band for the building:	<input type="text"/>

SIG Time Extended Group

Increased learning time by extending the school year:

Increased learning time by extending the school day:

Increased learning time in before and after school settings:

Increased learning time on the week end:

Increased learning time in summer school:

Increased learning time in some other time frame not listed above:

Free and Reduced Price Lunch

Free Lunch count:

Reduced Lunch count:

**View Building DN Record**

**Add Building DN Records**

Navigation: Home – EMIS – Maintenance – District and Building Information

1. On the **District and Building Information** screen **Building Organization Info (DN)** tab, click **Add New**.

Home >> EMIS >> Maintenance >> District and Building Information

### District and Building Information

From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

	School IRN	School Name	Feeder School
<input checked="" type="checkbox"/> <input type="text"/>	008003	DALTON HIGH SCHOOL	066845

**Add Building DN Records**

The add version of the screen displays.

2. In the **School** drop-down list, select the building for which you want to enter DN record information.
3. Enter information in the appropriate fields.

**Note:** Values in the **Teacher Group** and **Calamity Group** sections should be blank as these are no longer reported from this screen. Instead they are included in calendar reporting. [See “[Calendar Reporting Collection \(C\).](#)”]

4. Click **Save**.

### Add Building DN Record

A confirmation message displays, and the building DN record displays in the list.

The screenshot shows the 'District and Building Information' screen. At the top, there is a navigation breadcrumb: Home >> EMIS >> Maintenance >> District and Building Information. Below this is the title 'District and Building Information' and a sub-header: 'From this screen, you can update your District and Building Information.' A yellow message box states: 'The Building Organization Info DN Record was successfully saved'. Below the message are three tabs: 'District Testing - Year End (DT)', 'District Organization Info (DN)', and 'Building Organization Info (DN)'. An 'Add New' button is visible. A table displays the following records:

		School IRN	School Name	Feeder School
X		066845	DALTON INTERMEDIATE	007997
X		008003	DALTON HIGH SCHOOL	066845

### Building DN Record Added

## Edit Building DN Records

Navigation: Home – EMIS – Maintenance – District and Building Information

1. On the **District and Building Information** screen **Building Organization Info (DN)** tab, in the row of the record you want to edit, click .

The screenshot shows the same 'District and Building Information' screen as above. The 'Building Organization Info (DN)' tab is selected. The 'Add New' button is visible. The table displays the same records as in the previous screenshot. The edit icon (pencil) in the first row is highlighted with a red circle, indicating it is the record to be edited.

		School IRN	School Name	Feeder School
X		066845	DALTON INTERMEDIATE	007997
X		008003	DALTON HIGH SCHOOL	066845

### Edit Building DN Records

The edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** Values in the **Teacher Group** and **Calamity Group** sections should be blank as these are no longer reported from this screen. Instead they are included in calendar reporting. [See [“Calendar Reporting Collection \(C\).”](#)]

Home >> EMIS >> Maintenance >> District and Building Information Advanced Search | Feedback | Mgmt | Help | Version | Print

### District and Building Information

**From this screen, you can update your District and Building Information.**

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

School: 066845 - DALTON INTERMEDIATE

Feeder School Group

Feeder School: 018978 - Kidron Elementary School

Teacher Group

Professional Teacher Meetings FTE:  Parent/Teacher conference FTE:

Only community schools whose contracts are in hours, not days, should report the Professional Teacher Meetings hours and the Parent/Teacher conference hours.

Professional Teacher Meetings hours:  Parent/Teacher conference hours:

Calamity Group

Calamity days taken:  Calamity days made up:

Shortened days due to weather:  Shortened days, non-weather:

First Day Next Year Group

First Day Next Year:

PE Performance Measures

Enter counts for grade bands that are needed. Enter zeroes for the remaining fields in the grade band if no values apply. If the building being reported does not have any students in a specific grade band, leave all fields for that grade band blank. Only enter a value for "Evaluation not conducted at this grade band for the building" if a building in the district includes one or more of the grades in a band, but the students are not evaluated at that building.

KG-02 Total students scoring limited:	<input type="text"/>	06-08 Total students scoring limited:	<input type="text"/>
KG-02 Total students scoring proficient:	<input type="text"/>	06-08 Total students scoring proficient:	<input type="text"/>
KG-02 Total students scoring advanced:	<input type="text"/>	06-08 Total students scoring advanced:	<input type="text"/>
KG-02 Total students not evaluated:	<input type="text"/>	06-08 Total students not evaluated:	<input type="text"/>
KG-02 Evaluation not conducted at this grade band for the building:	<input type="text"/>	06-08 Evaluation not conducted at this grade band for the building:	<input type="text"/>

03-05 Total students scoring limited:	<input type="text"/>	09-12 Total students scoring limited:	<input type="text"/>
03-05 Total students scoring proficient:	<input type="text"/>	09-12 Total students scoring proficient:	<input type="text"/>
03-05 Total students scoring advanced:	<input type="text"/>	09-12 Total students scoring advanced:	<input type="text"/>
03-05 Total students not evaluated:	<input type="text"/>	09-12 Total students not evaluated:	<input type="text"/>
03-05 Evaluation not conducted at this grade band for the building:	<input type="text"/>	09-12 Evaluation not conducted at this grade band for the building:	<input type="text"/>

SIG Time Extended Group

Increased learning time by extending the school year:

Increased learning time by extending the school day:

Increased learning time in before and after school settings:

Increased learning time on the week end:

Increased learning time in summer school:

Increased learning time in some other time frame not listed above:

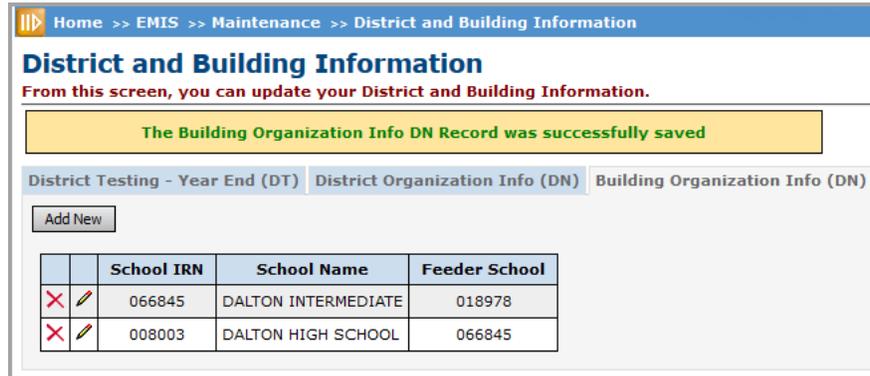
Free and Reduced Price Lunch

Free Lunch count:

Reduced Lunch count:

### Edit Building DN Record

A confirmation message displays, and the edited building DN record displays in the list.

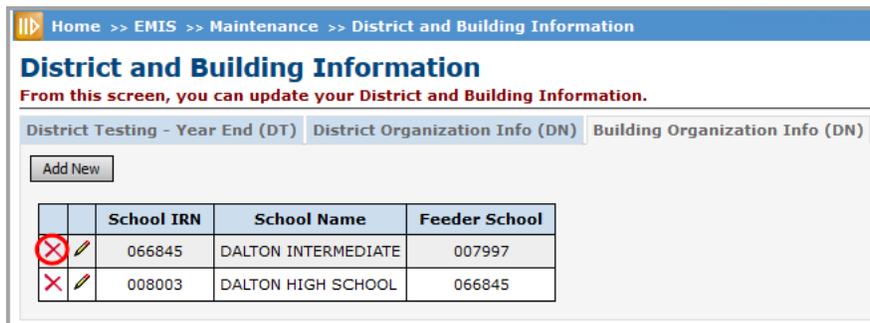


Confirmation of Edited Building DN Record

## Delete Building DN Records

Navigation: Home – EMIS – Maintenance – District and Building Information

1. On the **District and Building Information** screen **Building Organization Info (DN)** tab, in the row of the record you want to delete, click **X**.



Delete Building DN Record

A message displays, asking if you are sure you want to delete the record.

2. Click **Ok**.



Confirm Delete

The building DN record no longer displays in the list.

Home >> EMIS >> Maintenance >> District and Building Information

### District and Building Information

From this screen, you can update your District and Building Information.

District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Add New

	School IRN	School Name	Feeder School
 	008003	DALTON HIGH SCHOOL	066845

**Building DN Record Deleted**

## Maintain EMIS Term Dates

### Navigation: StudentInformation – EMIS – Maintenance – EMIS Term Dates

You can define alternative start and stop dates for course terms that are used in the verify and update course and class list (CTRMEMIS) processes.

1. With a district in context on the **EMIS Term Dates** screen, in the row of the school/course term whose date(s) you want to change, click  .

StudentInformation > EMIS > Maintenance > EMIS Term Dates

### EMIS Term Dates

From this screen, term start dates and term stop dates can be altered for EMIS reporting purposes.

	School Name	Term Code	Term Name	Start Date	Stop Date
	ASHLAND HIGH SCHOOL	1SEM	1st Sem Only	8/19/2014	1/9/2015
	ASHLAND HIGH SCHOOL	2SEM	2nd Sem Only	1/12/2015	5/28/2015
	ASHLAND HIGH SCHOOL	ALYR	All Year	7/1/2014	6/30/2015
	ASHLAND MIDDLE SCHOOL	1SEM	1st Sem Only	8/19/2014	1/9/2015
	ASHLAND MIDDLE SCHOOL	2SEM	2nd Sem Only	1/12/2015	5/28/2015
	ASHLAND MIDDLE SCHOOL	9WK1	1st 9 week only	8/19/2014	10/17/2014
	ASHLAND MIDDLE SCHOOL	9WK2	2nd 9 week only	10/20/2014	1/9/2015
	ASHLAND MIDDLE SCHOOL	9WK3	3rd 9 week only	1/12/2015	3/20/2015
	ASHLAND MIDDLE SCHOOL	9WK4	4th 9 week only	3/23/2015	5/28/2015
	ASHLAND MIDDLE SCHOOL	ALYR	All Year	8/19/2014	5/28/2015
	Edison Primary School North	ALYR	All Year	8/19/2014	5/28/2015
	Montgomery Intermediate School East	ALYR	All Year	8/19/2014	5/28/2015
	Osborn Intermediate School Central	ALYR	All Year	8/19/2014	5/28/2015
	Taft Primary School South	ALYR	All Year	8/19/2014	5/28/2015

**Edit EMIS Term Dates**

The **Start Date** and **Stop Date** fields for the term become enabled for editing.

2. In the **Start Date** and/or **Stop Date** fields, enter or select alternate term dates for EMIS reporting purposes.
3. Click **Update**.

StudentInformation > EMIS > Maintenance > EMIS Term Dates

### EMIS Term Dates

From this screen, term start dates and term stop dates can be altered for EMIS reporting purposes.

	School Name	Term Code	Term Name	Start Date	Stop Date
<a href="#">Update</a> <a href="#">Cancel</a>	ASHLAND HIGH SCHOOL	1SEM	1st Sem Only	08/04/2014	01/02/2015

#### Update EMIS Term Dates

A confirmation message displays, and the dates are updated.

**Note:** The verify and update course and class list (CTRMEMIS) processes will now use these alternate dates instead of the course term dates.

StudentInformation > EMIS > Maintenance > EMIS Term Dates

### EMIS Term Dates

From this screen, term start dates and term stop dates can be altered for EMIS reporting purposes.

Your changes were successfully saved

	School Name	Term Code	Term Name	Start Date	Stop Date
	ASHLAND HIGH SCHOOL	1SEM	1st Sem Only	8/4/2014	1/2/2015

#### EMIS Term Dates Updated

## Maintain Mapped Local Classroom Codes

Mapped local classroom codes are records that map (that is, combine) students from two or more classes to look like a single class for EMIS reporting purposes.

**Note:** The CTRMEMIS update process creates these records. If no records exist, run CTRMEMIS in update mode, and then try again. (See [“Verify/Update Course and Class List.”](#))

To maintain mapped local classroom codes, refer to the appropriate topic:

- [“Understand Mapped Local Classroom Codes”](#)
- [“View Mapped Local Classroom Codes”](#)
- [“Add Mapped Local Classroom Codes”](#)
- [“Edit Mapped Local Classroom Codes”](#)
- [“Delete Mapped Local Classroom Codes”](#)

## Understand Mapped Local Classroom Codes

When you map (or combine/merge) students from one class to another class, the students are then reported to EMIS as part of the new classroom. The rules for mapping local classroom codes are as follows:

- Both classes must have the same building IRN.
- Both classes must have the same values in the following elements:
  - Subject Code
  - Curriculum Element
  - Employee ID
  - Delivery Method
  - Educational Option
  - Student Population
- The mapping process is only for classes with a semester code of “1,” “2” or “3.”

You can map classes together in the following scenarios. (Based on the semester code of both classes, the mapping process automatically determines the type of mapping to use.)

- Mapping two classes from the same semester that should be reported as one class (For example, juniors and seniors scheduled separately for a class that is truly one class taught by the same teacher in the same period)
- Mapping first and second semester classes together (For example, a year-long class scheduled in two parts that is reported as an all year class)
- Combination (For example, combining two first semester classes into one class, two second semester classes into another class and then mapping the combined classes into a single all year class)

**Note:** A class can only appear once as a “from” class but can appear multiple times as a “to” class, and you can map a class that you have already mapped into to another class.

## View Mapped Local Classroom Codes

**Navigation:** StudentInformation – EMIS – Maintenance – Mapped Local Classroom Codes

On the **Mapped Local Classroom Codes** screen, you can review the classroom codes that are mapped together.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

Add Mapped Local Classroom Code

	Mapped From Classroom Code ^	Mapped To Classroom Code	Message
X	BRHS-1120-05 (Not Found)	BRHS-1120-03 (Not Found)	<ul style="list-style-type: none"> <li>▪ The Mapped From Classroom Code does not exist in the current reporting period</li> <li>▪ The Mapped To Classroom Code does not exist in the current reporting period</li> </ul>
X	BRHS-925-01 (260101)	BRHS-910-14 (260101)	

### View Mapped Local Classroom Codes

## Add Mapped Local Classroom Codes

Navigation: StudentInformation – EMIS – Maintenance – Mapped Local Classroom Codes

1. On the **Mapped Local Classroom Codes** screen, click **Add Mapped Local Classroom Code**.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

**Add Mapped Local Classroom Code**

	Mapped From Classroom Code ^	Mapped To Classroom Code	Message
✗	BRHS-1120-05 (Not Found)	BRHS-1120-03 (Not Found)	<ul style="list-style-type: none"> <li>The Mapped From Classroom Code does not exist in the current reporting period</li> <li>The Mapped To Classroom Code does not exist in the current reporting period</li> </ul>
✗	BRHS-925-01 (260101)	BRHS-910-14 (260101)	

### Add Mapped Local Classroom Code Records

The add version of the screen displays.

2. In the **Mapped From Classroom Code** drop-down list, select the class from which you want to merge students with another class for EMIS reporting.
3. In the **Mapped To Classroom Code** drop-down list, select the class to which you want to merge students.
4. Click **Save**. Or, to continue mapping classroom codes, click **Save and New**.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

Mapped From Classroom Code: BRHS-1002-04 (101900) ⚡

Mapped To Classroom Code: BRHS-1002-01 (101900) ⚡

### Add Mapped Local Classroom Code Record

A confirmation message displays, and the mapped local classroom code record displays in the list. The students that were previously reported in the **Mapped From Classroom** are now moved to the **Mapped To Classroom** and reported in that classroom.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

The mapping was saved successfully

**Add Mapped Local Classroom Code**

	Mapped From Classroom Code ^	Mapped To Classroom Code	Message
✗	BRHS-1000-04 (100200)	BRHS-1000-01 (100200)	
✗	BRHS-1120-05 (Not Found)	BRHS-1120-03 (Not Found)	<ul style="list-style-type: none"> <li>The Mapped From Classroom Code does not exist in the current reporting period</li> <li>The Mapped To Classroom Code does not exist in the current reporting period</li> </ul>
✗	BRHS-925-01 (260101)	BRHS-910-14 (260101)	

### Mapped Local Classroom Code Record Added

## Edit Mapped Local Classroom Codes

Navigation: StudentInformation – EMIS – Maintenance – Mapped Local Classroom Codes

1. On the **Mapped Local Classroom Codes** screen, in the row of the record you want to edit, click .

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

	Mapped From Classroom Code ^	Mapped To Classroom Code	Message
 	BRHS-1000-04 (100200)	BRHS-1000-01 (100200)	
 	BRHS-1120-05 (Not Found)	BRHS-1120-03 (Not Found)	<ul style="list-style-type: none"> <li>▪ The Mapped From Classroom Code does not exist in the current reporting period</li> <li>▪ The Mapped To Classroom Code does not exist in the current reporting period</li> </ul>
 	BRHS-925-01 (260101)	BRHS-910-14 (260101)	

### Edit Mapped Local Classroom Code Records

The edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Mapped Local Classroom Codes.”](#)

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

Mapped From Classroom Code:  

Mapped To Classroom Code:  

### Edit Mapped Local Classroom Code Record

A confirmation message displays, and the edited mapped local classroom code record displays in the list.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

The mapping was saved successfully

	Mapped From Classroom Code ^	Mapped To Classroom Code	Message
 	BRHS-1000-04 (100200)	BRHS-1000-01 (100200)	
 	BRHS-806-05 (091050)	BRHS-806-03 (091050)	
 	BRHS-925-01 (260101)	BRHS-910-14 (260101)	

### Confirmation of Edited Mapped Local Classroom Code Record

## Delete Mapped Local Classroom Codes

Navigation: StudentInformation – EMIS – Maintenance – Mapped Local Classroom Codes

1. On the **Mapped Local Classroom Codes** screen, in the row of the record you want to delete, click **X**.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

Add Mapped Local Classroom Code

	Mapped From Classroom Code ^	Mapped To Classroom Code	Message
	BRHS-1000-04 (100200)	BRHS-1000-01 (100200)	
	BRHS-806-05 (091050)	BRHS-806-03 (091050)	
	BRHS-925-01 (260101)	BRHS-910-14 (260101)	

### Delete Mapped Local Classroom Code Record

A message displays, asking if you are sure you want to delete the record.

2. Click **Ok**.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

Are you sure you want to delete the following mapping?  
BRHS-806-05 (091050) to BRHS-806-03 (091050)

### Confirm Delete

The mapped local classroom code record no longer displays in the list.

StudentInformation > EMIS > Maintenance > Mapped Local Classroom Codes

### Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

The selected mapping was successfully deleted

Add Mapped Local Classroom Code

	Mapped From Classroom Code ^	Mapped To Classroom Code	Message
	BRHS-1000-04 (100200)	BRHS-1000-01 (100200)	
	BRHS-925-01 (260101)	BRHS-910-14 (260101)	

### Mapped Local Classroom Code Record Deleted

## View Student Discipline Records

**Navigation: StudentInformation – EMIS – Maintenance – Student Discipline Record**

With a student in context on the **Student Discipline Record** screen, you can review the student's discipline records.

StudentInformation > EMIS > Maintenance > Student Discipline Record

From this screen you can view data pertaining to student discipline records.

Date ^	Building IRN	Discipline Type	Discipline Reason(s)	Discipline Days	Modified	Alt Program	Incident Building IRN
Nov 26, 2014	001081	2	07	0.00	0	0	001081
Nov 26, 2014	001081	1	18	0.00	0	0	001081
Nov 26, 2014	001081	1	21	0.00	0	0	001081
Nov 26, 2014	001081	1	09	0.00	0	0	001081

### View Student Discipline Records

## Maintain Student Missing Override Records

Student missing override records (FC records) report students who were withdrawn in a prior year but not reported as withdrawn. To view and maintain student missing override records, refer to the appropriate section as follows:

- To view student missing override records, see [“View Student Missing Override Records.”](#)
- To add a new student missing override record, see [“Add Student Missing Override Records.”](#)
- To edit an existing student missing override record, see [“Edit Student Missing Override Records.”](#)
- To delete a student missing override record, see [“Delete Student Missing Override Records.”](#)

## View Student Missing Override Records

**Navigation: Home – EMIS – Maintenance – Student Missing Override Record**

With the district in context, on the **Student Missing Override Record** screen, you can review the missing override records entered in the school year in context.

Home » EMIS » Maintenance » Student Missing Override Record

**Student Missing Override Record**

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

Add Student Missing Override Record

	SSID	Student Last Name	Student First Name	Withdrawal Date	Withdrawal Reason	Comment
✗	NM824507	Kenobi	Ben	Oct 24, 2012	41 - Transferred to Another Ohio School District	
✗	XL1021230	Willis	Connie	Jan 04, 2013	74 - Moved	

### View Student Missing Override Records

## Add Student Missing Override Records

Navigation: Home – EMIS – Maintenance – Student Missing Override Record

**Note:** This screen does not validate against records in StudentInformation; you can enter records for students who are not enrolled in the current school year.

1. With the district in context, on the **Student Missing Override Record** screen, click **Add Student Missing Override Record**.

Home » EMIS » Maintenance » Student Missing Override Record

### Student Missing Override Record

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

**Add Student Missing Override Record**

	SSID	Student Last Name	Student First Name	Withdrawal Date	Withdrawal Reason	Comment
✖	NM824507	Kenobi	Ben	Oct 24, 2012	41 - Transferred to Another Ohio School District	
✖	XL1021230	Willis	Connie	Jan 04, 2013	74 - Moved	

### Add Student Missing Override Records

The add-edit version of the screen displays.

Home » EMIS » Maintenance » Student Missing Override Record

### Student Missing Override Record

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

SSID: GX201923

Student Last Name: Joy

Student First Name: Laura

Withdrawal Date: 11/1/2012

Withdrawal Reason: 41 - Transferred to Another Ohio School District

Comment:

Save Save And New Cancel

### Add Student Missing Override Record

2. In the **SSID** field, enter the student's State Student ID.
3. Optional: In the **Student Last Name** field, enter the student's last name.
4. Optional: In the **Student First Name** field, enter the student's first name.
5. In the **Withdrawal Date** field, enter or select the date the student withdrew from the district.
6. In the **Withdrawal Reason** drop-down list, select the reason the student withdrew from the district.
7. Optional: If you want to enter any comments about the withdrawal, enter them in the **Comment** field.
8. Click **Save**. Or, to continue adding student missing override records, click **Save and New**.

A confirmation message displays, and the new student missing override record displays in the list.

Home >> EMIS >> Maintenance >> Student Missing Override Record

### Student Missing Override Record

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

The student missing override was successfully saved

Add Student Missing Override Record

		SSID	Student Last Name	Student First Name	Withdrawal Date	Withdrawal Reason	Comment
✖	✎	GX201923	Joy	Laura	Nov 01, 2013	41 - Transferred to another Ohio School District	
✖	✎	XL1021230	Willis	Connie	Jan 04, 2014	74 - Moved	

### Confirmation of Added Student Missing Override Record

## Edit Student Missing Override Records

Navigation: Home – EMIS – Maintenance – Student Missing Override Record

1. With the district in context, on the **Student Missing Override Record** screen, in the row of the record you want to edit, click .

Home >> EMIS >> Maintenance >> Student Missing Override Record

### Student Missing Override Record

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

Add Student Missing Override Record

		SSID	Student Last Name	Student First Name	Withdrawal Date	Withdrawal Reason	Comment
✖	✎	GX201923	Joy	Laura	Nov 01, 2013	41 - Transferred to another Ohio School District	
✖	✎	XL1021230	Willis	Connie	Jan 04, 2014	74 - Moved	

### Edit Student Missing Override Records

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Student Missing Override Records.”](#)

Home >> EMIS >> Maintenance >> Student Missing Override Record

### Student Missing Override Record

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

SSID:

Student Last Name:

Student First Name:

Withdrawal Date:

Withdrawal Reason:

Comment:

### Edit Student Missing Override Record

A confirmation message displays, and the edited student missing override record displays in the list.

Home >> EMIS >> Maintenance >> Student Missing Override Record

### Student Missing Override Record

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

The student missing override was successfully saved

		SSID	Student Last Name	Student First Name	Withdrawal Date	Withdrawal Reason	Comment
<input type="checkbox"/>	<input type="checkbox"/>	GX201923	Joy	Laura	Nov 01, 2013	42 - Transferred to a private school	
<input type="checkbox"/>	<input type="checkbox"/>	XL1021230	Willis	Connie	Jan 04, 2014	74 - Moved	

### Confirmation of Edited Student Missing Override Record

## Delete Student Missing Override Records

Navigation: Home – EMIS – Maintenance – Student Missing Override Record

1. With the district in context, on the **Student Missing Override Record** screen, in the row of the record you want to delete, click **X**.

Home >> EMIS >> Maintenance >> Student Missing Override Record

### Student Missing Override Record

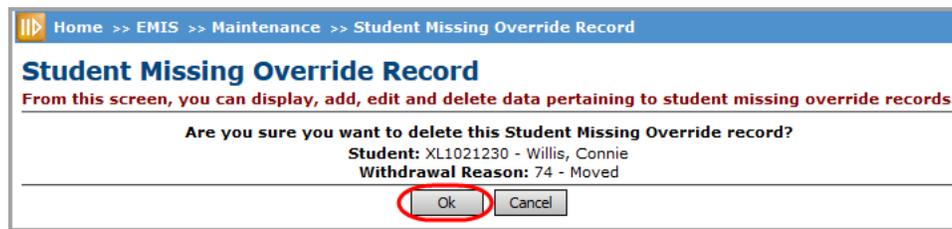
From this screen, you can display, add, edit and delete data pertaining to student missing override records.

		SSID	Student Last Name	Student First Name	Withdrawal Date	Withdrawal Reason	Comment
<input type="checkbox"/>	<input type="checkbox"/>	GX201923	Joy	Laura	Nov 01, 2013	42 - Transferred to a private school	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	XL1021230	Willis	Connie	Jan 04, 2014	74 - Moved	

### Delete Student Missing Override Record

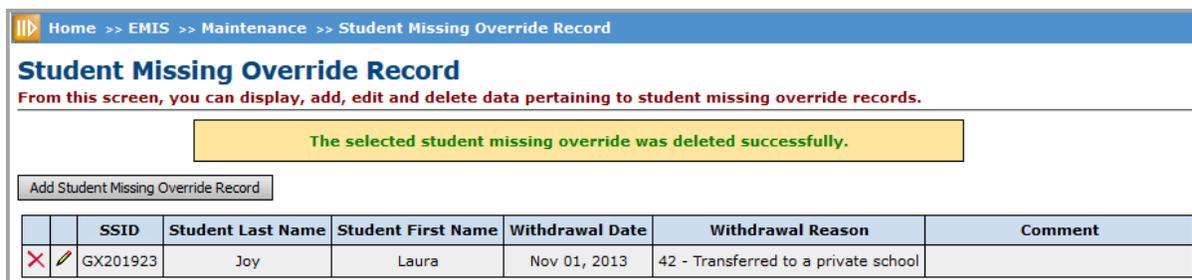
A message displays, asking if you are sure you want to delete the record.

2. Click **Ok**.



### Confirm Delete

A confirmation message displays, and the student missing override record no longer displays in the list.



### Confirmation of Deleted Student Missing Override Record

## Maintain Teacher History Records

Navigation: Home – EMIS – Maintenance – Teacher History Maintenance

You can mass update the teacher history records for course sections in the following ways:

- To change the start or stop date of teacher history records, see [“Edit Teacher History Dates.”](#)
- To delete existing teacher history records and create new records, see [“Recreate Teacher History Records.”](#)
- To add teacher history records for course sections that are missing them, see [“Add Missing Teacher History Records.”](#)

### Edit Teacher History Dates

Navigation: Home – EMIS – Maintenance – Teacher History Maintenance

You can change the start and stop dates of the teacher history records for course sections.

1. On the **Teacher History Maintenance** screen **Start and Stop Dates** tab, select the school(s) of the course(s) whose teacher history you want to edit. Or to select all schools, select the check box in the header.

**Note:** If you have a building in context, the building is selected automatically.

2. Enter or select new teacher history start and/or stop date(s) on course section records in the selected school(s) as follows:
  - To change the start date:
    - i. In the **Start Date to Change** field, enter or select the date currently on record as the start date.
    - ii. In the **New Start Date** field, enter or select the new start date.
  - To change the stop date:
    - i. In the **Stop Date to Change** field, enter or select the date currently on record as the stop date.
    - ii. In the **New Stop Date** field, enter or select the new stop date.
3. Click **Submit**.

Click to select all schools.

Home >> EMIS >> Maintenance >> Teacher History Maintenance

### Teacher History Maintenance

From this screen, you can adjust teacher history records.

Start and Stop Dates
Wipe And New
Add Missing

	Building Name	Last Updated Date	Last User
<input type="checkbox"/>	001081 - ASHLAND HIGH SCHOOL		
<input checked="" type="checkbox"/>	001099 - ASHLAND MIDDLE SCHOOL		
<input type="checkbox"/>	010025 - Edison Primary School North		
<input type="checkbox"/>	025395 - Montgomery Intermediate School East		
<input type="checkbox"/>	036806 - Osborn Intermediate School Central		
<input type="checkbox"/>	028811 - Taft Primary School South		

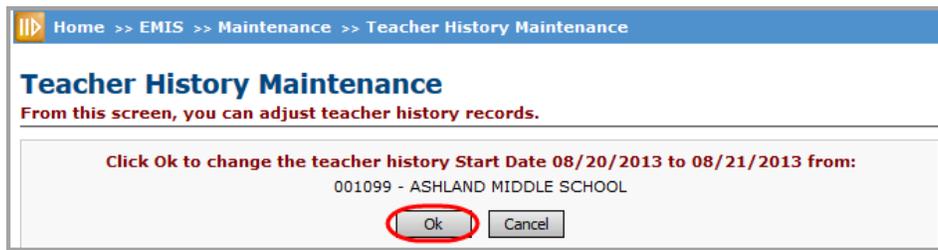
**Start Date to Change:**  
     
 **New Start Date:**

**Stop Date to Change:**  
     
 **New Stop Date:**

### Edit Teacher History Dates

A message displays, asking if you are sure you want to edit the dates.

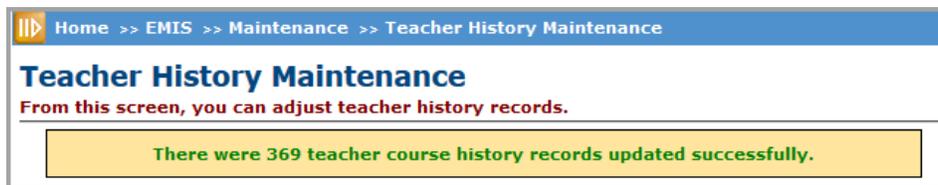
4. Click **Ok**.



#### Confirm Edit

A confirmation message displays the number of updated records.

**Note:** This process updates the **Start Date** and/or **End Date** fields on the **Teacher History** tab of the course section records.



#### Confirmation of Edited Teacher History Dates

## Recreate Teacher History Records

**Navigation:** Home – EMIS – Maintenance – Teacher History Maintenance

If needed, you can delete all existing course section teacher history records and recreate them.

**Note:** This process does not update any course section with missing meeting times. You must first add the meeting times. Then refer to [“Add Missing Teacher History Records.”](#)

1. On the **Teacher History Maintenance** screen **Wipe And New** tab, select the school(s) for which you want to recreate teacher history records. Or to select all schools, select the check box in the header.

**Note:** If you have a building in context, the building is selected automatically.

**Note:** Before you can run this process, the building’s schedule must be finalized (as indicated by  in the **Finalized Schedule** column).

2. Click **Wipe And New**.

Home >> EMIS >> Maintenance >> Teacher History Maintenance

### Teacher History Maintenance

From this screen, you can adjust teacher history records.

Start and Stop Dates    Wipe And New    Add Missing

Click to select all schools.

<input type="checkbox"/>	Building Name	Finalized Schedule	Last Updated Date	Last User
<input type="checkbox"/>	001081 - ASHLAND HIGH SCHOOL	✓		
<input type="checkbox"/>	001099 - ASHLAND MIDDLE SCHOOL	✓		
<input type="checkbox"/>	010025 - Edison Primary School North	✓		
<input type="checkbox"/>	025395 - Montgomery Intermediate School East	✓		
<input type="checkbox"/>	036806 - Osborn Intermediate School Central	✓		
<input checked="" type="checkbox"/>	028811 - Taft Primary School South	✓		

Building has a finalized schedule = ✓

Wipe And New

#### Recreate Teacher History Records

A message displays, asking if you are sure you want to recreate the records (“Wipe And New”).

3. Click **Ok**.

Home >> EMIS >> Maintenance >> Teacher History Maintenance

### Teacher History Maintenance

From this screen, you can adjust teacher history records.

Click Ok to Wipe And New the teacher history records from:  
028811 - Taft Primary School South

#### Confirm Recreate Records

A confirmation message displays the number of recreated records.

Home >> EMIS >> Maintenance >> Teacher History Maintenance

### Teacher History Maintenance

From this screen, you can adjust teacher history records.

There were 254 teacher course history records created successfully.

#### Confirmation of Recreated Teacher History Records

## Add Missing Teacher History Records

**Navigation:** Home – EMIS – Maintenance – Teacher History Maintenance

You can add teacher history records for course sections that do not have them.

**Note:** This process does not update any course section with missing meeting times. You must add the meeting times before performing these steps.

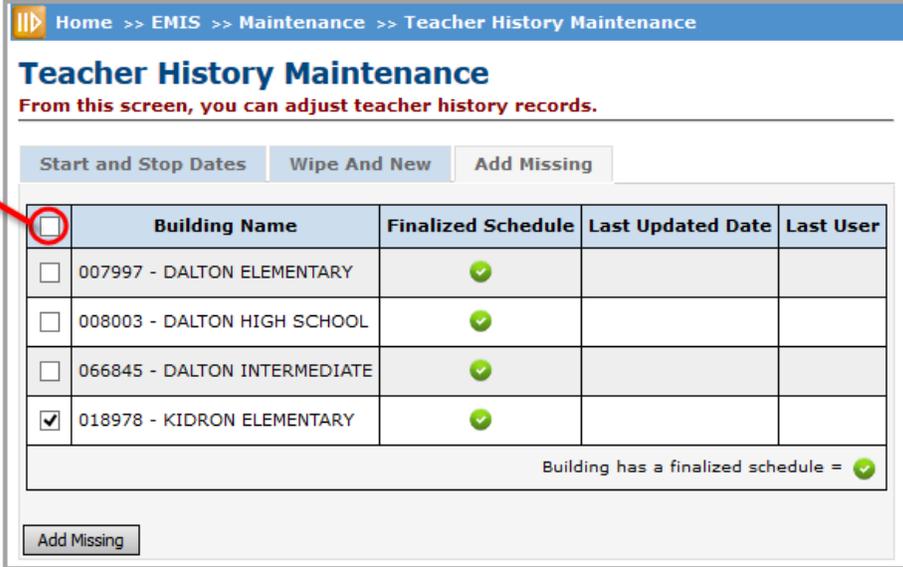
1. On the **Teacher History Maintenance** screen **Add Missing** tab, select the school(s) for which you want to create new teacher history records. Or to select all schools, select the check box in the header.

**Note:** If you have a building in context, the building is selected automatically.

**Note:** Before you can run this process, the building's schedule must be finalized (as indicated by  in the **Finalized Schedule** column).

2. Click **Add Missing**.

Click to select all schools.



The screenshot shows the 'Teacher History Maintenance' interface. At the top, there is a breadcrumb trail: Home >> EMIS >> Maintenance >> Teacher History Maintenance. Below this is the title 'Teacher History Maintenance' and a sub-header: 'From this screen, you can adjust teacher history records.' There are three tabs: 'Start and Stop Dates', 'Wipe And New', and 'Add Missing'. A table lists buildings with columns for 'Building Name', 'Finalized Schedule', 'Last Updated Date', and 'Last User'. The 'Finalized Schedule' column contains green checkmarks for all listed buildings. A red circle highlights the 'Select All' checkbox in the first column. Below the table, there is a status indicator: 'Building has a finalized schedule = '. At the bottom, there is an 'Add Missing' button.

<input type="checkbox"/>	Building Name	Finalized Schedule	Last Updated Date	Last User
<input type="checkbox"/>	007997 - DALTON ELEMENTARY			
<input type="checkbox"/>	008003 - DALTON HIGH SCHOOL			
<input type="checkbox"/>	066845 - DALTON INTERMEDIATE			
<input checked="" type="checkbox"/>	018978 - KIDRON ELEMENTARY			

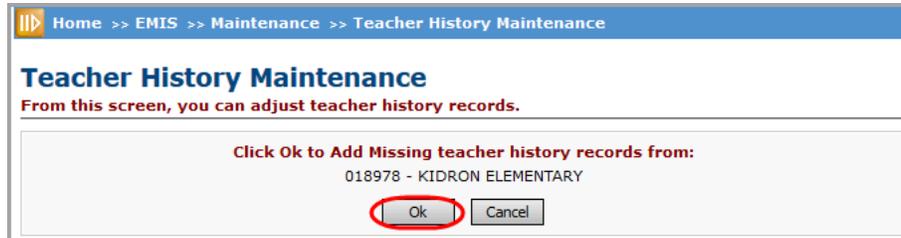
Building has a finalized schedule = 

Add Missing

### Add Missing Teacher History Records

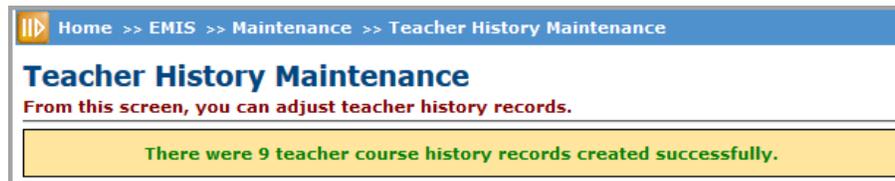
A message displays, asking if you are sure you want to add the missing teacher history records.

3. Click **Ok**.



### Confirm Add Missing Records

A confirmation message displays the number of added records.



### Confirmation of Added Teacher History Records

## Maintain Vocational Correlated Records

Vocational correlated records are used by the CTE (career-technical education) department of ODE to show the courses that tie together to form a vocational program.

**Note:** The CTRMEMIS update process creates these records. If no records exist, run CTRMEMIS in update mode, and then try again. (See [“Verify/Update Course and Class List.”](#))

To maintain vocational correlated records, refer to the appropriate topic:

- [“View Vocational Correlated Records”](#)
- [“Add Vocational Correlated Records”](#)
- [“Edit Vocational Correlated Records”](#)
- [“Delete Vocational Correlated Records”](#)

## View Vocational Correlated Records

Navigation: StudentInformation – EMIS – Maintenance – Vocational Correlated Records

On the **Vocational Correlated Records** screen, you can review the courses that tie together to form a vocational program.

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

Add Vocational Correlated Record

	Anchor Classroom ^	First Correlated Classroom	Second Correlated Classroom
✗	ASHS-610-02 (010105)	ASHS-650-04 (252525)	ASHS-650-04 (252525)
✗	ASHS-610-02 (010105)	ASHS-650-04 (252525)	
✗	ASHS-626-57 (no subject record found)	ASHS-625-04 (no subject record found)	
✗	ASHS-651-05 (252525)	ASHS-650-04 (252525)	ASHS-654-03 (150810)
✗	ASHS-658-57 (252525)	ASHS-656-11 (150300)	ASHS-656-12 (150300)
✗	ASHS-658-57 (252525)	ASHS-655-02 (252525)	
✗	ASHS-686-57 (140300)	ASHS-684-04 (140300)	
✗	ASJH-8925-61 (no subject record found)	ASJH-8930-04 (no subject record found)	

### View Vocational Correlated Records

## Add Vocational Correlated Records

Navigation: StudentInformation – EMIS – Maintenance – Vocational Correlated Records

1. On the **Vocational Correlated Records** screen, click **Add Vocational Correlated Record**.

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

Add Vocational Correlated Record

	Anchor Classroom ^	First Correlated Classroom	Second Correlated Classroom
✗	ASHS-610-02 (010105)	ASHS-650-04 (252525)	ASHS-650-04 (252525)
✗	ASHS-610-02 (010105)	ASHS-650-04 (252525)	
✗	ASHS-626-57 (no subject record found)	ASHS-625-04 (no subject record found)	
✗	ASHS-651-05 (252525)	ASHS-650-04 (252525)	ASHS-654-03 (150810)
✗	ASHS-658-57 (252525)	ASHS-656-11 (150300)	ASHS-656-12 (150300)
✗	ASHS-658-57 (252525)	ASHS-655-02 (252525)	
✗	ASHS-686-57 (140300)	ASHS-684-04 (140300)	
✗	ASJH-8925-61 (no subject record found)	ASJH-8930-04 (no subject record found)	

### Add Vocational Correlated Records

The add version of the screen displays. The drop-down lists on this screen only contain courses with the EMIS allowable curriculum value.

2. In the **Anchor/Lab/Co-op LCC** drop-down list, select the course to which you want to tie one or more other courses to form a vocational program.

- In the **1st Correlated Academic or tech related LCC** drop-down list, select a course to tie to the selected anchor course.
- Optional: To tie another course to the anchor course, in the **2nd Correlated Academic or tech related LCC** drop-down list, select the course.
- Click **Save**. Or, to continue tying courses together, click **Save and New**.

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

Anchor/Lab/Co-op LCC: ASHS-635-21 (091077) ⚡

1st Correlated Academic or tech related LCC: ASHS-655-02 (252525) ⚡

2nd Correlated Academic or tech related LCC:

### Add Vocational Correlated Record

A confirmation message displays, and the vocational correlated record displays in the list.

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

The Vocational Correlated Record was saved successfully

	Anchor Classroom ^	First Correlated Classroom	Second Correlated Classroom
	ASHS-610-02 (010105)	ASHS-650-04 (252525)	ASHS-650-04 (252525)
	ASHS-610-02 (010105)	ASHS-650-04 (252525)	
	ASHS-626-57 (no subject record found)	ASHS-625-04 (no subject record found)	
	ASHS-635-21 (091077)	ASHS-655-02 (252525)	
	ASHS-651-05 (252525)	ASHS-650-04 (252525)	ASHS-654-03 (150810)
	ASHS-658-57 (252525)	ASHS-655-02 (252525)	
	ASHS-658-57 (252525)	ASHS-656-11 (150300)	ASHS-656-12 (150300)
	ASHS-686-57 (140300)	ASHS-684-04 (140300)	
	ASJH-8925-61 (no subject record found)	ASJH-8930-04 (no subject record found)	

### Vocational Correlated Record Added

## Edit Vocational Correlated Records

Navigation: StudentInformation – EMIS – Maintenance – Vocational Correlated Records

- On the **Vocational Correlated Records** screen, in the row of the record you want to edit, click .

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

Add Vocational Correlated Record

		Anchor Classroom ^	First Correlated Classroom	Second Correlated Classroom
X	✎	ASHS-610-02 (010105)	ASHS-650-04 (252525)	ASHS-650-04 (252525)
X	✎	ASHS-610-02 (010105)	ASHS-650-04 (252525)	
X	✎	ASHS-626-57 (no subject record found)	ASHS-625-04 (no subject record found)	
X	✎	ASHS-635-21 (091077)	ASHS-655-02 (252525)	
X	✎	ASHS-651-05 (252525)	ASHS-650-04 (252525)	ASHS-654-03 (150810)
X	✎	ASHS-658-57 (252525)	ASHS-655-02 (252525)	
X	✎	ASHS-658-57 (252525)	ASHS-656-11 (150300)	ASHS-656-12 (150300)
X	✎	ASHS-686-57 (140300)	ASHS-684-04 (140300)	
X	✎	ASJH-8925-61 (no subject record found)	ASJH-8930-04 (no subject record found)	

### Edit Vocational Correlated Records

The edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Vocational Correlated Records.”](#)

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

Anchor/Lab/Co-op LCC: ASHS-610-02 (010105) ✎

1st Correlated Academic or tech related LCC: ASHS-655-02 (252525) ✎

2nd Correlated Academic or tech related LCC: [ ]

Save Cancel

### Edit Vocational Correlated Record

A confirmation message displays, and the edited vocational correlated record displays in the list.

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

The Vocational Correlated Record was saved successfully

Add Vocational Correlated Record

		Anchor Classroom ^	First Correlated Classroom	Second Correlated Classroom
X	/	ASHS-610-02 (010105)	ASHS-650-04 (252525)	ASHS-650-04 (252525)
X	/	ASHS-610-02 (010105)	ASHS-650-04 (252525)	
X	/	ASHS-610-02 (010105)	ASHS-655-02 (252525)	
X	/	ASHS-635-21 (091077)	ASHS-655-02 (252525)	
X	/	ASHS-651-05 (252525)	ASHS-650-04 (252525)	ASHS-654-03 (150810)
X	/	ASHS-658-57 (252525)	ASHS-655-02 (252525)	
X	/	ASHS-658-57 (252525)	ASHS-656-11 (150300)	ASHS-656-12 (150300)
X	/	ASHS-686-57 (140300)	ASHS-684-04 (140300)	
X	/	ASJH-8925-61 (no subject record found)	ASJH-8930-04 (no subject record found)	

#### Confirmation of Edited Vocational Correlated Record

## Delete Vocational Correlated Records

Navigation: StudentInformation – EMIS – Maintenance – Vocational Correlated Records

1. On the **Vocational Correlated Records** screen, in the row of the record you want to delete, click **X**.

StudentInformation > EMIS > Maintenance > Vocational Correlated Records

### Vocational Correlated Records

From this screen, you can create vocational correlated records.

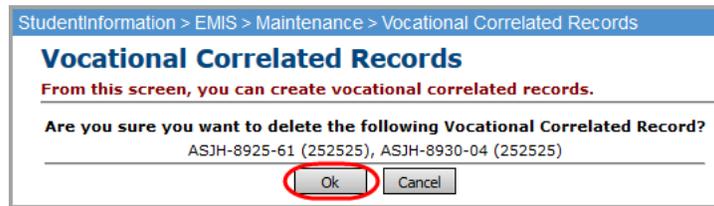
Add Vocational Correlated Record

		Anchor Classroom ^	First Correlated Classroom	Second Correlated Classroom
X	/	ASHS-610-02 (010105)	ASHS-650-04 (252525)	ASHS-650-04 (252525)
X	/	ASHS-610-02 (010105)	ASHS-650-04 (252525)	
X	/	ASHS-610-02 (010105)	ASHS-655-02 (252525)	
X	/	ASHS-635-21 (091077)	ASHS-655-02 (252525)	
X	/	ASHS-651-05 (252525)	ASHS-650-04 (252525)	ASHS-654-03 (150810)
X	/	ASHS-658-57 (252525)	ASHS-655-02 (252525)	
X	/	ASHS-658-57 (252525)	ASHS-656-11 (150300)	ASHS-656-12 (150300)
X	/	ASHS-686-57 (140300)	ASHS-684-04 (140300)	
X	/	ASJH-8925-61 (no subject record found)	ASJH-8930-04 (no subject record found)	

#### Delete Vocational Correlated Record

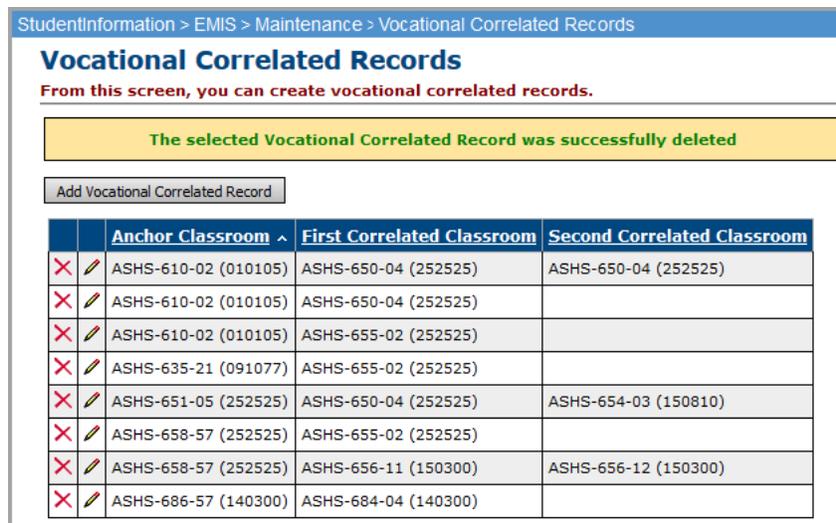
A message displays, asking if you are sure you want to delete the record.

2. Click **Ok**.



**Confirm Delete**

The vocational correlated record no longer displays in the list.



**Vocational Correlated Record Deleted**

## Maintain Student Acceleration (FB) Records

You can maintain student acceleration (FB) records in the following ways:

- To view FB records, see [“View FB Records.”](#)
- To add a new FB record, see [“Add FB Records.”](#)
- To edit an existing FB record, see [“Edit FB Records.”](#)
- To delete a FB record, see [“Delete FB Records.”](#)

## View FB Records

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

With a student in context on the **Student Acceleration (FB)** screen, you can review the student's acceleration (FB) records.

Home >> SIS >> Student >> Assessment >> Student Acceleration (FB)

### Student Acceleration (FB)

From this page, you can display, add, change and delete student acceleration records.

Add a Student Acceleration record

	District IRN	Assessment Area	Level Count	Assessment Flag	Assessment Accountability IRN
X ✎	050542	M - Mathematics	1	Y	*****
X ✎	050542	R - Reading	2	Y	008003

### View Student's FB Records

## Add FB Records

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

1. With a student in context on the **Student Acceleration (FB)** screen, click **Add a Student Acceleration Record**.

Home >> SIS >> Student >> Assessment >> Student Acceleration (FB)

### Student Acceleration (FB)

From this page, you can display, add, change and delete student acceleration records.

Add a Student Acceleration record

	District IRN	Assessment Area	Level Count	Assessment Flag	Assessment Accountability IRN
There are no records to display					

### Add FB Records

The add version of the screen displays.

2. In the **Assessment Area** drop-down list, select the subject for which the student was accelerated.
3. In the **Accelerated Level Count** drop-down list, select the number of year(s) the student was accelerated for the selected subject.
4. In the **Accelerated Assessment Flag** drop-down list, indicate whether the student is taking an assessment in the selected subject at a grade level higher than the student's overall grade level.
5. Optional: If the student is taking an accelerated assessment at a building other than the student's home school (for example, an 8th grader taking a 9th grade assessment at the high school building), in the **Accelerated Assessment Accountability IRN** field, enter the IRN of that building.

**Note:** If the student is not taking an accelerated assessment, or if the student is taking the assessment at his/her home school, leave the asterisks (\*\*\*\*\*).

- Click **Save**. Or, to continue adding FB records for this student, click **Save and New**.

Home >> SIS >> Student >> Assessment >> Student Acceleration (FB)

### Student Acceleration (FB)

From this page, you can display, add, change and delete student acceleration records.

Assessment Area: M - Mathematics

Accelerated Level Count: 1

Accelerated Assessment Flag: Y

Accelerated Assessment Accountability IRN: \*\*\*\*\* -

Save Save and New Cancel

#### Add FB Record

A confirmation message displays, and the student's new FB record displays in the list.

Home >> SIS >> Student >> Assessment >> Student Acceleration (FB)

### Student Acceleration (FB)

From this page, you can display, add, change and delete student acceleration records.

The student acceleration record was saved successfully

Add a Student Acceleration record

	District IRN	Assessment Area	Level Count	Assessment Flag	Assessment Accountability IRN
	050542	M - Mathematics	1	Y	*****

#### FB Record Added

## Edit FB Records

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

- With a student in context on the **Student Acceleration (FB)** screen, in the row of the record you want to edit, click .

Home >> SIS >> Student >> Assessment >> Student Acceleration (FB)

### Student Acceleration (FB)

From this page, you can display, add, change and delete student acceleration records.

Add a Student Acceleration record

	District IRN	Assessment Area	Level Count	Assessment Flag	Assessment Accountability IRN
	050542	M - Mathematics	1	Y	*****
	050542	R - Reading	2	Y	008003

#### Edit FB Records

The edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Edit FB Record**

A confirmation message displays, and the edited FB record displays in the list.

		District IRN	Assessment Area	Level Count	Assessment Flag	Assessment Accountability IRN
		050542	M - Mathematics	1	N	*****
		050542	R - Reading	2	Y	008003

**Confirmation of Edited FB Record**

## Delete FB Records

**Navigation:** Home – SIS – Student – Assessment – Student Acceleration (FB)

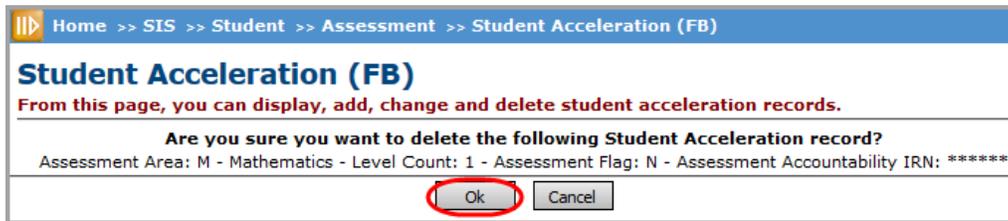
1. With a student in context on the **Student Acceleration (FB)** screen, in the row of the record you want to delete, click

		District IRN	Assessment Area	Level Count	Assessment Flag	Assessment Accountability IRN
		050542	M - Mathematics	1	N	*****
		050542	R - Reading	2	Y	008003

**Delete FB Record**

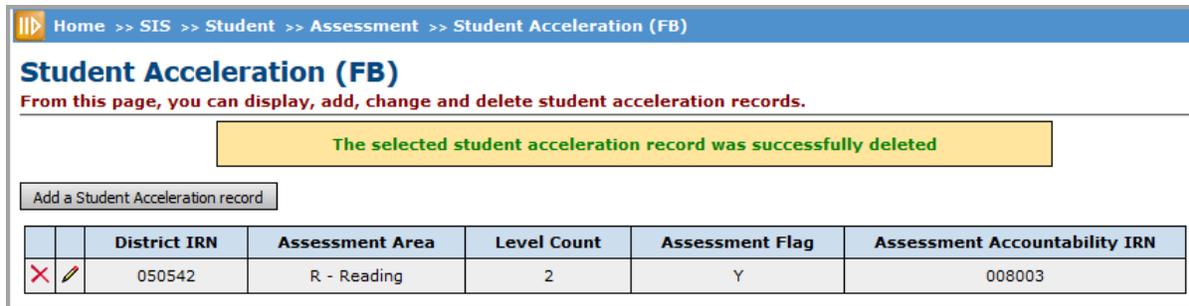
A message displays, asking if you are sure you want to delete the record.

2. Click **Ok**.



**Confirm Delete**

A confirmation message displays, and the FB record no longer displays in the list.



**FB Record Deleted**

---

## Maintain Attendance Patterns

You can maintain attendance patterns in the following ways:

- To view attendance patterns, see [“View Attendance Patterns.”](#)
- To add a new attendance pattern, see [“Add Attendance Patterns.”](#)
- To edit an existing attendance pattern, see [“Edit Attendance Patterns.”](#)

## View Attendance Patterns

**Navigation: StudentInformation – Management – School Administration – EMIS – Attendance Pattern Maintenance**

With the district in context on the **Attendance Pattern Maintenance** screen, you can review your attendance patterns.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

### Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

Add Attendance Pattern

	Attendance Pattern ^	Attendance Pattern Description	Is Active
	**	Not Applicable	
	AS	Alternative Schedule	
	FE	Full Day, Every Day	
	FO	Full Day, Every Other Day	
	HE	Half Day, Every Day	
	HO	Half Day, Every Other Day	

Show Active Only

### View Attendance Patterns

**Note:** Inactive attendance patterns (indicated with a  icon in the **Is Active** column) display only if you deselect the **Show Active Only** check box.

## Add Attendance Patterns

**Navigation: StudentInformation – Management – School Administration – EMIS – Attendance Pattern Maintenance**

1. With the district in context on the **Attendance Pattern Maintenance** screen, click **Add Attendance Pattern**.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

### Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

**Add Attendance Pattern**

Attendance Pattern ^	Attendance Pattern Description	Is Active
**	Not Applicable	
AS	Alternative Schedule	
FE	Full Day, Every Day	
FO	Full Day, Every Other Day	
HE	Half Day, Every Day	
HO	Half Day, Every Other Day	

Show Active Only

#### Add Attendance Patterns

The add version of the screen displays.

- In the **Attendance Pattern Code** field, enter a two-character code for this attendance pattern.

**Note:** Once you save this attendance pattern, you cannot edit the **Attendance Pattern Code**.

- Optional: In the **Attendance Pattern Description** field, enter a description of the code.
- Optional: If you do not want this attendance pattern to be active at this point, deselect the **Is Active** check box.

**Note:** You cannot assign inactive attendance patterns to calendars.

- Click **Save**.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

### Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

**Attendance Pattern Code:**

**Attendance Pattern Description:**

**Is Active:**

#### Add Attendance Pattern

A confirmation message displays, and the new attendance pattern displays in the list.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

### Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

The Attendance Pattern was successfully saved

Add Attendance Pattern

	Attendance Pattern ^	Attendance Pattern Description	Is Active
	**	Not Applicable	
	AS	Alternative Schedule	
	FE	Full Day, Every Day	
	FO	Full Day, Every Other Day	
	HE	Half Day, Every Day	
	HO	Half Day, Every Other Day	
	PM	Afternoon Attendance	

Show Active Only

Confirmation of Added Attendance Pattern

## Edit Attendance Patterns

Navigation: StudentInformation – Management – School Administration – EMIS – Attendance Pattern Maintenance

1. With the district in context on the **Attendance Pattern Maintenance** screen, in the row of the attendance pattern you want to edit, click .

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

### Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

Add Attendance Pattern

	Attendance Pattern ^	Attendance Pattern Description	Is Active
	**	Not Applicable	
	AS	Alternative Schedule	
	FE	Full Day, Every Day	
	FO	Full Day, Every Other Day	
	HE	Half Day, Every Day	
	HO	Half Day, Every Other Day	
	PM	Afternoon Attendance	

Show Active Only

Edit Attendance Patterns

The edit version of the screen displays.

2. Update the description and/or change the active status of the code, and click **Save**.

**Note:** You cannot change the **Attendance Pattern Code**.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

### Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

Attendance Pattern Code:

Attendance Pattern Description:

Is Active:

#### Edit Attendance Pattern

A confirmation message displays, and the edited attendance pattern displays in the list.

StudentInformation > Management > School Administration > EMIS > Attendance Pattern Maintenance

### Attendance Pattern Maintenance

From this screen, you can display, add, change and delete Attendance Patterns.

The Attendance Pattern was successfully saved

	Attendance Pattern ^	Attendance Pattern Description	Is Active
	**	Not Applicable	
	AS	Alternative Schedule	
	FE	Full Day, Every Day	
	FO	Full Day, Every Other Day	
	HE	Half Day, Every Day	
	HO	Half Day, Every Other Day	
	PM	PM Attendance	

Show Active Only

#### Confirmation of Edited Attendance Pattern

## View Course Records

### Navigation: StudentInformation – EMIS – Maintenance – Student Staff Classroom

You can look up and view Course Master (CN) and Staff Course (CU) records.

**Note:** The CTRMEMIS update process creates these records. If no records exist, run CTRMEMIS in update mode, and then try again. (See [“Verify/Update Course and Class List.”](#))

**Note:** You should only use the process described in this topic to view the records. If you need to edit the records, make the changes in the source data (course sections, course maintenance, HQT maintenance and course terms) instead of here.

1. On the **Student Staff Classroom** screen, select either the “Teacher” or “Local Classroom Code” option, depending on how you want to search for records.
2. In the corresponding drop-down list, select the teacher or course, as appropriate.
3. Click **Search**.

### Look Up Course Records

The first course record matching your search criteria displays.

4. Optional: To review additional course records matching your search criteria, page through the results using the **Previous** and **Next** buttons as needed.

StudentInformation > EMIS > Maintenance > Student Staff Classroom

### Student Staff Classroom

From this screen, you can display, add, change and delete data pertaining to staff classroom records.

Teacher:   
 Local Classroom Code: ASHS-010-03 (050300)

<b>Emis Subject:</b>	050300	<b>Local Classroom Code:</b>	ASHS-010-03
<b>Subject Code Description:</b>	Literature	<b>Length/Scheduled Instruction:</b>	150
<b>Course Level:</b>	6	<b>Semester Code:</b>	3
<b>High School Credit Amount:</b>	1.00	<b>Subject Area for Credit:</b>	ELE
<b>Language Used:</b>	E	<b>Credit Flex:</b>	N
<b>Building Name:</b>	ASHLAND HIGH SCHOOL	<b>Location IRN:</b>	999999
<b>Course Start Date:</b>	8/19/2014	<b>CTE College Credit:</b>	N
<b>Course End Date:</b>	5/28/2015	<b>Curriculum:</b>	PS
<b>Delivery Method:</b>	FF	<b>Educational Option:</b>	YS
<b>Student Population:</b>	RG		

Teacher Name	Staff Role Code	HQT Definition	Highly Qualified Teacher IRN	Staff Provider IRN
	LT-Lead Teacher	I-Not core course OR type of course isn't eval. for HQT	*****	*****
	LT-Lead Teacher	I-Not core course OR type of course isn't eval. for HQT	*****	*****

**View Course Records**

## View a Student's Subject Records

### Navigation: StudentInformation – EMIS – Maintenance – Student Subject Record

With a student in context on the **Student Subject Record** screen, you can view the student's current subject records.

**Note:** The CTRMEMIS update process creates these records. If no records exist, run CTRMEMIS in update mode, and then try again. (See [“Verify/Update Course and Class List.”](#))

**Note:** You should only use the process described in this topic to view the records. If you need to edit the records, make the changes in the source data (course section assignments) instead of here.

StudentInformation > EMIS > Maintenance > Student Subject Record

### Student Subject Record

From this screen, you can display, add, change and delete data pertaining to student subject records.

Local Classroom Code ^	Course Start Date	Course Stop Date	HS-CreditEarned	HS-CreditAmount
ASHS-241-11			P	0.00
ASHS-242-54			P	0.00
ASHS-742-04			P	0.00
ASHS-871-21			P	0.00
ASHS-885-12			P	0.00

**View a Student's Subject Records**

## View Student Subject Records by Class

### Navigation: StudentInformation – EMIS – Maintenance – Student Subject Record By Class

You can look up and view student subject records by class.

**Note:** The CTRMEMIS update process creates these records. If no records exist, run CTRMEMIS in update mode, and then try again. (See [“Verify/Update Course and Class List.”](#))

**Note:** You should only use the process described in this topic to view the records. If you need to edit the records, make the changes in the source data (course section assignments) instead of here.

1. On the **Student Subject Record By Class** screen, select either the “Teacher” or “Local Classroom Code” option, depending on how you want to search for records.
2. In the corresponding drop-down list, select the teacher or course, as appropriate.
3. Click **Search**.

### Look Up Student Subject Records By Class

The student subject record matching your search criteria displays.

4. Optional: To view a particular student’s EMIS student subject records, in the row of the student, click the first  icon. (For more information on individual student subject records, see [“View a Student’s Subject Records.”](#))
5. Optional: To view a particular student’s course section assignments, click the second  icon. (For more information on course section assignments, see *ProgressBook StudentInformation Scheduling Guide*.)

StudentInformation > EMIS > Maintenance > Student Subject Record By Class

### Student Subject Record By Class

From this screen, you can display, add, change and delete data pertaining to student subject records.

Teacher:

Local Classroom Code: ASHS-010-03 (050300)

Teacher:

	Subject Code	Local Classroom Code	Course Start Date	Course Stop Date	EMIS ID	Student Name	Grade	HS-CreditEarned	HS-CreditAmount
	050300	ASHS-010-03						P	0.00
	050300	ASHS-010-03						P	0.00
	050300	ASHS-010-03						P	0.00
	050300	ASHS-010-03						P	0.00
	050300	ASHS-010-03						P	0.00
	050300	ASHS-010-03						P	0.00
	050300	ASHS-010-03						P	0.00
	050300	ASHS-010-03						P	0.00

Opens student's subject records

Opens student's course section assignments

### View Student Subject Records By Class

# Special Education

You can view and maintain special education (“special ed”) records in StudentInformation for EMIS reporting purposes. These include special education events, graduation requirements and service records for special ed students.

Refer to the appropriate section as follows:

- [“Maintain Special Education Events”](#)
- [“Maintain Special Education Graduation Requirements”](#)
- [“Maintain Special Education Services”](#)

## Maintain Special Education Events

To view and maintain special education event records for a student, refer to the appropriate section as follows:

- To view a student’s special education events, see [“View Special Education Events.”](#)
- To add a new special education event, see [“Add Special Education Events.”](#)
- To edit an existing special education event, see [“Edit Special Education Events.”](#)
- To delete a special education event, see [“Delete Special Education Events.”](#)

## View Special Education Events

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Events** tab, review the student’s special education events.

Home >> SIS >> Student >> Special Education Advanced Search | Feedback | Mgmt | Help | Version | Print

**Special Education**  
From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

From Date:  To:

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
<input type="checkbox"/>	Dec 08, 2013	RETR			***	*****	ETEX - ETEX - Exiting Special Education	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Mar 27, 2013	RIEP	Mar 28, 2013	Mar 27, 2014	STA	*****	IE13 - Special Education outside regular class less than 21% of day	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Apr 08, 2012	RIEP					IESR - IEP Complete - Served	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	May 16, 2011	RIEP					IESR - IEP Complete - Served	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	May 17, 2010	IIEP					IESR - IEP Complete - Served	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Dec 15, 2009	IETR					ETDP - ETR Resulted in Due Process	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Dec 15, 2009	CNST					CNGT - Consent Granted	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>

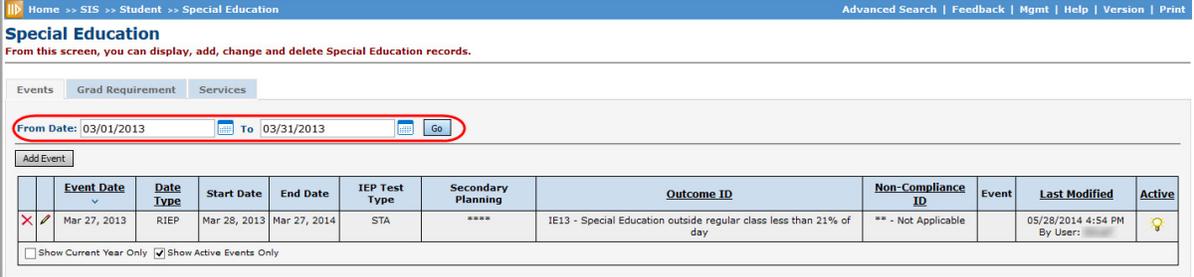
Show Current Year Only  Show Active Events Only

### View Special Education Events

**Note:** Inactive special education events (indicated with a  icon in the **Active** column) display only if you deselect the **Show Active Events Only** check box.

- Optional: To sort the grid by any column, click the column heading.
- Optional: To narrow the list to a particular event date range, enter or select the range of event dates in the **From Date** and **To** fields, and then click **Go**.

The list updates to display the special education events with event dates falling within the date range you entered.



Special Education  
From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

From Date: 03/01/2013 To: 03/31/2013 Go

Add Event

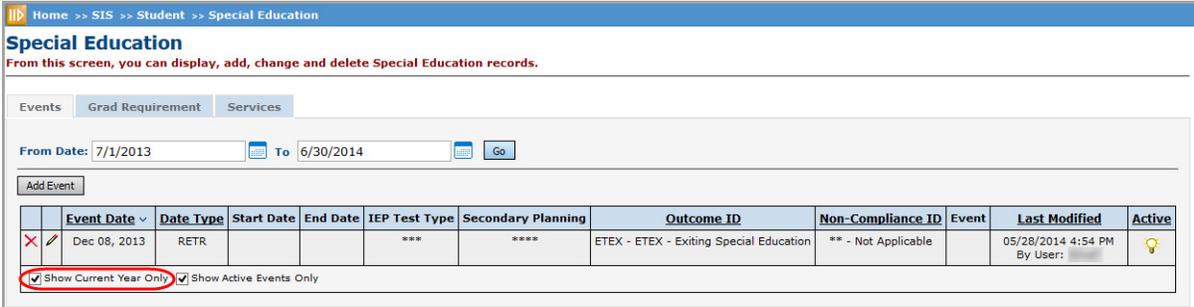
	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
X	Mar 27, 2013	RIEP	Mar 28, 2013	Mar 27, 2014	STA	****	IE13 - Special Education outside regular class less than 21% of day	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	

Show Current Year Only  Show Active Events Only

### View Special Education Events for Specified Date Range

- Optional: To narrow the list to the current school year, select the **Show Current Year Only** check box.

The list updates to display only the special education events for the current school year.



Special Education  
From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

From Date: 7/1/2013 To: 6/30/2014 Go

Add Event

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
X	Dec 08, 2013	RETR			***	****	ETEX - ETEX - Exiting Special Education	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	

Show Current Year Only  Show Active Events Only

### View Special Education Events for Current School Year

## Add Special Education Events

Navigation: Home – SIS – Student – Special Education

- With the appropriate student in context, on the **Special Education** screen **Events** tab, click **Add Event**.

Home >> SIS >> Student >> Special Education Advanced Search | Feedback | Mgmt | Help | Version | Print

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events

From Date:  To

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
<input type="checkbox"/>	Dec 08, 2013	RETR			***	****	ETEX - ETEX - Exiting Special Education	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Mar 27, 2013	RIEP	Mar 28, 2013	Mar 27, 2014	STA	****	IE13 - Special Education outside regular class less than 21% of day	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Apr 08, 2012	RIEP					IESR - IEP Complete - Served	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	May 16, 2011	RIEP					IESR - IEP Complete - Served	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	May 17, 2010	IIEP					IESR - IEP Complete - Served	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Dec 15, 2009	IETR					ETDP - ETR Resulted in Due Process	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>
<input type="checkbox"/>	Dec 15, 2009	CNST					CNGT - Consent Granted	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	<input type="checkbox"/>

Show Current Year Only  Show Active Events Only

### Add Special Education Events

The add-edit version of the screen displays.

2. In the **Event Date** field, enter or select the date the special education event occurred.
3. In the **Date Type** drop-down list, select the type of event.
4. In the **Outcome Id** drop-down list, select the outcome of the event.
5. In the **Outcome Begin Date** and **Outcome End Date** fields, select the effective start and end dates of the outcome.

**Note:** The Outcome End Date is optional for the NIEP event type.

6. For IEPs only:
  - a. In the **IEP Test Type** drop-down list, select the format of the test the student is required to take for all tests (such as an alternate version or standard version of tests).
  - b. In the **Secondary Planning** drop-down list, select the result of transition planning on the IEP for students age 14 and above.
7. In the **Non-Compliance Id** drop-down list, select the code identifier for the reason the event has not met federally mandated time lines, if applicable.
8. Optional: In the **Event** field, enter details about the special education event for this student.
9. Click **Save**.

Home >> SIS >> Student >> Special Education

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

Event Date: 02/21/2014

Date Type: TETR - Transfer Student ETR Adoption Date

Outcome Id: ET09 - Cognitive Disabilities (formerly Mental Retardation or Devel Handic

Outcome Begin Date: 02/21/2014

Outcome End Date: 05/11/2016

IEP Test Type: \*\*\* - Not Applicable

Secondary Planning: \*\*\*\* - Not Applicable

Non-Compliance Id: \*\* - Not Applicable

Event:

Save Cancel

### Add Special Education Event

The new special education event displays in the list.

Home >> SIS >> Student >> Special Education

Advanced Search | Feedback | Mgmt | Help | Version | Print

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

From Date: To Go

Add Event

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
X	Feb 21, 2014	TETR	Feb 21, 2014	May 11, 2016	***	****	ET09 - Cognitive Disabilities (formerly Mental Retardation or Devel Handic	** - Not Applicable		05/28/2014 5:21 PM By User:	Lightbulb
X	Dec 08, 2013	RETR			***	****	ETEX - ETEX - Exiting Special Education	** - Not Applicable		05/28/2014 4:54 PM By User:	Lightbulb
X	Mar 27, 2013	RIEP	Mar 28, 2013	Mar 27, 2014	STA	****	IE13 - Special Education outside regular class less than 21% of day	** - Not Applicable		05/28/2014 4:54 PM By User:	Lightbulb
X	Apr 08, 2012	RIEP					IESR -	** - Not Applicable		05/28/2014 4:54 PM By User:	Lightbulb
X	May 16, 2011	RIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb
X	May 17, 2010	IIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb
X	Dec 15, 2009	CNST					CNGT - Consent Granted	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb
X	Dec 15, 2009	IETR					ETDP - ETR Resulted in Due Process	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb

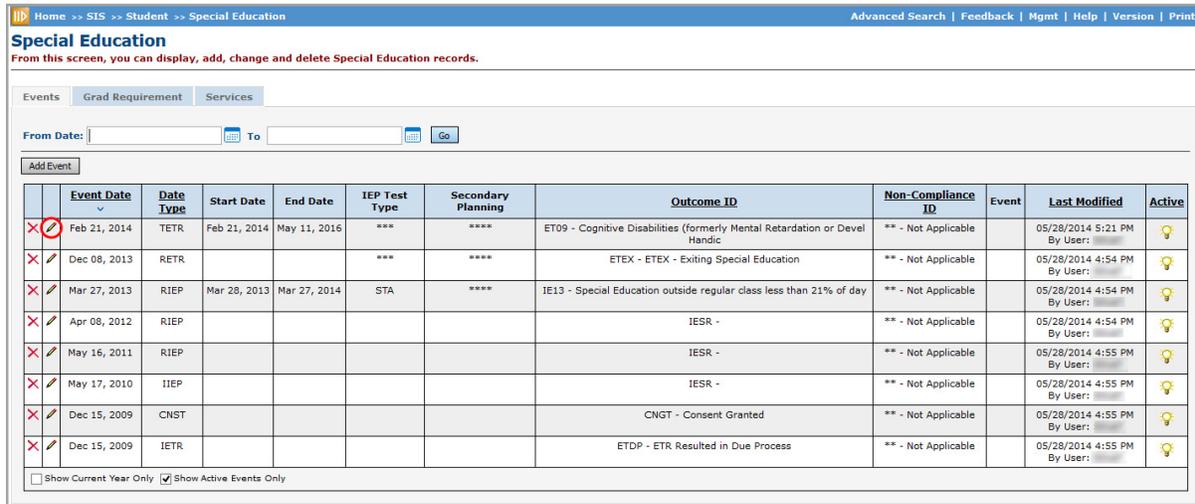
Show Current Year Only  Show Active Events Only

### Special Education Event Added

## Edit Special Education Events

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Events** tab, in the row of the special education event you want to edit, click .



Home >> SIS >> Student >> Special Education Advanced Search | Feedback | Mgmt | Help | Version | Print

**Special Education**  
From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

From Date:  To

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
	Feb 21, 2014	TETR	Feb 21, 2014	May 11, 2016	***	****	ET09 - Cognitive Disabilities (formerly Mental Retardation or Devel Handic	** - Not Applicable		05/28/2014 5:21 PM By User: [redacted]	
	Dec 08, 2013	RETR			***	****	ETEX - ETEX - Exiting Special Education	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	
	Mar 27, 2013	RIEP	Mar 28, 2013	Mar 27, 2014	STA	****	IE13 - Special Education outside regular class less than 21% of day	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	
	Apr 08, 2012	RIEP					IESR -	** - Not Applicable		05/28/2014 4:54 PM By User: [redacted]	
	May 16, 2011	RIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User: [redacted]	
	May 17, 2010	IIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User: [redacted]	
	Dec 15, 2009	CNST					CNGT - Consent Granted	** - Not Applicable		05/28/2014 4:55 PM By User: [redacted]	
	Dec 15, 2009	IETR					ETDP - ETR Resulted in Due Process	** - Not Applicable		05/28/2014 4:55 PM By User: [redacted]	

Show Current Year Only  Show Active Events Only

### Edit Special Education Events

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Special Education Events.”](#)

Home >> SIS >> Student >> Special Education

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | **Grad Requirement** | Services

Event Date: 2/21/2014

Date Type: TETR - Transfer Student ETR Adoption Date

Outcome Id: ET12 - Autism

Outcome Begin Date: 02/21/2014

Outcome End Date: 05/11/2016

IEP Test Type: \*\*\* - Not Applicable

Secondary Planning: \*\*\*\* - Not Applicable

Non-Compliance Id: \*\* - Not Applicable

Event:

Save Cancel

### Edit Special Education Event

The edited special education event displays in the list.

Home >> SIS >> Student >> Special Education

Advanced Search | Feedback | Mgmt | Help | Version | Print

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

From Date: To Go

Add Event

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
X	Feb 21, 2014	TETR	Feb 21, 2014	May 11, 2016	***	****	ET12 - Autism	** - Not Applicable		05/29/2014 10:14 AM By User:	Lightbulb
X	Dec 08, 2013	RETR			***	****	ETEX - ETEX - Exiting Special Education	** - Not Applicable		05/28/2014 4:54 PM By User:	Lightbulb
X	Mar 27, 2013	RIEP	Mar 28, 2013	Mar 27, 2014	STA	****	IE13 - Special Education outside regular class less than 21% of day	** - Not Applicable		05/28/2014 4:54 PM By User:	Lightbulb
X	Apr 08, 2012	RIEP					IESR -	** - Not Applicable		05/28/2014 4:54 PM By User:	Lightbulb
X	May 16, 2011	RIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb
X	May 17, 2010	IIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb
X	Dec 15, 2009	CNST					CNGT - Consent Granted	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb
X	Dec 15, 2009	IETR					ETDP - ETR Resulted in Due Process	** - Not Applicable		05/28/2014 4:55 PM By User:	Lightbulb

Show Current Year Only  Show Active Events Only

### Special Education Event Edited

## Delete Special Education Events

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Events** tab, in the row of the special education event you want to delete, click **X**.

Home >> SIS >> Student >> Special Education Advanced Search | Feedback | Mgmt | Help | Version | Print

**Special Education**  
From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

From Date:  To

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
<input checked="" type="checkbox"/>	Feb 21, 2014	TETR	Feb 21, 2014	May 11, 2016	***	****	ET12 - Autism	** - Not Applicable		05/29/2014 10:14 AM By User:	
<input checked="" type="checkbox"/>	Dec 08, 2013	RETR			***	****	ETEX - ETEX - Exiting Special Education	** - Not Applicable		05/28/2014 4:54 PM By User:	
<input checked="" type="checkbox"/>	Mar 27, 2013	RIEP	Mar 28, 2013	Mar 27, 2014	STA	****	IE13 - Special Education outside regular class less than 21% of day	** - Not Applicable		05/28/2014 4:54 PM By User:	
<input checked="" type="checkbox"/>	Apr 08, 2012	RIEP					IESR -	** - Not Applicable		05/28/2014 4:54 PM By User:	
<input checked="" type="checkbox"/>	May 16, 2011	RIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User:	
<input checked="" type="checkbox"/>	May 17, 2010	IIEP					IESR -	** - Not Applicable		05/28/2014 4:55 PM By User:	
<input checked="" type="checkbox"/>	Dec 15, 2009	CNST					CNGT - Consent Granted	** - Not Applicable		05/28/2014 4:55 PM By User:	
<input checked="" type="checkbox"/>	Dec 15, 2009	IETR					ETDP - ETR Resulted in Due Process	** - Not Applicable		05/28/2014 4:55 PM By User:	

Show Current Year Only  Show Active Events Only

### Delete Special Education Event

A message displays, asking if you are sure you want to delete the event.

2. Click **Ok**.

Home >> SIS >> Student >> Special Education

**Special Education**  
From this screen, you can display, add, change and delete Special Education records.

**Are you sure you want to delete the following event?**  
Event Date: 2/21/2014  
Date Type: TETR  
Event:

### Confirm Delete

A confirmation message displays, and the special education event is inactivated and no longer displays in the list.

The screenshot shows the 'Special Education' interface. At the top, there is a navigation bar with 'Home >> SIS >> Student >> Special Education' and utility links like 'Advanced Search', 'Feedback', 'Mgmt', 'Help', 'Version', and 'Print'. Below the navigation bar, the title 'Special Education' is displayed, followed by a sub-header: 'From this screen, you can display, add, change and delete Special Education records.' A yellow confirmation message box states: 'The selected event was deleted successfully.' Below this, there are tabs for 'Events', 'Grad Requirement', and 'Services'. A date range filter is set to 'From Date: [calendar icon] To [calendar icon] Go'. An 'Add Event' button is visible. The main content is a table with the following columns: Event Date, Date Type, Start Date, End Date, IEP Test Type, Secondary Planning, Outcome ID, Non-Compliance ID, Event, Last Modified, and Active. The table contains several rows of data, including events for Dec 08, 2013 (RETR), Mar 27, 2013 (RIEP), Apr 08, 2012 (RIEP), May 16, 2011 (RIEP), May 17, 2010 (IIEP), Dec 15, 2009 (CNST), and Dec 15, 2009 (IETR). Each row has an 'X' icon in the first column and a lightbulb icon in the 'Active' column. At the bottom of the table, there are checkboxes for 'Show Current Year Only' and 'Show Active Events Only'.

Confirmation of Deleted Special Education Event

## Maintain Special Education Graduation Requirements

Special education students may have graduation requirements specific to the special education services they are receiving. To view and maintain special education graduation requirements for a student, refer to the appropriate section as follows:

- To view a student’s special education graduation requirements, see [“View Special Education Graduation Requirements.”](#)
- To add a new special education graduation requirement, see [“Add Special Education Graduation Requirements.”](#)
- To edit an existing special education graduation requirement, see [“Edit Special Education Graduation Requirements.”](#)
- To delete a special education graduation requirement, see [“Delete Special Education Graduation Requirements.”](#)

## View Special Education Graduation Requirements

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Grad Requirement** tab, review the student’s special education graduation requirements.
2. Optional: To sort the grid by any column, click the column heading.

Home >> SIS >> Student >> Special Education

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Events   Grad Requirement   Services

Add Requirement

		IEP Date	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
X		Mar 27, 2013	RIEP	R	Y		05/29/2014 10:33 AM By User: [redacted]	
X		Mar 27, 2013	RIEP	S	N		05/29/2014 10:33 AM By User: [redacted]	
X		Mar 27, 2013	RIEP	C	N		05/29/2014 10:32 AM By User: [redacted]	
X		Mar 27, 2013	RIEP	M	N		05/29/2014 10:31 AM By User: [redacted]	

Show Active Requirements Only   = Record has a matching IEP for date on Events tab.

### View Special Education Graduation Requirements

**Note:** Inactive graduation requirements (indicated with a icon in the **Active** column) display only if you deselect the **Show Active Requirements Only** check box.

## Add Special Education Graduation Requirements

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Grad Requirement** tab, click **Add Requirement**.

Home >> SIS >> Student >> Special Education

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Events   Grad Requirement   Services

**Add Requirement**

		IEP Date	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
X		Mar 27, 2013	RIEP	R	Y		05/29/2014 10:33 AM By User: [redacted]	
X		Mar 27, 2013	RIEP	S	N		05/29/2014 10:33 AM By User: [redacted]	
X		Mar 27, 2013	RIEP	C	N		05/29/2014 10:32 AM By User: [redacted]	
X		Mar 27, 2013	RIEP	M	N		05/29/2014 10:31 AM By User: [redacted]	

Show Active Requirements Only   = Record has a matching IEP for date on Events tab.

### Add Special Education Graduation Requirements

The add-edit version of the screen displays.

2. In the **IEP Date** field, enter or select the date this student's IEP was created.
3. In the **Date Type** drop-down list, select the type of IEP.
4. In the **Assessment Area** drop-down list, select the assessment area to be covered by this IEP graduation requirement.
5. In the **Exemption Flag** drop-down list, select an exemption choice indicating whether the student does or does not need to pass this assessment area in order to graduate.
6. Click **Save**.

**Add Special Education Graduation Requirement**

A confirmation message displays, and the new special education graduation requirement displays in the list.

	IEP Date	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
X	Mar 27, 2013	RIEP	W	Y	✔	05/29/2014 10:35 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	R	Y	✔	05/29/2014 10:33 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	S	N	✔	05/29/2014 10:33 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	C	N	✔	05/29/2014 10:32 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	M	N	✔	05/29/2014 10:31 AM By User: [redacted]	💡

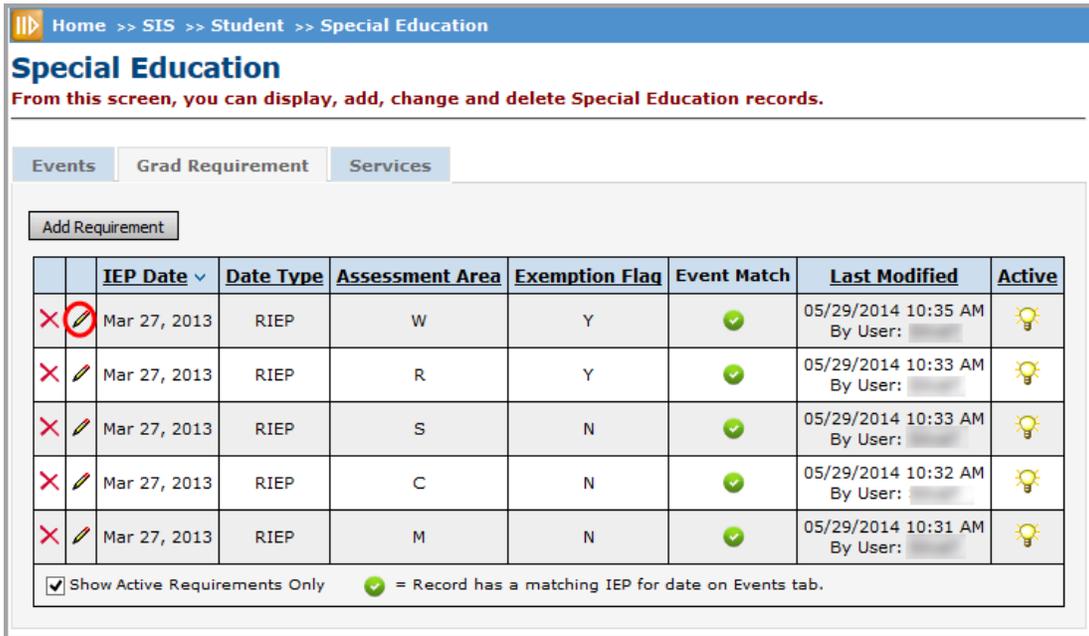
Show Active Requirements Only    ✔ = Record has a matching IEP for date on Events tab.

**Confirmation of Added Special Education Graduation Requirement**

## Edit Special Education Graduation Requirements

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Grad Requirement** tab, in the row of the special education graduation requirement you want to edit, click .



Home >> SIS >> Student >> Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | **Grad Requirement** | Services

Add Requirement

	IEP Date	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
 	Mar 27, 2013	RIEP	W	Y		05/29/2014 10:35 AM By User: [redacted]	
 	Mar 27, 2013	RIEP	R	Y		05/29/2014 10:33 AM By User: [redacted]	
 	Mar 27, 2013	RIEP	S	N		05/29/2014 10:33 AM By User: [redacted]	
 	Mar 27, 2013	RIEP	C	N		05/29/2014 10:32 AM By User: [redacted]	
 	Mar 27, 2013	RIEP	M	N		05/29/2014 10:31 AM By User: [redacted]	

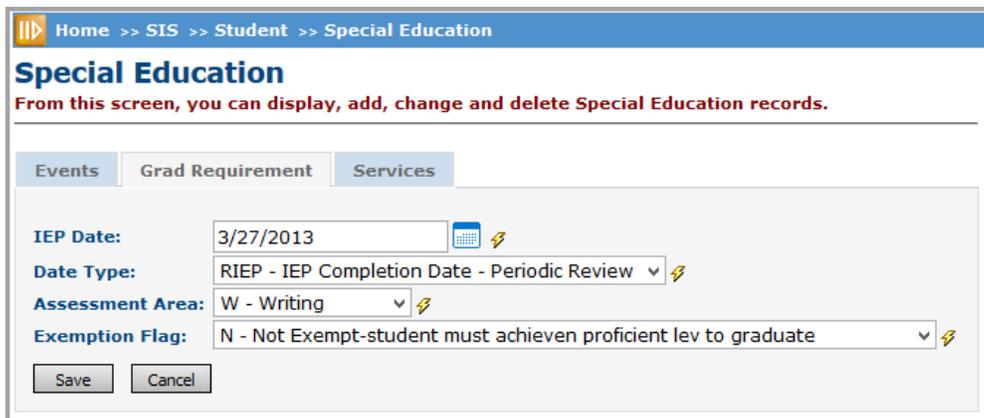
Show Active Requirements Only     = Record has a matching IEP for date on Events tab.

### Edit Special Education Graduation Requirements

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Special Education Graduation Requirements.”](#)



Home >> SIS >> Student >> Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | **Grad Requirement** | Services

IEP Date:   

Date Type:  

Assessment Area:  

Exemption Flag:  

### Edit Special Education Graduation Requirement

A confirmation message displays, and the edited special education graduation requirement displays in the list.

The screenshot shows the 'Special Education' interface with a confirmation message: 'The grad requirement was successfully saved'. Below this, there are tabs for 'Events', 'Grad Requirement', and 'Services'. An 'Add Requirement' button is visible. The main content is a table with the following columns: IEP Date, Date Type, Assessment Area, Exemption Flag, Event Match, Last Modified, and Active. The table contains five rows of data, each with a red 'X' icon in the first column and a lightbulb icon in the last column. A legend at the bottom indicates that a green checkmark in the 'Event Match' column means 'Record has a matching IEP for date on Events tab.'.

	IEP Date	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
X	Mar 27, 2013	RIEP	W	N	✓	05/29/2014 10:36 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	R	Y	✓	05/29/2014 10:33 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	S	N	✓	05/29/2014 10:33 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	C	N	✓	05/29/2014 10:32 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	M	N	✓	05/29/2014 10:31 AM By User: [redacted]	💡

Show Active Requirements Only    ✓ = Record has a matching IEP for date on Events tab.

Confirmation of Edited Special Education Graduation Requirement

## Delete Special Education Graduation Requirements

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Grad Requirement** tab, in the row of the special education graduation requirement you want to delete, click **X**.

Home >> SIS >> Student >> Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

Add Requirement

	IEP Date	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
	Mar 27, 2013	RIEP	W	N		05/29/2014 10:36 AM By User: [redacted]	
	Mar 27, 2013	RIEP	R	Y		05/29/2014 10:33 AM By User: [redacted]	
	Mar 27, 2013	RIEP	S	N		05/29/2014 10:33 AM By User: [redacted]	
	Mar 27, 2013	RIEP	C	N		05/29/2014 10:32 AM By User: [redacted]	
	Mar 27, 2013	RIEP	M	N		05/29/2014 10:31 AM By User: [redacted]	

Show Active Requirements Only     = Record has a matching IEP for date on Events tab.

### Delete Special Education Graduation Requirement

A message displays, asking if you are sure you want to delete the graduation requirement.

2. Click **Ok**.

Home >> SIS >> Student >> Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

**Are you sure you want to delete the following Grad Requirement Record?**  
 IEP Date: 3/27/2013  
 Date Type: RIEP  
 Assessment Area: W

### Confirm Delete

A confirmation message displays, and the special education graduation requirement no longer displays in the list.

**Special Education**  
From this screen, you can display, add, change and delete Special Education records.

The selected grad requirement was deleted successfully.

Events | **Grad Requirement** | Services

Add Requirement

	IEP Date	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
X	Mar 27, 2013	RIEP	R	Y	✓	05/29/2014 10:33 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	S	N	✓	05/29/2014 10:33 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	C	N	✓	05/29/2014 10:32 AM By User: [redacted]	💡
X	Mar 27, 2013	RIEP	M	N	✓	05/29/2014 10:31 AM By User: [redacted]	💡

Show Active Requirements Only    ✓ = Record has a matching IEP for date on Events tab.

**Confirmation of Deleted Special Education Graduation Requirement**

## Maintain Special Education Services

To view, assign and maintain students' special education services (215xxx codes), refer to the appropriate section as follows:

- To set default values for a special education service, see [“Set Up Special Education Service Defaults.”](#)
- To inactivate default values for a special education service, see [“Inactivate Special Education Service Defaults.”](#)
- To view a student's special education services, see [“View Special Education Services.”](#)
- To add a new special education service, see [“Add Special Education Services.”](#)
- To edit an existing special education service, see [“Edit Special Education Services.”](#)
- To delete a special education service, see [“Delete Special Education Services.”](#)

## Set Up Special Education Service Defaults

**Navigation: Home – Management – School Administration – Service Defaults**

You can set up the default staff member and program provider IRN that display when a user selects a 215xxx service on the **Special Education** screen **Services** tab, as shown in the following example:

Home » Management » School Administration » Service Defaults Advanced Search | Fe

### Service Defaults

From this screen, you can display, and edit data pertaining to service defaults.

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	
	215003	Attendant Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215004	Audiological Services	MS CARVER	***** - <input type="text"/>	
	215006	Interpreter Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	

Home » SIS » Student » Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to F13 report to EMIS from the Memberships page.

Service: 215002 - Aide Services

Start Date:

Stop Date:

Staff Member: MS BRADFORD

Program Provider IRN: 043505 - Ashland City SD

An example of how the service defaults enter the default value on the Services tab

1. With the appropriate building in context, on the **Service Defaults** screen, in the row of the service whose defaults you want to set, click .

The row you selected becomes active, which is indicated by yellow highlighting.

Home » Management » School Administration » Service Defaults Advanced Search | Feedback | Mgmt | Help

### Service Defaults

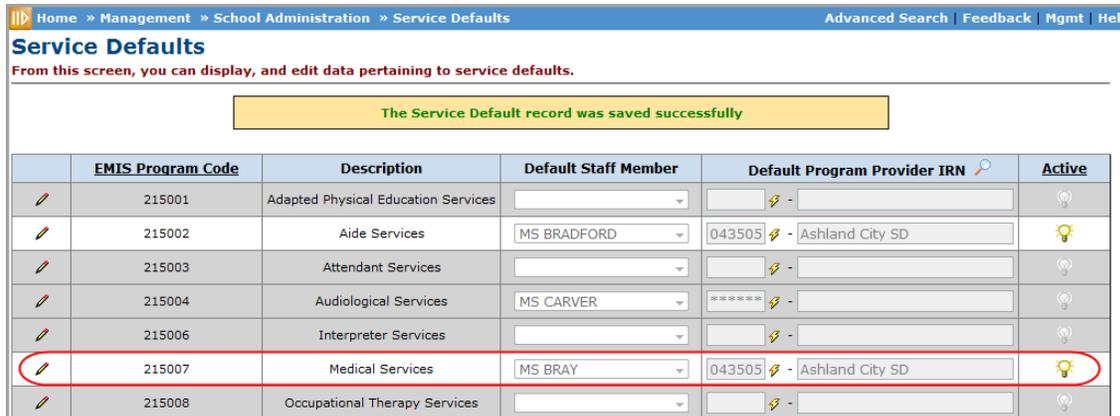
From this screen, you can display, and edit data pertaining to service defaults.

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	<input checked="" type="checkbox"/>
	215003	Attendant Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215004	Audiological Services	MS CARVER	***** - <input type="text"/>	<input checked="" type="checkbox"/>
	215006	Interpreter Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215007	Medical Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input checked="" type="checkbox"/>
	215008	Occupational Therapy Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>

**Active Row on the Services Defaults Screen**

2. Optional: In the **Default Staff Member** column for the selected service, select the default staff member.

3. In the **Default Program Provider IRN** column, enter the default program provider's IRN.
4. Click  to save the defaults for the service.  
A confirmation message displays.



The Service Default record was saved successfully

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services			
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	
	215003	Attendant Services			
	215004	Audiological Services	MS CARVER	*****	
	215006	Interpreter Services			
	215007	Medical Services	MS BRAY	043505 - Ashland City SD	
	215008	Occupational Therapy Services			

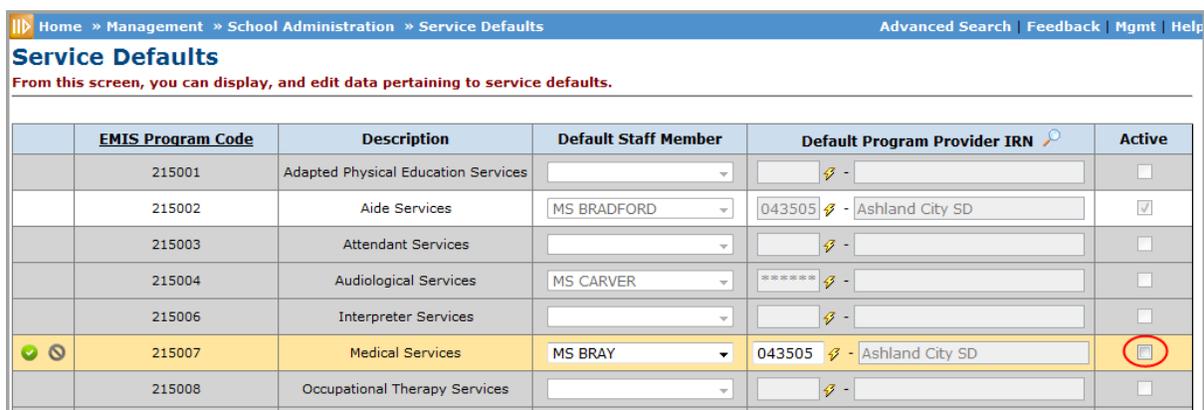
Active Service Default on the Service Defaults Screen

## Inactivate Special Education Service Defaults

Navigation: Home – Management – School Administration – Service Defaults

If you no longer want to apply default values to a particular special education service, you can set it as inactive.

1. With the appropriate building in context, on the **Service Defaults** screen, in the row of the service you want to set as inactive, click  .  
The row you selected becomes active, which is indicated by yellow highlighting.
2. Deselect the check box in the **Active** column.

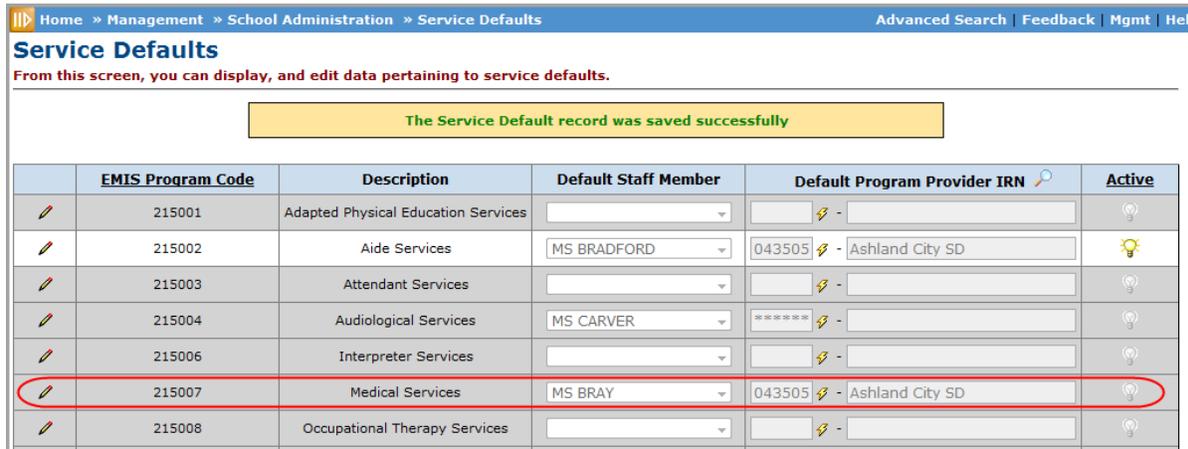


	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services			<input type="checkbox"/>
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	<input checked="" type="checkbox"/>
	215003	Attendant Services			<input type="checkbox"/>
	215004	Audiological Services	MS CARVER	*****	<input type="checkbox"/>
	215006	Interpreter Services			<input type="checkbox"/>
 	215007	Medical Services	MS BRAY	043505 - Ashland City SD	<input type="checkbox"/>
	215008	Occupational Therapy Services			<input type="checkbox"/>

Active Check Box on the Service Defaults Screen

- Click  to save the defaults for the service.

A confirmation message displays, and the service default record is now inactive. The **Staff Member** and **Program Provider IRN** fields on the **Services** tab on the **Special Education** screen no longer default to the specified values when a user selects the modified service.



Home » Management » School Administration » Service Defaults Advanced Search | Feedback | Mgmt | Hel

**Service Defaults**  
From this screen, you can display, and edit data pertaining to service defaults.

The Service Default record was saved successfully

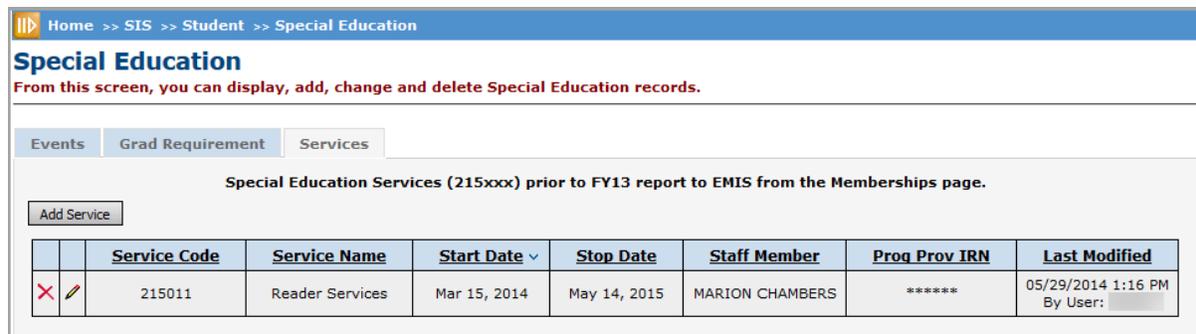
	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215002	Aide Services	MS BRADFORD	043505  - Ashland City SD	
	215003	Attendant Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215004	Audiological Services	MS CARVER	*****  - <input type="text"/>	
	215006	Interpreter Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215007	Medical Services	MS BRAY	043505  - Ashland City SD	
	215008	Occupational Therapy Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	

**Inactivated Service Default on the Service Defaults Screen**

## View Special Education Services

Navigation: Home – SIS – Student – Special Education

With the appropriate student in context, on the **Special Education** screen **Services** tab, review the student's special education services.



Home >> SIS >> Student >> Special Education

**Special Education**  
From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

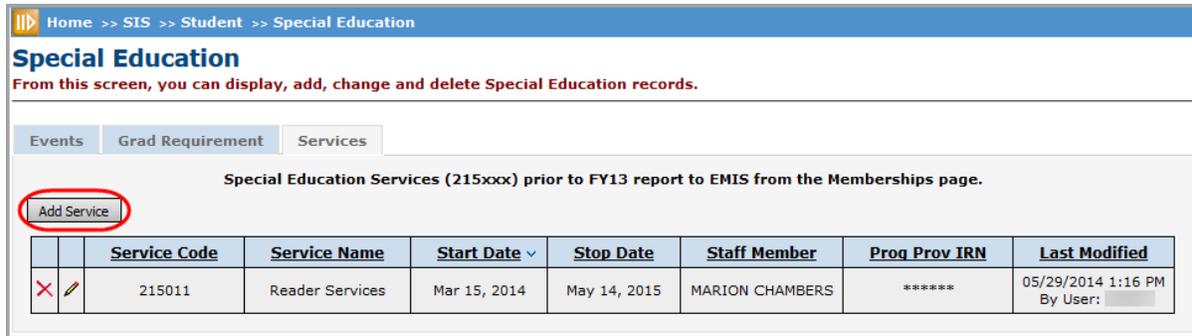
	Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
 	215011	Reader Services	Mar 15, 2014	May 14, 2015	MARION CHAMBERS	*****	05/29/2014 1:16 PM By User: <input type="text"/>

**View Student's Special Education Services**

## Add Special Education Services

Navigation: Home – SIS – Student – Special Education

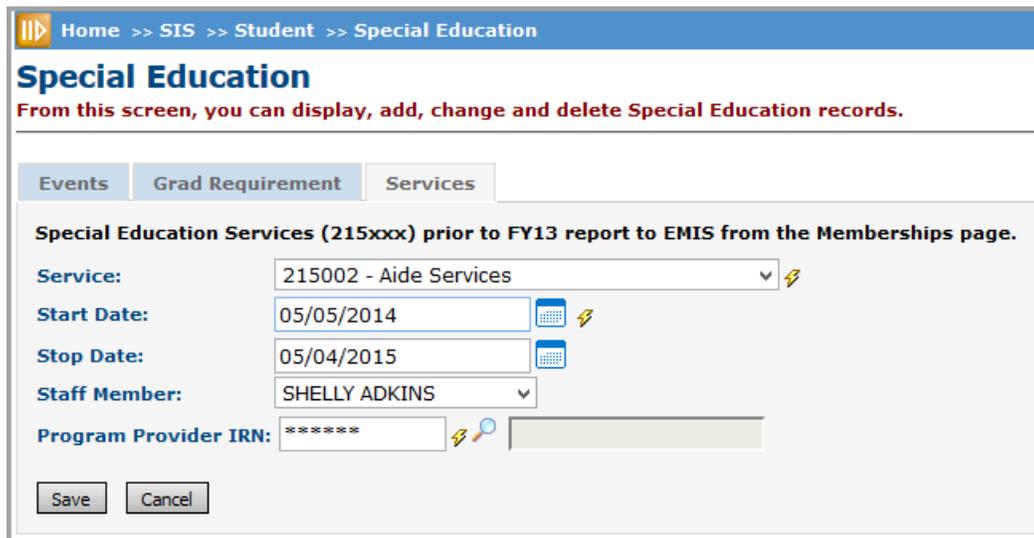
- With the appropriate student in context, on the **Special Education** screen **Services** tab, click **Add Service**.



### Add Special Education Services

The add-edit version of the screen displays.

2. In the **Service** drop-down list, select the service you want to assign to the student.
3. In the **Start Date** field, enter the start date for the service.
4. Optional: In the **Stop Date** field, enter the end date for the service.
5. Optional: In the **Staff Member** drop-down list, select the staff member that will provide the service.
6. In the **Program Provider IRN** field, enter the IRN of the school or district where the student will receive the service. (The value in this field defaults to \*\*\*\*\*.) To search for an IRN, click to open ODE's Organization Search page.
7. Click **Save**.



### Add Special Education Service

A confirmation message displays, and the new special education service displays in the list.

Home >> SIS >> Student >> Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

The Special Education Service was saved successfully

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

Add Service

		Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
X		215002	Aide Services	May 05, 2014	May 04, 2015	SHELLY ADKINS	*****	05/29/2014 1:19 PM By User: [redacted]
X		215011	Reader Services	Mar 15, 2014	May 14, 2015	MARION CHAMBERS	*****	05/29/2014 1:16 PM By User: [redacted]

### Confirmation of Added Special Education Service

## Edit Special Education Services

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Services** tab, in the row of the special education service you want to edit, click .

Home >> SIS >> Student >> Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

Add Service

		Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
X		215002	Aide Services	May 05, 2014	May 04, 2015	SHELLY ADKINS	*****	05/29/2014 1:19 PM By User: [redacted]
X		215011	Reader Services	Mar 15, 2014	May 14, 2015	MARION CHAMBERS	*****	05/29/2014 1:16 PM By User: [redacted]

### Edit Special Education Services

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Special Education Services.”](#)

### Edit Special Education Service

A confirmation message displays, and the edited special education service displays in the list.

	Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
✕ ✎	215011	Reader Services	May 15, 2014	May 14, 2015	MARION CHAMBERS	*****	05/29/2014 1:20 PM By User: [redacted]
✕ ✎	215002	Aide Services	May 05, 2014	May 04, 2015	SHELLY ADKINS	*****	05/29/2014 1:19 PM By User: [redacted]

### Confirmation of Edited Special Education Service

## Delete Special Education Services

Navigation: Home – SIS – Student – Special Education

1. With the appropriate student in context, on the **Special Education** screen **Services** tab, in the row of the special education service you want to delete, click ✕.

Home >> SIS >> Student >> Special Education

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

Add Service

		Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
		215011	Reader Services	May 15, 2014	May 14, 2015	MARION CHAMBERS	*****	05/29/2014 1:20 PM By User: [redacted]
		215002	Aide Services	May 05, 2014	May 04, 2015	SHELLY ADKINS	*****	05/29/2014 1:19 PM By User: [redacted]

### Delete Special Education Service

A message displays, asking if you are sure you want to delete the service.

- Click **Ok**.

Home >> SIS >> Student >> Special Education

## Special Education

From this screen, you can display, add, change and delete Special Education records.

Are you sure you want to delete the following Service?  
215002 - Aide Services

### Confirm Delete

A confirmation message displays, and the special education service no longer displays in the list.

Home >> SIS >> Student >> Special Education

## Special Education

From this screen, you can display, add, change and delete Special Education records.

The selected service was deleted successfully.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

Add Service

		Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
		215011	Reader Services	May 15, 2014	May 14, 2015	MARION CHAMBERS	*****	05/29/2014 1:20 PM By User: [redacted]

### Confirmation of Deleted Special Education Service

This page intentionally left blank.

# Gifted Education

You can view and maintain student gifted records in StudentInformation for EMIS reporting purposes. Generally, the process is as follows:

1. Set up the appropriate gifted rules (default record values) for your district and/or building. See [“Maintain Gifted Rules.”](#)
2. Set initial values for the school year. See [“Mass Update Student Gifted Records.”](#)
3. Adjust individual student gifted records as necessary for EMIS reporting. See [“Maintain Student Gifted Records.”](#)
4. At the end of the school year, copy the **Served** value from all student gifted records to the next school year. See [“Copy Served Values to Next School Year.”](#)

**Note:** *There are several reports in StudentInformation to help you manage your gifted student data. See [“Run Gifted Student Reports.”](#)*

---

## Maintain Gifted Rules

Gifted rules are the default values used for mass updating student gifted records. You can set up and run gifted rules at the district or building level and for one grade level or all grade levels.

**Note:** *Building level rules override district level rules.*

Following are ways to set up your gifted rules and some recommended best practices:

- **Default rule to create a blank gifted record:**
  - Every district should have a default rule set up with a blank **Grade Level** and no **Screening** or **Assessment** check boxes selected.
  - Use for any student not screened or assessed (no gifted record) including new students coming into the district.
- **District/Grade level rules** – Use when every student in a district/grade level is screened and/or assessed in certain gifted areas.
- **Building/Grade level rules** – Use when every student in a building/grade level is screened and/or assessed in certain gifted areas.

**Note:** *As a general rule, almost all other gifted rules for district, building and/or grade level should have only the **Screening** check boxes selected. The exceptions to this would be if you have an entire building and/or grade level with assessed gifted students.*

To view and maintain gifted rules, refer to the appropriate section as follows:

- To view your district or building’s gifted rules, see “[View Gifted Rules.](#)”
- To add a new gifted rule, see “[Add Gifted Rules.](#)”
- To edit an existing gifted rule, see “[Edit Gifted Rules.](#)”
- To delete a gifted rule, see “[Delete Gifted Rules.](#)”

**Note:** You can create gifted rules at the district or building level. If   icons display at the beginning of the row, this indicates the rule was created at a higher level, and you can only edit or delete it at that higher level.

## View Gifted Rules

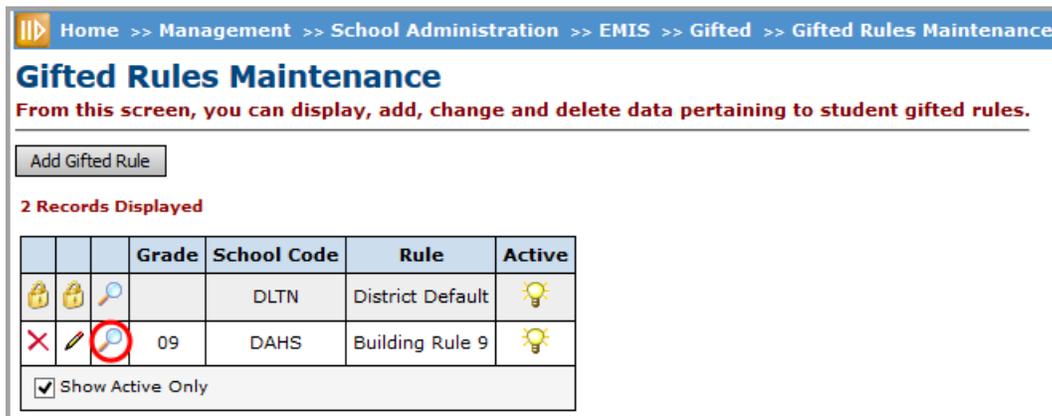
**Navigation:** Home – Management – School Administration – EMIS – Gifted – Gifted Rules Maintenance

1. With the appropriate district or building in context, on the **Gifted Rules Maintenance** screen, review the list of gifted rules.

**Note:** If a school building is in context, all school level as well as all district level rules display.

**Note:** Inactive gifted rules (indicated with a  icon in the **Active** column) display only if you deselect the **Show Active Only** check box.

2. In the row of the rule you want to view, click .



Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Add Gifted Rule

2 Records Displayed

		Grade	School Code	Rule	Active
			DLTN	District Default	
		09	DAHS	Building Rule 9	

Show Active Only

View Gifted Rules

The rule detail version of the screen opens in view-only format.

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Rule Name:

Grade Level:

Active:

	Screening	Assessment	Screened Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/1/2013
Specific Academic Ability - Math	<input type="checkbox"/>	<input type="checkbox"/>	
Specific Academic Ability - Science	<input type="checkbox"/>	<input type="checkbox"/>	
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input type="checkbox"/>	
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	

View Gifted Rule Detail

## Add Gifted Rules

Navigation: Home – Management – School Administration – EMIS – Gifted – Gifted Rules Maintenance

1. With the appropriate district or building in context, on the **Gifted Rules Maintenance** screen, click **Add Gifted Rule**.

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

**Add Gifted Rule**

2 Records Displayed

	Grade	School Code	Rule	Active
  		DLTN	District Default	
  	09	DAHS	Building Rule 9	

Show Active Only

Add Gifted Rules

The add-edit version of the screen displays.

2. In the **Rule Name** field, enter a descriptive name for the rule you are creating.

3. Optional: To specify the grade level to which this gifted rules applies, in the **Grade Level** drop-down list, select the grade level. (To apply this rule to all grade levels, leave this field blank.)
4. Optional: If you do not want this rule to be active at this point, deselect the **Active** check box.

**Note:** You cannot use inactive gifted rules on new student gifted records.

5. Optional: If students have been screened in any gifted area(s), enter details as follows:
  - a. In the row of the gifted area, select the **Screening** check box.
  - b. In the **Screened Date** field, enter or select the date the screening took place.
  - c. If students have been assessed in the gifted area, select the **Assessment** check box.
6. Click **Save**.

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

---

Rule Name:  ⚡

Grade Level:  ▾

Active:

	Screening	Assessment	Screened Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="09/01/2013"/> 📅 ⚡
Specific Academic Ability - Math	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="09/01/2013"/> 📅 ⚡
Specific Academic Ability - Science	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="09/01/2013"/> 📅 ⚡
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**Add Gifted Rule**

The new gifted rule displays in the list.

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

The gifted rule was saved successfully

Add Gifted Rule

3 Records Displayed

			Grade	School Code	Rule	Active
				DLTN	District Default	
			09	DAHS	Building Rule 9	
			10	DAHS	Building Rule 10	

Show Active Only

**Gifted Rule Added**

## Edit Gifted Rules

Navigation: Home – Management – School Administration – EMIS – Gifted – Gifted Rules Maintenance

1. With the appropriate district or building in context, on the **Gifted Rules Maintenance** screen, in the row of the gifted rule you want to edit, click .

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Add Gifted Rule

3 Records Displayed

			Grade	School Code	Rule	Active
				DLTN	District Default	
			09	DAHS	Building Rule 9	
			10	DAHS	Building Rule 10	

Show Active Only

**Edit Gifted Rules**

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Gifted Rules.”](#)

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Rule Name:

Grade Level:

Active:

	Screening	Assessment	Screened Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="09/01/2013"/>
Specific Academic Ability - Math	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Science	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**Edit Gifted Rule**

The edited gifted rule displays in the list.

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Rules Maintenance

### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

The gifted rule was saved successfully

**3 Records Displayed**

		Grade	School Code	Rule	Active
			DLTN	District Default	
		09	DAHS	Building Rule 9	
		10	DAHS	Building Rule 10	

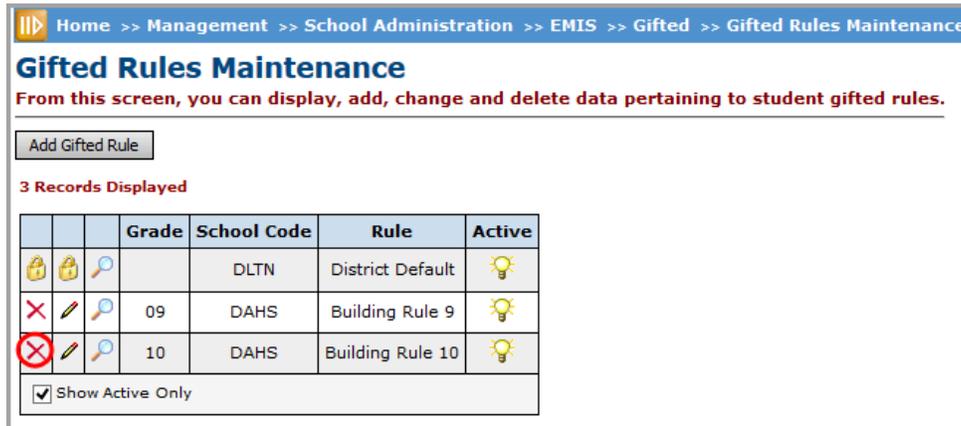
Show Active Only

**Gifted Rule Edited**

## Delete Gifted Rules

Navigation: Home – Management – School Administration – EMIS – Gifted – Gifted Rules Maintenance

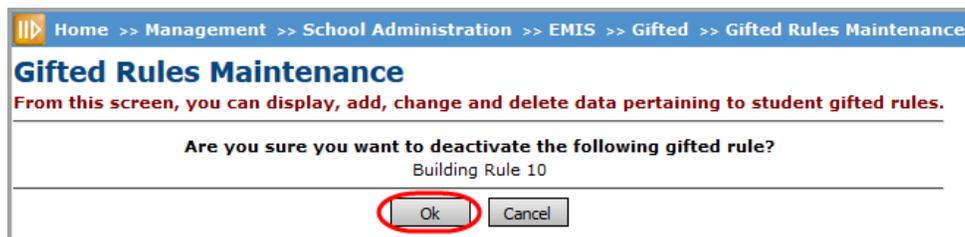
1. With the appropriate district or building in context, on the **Gifted Rules Maintenance** screen, in the row of the gifted rule you want to delete, click **X**.



### Delete Gifted Rule

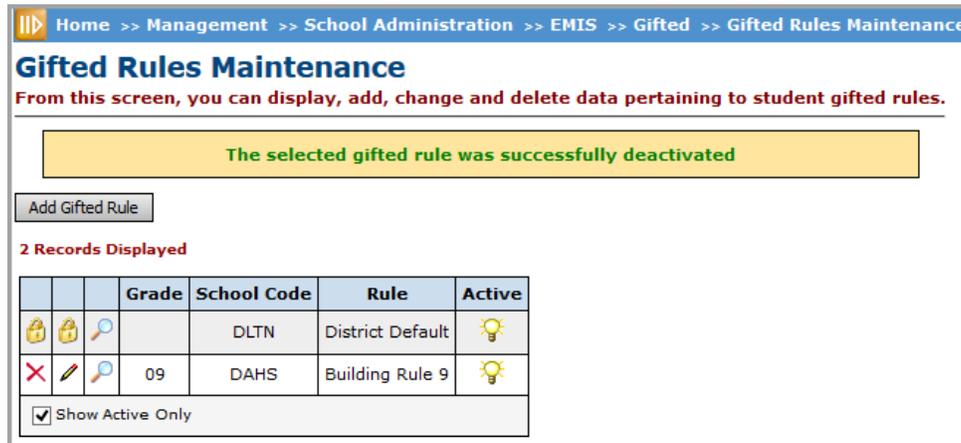
A message displays, asking if you are sure you want to delete the rule.

2. Click **Ok**.



### Confirm Delete

A confirmation message displays, and the gifted rule is inactivated and no longer displays in the list.



Confirmation of Deleted Gifted Rule

## Mass Update Student Gifted Records

**Navigation: Home – Management – School Administration – EMIS – Gifted – Gifted Mass Update**

You can use the gifted mass update process to apply the default values from your gifted rules to student gifted records and create a record for any student who is missing one. You typically run this process on a yearly basis to set initial values for the school year or to restore students to the gifted rule default **Screening** and **Assessment** values for the specific district, building and/or grade level.

Following are examples of how to use the mass update:

- Run to apply the district default rule to establish a blank gifted record.
- Run annually to apply a rule that your 2nd grade students are always screened and assessed for science.

To perform the mass update:

1. With the appropriate district or building in context, on the **Gifted Mass Update** screen, in the **Gifted Rules** area, select the rules you want to apply in this mass update by moving them from the multi-select list on the left to the list on the right.

**Note:** Grade level rules take precedence over non-grade level rules.

**Note:** If a student is enrolled in more than one building, the rule for the student's primary building or grade level/building is used.

2. Optional: If you want to override values on existing gifted records, select the **Overwrite Existing Student Gifted** records check box.

**Note:** Use caution if selecting this option as it overwrites student gifted records with the **Screening** and **Assessment** values from the applicable gifted rules. (However, the **Identified** and **Served** values remain the same.)

3. Optional: If you want to run the process without displaying the resulting changes, deselect the **Display results** check box.
4. Click **Submit**.

||| Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Mass Update

## Gifted Mass Update

This screen allows for a mass update of student gifted records.

---

**Gifted Rules:**

District Default

← →  
⇐ ⇒

**Overwrite Existing Student Gifted records:**

**Display results:**

**Instructions:** Use this section for resetting all served values on student gifted records.

**Grade Level:**  v

**Mass Update Student Gifted Records**

A confirmation message displays. If you ran the process with **Display results** selected, the updated or newly created records also display in a grid beneath the selection criteria.

**Gifted Mass Update**

This screen allows for a mass update of student gifted records.

The student gifted records have been successfully updated.

**Gifted Rules:**

Overwrite Existing Student Gifted records:

Display results:

Submit

Instructions: Use this section for resetting all served values on student gifted records.

Grade Level:  Reset Served

901 Records Displayed

Student	Grade Level	Rule	Status
ABBOTT, CLINTON	05	District Default	Created
ABBOTT, FERNANDO	02	District Default	Created
ACEVEDO, KRISTEN	03	District Default	Created
ACEVEDO, MICHAEL	KG	District Default	Created
ACEVEDO, VANESSA	12	District Default	Created

**Student Gifted Records Mass Updated**

**Note:** The gifted mass update only updates student gifted records for students enrolled in the school as of the indicated **Screened Date** on the gifted rule. If a student has enrolled since you ran the initial mass update (and was not enrolled as of the **Screened Date**), run this process again with **Overwrite Existing Student Gifted Records** deselected to create a gifted record with blank values for the recently enrolled student.

5. Optional: If you want to reset the **Served** value on student gifted records, do the following:
  - a. In the **Grade Level** drop-down list, select the appropriate grade level of the students whose **Served** value you want to reset. To reset the **Served** value for all grade levels, leave this field blank.
  - b. Click **Reset Served**.

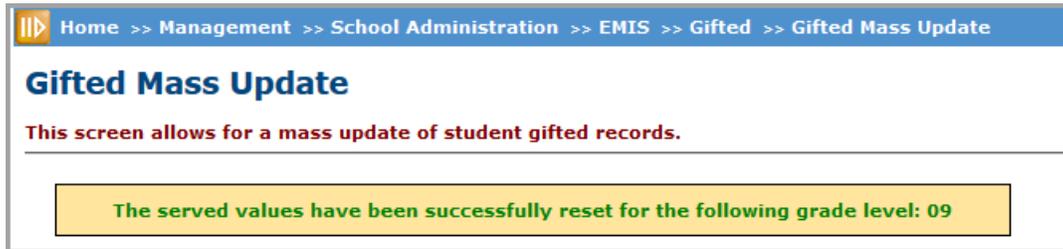
**Reset Served Values**

A message displays, asking if you are sure you want to reset the **Served** value for students in the selected grade level (or all grade levels, depending on your selection).

6. Click **Ok**.

**Confirm Reset**

A confirmation message displays, and the system resets the **Served** value for students in the specified grade level (or all grade levels, depending on your selection).



**Confirmation of Reset Served Values**

---

## Maintain Student Gifted Records

### Navigation: Home – SIS – Student – Gifted – Student Gifted Record

You can maintain gifted records for a student from year to year within the same district. The records are school year specific with the exception of the **Identified** and **Served** values.

While you can use the gifted mass update process to create records for new students (see "[Mass Update Student Gifted Records](#)"), you can also manually create these records using the procedure described here. This topic is also relevant if you have already run the mass update but need to adjust individual student gifted records for EMIS reporting.

1. With the correct student in context, on the **Student Gifted Record** screen, review the student's gifted record.
2. Make any desired changes to the following fields:
  - **Screening** – Select if this student has been screened in each specific gifted area.
  - **Assessment** – Select if this student has been assessed in each specific gifted area.
  - **Identified** – Select if this student has been identified as gifted in each specific gifted area. If you select **Identified** in any gifted area, in that area's **Identified Date** field, enter or select the date the student was identified as gifted in the specific area.
  - **Served** – Select if this student is being served for each specific gifted area.
3. Optional: To cancel the changes you have made on screen before saving, click **Discard Changes**.

**Note:** If you made any selections in the **Identified** fields or entered any dates in the **Identified Date** fields, you must manually restore the values. The **Discard Changes** button does not reset these fields.

4. Optional: To restore the student's record to your district or building level gifted rule default values for **Screening** and **Assessment**, click **Restore Default**. Then, on the confirmation screen, click **Ok**.

**Note:** If you made any selections in the **Identified** fields or entered any dates in the **Identified Date** fields, you must manually restore these values. The **Restore Default** button does not reset these fields.

**Note:** To reset **Served** values, use the gifted mass update.

- Click **Save**.

Home >> SIS >> Student >> Gifted >> Student Gifted Record

### Student Gifted Record

From this screen, you can display, add, change and delete data pertaining to a student's gifted record.

**Notes:** For students identified prior to 2000 with an unknown identified date, enter a date of 1/1/1900.

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09/03/2012  
Specific Academic Ability - Math	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/15/2012  
Specific Academic Ability - Science	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/26/2008  
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Save Discard Changes Restore Default

#### Maintain Student Gifted Record

A confirmation message displays, and the record is updated with your changes.

Home >> SIS >> Student >> Gifted >> Student Gifted Record

### Student Gifted Record

From this screen, you can display, add, change and delete data pertaining to a student's gifted record.

**Notes:** For students identified prior to 2000 with an unknown identified date, enter a date of 1/1/1900.

The student gifted record has been successfully saved

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09/03/2012  
Specific Academic Ability - Math	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/15/2012  
Specific Academic Ability - Science	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/26/2008  
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Save Discard Changes Restore Default

#### Student Gifted Record Updated

## Copy Served Values to Next School Year

### Navigation: Home – Management – School Administration – EMIS – Gifted – Gifted Initialization

At the end of the school year, you can copy the **Served** value on all student gifted records to the next school year.

**Note:** You should run this process at the building level. It does not work correctly at the district level!

1. Open the **Gifted Initialization** screen with the building in context and the school year set to the year to which you want to copy the previous year's student gifted record **Served** values.
2. In the **Copy From School Year**, select the previous year (year from which you want to copy student gifted record **Served** values).
3. In the **Grade Levels to Copy** area, select the grade levels for which you want to copy student gifted record **Served** values by moving them from the multi-select list on the left to the list on the right.
4. Optional: To reset all values before submitting, click **Reset Form**, and then make new selections.
5. Click **Submit**.

The screenshot shows the 'Gifted Initialization' web application interface. At the top, a navigation breadcrumb reads: Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Initialization. Below this, the title 'Gifted Initialization' is displayed in blue, followed by a red instruction: 'Use this page to copy Student Gifted Served values from one year to another.' The main form area contains a dropdown menu for 'Copy From School Year' set to '2013-2014'. Below that is a section titled 'Grade Levels to Copy:' with two multi-select lists. The left list is empty, and the right list contains the following grade levels: 08 - 08, 09 - 09, 10 - 10, 11 - 11, 12 - 12, 13 - 13, and 23 - 23. Between the lists are four arrows: two blue arrows pointing left and right, and two blue arrows pointing left and right with a lightning bolt icon. At the bottom of the form are two buttons: 'Submit' and 'Reset Form'.

Copy Served Values to Next School Year

The **Served** values of all student gifted records are copied to the school year in context, and a confirmation message indicates how many records were created and updated.

Home >> Management >> School Administration >> EMIS >> Gifted >> Gifted Initialization

**Gifted Initialization**

Use this page to copy Student Gifted Served values from one year to another.

---

The served values have been successfully copied. 59 records were created, 0 records were updated.

**Confirmation of Copied Served Values**

## Run Gifted Student Reports

The following reports are available in StudentInformation to help you manage your gifted student data:

- ["Gifted Area Students Report"](#)
- ["Gifted Student Courses Report"](#)
- ["Gifted Student Detail Report"](#)
- ["Gifted Students Missing Records Report"](#)

For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

## Gifted Area Students Report

**Navigation: Home – SIS – School – Student Reports – Gifted Area Students**

This report displays details about gifted students, including their area of giftedness, school, grade level, date they were identified as gifted and whether they are being served.

Report: Gifted Area Students		<b>DASL HIGH SCHOOL</b>					
Printed Mon, Jul 13, 2009, 11:42 AM		2009-2010					
		<b>Gifted Area Students</b>					
Student Name	Student Number	Gender	Ethnicity	Full Time Equivalent			
Student48253, ALEXIS	4152	F	WHITE	100			
	Superior Cognitive	Math	Science	Reading/Writing	Social Studies	Creative Thinking	Visual/Performing Arts
Identified Date	5/1/2006	5/1/2006	5/1/2006	5/1/2006			
Served	N	N	N	N	N	N	N
Student48260, CARALEE	4145	F	WHITE	100			
	Superior Cognitive	Math	Science	Reading/Writing	Social Studies	Creative Thinking	Visual/Performing Arts
Identified Date	5/1/2006						
Served	N	N	N	N	N	N	N

**Gifted Area Students Report**

## Gifted Student Courses Report

Navigation: Home – SIS – School – Student Reports – Gifted Student Courses

This report displays the courses (schedule) for the selected students along with their areas of giftedness.

Report: Gifted Student Courses		DASL HIGH SCHOOL						
Printed Mon, Jul 13, 2009, 1:39 PM		2008-2009						
Gifted Student Courses								
Student	Student Number	Cognitive	Math	Science	Reading/Writing	Social Studies	Creative Thinking	Visual/Performing Arts
<b>Student48948, MACKENZIE</b>	<b>2516</b>	Y	N	Y	Y	N	N	N
Course Name	Course Section	Credits	Teacher	Meeting Time	EMIS Subject Code	Core Subject Area		
HEALTH I	0312-62	0.50	MS. C. Teacher1537	6 (223)	260101	HEC		
ENGLISH 9	0111-8	1.00	MRS. J. Teacher1558	8 (221)	050160	ENG		
GEOMETRY	0522-7	1.00	MRS. R. Teacher1461	7 (225)	111200	MTO		
FRENCH II	0421-4	1.00	MRS. L. Teacher1465	4 (229)	060230	FLR		
CHOIR	0212-5	1.00	MRS. R. Teacher1529	5 (421)	120400	FAR		
CP BIOLOGY	0613-2	1.00	MRS. C. Teacher1473	2 (220)	132230	SCA		
STUDY HALL	SH-12	0.00	MR. K. Teacher1572	1 (CAF)	999370			
US STUDIES I	0721-3	1.00	MR. K. Teacher1495	3 (228)	150810	SOH		
Student Total Credits:		6.50						

### Gifted Student Courses Report

## Gifted Student Detail Report

Navigation: Home – SIS – School – Student Reports – Gifted Student Detail Report

This report displays detailed gifted area information for each student selected.

Report: Gifted Student Detail		DASL HIGH SCHOOL				
Printed Mon, Jul 13, 2009, 1:42 PM		2008-2009				
Gifted Student Detail						
Student	Student Number	Grade	Ethnicity	Disability Condition		
Student47954, ALEXANDRA	4913	07	WHITE	**		
Gifted Area	Screened	Assessed	Identified	Served	Identified Date	
Math	N	N	Y	Y	3/1/2005	
Student	Student Number	Grade	Ethnicity	Disability Condition		
Student48038, BRYCE	4832	07	WHITE	**		
Gifted Area	Screened	Assessed	Identified	Served	Identified Date	
Creative Thinking	N	N	Y	N	3/1/2005	
Student	Student Number	Grade	Ethnicity	Disability Condition		
Student48097, BAILEY	4749	08	WHITE	**		
Gifted Area	Screened	Assessed	Identified	Served	Identified Date	
Superior Cognitive	N	N	Y	Y	3/1/2004	
Math	N	N	Y	Y	3/1/2004	
Science	N	N	Y	Y	3/1/2004	
Reading/Writing	N	N	Y	Y	3/1/2005	
Social Studies	N	N	Y	Y	3/1/2004	

Gifted Student Detail Report

## Gifted Students Missing Records Report

Navigation: Home – SIS – School – Student Reports – Gifted Student Missing Records

This report displays a list of students who are missing a gifted record.

Report: Gifted Students Missing		DASL HIGH SCHOOL						
Printed Mon, Jul 13, 2009, 11:46 AM		2009-2010						
Gifted Students Missing Records								
School Code: AVHS	School Name: DASL HIGH SCHOOL			IRN: 000067				
Name	Student Number	Grade	Gender	Ethnicity	FTE	Sent To IRN	Admission Date	Withdrawal Date
Student47826, QUINN	5004	07	F	WHITE	100	*****	8/29/2005	
Student48948, MACKENZIE	2516	10	F	WHITE	100	*****	8/28/2006	

Gifted Students Missing Records Report

This page intentionally left blank.

# Ad-Hoc Updates

Ad-hoc updates update the StudentInformation database and create a report with results for you to verify. You can make the following types of ad-hoc updates related to your EMIS data:

- [“Bulk Update Graduation Date”](#)
- [“Bulk Update Diploma Type”](#)
- [“Copy Student Memberships”](#)
- [“Bulk Update Courses”](#)
- [“Bulk Update Manual Courses”](#)
- [“Bulk Update Fall Initialization Blocks”](#)

---

## Bulk Update Graduation Date

**Navigation: Home – Management – Ad-Hoc Updates – Update Graduation Date**

You can apply a graduation date to all 12th grade students with a given status or all students in an ad-hoc membership (for example, an ad-hoc membership group for 12th grade students).

For detailed information on bulk updating graduation dates, see *ProgressBook StudentInformation Ad-Hoc Updates Guide*.

---

## Bulk Update Diploma Type

**Navigation: Home – Management – Ad-Hoc Updates – Update Diploma Type**

You can bulk update the diploma type for all students with a given graduation date.

For detailed information on bulk updating diploma types, see *ProgressBook StudentInformation Ad-Hoc Updates Guide*.

---

## Copy Student Memberships

**Navigation: Home – Management – Ad-Hoc Updates – Student Membership Copy**

You can copy student membership assignments from the previous school year to the current year in context.

For detailed information on copying student memberships, see *ProgressBook StudentInformation Ad-Hoc Updates Guide*.

## Bulk Update Courses

### Navigation: StudentInformation – Management – Ad-Hoc Updates – Bulk Course Update

You can bulk update courses with a core subject area and/or dual credit indicator. You report this information on the GC-Student Graduation-Core Summary record.

- On the **Bulk Course Update** screen, find the courses you want to bulk update by entering search criteria in any/all of the following fields:
  - Department**
  - Area of Study**
  - Subject Area**
  - Is High School Credit Only** – Select this check box to only search for courses marked **Is High School Credit**.
  - EMIS Subject Area For Credit**
  - Report To EMIS Only** – Select this check box to only search for courses marked **Report to EMIS**.
  - EMIS Subject Codes** – Options are filtered based on your selection in the **EMIS Subject Area For Credit** drop-down list. Select one or more subject codes by moving them from the multi-select list on the left to the list on the right.
- Click **Preview Courses**.

StudentInformation > Management > Ad-Hoc Updates > Bulk Course Update

### Bulk Course Update

From this screen, you can bulk update courses.

[ Hide Course Filters ]

The Course Filter options will allow you to bulk update courses that match search criteria. You will be able to preview courses that match your search, and select/deselect courses for updating with the CORE Subject Area or Dual Credit value chosen below.

**Note:** If an item is selected in the EMIS Subject Area for Credit dropdown, the EMIS Subject Codes dual select will only be populated with codes associated with the selected EMIS Subject Area for Credit.

Department:  Area Of Study:

Subject Area:   Is High School Credit Only

EMIS Subject Area For Credit:   Report To EMIS Only

EMIS Subject Codes

010001 - Environmental and Agricultural Science	↔	Selected EMIS Subject Codes
010105 - Agriculture, Food and Natural Resources	↔	
010110 - Communications and Leadership	↔	
010115 - Business Management for Agricultural and Environmental Syst	↔	

[Preview Courses](#)

[ Show Update Directives ]

[ Show Sort Courses ]

I want to update:  Core Subject Area or  Dual Credit

[ Show Course Preview ]

### Search for Courses to Update

Courses matching your search criteria display in the course preview list at the bottom of the screen.

3. Optional: If you only want to view in the list courses that have no core subject area assigned, select the **Show Only Courses with no CORE Subject Area** check box.
4. Optional: If you want to bulk update the courses for any school years in addition to the school year in context, in the Update Directives section **School Years** multi-select list, select the school years and move them to the **School Years To Update** list on the right.

**Note:** *Courses are automatically updated for the school year in context.*

5. Optional: To change the sort order of the course preview listing:
  - a. In the Sort Courses section **Course Sorting Options** multi-select list, move one or more sort options to the **Selected Course Sorting Options** list on the right.

**Note:** *If you select multiple sort options, the system sorts the list first by the first option and then by the subsequent option(s).*

- b. Click **Sort Courses**.
6. For the **I want to update** option, select what you want to bulk update for the selected courses.
  - To update the core subject area:
    - i. Select "Core Subject Area."
    - ii. In the **CORE Subject Area** drop-down list, select the core subject area to assign to the courses. Or to clear the core subject area for the selected courses, select the blank option.

StudentInformation > Management > Ad-Hoc Updates > Bulk Course Update

### Bulk Course Update

From this screen, you can bulk update courses.

[ Show Course Filters ]  
[ Hide Update Directives ]

The Update Directives options will allow you to provide additional direction for the bulk update of courses.

**School Years**  
2013-2014  
2012-2013  
2012 Summer  
2011-2012

**School Years To Update**

The bulk update will assign the update type to selected courses within all school years chosen in the 'School Years to Update' dual select. The course will automatically be updated in the context school year.

[ Hide Sort Courses ]

**Course Sorting Options**  
Subject Area  
Area Of Study  
EMIS Subject Code  
EMIS Subject Area For Credit

**Selected Course Sorting Options**  
Course Code  
Course Name

Sort Courses

I want to update:  Core Subject Area or  Dual Credit  
**CORE Subject Area:** ENG - English Language Arts Units

Update Selected Courses

[ Hide Course Preview ]

	<input type="checkbox"/>	Course Code	Course Name	Hours Of Instruction	Department	Subject Area	Area Of Study	EMIS Subject Code	EMIS Subject Area For Credit	CORE Subject Area	Dual Credit
1	<input checked="" type="checkbox"/>	001R	ENGLISH 9R	60	010	ENG	ENG	050160	ENG		<input checked="" type="checkbox"/>
2	<input type="checkbox"/>	001W	ENGLISH 9W	60	010	ENG	ENG	050160	ENG	ENG	<input type="checkbox"/>
3	<input type="checkbox"/>	002R	ENGLISH 10R	60	010	ENG	ENG	050170	ENG	ENG	<input type="checkbox"/>
4	<input type="checkbox"/>	002W	ENGLISH 10W	60	010	ENG	ENG	050170	ENG	ENG	<input type="checkbox"/>
5	<input type="checkbox"/>	003	ENGLISH 11	120	010	ENG	ENG	050180	ENG	ENG	<input type="checkbox"/>
6	<input type="checkbox"/>	004	ENGLISH 12	120	010	ENG	ENG	050190	ENG	ENG	<input type="checkbox"/>
7	<input type="checkbox"/>	005	ADV COMPOSITION	60	010	ENG	ENG	050400	ENG	ENG	<input type="checkbox"/>
8	<input type="checkbox"/>	005DE	ADV COMP-DE	60	010	ENG	ENG	050400	ENG	ENG	<input type="checkbox"/>
9	<input type="checkbox"/>	006	EFFECTIVE SPEAKING	60	010	ENG	ENG	050500	ENG	ENG	<input type="checkbox"/>
10	<input type="checkbox"/>	006DE	EFFECTIVE SPEAKING DE	60	010	ENG	ENG	050500	ENG	ENG	<input type="checkbox"/>
11	<input type="checkbox"/>	009	MEDIA	20	010	ART	FA	050600	FAR	ELE	<input type="checkbox"/>
12	<input type="checkbox"/>	010	ALGEBRA I	120	020	MTH	MTH	110301	MTO	MTO	<input type="checkbox"/>
13	<input type="checkbox"/>	011	WORLD STUDIES	120	040	WH	SOC	150890	SOO	SOO	<input type="checkbox"/>
14	<input type="checkbox"/>	012	MODERN US HISTORY	120	040	AH	SOC	150810	SOH	SOH	<input type="checkbox"/>

### Bulk Update Courses – Core Subject Area

- To update the dual credit status of a course:
  - i. Select “Dual Credit.”
  - ii. Select or deselect the **Dual Credit** check box to indicate that the courses should/should not have a dual credit status.

StudentInformation > Management > Ad-Hoc Updates > Bulk Course Update

### Bulk Course Update

From this screen, you can bulk update courses.

[ Show Course Filters ]  
[ Hide Update Directives ]

The Update Directives options will allow you to provide additional direction for the bulk update of courses.

**School Years**      **School Years To Update**

2013-2014  
2012-2013  
2012 Summer  
2011-2012

The bulk update will assign the update type to selected courses within all school years chosen in the 'School Years to Update' dual select. The course will automatically be updated in the context school year.

[ Hide Sort Courses ]

**Course Sorting Options**      **Selected Course Sorting Options**

Subject Area  
Area Of Study  
EMIS Subject Code  
EMIS Subject Area For Credit

Course Code  
Course Name

Sort Courses

I want to update:  Core Subject Area or  Dual Credit

Dual Credit:

Update Selected Courses

[ Hide Course Preview ]

	<input type="checkbox"/>	Course Code	Course Name	Hours Of Instruction	Department	Subject Area	Area Of Study	EMIS Subject Code	EMIS Subject Area For Credit	CORE Subject Area	Dual Credit
1	<input checked="" type="checkbox"/>	001R	ENGLISH 9R	60	010	ENG	ENG	050160	ENG		<input type="checkbox"/>
2	<input type="checkbox"/>	AK FIT WELL	AK FITNESS AND WELLNESS	60					PHE		<input type="checkbox"/>
3	<input type="checkbox"/>	AK HUM REL	HUMAN RELATIONS	60					SOO		<input type="checkbox"/>
4	<input type="checkbox"/>	AK MED TERM	MEDICAL TERMINOLOGY	60					ELE		<input type="checkbox"/>
5	<input checked="" type="checkbox"/>	AK PRIN CHEM	AK PRINCIPLES OF CHEMISTRY	60					SCA		<input type="checkbox"/>
6	<input checked="" type="checkbox"/>	AK SHAKESP	AK SHAKESPEARE & HIS WORLD	60					ENG		<input type="checkbox"/>
7	<input type="checkbox"/>	AK SOC	INTRO TO SOCIOLOGY	60					SOO		<input type="checkbox"/>
8	<input type="checkbox"/>	CA ENG CMP II	CA ENG CMP II	60	010	ENG	ENG	050400	ENG		<input type="checkbox"/>
9	<input type="checkbox"/>	CA PHYSICS	CA PHYSICS	120	030		SCI		SCA		<input type="checkbox"/>
10	<input type="checkbox"/>	SH1	STUDY HALL	0	160						<input type="checkbox"/>
11	<input type="checkbox"/>	SH2	STUDY HALL	0	160						<input type="checkbox"/>
12	<input type="checkbox"/>	SH3	STUDY HALL	0	160						<input type="checkbox"/>
13	<input type="checkbox"/>	SH4	STUDY HALL	0	160						<input type="checkbox"/>
14	<input type="checkbox"/>	SH7	STUDY HALL	0	160						<input type="checkbox"/>
15	<input type="checkbox"/>	SH8	STUDY HALL	0	160						<input type="checkbox"/>
16	<input type="checkbox"/>	SH9	STUDY HALL	0	160						<input type="checkbox"/>
17	<input type="checkbox"/>	SS CO	STARK STATE COLLEGE	120	000				***		<input type="checkbox"/>

Show Only Courses with no CORE Subject Area

17 Records Displayed [Back To Top](#)

All courses will be returned if the 'Show Only Courses with no CORE Subject Area' box is unchecked, allowing you to change pre-existing CORE Subject Area values with the bulk update.

### Bulk Update Courses – Dual Credit

- In the Course Preview list, select the courses you want to bulk update. To select all courses in the list, select the check box at the top of the grid.
- Important: Review your selections and ensure these are the correct courses you want to bulk update and that you have made the correct selections.
- Click **Update Selected Courses**.

A confirmation message displays, and the system updates the selected courses with your selections.

## Bulk Update Manual Courses

### Navigation: StudentInformation – Management – Ad-Hoc Updates – Bulk Manual Course Update

You can bulk update manually entered courses with a core subject area and/or dual credit indicator.

**Note:** All manually entered course history records that are marked **Is High School Credit** need a core subject area value. For all courses in which high school credit is earned, you must update the core subject area for the current year, the future year (if you have already completed school year initialization) and prior years, regardless of where the course was taken (JVS, post-secondary institution, another district or middle school).

1. On the **Bulk Manual Course Update** screen **Choose school years** tab, indicate the school year(s) for which you want to update manually entered courses by selecting them in the **Manually Entered Course School Years** multi-select list on the left and moving them to the **Chosen** list on the right.
2. Click **Next**.

#### Choose School Years to Bulk Update Manual Courses

3. On the **Choose originating schools** tab, select the originating school(s) of the manually entered courses by selecting them in the **Manually Entered Course Originating Schools** multi-select list on the left and moving them to the **Chosen** list on the right.

**Note:** It is recommended that you run the update process for one originating school at a time.

4. Optional: If you want to view and update all manually entered courses (and not just those that are marked **Is High School Credit**), deselect the **High School Credit Manually Entered Courses Only** check box.

**Note:** If you are bulk updating the core subject area, you should typically leave this check box selected (which is the default) since these are the courses that require a core subject area.

- Click **Next**.

### Choose Originating Schools to Bulk Update Manual Courses

- Optional: To limit the manually entered courses that you want to view and update to those with specific field value(s), on the **Choose Filters** tab, select the values by moving them from the multi-select lists on the left to the respective **Chosen** list on the right.

**Note:** Instead of choosing a specific value for a filter, you can also enter text in the **Or like** field to filter the courses based on the first few letters of the value. For example, if you enter **alg** in the **Or like** field for **Subject Areas**, the system filters the courses to potentially include manual courses with subject areas of ALG, ALG2, ALGEBRA I, and ALGEBRA II.

- Click **Next**.

StudentInformation > Management > Ad-Hoc Updates > Bulk Manual Course Update

### Bulk Manual Course Update

From this screen you can bulk update Manually Entered Courses

Choose school years | Choose originating schools | **Choose filters** | View courses and update records | View summary

< Prev | Next > | Summary >>

**Chose filters to limit the manually entered courses to view and update.**  
The filters contain a distinct list of values from the manually entered courses in the school years and originating schools chosen in previous tabs. To view all courses, do not select any filters. If a filter is chosen, only records matching the filter(s) will be returned.

<b>Subject Areas</b>	Chosen	Or like
PE - PHYS ED		<input type="text"/>
<b>Areas Of Study</b>	Chosen	Or like
PE - PHYSICAL EDUCATION		<input type="text"/>
<b>Course Codes</b>	Chosen	Or like
301B 301G		<input type="text"/>
<b>Course Short Names</b>	Chosen	Or like
PHYSED PHYSED9 PHYSED9B PHYSEDG9		<input type="text"/>
<b>Course Names</b>	Chosen	Or like
PHYSED		<input type="text"/>

#### Choose Additional Filters to Bulk Update Manual Courses

- On the **View courses and update records** tab, review the list of courses matching your search criteria.

**Note:** The **Records** column displays the number of course history records that will be updated for each course.

- Optional: If you only want to view in the list manually entered courses that have no core subject area assigned, select the **Show Manually Entered Courses Missing CORE Subject Area Only** check box.
- Select the check box beside each manually entered course that you want to update. To select all courses in the list, select the **Select All** check box.

11. For the **I want to update option**, select what you want to bulk update for the selected manual courses.

- To update the core subject area:
  - i. Select “Core Subject Area.”
  - ii. In the **CORE Subject Area** drop-down list, select the core subject area to assign to the manual courses. Or to clear the core subject area for the selected manual courses, select “[Clear CORE Subject Area].”

StudentInformation > Management > Ad-Hoc Updates > Bulk Manual Course Update

### Bulk Manual Course Update

From this screen you can bulk update Manually Entered Courses

Choose school years | Choose originating schools | Choose filters | View courses and update records | View summary

< Prev | Next > | Summary >>

Select the manually entered courses to update. Choose a value and click the 'Update Selected Records' button. Only records matching the school years and originating schools selected in the previous tab will be updated.

I want to update:  Core Subject Area or  Dual Credit

CORE Subject Area: PHE - Physical Education Units

Select All | Update Selected Records

	Code ^	Short Name	Name	Is HS Credit	CORE Subject Area	Dual Credit	Records
<input checked="" type="checkbox"/>	301B	PHYSED	PHYSED	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	2
<input type="checkbox"/>	301B	PHYSED9B	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	1
<input type="checkbox"/>	301G	PHYSED	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	11
<input type="checkbox"/>	301G	PHYSED9	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	1
<input type="checkbox"/>	301G	PHYSEDG9	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	6

Show Manually Entered Courses Missing CORE Subject Area Only

**Total Manual Course Records**  
21

#### Bulk Update Manual Courses – Core Subject Area

- To update the dual credit status of a manual course:
  - i. Select “Dual Credit.”
  - ii. Select or deselect the **Dual Credit** check box to indicate that the manual courses should/should not have a dual credit status.

StudentInformation > Management > Ad-Hoc Updates > Bulk Manual Course Update

### Bulk Manual Course Update

From this screen you can bulk update Manually Entered Courses

Choose school years | Choose originating schools | Choose filters | View courses and update records | View summary

< Prev | Next > | Summary >>

Select the manually entered courses to update. Choose a value and click the 'Update Selected Records' button. Only records matching the school years and originating schools selected in the previous tab will be updated.

I want to update:  Core Subject Area or  Dual Credit

Dual Credit:

Select All | Update Selected Records

	Code ^	Short Name	Name	Is HS Credit	CORE Subject Area	Dual Credit	Records
<input checked="" type="checkbox"/>	301B	PHYSED	PHYSED	<input checked="" type="checkbox"/>	PHE	<input type="checkbox"/>	2
<input checked="" type="checkbox"/>	301B	PHYSED9B	PHYSED	<input checked="" type="checkbox"/>	PHE	<input type="checkbox"/>	1
<input checked="" type="checkbox"/>	301G	PHYSED	PHYSED	<input checked="" type="checkbox"/>	PHE	<input type="checkbox"/>	11
<input checked="" type="checkbox"/>	301G	PHYSED9	PHYSED	<input checked="" type="checkbox"/>	PHE	<input type="checkbox"/>	1
<input checked="" type="checkbox"/>	301G	PHYSEDG9	PHYSED	<input checked="" type="checkbox"/>	PHE	<input type="checkbox"/>	6

Show Manually Entered Courses Missing CORE Subject Area Only

<b>Total Manual Course Records</b>	21
------------------------------------	----

### Bulk Update Manual Courses – Dual Credit

12. Click **Update Selected Records**.

The list of manual courses updates to display your selected changes.

13. Click **Next**.

StudentInformation > Management > Ad-Hoc Updates > Bulk Manual Course Update

### Bulk Manual Course Update

From this screen you can bulk update Manually Entered Courses

Choose school years | Choose originating schools | Choose filters | View courses and update records | View summary

< Prev | Next > | Summary >>

Select the manually entered courses to update. Choose a value and click the 'Update Selected Records' button. Only records matching the school years and originating schools selected in the previous tab will be updated.

I want to update:  Core Subject Area or  Dual Credit

Dual Credit:

Select All | Update Selected Records

	Code ^	Short Name	Name	Is HS Credit	CORE Subject Area	Dual Credit	Records
<input type="checkbox"/>	301B	PHYSED	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	2
<input type="checkbox"/>	301B	PHYSED9B	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	1
<input type="checkbox"/>	301G	PHYSED	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	11
<input type="checkbox"/>	301G	PHYSED9	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	1
<input type="checkbox"/>	301G	PHYSEDG9	PHYSED	<input checked="" type="checkbox"/>	PHE	<input checked="" type="checkbox"/>	6

Show Manually Entered Courses Missing CORE Subject Area Only

<b>Total Manual Course Records</b>	21
------------------------------------	----

### Manual Courses Updated

On the **View summary** tab, a summary of manual course records displays for each originating school, including the number of records with a core subject area still missing, if applicable.

StudentInformation > Management > Ad-Hoc Updates > Bulk Manual Course Update

### Bulk Manual Course Update

From this screen you can bulk update Manually Entered Courses

Choose school years | Choose originating schools | Choose filters | View courses and update records | **View summary**

< Prev | Next > | << Start Over

**The summary shows counts by originating school and high school credit.**  
Counts are for the manually entered courses that match the school years, originating school and high school credit options chosen on the previous tabs. Use the summary to view the number of records for which the values are set.

Originating School	Is HS Credit	CORE Missing	CORE Set	Dual Credit	Total
DALTON HIGH SCHOOL	<input checked="" type="checkbox"/>	0	21	21	42

Total Missing	Total Set	Total Records
0	21	42

### Summary of Manual Course Records

## Bulk Update Fall Initialization Blocks

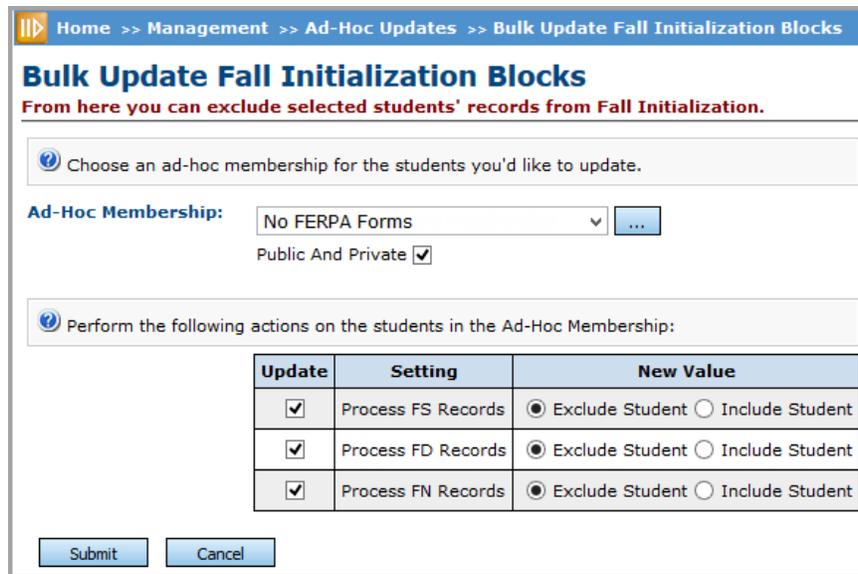
### Navigation: Home – Management – Ad-Hoc Updates – Bulk Update Fall Initialization Blocks

You can perform a bulk update for a collection of students using ad-hoc membership groups to set/unset the options on the student profile to exclude FS, FD and FN records from fall initialization updates.

1. On the **Bulk Update Fall Initialization Blocks** screen with the school in context, in the **Ad-Hoc Membership** drop-down list, select the ad-hoc group.

**Note:** To find or build an ad-hoc membership, click . (For more information on setting up ad-hoc memberships, see *ProgressBook StudentInformation Getting Started Guide*.)

2. Optional: To expand the available ad-hoc membership groups in the **Ad-Hoc Membership** drop-down list to include both public and private groups, select the **Public And Private** check box.
3. In the row of each type of record for which you want to set a value on the student profile, select the **Update** check box. Then, in the **New Value** column, select either “Exclude Student” or “Include Student.”
4. Click **Submit**.



Home >> Management >> Ad-Hoc Updates >> Bulk Update Fall Initialization Blocks

### Bulk Update Fall Initialization Blocks

From here you can exclude selected students' records from Fall Initialization.

Choose an ad-hoc membership for the students you'd like to update.

**Ad-Hoc Membership:** No FERPA Forms 

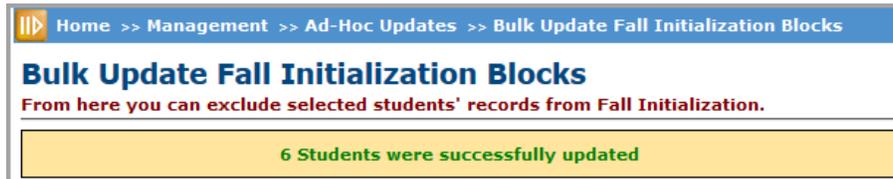
Public And Private

Perform the following actions on the students in the Ad-Hoc Membership:

Update	Setting	New Value
<input checked="" type="checkbox"/>	Process FS Records	<input checked="" type="radio"/> Exclude Student <input type="radio"/> Include Student
<input checked="" type="checkbox"/>	Process FD Records	<input checked="" type="radio"/> Exclude Student <input type="radio"/> Include Student
<input checked="" type="checkbox"/>	Process FN Records	<input checked="" type="radio"/> Exclude Student <input type="radio"/> Include Student

### Bulk Update Fall Initialization Blocks

A confirmation message displays the number of student profiles updated.



### Confirmation of Updated Fall Initialization Blocks

The update selects or deselects the following check box options on the student profile based on your selections:

Student Profile Tab	Check Box Option
FS-Standing	Exclude FS Records from Fall Initialization Updates
FD-Attributes	Exclude FD Records from Fall Initialization Updates
FN-Attributes	Exclude FN Records from Fall Initialization Updates

This page intentionally left blank.

# Highly Qualified Teacher

StudentInformation provides the following tools to help you in your EMIS reporting of highly qualified teachers (HQT). Refer to the appropriate section as follows:

- For a report showing a list of teachers who are required to enter HQT data, see [“Run Highly Qualified Teacher Report.”](#)
- For a verification worksheet to provide to your HQT teachers, see [“Print Highly Qualified Teacher Worksheet.”](#)
- To update the HQT definition for teachers, see [“Update Highly Qualified Teacher Definitions.”](#)

---

## Run Highly Qualified Teacher Report

**Navigation: Home – SIS – School – Highly Qualified Teacher Report**

This report generates a list of teachers who are required to report HQT data and their associated core courses.

For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

Report: HQT Report Printed Mon, Jun 02, 2014, 10:57 AM		<b>DALTON HIGH SCHOOL</b> 2013-2014 <b>Ohio Highly Qualified Teacher Report</b>	
Building IRN / Name: 008003 DALTON HIGH SCHOOL			
Teacher: BOYER, DOLORES SSN: [REDACTED] SSID [REDACTED] CR: Curriculum DM: Delivery Method SP: Student Population			
Emis Subject	CR DM SP	HQT Def	
150300 - Government (American) 013 - AMERICAN GOVERNMENT 013DE - AMERICAN GOVERNMENT-DE	OT FF RG	1 - NTE/Praxis II - State Licensing Exam	
150890 - History (World) 011 - WORLD STUDIES	OT FF RG	1 - NTE/Praxis II - State Licensing Exam	
151121 - Psychology 015 - PSYCHOLOGY DE	OT FF RG		
151300 - Sociology 018 - INTRO TO SOCIOLOGY DE	OT FF RG	I - Not core course OR type of course isn't eval. for HQT	
159940 - Microeconomics 014 - MICROECONOMICS DE	OT FF RG		
159999 - Other Social Studies 016 - POLITICAL SCIENCE 016DE - POLITICAL SCIENCE DE	OT FF RG	I - Not core course OR type of course isn't eval. for HQT	
Teacher: BRANCH, JEFFERY SSN: [REDACTED] SSID [REDACTED] CR: Curriculum DM: Delivery Method SP: Student Population			
Emis Subject	CR DM SP	HQT Def	
060107 - Latin 209 - FV LATIN I 209.5 - FV LATIN I 219 - FV LATIN II 229 - FV LATIN III	OT ID RG	I - Not core course OR type of course isn't eval. for HQT	

**Highly Qualified Teacher Report**

## Print Highly Qualified Teacher Worksheet

**Navigation: Home – SIS – School – Highly Qualified Teacher Worksheet**

This is a verification worksheet that you can print for teachers who are required to report HQT data for their core courses (as defined by the federal No Child Left Behind Act). Each teacher's data prints on a separate page, and teachers must verify the data for each of their core courses (or indicate the required changes) and then sign the worksheet. You can then make any required updates to the HQT data. (See ["Update Highly Qualified Teacher Definitions."](#))

For information on running reports, see *ProgressBook StudentInformation Getting Started Guide*.

**Note:** Refer to the ODE website for instructions for completing the Highly Qualified Teacher Worksheet.

Report: HQT Worksheet Printed Mon, Jun 02, 2014, 11:00 AM		<b>DALTON HIGH SCHOOL</b> 2013-2014 <b>HQT Worksheet</b>																		
District IRN / Name: 050542 Dalton Local Schools		Building IRN / Name: 008003 DALTON HIGH SCHOOL																		
Teacher: BRANCH, JEFFERY																				
SSN: ██████████ SSID: ██████████		CR: Curriculum DM: Delivery Method SP: Student Population																		
Emis Subject	CR	DM	SP	HQT Def	Change HQT Reason															
060107 - Latin	OT	ID	RG	I	1	2	3	5	6	7	8	9	I	N						
209 - FV LATIN I																				
209.5 - FV LATIN I																				
219 - FV LATIN II																				
229 - FV LATIN III																				
(blank rows available below to add new courses)																				
___ "No Changes". Checking this blank means that there have been no changes to your HQT criteria for the course(s) you taught during the previous school year.																				
I hereby assure that all information presented is correct and is acceptable for reporting for No Child Left Behind Highly Qualified Teacher requirements as stated in section 1111, 1119, and 9101.																				
Signature: _____												Date: _____								
Your building administrator may request that you provide backup documentation.																				

**Highly Qualified Teacher Worksheet**

## Update Highly Qualified Teacher Definitions

You can make any needed updates to HQT data based on changes that teachers have submitted on their HQT worksheet. (See ["Print Highly Qualified Teacher Worksheet."](#)) This process updates the HQT definition for a teacher's course sections.

**Note:** To update a teacher's HQT definition for a course, the teacher must be selected as the **Teacher of Record** on the **Teacher History** tab of the course section record.

Refer to the appropriate section as follows:

- To add a new HQT definition, see ["Add HQT Definitions."](#)
- To edit an existing HQT definition, see ["Edit HQT Definitions."](#)
- To delete an HQT definition, see ["Delete HQT Definitions."](#)

## Add HQT Definitions

Navigation: Home – Management – School Administration – Scheduling Administration – Highly Qualified Teacher Update

1. On the **Highly Qualified Teacher Update Maintenance** screen, in the **Filter By Teacher** drop-down list, select the teacher for whom you want to add HQT definitions.

### Select Teacher to Add HQT Definitions

The screen refreshes to display the teacher’s core courses with HQT definitions.

2. Click **Add HQT Definition**.

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HQ Definition
<input checked="" type="checkbox"/>	150300 - Government (American)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150400 - Intervention Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	151300 - Sociology	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	159999 - Other Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT

### Add HQT Definitions

The add version of the screen displays.

3. In the **EMIS Definition** drop-down list, select a unique combination of EMIS Subject/Curriculum/Delivery Method/Student Population taught by the selected teacher.

**Note:** These options are populated from the **EMIS Override** tab of the course section record. If the teacher already has an HQT definition for a unique combination in the school and school year in context, that unique combination does not display in the drop-down list. Only unique combinations that do not have HQT definitions display.

### Select EMIS Definition

Based on your selection, codes and descriptions display in read-only format in the **EMIS Subject, Curriculum, Delivery Method** and **Student Population** fields.

- In the **How the teacher meets highly qualified definition** drop-down list, select an HQT definition.

**Note:** *If one or more of the following is true, you should select option “1 - Not core course OR type of course isn’t eval. for HQT”:*

- Curriculum Element = PS, PI or OC
- Delivery Method = CC, ET, OL, and Ed option = YS
- Delivery Method = ID, IM, TO or CI
- Student Population = D8, DP or PR

- Click **Save**.

### Add HQT Definition

A confirmation message displays, and the new HQT definition displays in the list.

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HQ Definition
<input checked="" type="checkbox"/>	150300 - Government (American)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150400 - Intervention Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	151300 - Sociology	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	159999 - Other Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT

### HQT Definition Added

## Edit HQT Definitions

Navigation: Home – Management – School Administration – Scheduling Administration – Highly Qualified Teacher Update

1. On the **Highly Qualified Teacher Update Maintenance** screen, in the **Filter By Teacher** drop-down list, select the teacher whose HQT definitions you want to edit.

### Select Teacher to Edit HQT Definitions

The screen refreshes to display the teacher’s core courses with HQT definitions.

2. In the row of the HQT definition that you want to edit, click  .

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HQ Definition
<input checked="" type="checkbox"/>	150300 - Government (American)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150400 - Intervention Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	151300 - Sociology	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	159999 - Other Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT

### Edit HQT Definitions

The edit version of the screen displays.

3. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add HQT Definitions.”](#)

### Edit HQT Definition

The edited HQT definition displays in the list.

Home >> Management >> School Administration >> Scheduling Administration >> Highly Qualified Teacher Update Advanced Search | Feedback | Mgmt | Help | Version | Print

### Highly Qualified Teacher Update Maintenance

From this screen, you can display and edit data pertaining to highly qualified teacher values in EMIS.

The Highly Qualified Teacher Update was saved successfully

Filter By Teacher: DOLORES BOYER

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HQ Definition
<input checked="" type="checkbox"/>	150300 - Government (American)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150400 - Intervention Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	3 - Masters degree
<input checked="" type="checkbox"/>	151300 - Sociology	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	159999 - Other Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT

### HQT Definition Edited

## Delete HQT Definitions

Navigation: Home – Management – School Administration – Scheduling Administration – Highly Qualified Teacher Update

1. On the **Highly Qualified Teacher Update Maintenance** screen, in the **Filter By Teacher** drop-down list, select the teacher whose HQT definitions you want to delete.

Home >> Management >> School Administration >> Scheduling Administration >> Highly Qualified Teacher Update Advanced Search | Feedback | Mgmt | Help | Version | Print

### Highly Qualified Teacher Update Maintenance

From this screen, you can display and edit data pertaining to highly qualified teacher values in EMIS.

Filter By Teacher: -- Select a Teacher --

### Select Teacher to Delete HQT Definitions

The screen refreshes to display the teacher's core courses with HQT definitions.

2. In the row of the HQT definition that you want to delete, click **X**.

Home >> Management >> School Administration >> Scheduling Administration >> Highly Qualified Teacher Update Advanced Search | Feedback | Mgmt | Help | Version | Print

### Highly Qualified Teacher Update Maintenance

From this screen, you can display and edit data pertaining to highly qualified teacher values in EMIS.

Filter By Teacher: DOLORES BOYER

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HQ Definition
<input checked="" type="checkbox"/>	150300 - Government (American)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150400 - Intervention Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - NTE/Praxis II - State Licensing Exam
<input checked="" type="checkbox"/>	151300 - Sociology	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT
<input checked="" type="checkbox"/>	159999 - Other Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT

### Delete HQT Definition

A confirmation message displays, and the HQT definition no longer displays in the list.

Home >> Management >> School Administration >> Scheduling Administration >> Highly Qualified Teacher Update Advanced Search | Feedback | Mgmt | Help | Version | Print

### Highly Qualified Teacher Update Maintenance

From this screen, you can display and edit data pertaining to highly qualified teacher values in EMIS.

Delete of Highly Qualified Teacher Record Successful

Filter By Teacher:

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HQ Definition
✖	150300 - Government (American)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
✖	150400 - Intervention Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	SE - Special Education K-12	1 - Not core course OR type of course isn't eval. for HQT
✖	150890 - History (World)	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam
✖	151300 - Sociology	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT
✖	159999 - Other Social Studies	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - Not core course OR type of course isn't eval. for HQT

### Confirmation of Deleted HQT Definition

# Student Reporting Collection (S)

Use Student Reporting Collection S to report student data to the state during the required collection windows throughout the year. This process includes reporting not only for traditional schools but also for community schools, which must include additional file types as part of SOES (School Options Enrollment System) reporting. Refer to the appropriate section:

- To verify the completeness of the student data you plan to report to EMIS, see [“Verify Student Data.”](#)
- To create the extract to transfer your student data, see [“Transfer Student Data.”](#)

---

## Verify Student Data

You can verify different types of student data before transferring it to the state. Refer to the appropriate section as follows:

- [“Verify EMIS Run Requests for Student Data”](#)
- [“Verify Discipline Information”](#)
- [“Verify Membership Programs”](#)
- [“Verify Special Education Services”](#)
- [“Verify Non-reportable Students”](#)
- [“Verify Student Demographic”](#)
- [“Verify Student Special Education”](#)
- [“Update Student Attendance”](#)

## Verify EMIS Run Requests for Student Data

You can run this verify process at any time to monitor your district’s outstanding EMIS processes and transfers of student data. This process reports on the history of these processes, showing when they were run and who ran them.

### Navigation: StudentInformation – EMIS – Student Reporting Collection (S)

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
2. Click **Next**.

### Verify Student Data

3. On the **Program Selection** tab, select “Verify - EMIS Run Requests (CHECK\_EMIS).”
4. Click **Next**.

### Verify EMIS Run Requests

5. On the **EMIS Run Requests (CHECK\_EMIS)** screen, in the **District** section, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. Select whether to view those processes that are “Not Run,” “Already Run” (lists the last time each process was run) or a “History” (lists every time each process was run) for this reporting collection.
7. Optional: If you selected “Not Run,” and you want to exclude verifications and/or transfers from the results, deselect the “Verification Not Run” and/or “Transfer Not Run” options as appropriate.
8. Optional: For any of the process options, if you want to exclude from the results processes run prior to a specific date, in the **Exclude Runs Prior To** field, enter or select that date.
9. Click **Submit**.

StudentInformation > EMIS > Verify EMIS Run Requests

### EMIS Run Requests (CHECK\_EMIS)

**From this screen, you can verify which EMIS programs have or have not been run.**

Reporting Collection:  ⚡

**District:** Dalton Local Schools  
 Select All Buildings  Clear All Buildings

---

DAES - DALTON ELEMENTARY SCHOOL  DAJH - DALTON INTERMEDIATE ⚡  
 DAHS - DALTON HIGH SCHOOL

**Not Run**  Already Run  History

**Include the Following Potential Problems:**

Verification Not Run  
 Transfer Not Run

**Required:**

- Student Collection Transfer - District Testing (DT)
- Student Collection Transfer - Organization - General Information (DN)
- Student Collection Transfer - Student Acceleration (FB)
- Student Collection Transfer - Student Attributes - Effective Date (FD)
- Student Collection Transfer - Student Attributes - No Date (FN)
- Student Collection Transfer - Student Demographic (GI)
- Student Collection Transfer - Student Demographic - Race Detail (GJ)
- Student Collection Transfer - Student Discipline (GD)
- Student Collection Transfer - Student Gifted Education (GG)
- Student Collection Transfer - Student Missing Override (FC)
- Student Collection Transfer - Student Program (GQ)
- Student Collection Transfer - Student Special Ed. Graduation Requirement (FE)
- Student Collection Transfer - Student Special Education (GE)
- Student Collection Transfer - Student Standing (FS)
- Student Collection Transfer - Student Summer Withdrawal (FL)
- Student Collection Verify - Discipline (DISCEMIS)
- Student Collection Verify - Membership Programs (MEMBEMIS)
- Student Collection Verify - Non-reportable Students
- Student Collection Verify - Student Demographic (UNCLEMIS)
- Student Collection Verify - Student Special Education

**Required (Not Available Yet):**

- Student Collection Verify - Majority of Attendance IRN (MAJOREMIS)
- Student Collection Verify - Student Gifted Records
- Student Collection Verify - Student Attendance

Exclude Runs Prior To:  📅

**Submit EMIS Run Requests**

Student Reporting Collection (S)

Results display in a grid at the bottom of the screen based on your selections. (See examples that follow.)

Not Run
  Already Run
  History



Building	Module	Program	Run Date	Issue
	Student Collection	Organization - General Information (DN)		Transfer not run
	Student Collection	Student Attendance		Verify not run
	Student Collection	Student Attributes - Effective Date (FD)		Transfer not run
	Student Collection	Student Attributes - No Date (FN)		Transfer not run
	Student Collection	Student Contact (FF)		Transfer not run
	Student Collection	Student Contact Address (FG)		Transfer not run
	Student Collection	Student Demographic (G1)		Transfer not run
	Student Collection	Student Demographic - Race Detail (G3)		Transfer not run
	Student Collection	Student Missing Override (FC)		Transfer not run
	Student Collection	Student Program (GQ)		Transfer not run

**EMIS Requests Not Run**

Not Run
  Already Run
  History

Exclude Runs Prior To:

Building	Module	Program	Verify Run Date	Verify	Update Run Date	Update	Transfer Run Date	Transfer
	Student Collection	Membership Programs (MEMBEMIS)	09/05/2014 03:39 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Non-reportable Students	08/28/2014 10:09 AM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Student Demographic (UNCLEMIS)	09/04/2014 01:27 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Membership Programs (MEMBEMIS)	09/05/2014 03:39 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Non-reportable Students	08/28/2014 10:09 AM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Student Demographic (UNCLEMIS)	09/04/2014 01:27 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Membership Programs (MEMBEMIS)	09/05/2014 03:39 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Non-reportable Students	08/28/2014 10:09 AM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Student Demographic (UNCLEMIS)	09/04/2014 01:27 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Membership Programs (MEMBEMIS)	09/05/2014 03:39 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Non-reportable Students	08/28/2014 10:09 AM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	Student Collection	Student Demographic (UNCLEMIS)	09/04/2014 01:27 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

**EMIS Requests Already Run**

Not Run
  Already Run
  History

Exclude Runs Prior To:

48 Records Displayed

Building	Module	Program	Action	User	Run Date
	Student Collection	Membership Programs (MEMBEMIS)	Verify		09/05/2014 03:39 PM
	Student Collection	Membership Programs (MEMBEMIS)	Verify		09/05/2014 03:39 PM
	Student Collection	Membership Programs (MEMBEMIS)	Verify		09/05/2014 03:39 PM
	Student Collection	Membership Programs (MEMBEMIS)	Verify		09/05/2014 03:39 PM
	Student Collection	Membership Programs (MEMBEMIS)	Verify		09/05/2014 03:27 PM
	Student Collection	Membership Programs (MEMBEMIS)	Verify		09/05/2014 03:27 PM
	Student Collection	Membership Programs (MEMBEMIS)	Verify		09/05/2014 03:27 PM

History of EMIS Run Requests

## Verify Discipline Information

Navigation: StudentInformation – EMIS – Student Reporting Collection (S)

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
2. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Transfer - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type   Program Selection

Verify Student Data  
 Transfer Student Data

Verify Student Data

3. On the **Program Selection** tab, select “Verify - Discipline (DISCEMIS).”
4. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Verify/Update - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type | Program Selection

- Verify - Discipline (DISCEMIS)
- Verify - EMIS Run Requests (CHECK\_EMIS)
- Verify - Majority of Attendance IRN (MAJOREMIS)
- Verify - Membership Programs (MEMBEMIS)
- Verify - Non-reportable Students
- Verify - Student Demographic (UNCLEMIS)
- Verify - Student Gifted Records
- Verify - Student Special Education
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back | Next > | Cancel

#### Verify Discipline Information

- On the **Verify Discipline Information** screen, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
- Optional: If you want to generate a file containing the student discipline information, in the **File Download Options** section, make the following selections:
  - Select A File Type** – Select either “CSV,” “HTML” or “TAB” format.
  - Select A Download Method** – Select to either “Download” or “Email” the file.
- Click **Submit**.

StudentInformation > EMIS > Verify/Update Discipline Information

### Verify Discipline Information - Ashland City Schools

From this screen, you can verify and update discipline information.

**Include Buildings:**

Select All Buildings  Clear All Buildings

- ASHS - ASHLAND HIGH SCHOOL
- ASJH - ASHLAND MIDDLE SCHOOL
- ASED - Edison Primary School North
- ASMO - Montgomery Intermediate School East
- ASOS - Osborn Intermediate School Central
- ASTA - Taft Primary School South

Number of Students Per Page: 50

**File Download Options**

Select A File Type | Select A Download Method

Submit | Cancel

#### Verify Discipline Information – Select Options

Any errors from the verify process display in a grid at the bottom of the screen and (if you selected file download options) in the generated file.

- Optional: If errors display, in the row of each error, click the incident link, and make the needed correction(s).

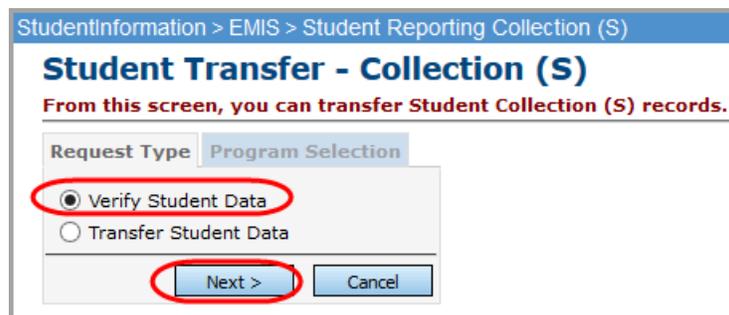
Building IRN	Building	Student	Student Number	EMIS ID
<i>Incident Messages:</i>				
		- <a href="#">99809 - test</a>	GD01W - Warning: Discipline Action Date is not specified, the record will be transferred with the Incident date	
		- <a href="#">99809 - test</a>	GD02E - Error: Date of Discipline is outside the range of the FS effective dates	
		- <a href="#">99810 - test2</a>	GD01W - Warning: Discipline Action Date is not specified, the record will be transferred with the Incident date	
		- <a href="#">99810 - test2</a>	GD02E - Error: Date of Discipline is outside the range of the FS effective dates	
		- <a href="#">99811 - test3</a>	GD01W - Warning: Discipline Action Date is not specified, the record will be transferred with the Incident date	

**Errors – Verify Discipline Information**

## Verify Membership Programs

### Navigation: StudentInformation – EMIS – Student Reporting Collection (S)

- On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
- Click **Next**.



**Verify Student Data**

- On the **Program Selection** tab, select “Verify - Membership Programs (MEMBEMIS).”
- Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Verify/Update - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type Program Selection

- Verify - Discipline (DISCEMIS)
- Verify - EMIS Run Requests (CHECK\_EMIS)
- Verify - Majority of Attendance IRN (MAJOREMIS)
- Verify - Membership Programs (MEMBEMIS)
- Verify - Non-reportable Students
- Verify - Student Demographic (UNCLEMIS)
- Verify - Student Gifted Records
- Verify - Student Special Education
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back Next > Cancel

#### Verify Membership Programs

5. On the **Verify/Update Memberships** screen, in the **Run Type** option, select “Verify Memberships.”
6. Optional: If you want to generate a file containing the memberships of all students in the district, in the **File Download Options** section, make the following selections:
  - a. **Select A File Type** – Select either “CSV,” “HTML” or “TAB” format.
  - b. **Select A Download Method** – Select to either “Download” or “Email” the file.
7. Click **Submit**.

StudentInformation > EMIS > Verify/Update Memberships

### Verify/Update Memberships - Dalton Local Schools

From this screen, you can verify and update student memberships.

DADA - DALTON ELEMENTARY  
 DAHS - DALTON HIGH SCHOOL  
 DAJH - DALTON INTERMEDIATE  
 DAKI - KIDRON ELEMENTARY

Run Type:  Verify Memberships  Verify Special Education Services

File Download Options

Select A File Type ▼ Select A Download Method ▼

Submit Cancel

#### Verify Memberships

Any errors from the verify process display in a grid at the bottom of the screen and (if you selected file download options) in the generated file.

8. Optional: If errors display, in the row of each error, click the **Memb. Name** link, and make the needed correction(s).

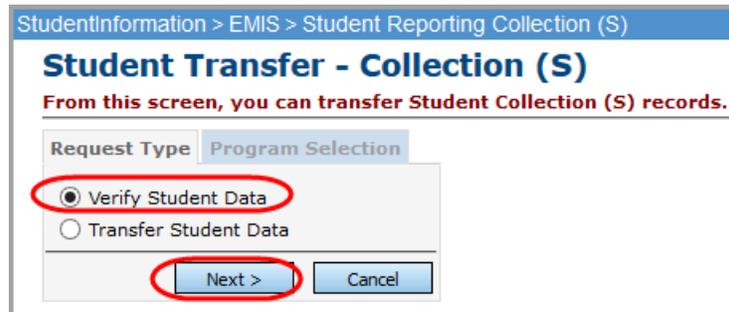
Memberships								
Building IRN	Building	Group Code	Group Name	Memb. Code	Memb. Name	Program Code	Message	Student Count
		12	Post-secondary Enrollment Options Program	120010	Early College High School	120010	Membership requires staff member but no staff member specified	3
		41	Academic Intracurricular Descriptions (Vocational)	410002	Distributive Education Clubs of America (DECA)	410002	Membership required start and stop dates	2
		24	Emergency Immigrant Education Program	240001	The student is an immigrant and participates in program.	240001	Membership is mapped to an invalid EMIS Program code	2
		15	15	152505	Guided Reading (Small Group Instruction)	152505	Program Provider IRN is invalid	1
		40	Extracurricular/Intracurricular Programs and Servi	405008	Computer Clubs	405008	Social Security Number or State Staff ID is not specified for selected default staff member	3
		40	Extracurricular/Intracurricular Programs and Servi	405008	Computer Clubs	405008	Social Security Number or State Staff ID is not specified for staff member selected on student membership	
		23	Title I	232106	Earned GED (Summer School)	232106	Student Membership outside the range of the fiscal year	1
		30	Vocational Programs	305008	Job for Ohio's Graduates (JOG)	305008	Program Provider IRN is required	2

**Errors – Verify Membership**

**Verify Special Education Services**

**Navigation: StudentInformation – EMIS – Student Reporting Collection (S)**

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
2. Click **Next**.



**Verify Student Data**

3. On the **Program Selection** tab, select “Verify - Membership Programs (MEMBEMIS).”
4. Click **Next**.

### Verify Membership Programs

5. On the **Verify/Update Memberships** screen, in the **Run Type** option, select “Verify Special Education Services.”
6. Optional: If you want to generate a file containing all special education service records, in the **File Download Options** section, make the following selections:
  - a. **Select A File Type** – Select either “CSV,” “HTML” or “TAB” format.
  - b. **Select A Download Method** – Select to either “Download” or “Email” the file.
7. Click **Submit**.

### Verify Special Education Services

Any errors from the verify process display in a grid at the bottom of the screen and (if you selected file download options) in the generated file.

8. Optional: If errors display, in the row of each error, click the service code link, and make the needed correction(s).

Special Education Services				
Building IRN	Building	Student	Student Number	EMIS ID
<i>Special Education Services:</i> - <a href="#">21500L</a> - Membership is mapped to an invalid EMIS Program code <i>Special Education Services:</i> - <a href="#">215002</a> - Program Provider IRN is invalid <i>Special Education Services:</i> - <a href="#">215007</a> - Duplicate Service for the same Student, Service Code, and Start Date <i>Special Education Services:</i> - <a href="#">215009</a> - Duplicate Service for the same Student, Service Code, and Start Date				

### Errors – Verify Special Education Services

## Verify Non-reportable Students

Navigation: StudentInformation – EMIS – Student Reporting Collection (S)

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
2. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Transfer - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type **Program Selection**

Verify Student Data  
 Transfer Student Data

**Next >** Cancel

### Verify Student Data

3. On the **Program Selection** tab, select “Verify - Non-reportable Students.”
4. Click **Next**.

### Verify Non-reportable Students

5. On the **Verify Non-Reportable Students** screen, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. Click **Verify**.

### Verify Non-reportable Students – Select Schools

Any errors from the verify process display in a grid at the bottom of the screen.

7. Optional: If errors display, correct them using the following options as needed:
  - To correct a student’s profile, in the row of the error, click the student name link, and make any needed corrections.
  - To indicate a student should be reported to EMIS:
    - i. In the row of the student, select the **Report to EMIS** check box. (Or to select all students, select the **Select all students** check box.)
    - ii. Click **Save Report to EMIS**.

1 Record Displayed

Report to EMIS	Building	Student Number	Student Name	How Received	Percent of Time	EMIS Situation	Admission Date	Withdrawal Date	Status
<input type="checkbox"/>				*	0	473 - Res, Jon Peterson Scholarship Student elsewhere Full Time	04/10/2014		R-RES A/ELSE

Select all students

**Errors – Verify Non-reportable Students**

**Verify Student Demographic**

**Navigation: StudentInformation – EMIS – Student Reporting Collection (S)**

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
2. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

**Student Transfer - Collection (S)**

From this screen, you can transfer Student Collection (S) records.

Request Type | Program Selection

Verify Student Data

Transfer Student Data

**Verify Student Data**

3. On the **Program Selection** tab, select “Verify - Student Demographic (UNCLEMIS).”
4. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

**Student Verify/Update - Collection (S)**

From this screen, you can transfer Student Collection (S) records.

Request Type | Program Selection

Verify - Discipline (DISCEMIS)

Verify - EMIS Run Requests (CHECK\_EMIS)

Verify - Majority of Attendance IRN (MAJOREMIS)

Verify - Membership Programs (MEMBEMIS)

Verify - Non-reportable Students

Verify - Student Demographic (UNCLEMIS)

Verify - Student Gifted Records

Verify - Student Special Education

Verify/Update - Student Attendance (ATTUPEMIS)

**Verify Student Demographic**

5. On the **Verify Student Demographics** screen, in the **Include Buildings** section, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. Optional: To change the number of students who display per page from the default value of 50, in the **Number of Students Per Page** drop-down list, select a different value.
7. Optional: If you do not want the system to ignore a warning about students with overlapping history records, deselect the **Ignore “Student has overlapping admission history records”** check box.
8. Click **Verify**.

### Verify Student Demographics

Any errors from the verify process display in a grid at the bottom of the screen.

9. Optional: If errors display, in the row of each error, click the student name link, and make the needed corrections on the student profile.

Building IRN	Building	Student	Student Number	EMIS ID
UNCLEMIS:		- FS33E - 07/01/2014 - Warning: County of Residence is incorrect based on the student's residence zip code.		
UNCLEMIS:		- FD09E - 07/01/2014 - ERROR: Preschool Poverty Level cannot be N for PS student		
		- FD17W - 07/01/2014 - Warning: State Equivalent Grade Level does not match primary building grade level		
UNCLEMIS:		- FD17W - 07/01/2014 - Warning: State Equivalent Grade Level does not match primary building grade level		
UNCLEMIS:		- FS07E - 07/01/2014 - ERROR: If District Relationship = 2 or 3 then % of Time must be = 0		
SMART:		- 7/1/2014 - Percent of Time must be: 0		

### Errors – Verify Student Demographics

## Verify Student Special Education

### Navigation: StudentInformation – EMIS – Student Reporting Collection (S)

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
2. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Transfer - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type Program Selection

Verify Student Data

Transfer Student Data

Next > Cancel

#### Verify Student Data

3. On the **Program Selection** tab, select “Verify - Student Special Education.”
4. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Verify/Update - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type Program Selection

Verify - Discipline (DISCEMIS)

Verify - EMIS Run Requests (CHECK\_EMIS)

Verify - Majority of Attendance IRN (MAJOREMIS)

Verify - Membership Programs (MEMBEMIS)

Verify - Non-reportable Students

Verify - Student Demographic (UNCLEMIS)

Verify - Student Gifted Records

Verify - Student Special Education

Verify/Update - Student Attendance (ATTUPEMIS)

< Back Next > Cancel

#### Verify Student Special Education

5. On the **Verify Special Education** screen, in the **Include Buildings** section, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. Optional: To run this process for a date other than today, in the **Run Date** field, enter or select a different date.
7. Optional: To change the number of students who display per page from the default value of 50, in the **Number of students per page** drop-down list, select a different value.
8. Optional: If you want to generate a file containing the results of this verify process, in the **File output** section, make the following selections:

- a. **Download File** – Select whether you want the download file to contain “Verification messages,” “Student Special Ed. Events” or “Student Special Ed. Grad. Req.” (graduation requirements).

**Note:** Regardless of which option you select, when you submit this verify process request, all verification messages display in a grid at the bottom of the screen. The **Download File** option only controls what is included in the download file.

- b. If you selected “Student Special Ed. Events,” in the **Event range** date fields, enter or select dates representing the range of special education events to include in the download file.
  - c. **Select A File Type** – Select either “CSV,” “HTML” or “TAB” format.
  - d. **Select A Download Method** – Select to either “Download” or “Email” the file.
9. Click **Submit**.

StudentInformation > EMIS > Verify Special Education

### Verify Special Education - Dalton Local Schools

From this screen, you can verify and update special education information.

**Include Buildings:**  
 Select All Buildings  Clear All Buildings

DADA - DALTON ELEMENTARY ⚡  
 DAHS - DALTON HIGH SCHOOL  
 DAJH - DALTON INTERMEDIATE  
 DAKI - KIDRON ELEMENTARY

**Run Date:** 9/9/2014 📅 ⚡

**Screen output:**  
**Number of students per page:** 50 ▾

**File output:**  
**Download File:**  Verification messages  Student Special Ed. Events  Student Special Ed. Grad. Req.  
**Event range:** 08/20/2014 📅 ⚡ to 06/05/2015 📅 ⚡

**File Download Options**  
Select A File Type ▾ Select A Download Method ▾

### Verify Special Education

Any errors from the verify process display in a grid at the bottom of the screen.

10. Optional: If errors display, in the row of each error, click the **Click Here to Add** link, and make the needed corrections on the **Special Education** screen.

1 - 24 | Next

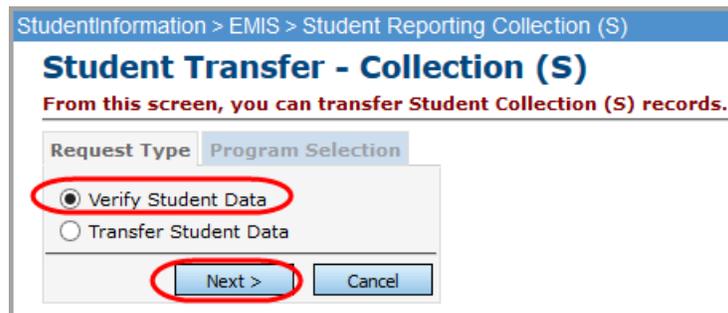
Building IRN	Building	Student	Student Number	EMIS ID	Grade Level
008003	DAHS	BAILEY, MELISSA	00160155	A10071774	10
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
008003	DAHS	BAILEY, STEPHANIE	00150119	A10071796	12
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
008003	DAHS	BEACH, RICK	00150132	A10072643	12
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
008003	DAHS	CALLAHAN, BOBBY	00150130	A10075320	12
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
008003	DAHS	CALLAHAN, VICTOR	00160560	A10075321	10
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
008003	DAHS	CASEY, KURT	300110095	A10072176	11
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
008003	DAHS	COPELAND, PERRY	00160035	A10075150	11
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					

**Errors – Verify Special Education**

**Update Student Attendance**

**Navigation: StudentInformation – EMIS – Student Reporting Collection (S)**

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Verify Student Data.”
2. Click **Next**.



**Verify Student Data**

3. On the **Program Selection** tab, select “Verify/Update - Student Attendance (ATTUPEMIS).”
4. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Verify/Update - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type Program Selection

- Verify - Discipline (DISCEMIS)
- Verify - EMIS Run Requests (CHECK\_EMIS)
- Verify - Majority of Attendance IRN (MAJOREMIS)
- Verify - Membership Programs (MEMBEMIS)
- Verify - Non-reportable Students
- Verify - Student Demographic (UNCLEMIS)
- Verify - Student Gifted Records
- Verify - Student Special Education
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back Next > Cancel

#### Verify/Update Student Attendance

5. On the **Verify/Update Student Attendance (ATTUPEMIS)** screen, leave the “Select All Buildings” option selected.
6. In the **Run Type** option, select “Update Attendance.”
7. Click **Submit**.

StudentInformation > EMIS > Verify/Update Student Attendance

### Verify/Update Student Attendance (ATTUPEMIS) - Ashland City Schools

From this screen, you can verify and update student attendance data.

**Include Buildings:**

Select All Buildings  Clear All Buildings

- ASHS - ASHLAND HIGH SCHOOL
- ASJH - ASHLAND MIDDLE SCHOOL
- ASED - Edison Primary School North
- ASMO - Montgomery Intermediate School East
- ASOS - Osborn Intermediate School Central
- ASTA - Taft Primary School South

**Run Type:**  Verify Attendance  Update Attendance

Submit Cancel

#### Update Attendance

A confirmation message displays.

**Note:** Any errors from the update process display in a grid at the bottom of the screen.

StudentInformation > EMIS > Verify/Update Student Attendance

### Verify/Update Student Attendance (ATTUPEMIS) - Ashland City Schools

From this screen, you can verify and update student attendance data.

The update job was submitted successfully.

**Include Buildings:**

Select All Buildings    Clear All Buildings

---

ASHS - ASHLAND HIGH SCHOOL

ASJH - ASHLAND MIDDLE SCHOOL

ASED - Edison Primary School North

ASMO - Montgomery Intermediate School East

ASOS - Osborn Intermediate School Central

ASTA - Taft Primary School South

**Run Type:**    Verify Attendance    Update Attendance

**0 Records Displayed**

Building	EMIS ID	Student Number	Student Name	Percent of Time	Issue
There are no records to display					

### Confirmation of Updated Student Attendance

The update attendance process updates the attendance **Hours** fields (**Current Entity** section) on the **FS-Attendance** tab of each student's profile.

StudentInformation > SIS > Student > Edit Profile

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation

Start Date	Withdraw Date	Withdraw Reason	School Year Attendance Hours	School Year Excused Absence Hours	School Year Unexcused Absence Hours	Other SY Attendance Hours	Other SY Excused Absence Hours	Other SY Unexcused Absence Hours
7/1/2014		**	455.00	0.00	6.50	0.00	0.00	0.00

Show Current Year Only

Save Cancel

Last Modified: 02/13/2014 11:16 AM by User: \_\_\_\_\_

Effective Start Date: 7/1/2014

District Withdraw Date: \_\_\_\_\_

The relation between Days and Hours may not be equal due to the accuracy of the calculations and values entered on the calendars. Days are for reference only, hours will be reported.

	Current Entity		Other Entity	
	Days	Hours	Days	Hours
Attendance	70.00	455.00	0.00	0.00
Excused Absence	0.00	0.00	0.00	0.00
Unexcused Absence	1.00	6.50	0.00	0.00

Populated by Update Student Attendance (ATTUPEMIS) Process

Edit Student Profile - FS-Attendance Tab

## Transfer Student Data

Navigation: StudentInformation – EMIS – Student Reporting Collection (S)

1. On the **Student Transfer - Collection (S)** screen **Request Type** tab, select “Transfer Student Data.”
2. Click **Next**.

StudentInformation > EMIS > Student Reporting Collection (S)

### Student Transfer - Collection (S)

From this screen, you can transfer Student Collection (S) records.

Request Type Program Selection

Verify Student Data

Transfer Student Data

Next > Cancel

Student Transfer Collection (S) Screen – Request Type Tab

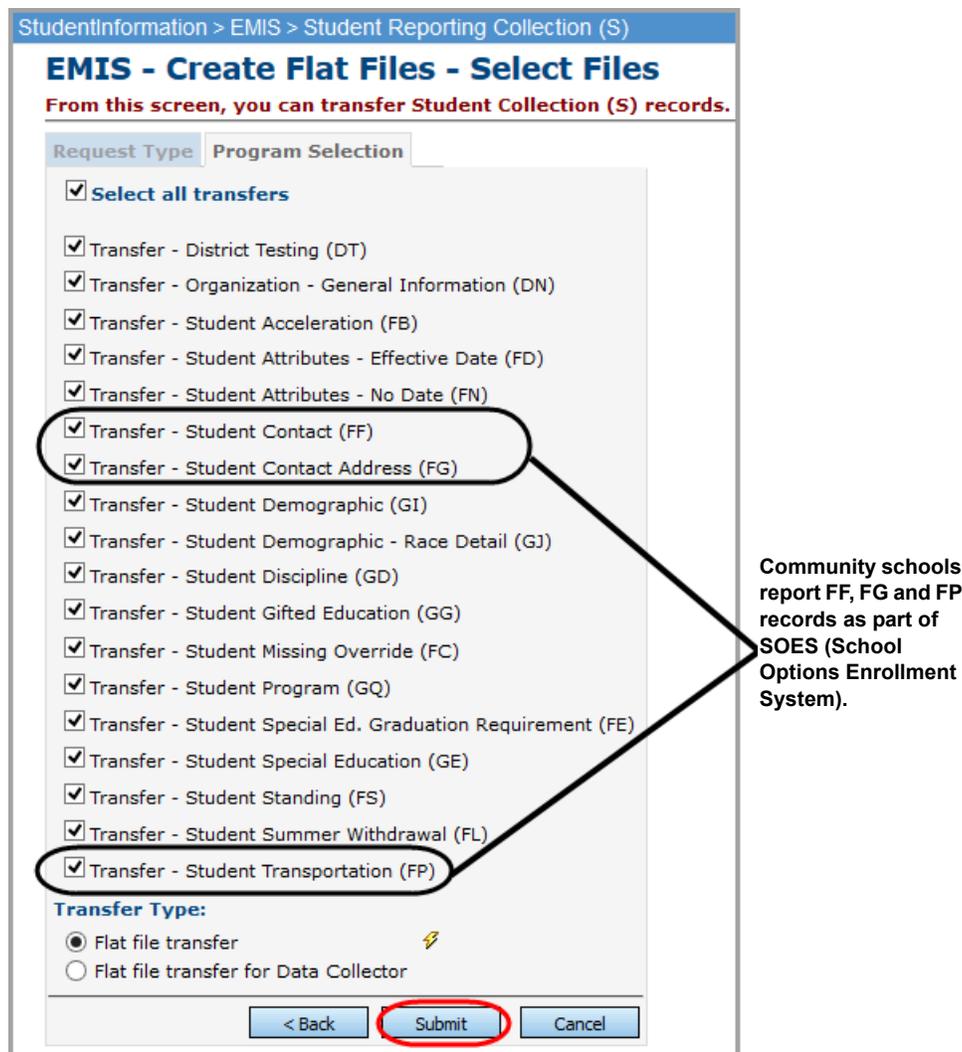
3. On the **Program Selection** tab, select the transfer(s) of student data that you want to run. Or to select all available transfers, click **Select all transfers**.

**Note:** The **Student Contact (FF)**, **Student Contact Address (FG)** and **Student Transportation (FP)** options only display for community schools.

4. In the **Transfer Type** option, select how you want to transfer the extracted data:
  - **Flat file transfer** – Creates a flat file that you can manually transfer into the Data Collector
  - **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with your district's unique district code

**Note:** If you are not sure which **Transfer Type** to choose, please contact your ITC.

5. Click **Submit**.



StudentInformation > EMIS > Student Reporting Collection (S)

### EMIS - Create Flat Files - Select Files

From this screen, you can transfer Student Collection (S) records.

Request Type | Program Selection

Select all transfers

Transfer - District Testing (DT)

Transfer - Organization - General Information (DN)

Transfer - Student Acceleration (FB)

Transfer - Student Attributes - Effective Date (FD)

Transfer - Student Attributes - No Date (FN)

Transfer - Student Contact (FF)

Transfer - Student Contact Address (FG)

Transfer - Student Demographic (G1)

Transfer - Student Demographic - Race Detail (GJ)

Transfer - Student Discipline (GD)

Transfer - Student Gifted Education (GG)

Transfer - Student Missing Override (FC)

Transfer - Student Program (GQ)

Transfer - Student Special Ed. Graduation Requirement (FE)

Transfer - Student Special Education (GE)

Transfer - Student Standing (FS)

Transfer - Student Summer Withdrawal (FL)

Transfer - Student Transportation (FP)

**Transfer Type:**

Flat file transfer

Flat file transfer for Data Collector

< Back | Submit | Cancel

Community schools report FF, FG and FP records as part of SOES (School Options Enrollment System).

#### Program Selection Tab

The extract creates a file with the selected student record data.

The transfer includes the following student special education information:

- **Student Special Ed. Graduation Requirement (FE) Records:** All FE records per assessment area
- **Student Special Education (GE) Records:**

Events	Outcome IDs
IIEP	IENS, IEPR, IEDP and IE13-IE72
RIEP	IENS, IEPR, IEDP and IE13-IE72
TIEP	IE13-IE72
NIEP	IENS, IEPR, IEDP and IE13-IE72
CIEP	IEPR
AIEP	IE13-IE72
RISP	IE39
IISP	IE39
IETR	ETNE, ETDP and ET01-ET16
RETR	ETEX, ETDP and ET01-ET16
TETR	ET01-ET16
PSTC	****
RFRL	****
CNST	CNGI, CNGO, CNGR, CNGT, CNRF, CNNR and CNDP

# Assessment Reporting Collection (A)

Use Assessment Reporting Collection A to report assessment data to EMIS. Refer to the appropriate section:

- To verify the completeness of the assessment data you plan to report to EMIS, see [“Verify Assessment Data.”](#)
- To monitor your district’s EMIS processes and transfers of assessment data, see [“Verify EMIS Run Requests for Assessment Data.”](#)
- To create the extract to transfer your assessment data, see [“Transfer Assessment Data.”](#)

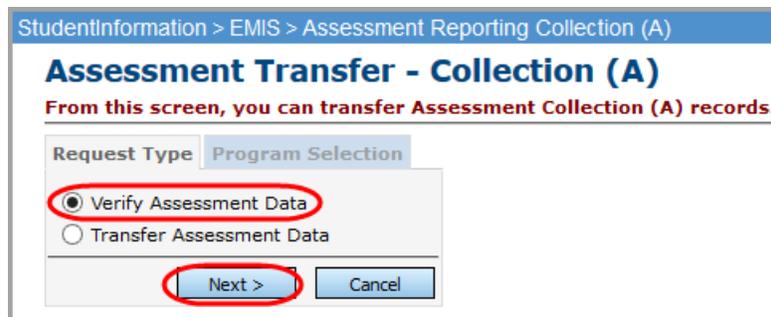
---

## Verify Assessment Data

You can verify different types of assessment data before transferring it to the state.

### Navigation: StudentInformation – EMIS – Assessment Reporting Collection (A)

1. On the **Assessment Transfer - Collection (A)** screen **Request Type** tab, select “Verify Assessment Data.”
2. Click **Next**.



The screenshot shows a web application interface. At the top, a breadcrumb trail reads 'StudentInformation > EMIS > Assessment Reporting Collection (A)'. Below this is the title 'Assessment Transfer - Collection (A)' and a subtitle 'From this screen, you can transfer Assessment Collection (A) records.'. There are two tabs: 'Request Type' (active) and 'Program Selection'. Under the 'Request Type' tab, there are two radio button options: 'Verify Assessment Data' (which is selected and circled in red) and 'Transfer Assessment Data'. At the bottom of the form area, there are two buttons: 'Next >' (circled in red) and 'Cancel'.

### Verify Assessment Data

3. On the **Program Selection** tab, in the **Include Buildings** section, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
4. For the **Test Type** option, select the assessment for which you want to run the verify process.
5. Click **Verify**.

StudentInformation > EMIS > Verify Assessment

### Verify Assessment - Dalton Local Schools

From this screen, you can verify student assessment data.

**Include Buildings:**  
 Select All Buildings  Clear All Buildings

DADA - DALTON ELEMENTARY  DAJH - DALTON INTERMEDIATE ⚡  
 DAHS - DALTON HIGH SCHOOL  DAKI - KIDRON ELEMENTARY

**Test Type:**  
 Verify - Preschool ASQ/SE (GS)  
 Verify - Preschool ECO (GM)  
 Verify - ELA (GB)  
 Verify - OTELA (GF)  
 Verify - KRA (GO)  
 Verify - Student Achievement OAA (GA)  
 Verify - OGT (GX)

Verify Cancel

### Verify Assessment

Any errors from the verify process display in a grid at the bottom of the screen.

- Optional: If errors display, correct them before running the verify process again.

LCE Validation:  
755 Records Displayed

Building IRN	Building	EMIS ID	Student Number	Name	Severity	Issue
008003	DALTON HIGH SCHOOL	A10074793	00160178	ALEXANDER, SHELLY	F	Student is missing required test record for test part Math
008003	DALTON HIGH SCHOOL	A10074793	00160178	ALEXANDER, SHELLY	F	Student is missing required test record for test part Reading
008003	DALTON HIGH SCHOOL	A10074793	00160178	ALEXANDER, SHELLY	F	Student is missing required test record for test part Social Studies / Citizenship
008003	DALTON HIGH SCHOOL	A10074793	00160178	ALEXANDER, SHELLY	F	Student is missing required test record for test part Science
008003	DALTON HIGH SCHOOL	A10074793	00160178	ALEXANDER, SHELLY	F	Student is missing required test record for test part Writing
008003	DALTON HIGH SCHOOL	A10073198	00170047	ATKINS, ROSA	F	Student is missing required test record for test part Math
008003	DALTON HIGH SCHOOL	A10073198	00170047	ATKINS, ROSA	F	Student is missing required test record for test part Reading
008003	DALTON HIGH SCHOOL	A10073198	00170047	ATKINS, ROSA	F	Student is missing required test record for test part Social Studies / Citizenship

### Errors – Verify Assessment

## Verify EMIS Run Requests for Assessment Data

You can run this verify process at any time to monitor your district’s outstanding EMIS processes and transfers of assessment data. This process reports on the history of these processes, showing when they were run and who ran them.

### Navigation: StudentInformation – EMIS – Verify EMIS Run Requests

- On the **EMIS Run Requests (CHECK\_EMIS)** screen, in the **Reporting Collection** drop-down list, select “A.”
- In the **District** section, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)

3. Select whether to view those processes that are “Not Run,” “Already Run” (lists the last time each process was run) or a “History” (lists every time each process was run) for this reporting collection.
4. Optional: If you selected “Not Run,” and you want to exclude verifications and/or transfers from the results, deselect the “Verification Not Run” and/or “Transfer Not Run” options as appropriate.
5. Optional: For any of the process options, if you want to exclude from the results processes run prior to a specific date, in the **Exclude Runs Prior To** field, enter or select that date.
6. Click **Submit**.

StudentInformation > EMIS > Verify EMIS Run Requests

### EMIS Run Requests (CHECK\_EMIS)

From this screen, you can verify which EMIS programs have or have not been run.

---

**Reporting Collection:** A

**District:** Dalton Local Schools

Select All Buildings    Clear All Buildings

---

DADA - DALTON ELEMENTARY    DAJH - DALTON INTERMEDIATE

DAHS - DALTON HIGH SCHOOL    DAKI - KIDRON ELEMENTARY

**Not Run**    Already Run    History

**Include the Following Potential Problems:**

Verification Not Run

Transfer Not Run

**Required:**

- Assessment Collection Transfer - ACT (AC)
- Assessment Collection Transfer - AP (AP)
- Assessment Collection Transfer - CTE Industry Assessment (GU)
- Assessment Collection Transfer - CTE Industry Credential (GW)
- Assessment Collection Transfer - CTE Student Assessment - OCTCA (GY)
- Assessment Collection Transfer - International Baccalaureate (IB)
- Assessment Collection Transfer - KRA (GO)
- Assessment Collection Transfer - OGT (GX)
- Assessment Collection Transfer - OTELA (GF)
- Assessment Collection Transfer - Preschool ASQ/SE (GS)
- Assessment Collection Transfer - Preschool ECO (GM)
- Assessment Collection Transfer - Preschool ELA (GB)
- Assessment Collection Transfer - SAT (SA)
- Assessment Collection Transfer - Student Achievement (GA)
- Assessment Collection Verify - ELA (GB)
- Assessment Collection Verify - KRA (GO)
- Assessment Collection Verify - OGT (GX)
- Assessment Collection Verify - OTELA (GF)
- Assessment Collection Verify - Preschool ASQ/SE (GS)
- Assessment Collection Verify - Preschool ECO (GM)
- Assessment Collection Verifv - Student Achievement OAA (GA)

**Exclude Runs Prior To:**

**Submit EMIS Run Requests**

Assessment Reporting Collection (A)

Results display in a grid at the bottom of the screen based on your selections. (See examples that follow.)

Not Run
  Already Run
  History

Dalton Local Schools

Building	Module	Program	Run Date	Issue
DALTON ELEMENTARY	Assessment Collection	CTE Industry Credential(GW)		Transfer not run
DALTON ELEMENTARY	Assessment Collection	OGT(GX)		Transfer not run
DALTON ELEMENTARY	Assessment Collection	Preschool ASQ/SE (GS)	09/09/2014 04:30 PM	Transfer not run
DALTON ELEMENTARY	Assessment Collection	Preschool ECO(GM)		Transfer not run
DALTON ELEMENTARY	Assessment Collection	Preschool GGG(GB)		Transfer not run
DALTON ELEMENTARY	Assessment Collection	Student Achievement(GA)		Transfer not run
DALTON HIGH SCHOOL	Assessment Collection	CTE Industry Credential(GW)		Transfer not run
DALTON HIGH SCHOOL	Assessment Collection	OGT(GX)		Transfer not run
DALTON HIGH SCHOOL	Assessment Collection	Preschool ASQ/SE (GS)	09/09/2014 04:30 PM	Transfer not run
DALTON HIGH SCHOOL	Assessment Collection	Preschool ECO(GM)		Transfer not run
DALTON HIGH SCHOOL	Assessment Collection	Preschool GGG(GB)		Transfer not run
DALTON HIGH SCHOOL	Assessment Collection	Student Achievement(GA)		Transfer not run
DALTON INTERMEDIATE	Assessment Collection	CTE Industry Credential(GW)		Transfer not run
DALTON INTERMEDIATE	Assessment Collection	OGT(GX)		Transfer not run

EMIS Requests Not Run

Not Run
  Already Run
  History

Exclude Runs Prior To:

Dalton Local Schools

Building	Module	Program	Verify Run Date	Verify	Update Run Date	Update	Transfer Run Date	Transfer
DALTON ELEMENTARY	Assessment Collection	KRA (GO)	09/09/2014 04:31 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON ELEMENTARY	Assessment Collection	OGT (GX)	09/09/2014 04:31 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON ELEMENTARY	Assessment Collection	Preschool ASQ/SE (GS)	09/09/2014 04:30 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON ELEMENTARY	Assessment Collection	Preschool ECO (GM)	09/09/2014 04:30 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON ELEMENTARY	Assessment Collection	Preschool GGG (GB)	09/09/2014 04:30 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON ELEMENTARY	Assessment Collection	Student Achievement OAA (GA)	09/09/2014 04:31 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON HIGH SCHOOL	Assessment Collection	KRA (GO)	09/09/2014 04:31 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON HIGH SCHOOL	Assessment Collection	OGT (GX)	09/09/2014 04:31 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON HIGH SCHOOL	Assessment Collection	Preschool ASQ/SE (GS)	09/09/2014 04:30 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

EMIS Requests Already Run

Not Run
  Already Run
  History

Exclude Runs Prior To:

28 Records Displayed

Building	Module	Program	Action	User	Run Date
DALTON ELEMENTARY	Assessment Collection	OGT (GX)	Verify		09/09/2014 04:31 PM
DALTON HIGH SCHOOL	Assessment Collection	OGT (GX)	Verify		09/09/2014 04:31 PM
DALTON INTERMEDIATE	Assessment Collection	OGT (GX)	Verify		09/09/2014 04:31 PM
KIDRON ELEMENTARY	Assessment Collection	OGT (GX)	Verify		09/09/2014 04:31 PM
DALTON ELEMENTARY	Assessment Collection	Student Achievement OAA (GA)	Verify		09/09/2014 04:31 PM
DALTON HIGH SCHOOL	Assessment Collection	Student Achievement OAA (GA)	Verify		09/09/2014 04:31 PM
DALTON INTERMEDIATE	Assessment Collection	Student Achievement OAA (GA)	Verify		09/09/2014 04:31 PM
KIDRON ELEMENTARY	Assessment Collection	Student Achievement OAA (GA)	Verify		09/09/2014 04:31 PM

History of EMIS Run Requests

## Transfer Assessment Data

### Navigation: StudentInformation – EMIS – Assessment Reporting Collection (A)

1. On the **Assessment Transfer - Collection (A)** screen **Request Type** tab, select "Transfer Assessment Data."
2. Click **Next**.

StudentInformation > EMIS > Assessment Reporting Collection (A)

### Assessment Transfer - Collection (A)

From this screen, you can transfer Assessment Collection (A) records.

Request Type **Program Selection**

Verify Assessment Data  
 Transfer Assessment Data

Assessment Transfer Screen – Request Type Tab

3. On the **Program Selection** tab, select the transfer(s) of assessment data that you want to run. Or to select all available transfers, click **Select all transfers**.

**Note:** The transfer options that are grayed out are not currently functional.

4. In the **Transfer Type** option, select how you want to transfer the extracted data:
  - **Flat file transfer** – Creates a flat file that you can manually transfer into the Data Collector
  - **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with your district's unique district code

**Note:** If you are not sure which **Transfer Type** to choose, please contact your ITC.

5. Click **Submit**.

The screenshot shows a web application window titled "StudentInformation > EMIS > Assessment Reporting Collection (A)". The main heading is "EMIS - Create Flat Files - Select Files". Below the heading is a red instruction: "From this screen, you can transfer Assessment Collection (A) records." There are two tabs: "Request Type" and "Program Selection", with "Program Selection" being the active tab. A list of assessment records is displayed, each with a checked checkbox: "Select all transfers", "Transfer - ACT (AC)", "Transfer - AP (AP)", "Transfer - CTE Industry Assessment (GU)", "Transfer - CTE Industry Credential (GW)", "Transfer - CTE Student Assessment - OCTCA (GY)", "Transfer - International Baccalaureate (IB)", "Transfer - KRA (GO)", "Transfer - OGT (GX)", "Transfer - OTELA (GF)", "Transfer - Preschool ASQ/SE (GS)", "Transfer - Preschool ECO (GM)", "Transfer - Preschool ELA (GB)", "Transfer - SAT (SA)", and "Transfer - Student Achievement (GA)". Below the list is the "Transfer Type:" section with two radio buttons: "Flat file transfer" (unselected) and "Flat file transfer for Data Collector" (selected). At the bottom are three buttons: "< Back", "Submit" (circled in red), and "Cancel".

#### Program Selection Tab

The extract creates a file with the appropriate assessment records.

# Staff/Course Reporting Collection (L)

Use Staff/Course Reporting Collection (L) to report course data to the state during the required collection windows throughout the year. This includes relationship information between courses, classes, staff and students.

- To verify the completeness of the course data you plan to report to EMIS, see [“Verify Course Data.”](#)
- To create the extract to transfer your course data, see [“Transfer Course Data.”](#)

---

## Verify Course Data

You can verify different types of course data before transferring it to the state. Refer to the appropriate section as follows:

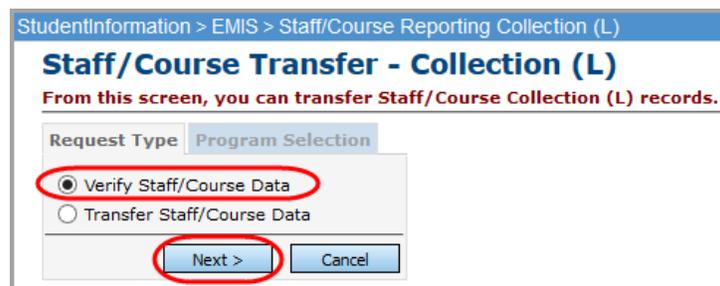
- [“Verify EMIS Run Requests for Course Data”](#)
- [“Verify Reportable Courses”](#)
- [“Verify Subject Codes”](#)
- [“Verify/Update Course and Class List”](#)

## Verify EMIS Run Requests for Course Data

You can run this verify process at any time to monitor your district’s outstanding EMIS processes and transfers of course data. This process reports on the history of these processes, showing when they were run and who ran them.

### Navigation: StudentInformation – EMIS – Staff/Course Reporting Collection (L)

1. On the **Staff/Course Transfer - Collection (L)** screen **Request Type** tab, select “Verify Staff/Course Data.”
2. Click **Next**.



### Verify Course Data

3. On the **Program Selection** tab, select “Verify - EMIS Run Requests (CHECK\_EMIS).”
4. Click **Next**.

StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Verify/Update - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type | Program Selection

Verify - EMIS Run Requests (CHECK\_EMIS)

Verify - Reportable Courses

Verify - Subject Codes (INVSUBJ)

Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)

< Back | Next > | Cancel

#### Verify EMIS Run Requests

5. On the **EMIS Run Requests (CHECK\_EMIS)** screen, in the **District** section, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. Select whether to view those processes that are “Not Run,” “Already Run” (lists the last time each process was run) or a “History” (lists every time each process was run) for this reporting collection.
7. Optional: If you selected “Not Run,” and you want to exclude verifications and/or transfers from the results, deselect the “Verification Not Run” and/or “Transfer Not Run” options as appropriate.
8. Optional: For any of the process options, if you want to exclude from the results processes run prior to a specific date, in the **Exclude Runs Prior To** field, enter or select that date.
9. Click **Submit**.

StudentInformation > EMIS > Verify EMIS Run Requests

### EMIS Run Requests (CHECK\_EMIS)

**From this screen, you can verify which EMIS programs have or have not been run.**

Reporting Collection:  ⚡

District: Dalton Local Schools

Select All Buildings  Clear All Buildings

DAES - DALTON ELEMENTARY SCHOOL  DAJH - DALTON INTERMEDIATE ⚡  
 DAHS - DALTON HIGH SCHOOL

Not Run  Already Run  History

**Include the Following Potential Problems:**

Verification Not Run  
 Transfer Not Run

**Required:**

- Staff/Course Collection Transfer - Course Master (CN)
- Staff/Course Collection Transfer - CTE Correlated Class Record (CV)
- Staff/Course Collection Transfer - Mapped Local Classroom Code (CM)
- Staff/Course Collection Transfer - Staff Course (CU)
- Staff/Course Collection Transfer - Student Course (GN)
- Staff/Course Collection Update - Course and Class List (CLISEMIS/CTRMEMIS)
- Staff/Course Collection Verify - Course and Class List (CLISEMIS/CTRMEMIS)
- Staff/Course Collection Verify - Reportable Courses
- Staff/Course Collection Verify - Subject Codes (INVSUBJ)

Exclude Runs Prior To:  📅

### Submit EMIS Run Requests

Results display in a grid at the bottom of the screen based on your selections. (See examples that follow.)

Not Run  Already Run  History

Dalton Local Schools

Building	Module	Program	Run Date	Issue
DALTON ELEMENTARY	Staff/Course Collection	Course and Class List (CLISEMIS/CTRMEMIS)		Verify not run
DALTON ELEMENTARY	Staff/Course Collection	Course Master (CN)		Transfer not run
DALTON ELEMENTARY	Staff/Course Collection	CTE Correlated Class Record (CV)		Transfer not run
DALTON ELEMENTARY	Staff/Course Collection	Mapped Local Classroom Code (CM)		Transfer not run
DALTON ELEMENTARY	Staff/Course Collection	Staff Course (CU)		Transfer not run
DALTON ELEMENTARY	Staff/Course Collection	Student Course (GN)		Transfer not run
DALTON HIGH SCHOOL	Staff/Course Collection	Course and Class List (CLISEMIS/CTRMEMIS)		Verify not run
DALTON HIGH SCHOOL	Staff/Course Collection	Course Master (CN)		Transfer not run
DALTON HIGH SCHOOL	Staff/Course Collection	CTE Correlated Class Record (CV)		Transfer not run

### EMIS Requests Not Run

StudentInformation > EMIS > Verify EMIS Run Requests

### EMIS Run Requests (CHECK\_EMIS)

From this screen, you can verify which EMIS programs have or have not been run.

Reporting Collection: L

District: Dalton Local Schools

Select All Buildings  Clear All Buildings

DADA - DALTON ELEMENTARY  DAJH - DALTON INTERMEDIATE  
 DAHS - DALTON HIGH SCHOOL  DAKI - KIDRON ELEMENTARY

Not Run  **Already Run**  History

Exclude Runs Prior To: [ ]

Submit Cancel

Dalton Local Schools

Building	Module	Program	Verify Run Date	Verify	Update Run Date	Update	Transfer Run Date	Transfer
DALTON ELEMENTARY	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	10/10/2014 05:03 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON HIGH SCHOOL	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	10/10/2014 05:03 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON INTERMEDIATE	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	10/10/2014 05:03 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
KIDRON ELEMENTARY	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	10/10/2014 05:03 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

### EMIS Requests Already Run

StudentInformation > EMIS > Verify EMIS Run Requests

### EMIS Run Requests (CHECK\_EMIS)

From this screen, you can verify which EMIS programs have or have not been run.

Reporting Collection: L

District: Dalton Local Schools

Select All Buildings  Clear All Buildings

DADA - DALTON ELEMENTARY  DAJH - DALTON INTERMEDIATE  
 DAHS - DALTON HIGH SCHOOL  DAKI - KIDRON ELEMENTARY

Not Run  Already Run  **History**

Exclude Runs Prior To: [ ]

Submit Cancel

4 Records Displayed

Building	Module	Program	Action	User	Run Date
DALTON ELEMENTARY	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	Verify		10/10/2014 05:03 PM
DALTON HIGH SCHOOL	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	Verify		10/10/2014 05:03 PM
DALTON INTERMEDIATE	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	Verify		10/10/2014 05:03 PM
KIDRON ELEMENTARY	CTRMEMIS/CLISEMIS	Course and Class List (CLISEMIS/CTRMEMIS)	Verify		10/10/2014 05:03 PM

### History of EMIS Run Requests

## Verify Reportable Courses

This process verifies the **Report to EMIS** value on the course records in the building(s) you select and lets you update this value if it is incorrect for any course.

### Navigation: StudentInformation – EMIS – Staff/Course Reporting Collection (L)

1. On the **Staff/Course Transfer - Collection (L)** screen **Request Type** tab, select “Verify Staff/Course Data.”
2. Click **Next**.

StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Transfer - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type **Program Selection**

Verify Staff/Course Data  
 Transfer Staff/Course Data

**Next >** Cancel

#### Verify Course Data

3. On the **Program Selection** tab, select “Verify - Reportable Courses.”
4. Click **Next**.

StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Verify/Update - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type **Program Selection**

Verify - EMIS Run Requests (CHECK\_EMIS)  
 Verify - Reportable Courses  
 Verify - Subject Codes (INVSUBJ)  
 Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)

< Back **Next >** Cancel

#### Verify Reportable Courses

5. On the **Verify Reportable Courses - (L)** screen, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. Select a run option for this process from the following options:
  - **All Courses** – Returns all courses for the selected building(s); courses reportable to EMIS have the **Report to EMIS** check box selected by default
  - **Only Reportable Courses** – Returns only courses marked as reportable to EMIS
  - **Only Non-Reportable Courses** – Returns only courses marked as not reportable to EMIS
7. Click **Verify**.

StudentInformation > EMIS > Verify Reportable Courses

### Verify Reportable Courses - (L) Local Schools

From this screen, you can verify courses marked reportable to EMIS.

Select All Buildings  Clear All Buildings

ELEMENTARY SCHOOL  INTERMEDIATE 

HIGH SCHOOL

All Courses  Only Reportable Courses  Only Non-Reportable Courses

#### Select Run Option – Verify Reportable Courses

Courses matching your run type selection display.

8. Optional: To open a course record, in the row of the course, click the **Course Code** link.
9. Optional: To update whether a course in the list is reportable to EMIS:
  - a. In the row of the course, select or deselect the **Report to EMIS** check box. (To select or deselect all courses in the list at once, select the **Select all courses** check box at the bottom of the screen.)
  - b. Click **Save Report to EMIS**.

StudentInformation > EMIS > Verify Reportable Courses

### Verify Reportable Courses - (L) ██████ Local Schools

From this screen, you can verify courses marked reportable to EMIS.

Select All Buildings    Clear All Buildings

██████ ELEMENTARY SCHOOL    ██████ INTERMEDIATE

██████ HIGH SCHOOL

All Courses    Only Reportable Courses    Only Non-Reportable Courses

32 Records Displayed

Report to EMIS	Building	Course Code	Course Name	Curriculum	Delivery Method	Educational Option	Student Population	EMIS Subject Code	Section Exists	CSA Exists	Is Active
<input type="checkbox"/>	DAHS	0001	LUNCH	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	0002	LUNCH	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	007F	Adv Comp Findlay	**	**	**	**		no	no	💡
<input checked="" type="checkbox"/>	DAHS	507	LIFE SKILLS MATH II	OT	FF	NO	SE	111200	no	no	💡
<input checked="" type="checkbox"/>	DAHS	512	LIFE SKILLS ENGLISH IV	OT	FF	NO	SE	050190	no	no	💡
<input type="checkbox"/>	DAHS	700A	BAND AUDIT	**	**	**	**	120500	no	no	💡
<input checked="" type="checkbox"/>	DAHS	900	MNG PERSONAL TRAN I	OT	FF	NO	SE	091300	no	no	💡
<input type="checkbox"/>	DAHS	999	Assesment	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	999E1	ASSESSMENT ENG 1-2	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	999E7	ASSESSMENT ENG 7-8	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	999M11	ASSESS MTH 11-12	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	999M15	ASSESS MTH 15-16	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	999M17	ASSESS MTH 17-18	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	999M5	ASSESS MTH 5-6	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	ATH	ATHLETIC	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	CA ORRVILLE	CA ORRVILLE	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	CC	CAREER CENTER	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	ELL	ELL						no	no	💡
<input type="checkbox"/>	DAHS	MAP	MAP	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH1	STUDY HALL	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH2	STUDY HALL	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH3	STUDY HALL	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH4	STUDY HALL	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH5A	STUDY HALL 5A	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH5B	STUDY HALL 5B	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH6A	STUDY HALL 6A	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH6B	STUDY HALL 6B	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH7	STUDY HALL	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH8	STUDY HALL	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SH9	STUDY HALL	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	SS CO	STARK STATE COLLEGE	**	**	**	**		no	no	💡
<input type="checkbox"/>	DAHS	WYN CO	WAYNE COLLEGE	OT	FF	NO	RG		no	no	💡

32 Records Displayed

Select all courses

[Back To Top](#)

### Update Report to EMIS

A confirmation message displays, and the **Report to EMIS** value of the selected course(s) is updated.

StudentInformation > EMIS > Verify Reportable Courses

### Verify Reportable Courses - (L) ██████ Local Schools

From this screen, you can verify courses marked reportable to EMIS.

**Report to EMIS flag was successfully updated for all courses.**

### Confirmation of Report to EMIS Updated

## Verify Subject Codes

This process reports any EMIS reportable courses or course section overrides that are tied to invalid subject codes.

### Navigation: StudentInformation – EMIS – Staff/Course Reporting Collection (L)

1. On the **Staff/Course Transfer - Collection (L)** screen **Request Type** tab, select “Verify Staff/Course Data.”
2. Click **Next**.

StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Transfer - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type | Program Selection

Verify Staff/Course Data  
 Transfer Staff/Course Data

Next > | Cancel

#### Verify Course Data

3. On the **Program Selection** tab, select “Verify - Subject Codes (INVSUBJ).”
4. Click **Next**.

StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Verify/Update - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type | Program Selection

Verify - EMIS Run Requests (CHECK\_EMIS)  
 Verify - Reportable Courses  
 Verify - Subject Codes (INVSUBJ)  
 Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)

< Back | Next > | Cancel

#### Verify Subject Codes

5. On the **Identify Invalid Subjects - (L)** screen, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. Click **Submit**.

StudentInformation > EMIS > Identify Invalid Subjects

### Identify Invalid Subjects - (L) [Redacted] City Schools

From this screen, you can find invalid subject codes

**Include Buildings:**  
 Select All Buildings    Clear All Buildings

[Redacted] HIGH SCHOOL    [Redacted] Intermediate School

[Redacted] MIDDLE SCHOOL    [Redacted] Intermediate School Central

[Redacted] Primary School South    [Redacted] Primary School South

### Identify Invalid Subjects

If any EMIS reportable course is tied to an invalid subject code, it displays in the **Course Subjects** grid. If any EMIS reportable course section override is tied to an invalid subject code, it displays in the **Course Section Override Subjects** grid.

StudentInformation > EMIS > Identify Invalid Subjects

### Identify Invalid Subjects - (L) [Redacted] City Schools

From this screen, you can find invalid subject codes

**Include Buildings:**  
 Select All Buildings    Clear All Buildings

[Redacted] HIGH SCHOOL    [Redacted] Intermediate School

[Redacted] MIDDLE SCHOOL    [Redacted] Intermediate School Central

[Redacted] Primary School South    [Redacted] Primary School South

**11 Records Displayed**

Course Subjects				
Building IRN	Building	Course Code	Course Name	EMIS Course Subject Code
[Redacted]	[Redacted]	241	PHYSICAL SCIENCE I	132212
[Redacted]	[Redacted]	P340	ALGEBRA I	
[Redacted]	[Redacted]	005	COLLGE-NOW PIONEER	
[Redacted]	[Redacted]	P330	GEOMETRY	
[Redacted]	[Redacted]	P250	BIOLOGY	
[Redacted]	[Redacted]	913	BASIC PHYSICAL SCIENCE I	132212
[Redacted]	[Redacted]	242	PHYSICAL SCIENCE II	132212
[Redacted]	[Redacted]	914	BASIC PHYSICAL SCIENCE II	132212
[Redacted]	[Redacted]	333	333	
[Redacted]	[Redacted]	8705	PRE ALG 8	110050
[Redacted]	[Redacted]	7706	PREALGEBRA	110050

**0 Records Displayed**

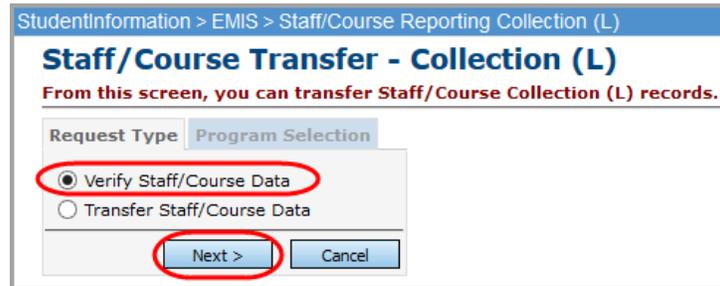
Course Section Override Subjects					
Building IRN	Building	Course Code	Course Name	EMIS Course Subject Code	Section Number
There are no records to display					

### Invalid Subject Codes

## Verify/Update Course and Class List

### Navigation: StudentInformation – EMIS – Staff/Course Reporting Collection (L)

1. On the **Staff/Course Transfer - Collection (L)** screen **Request Type** tab, select “Verify Staff/Course Data.”
2. Click **Next**.



StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Transfer - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type Program Selection

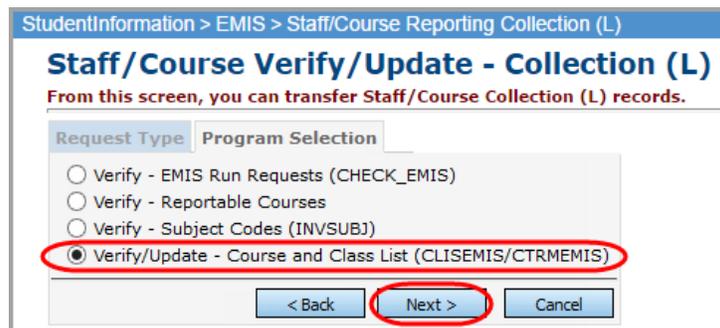
Verify Staff/Course Data

Transfer Staff/Course Data

Next > Cancel

#### Verify Course Data

3. On the **Program Selection** tab, select “Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS).”
4. Click **Next**.



StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Verify/Update - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type Program Selection

Verify - EMIS Run Requests (CHECK\_EMIS)

Verify - Reportable Courses

Verify - Subject Codes (INVSUBJ)

Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)

< Back Next > Cancel

#### Verify/Update Course and Class List

5. On the **Verify/Update Course Terms & Class List - (L)** screen, in the **Include Buildings** section, select the check box beside each building for which you want to run this process. (You can also select the option to “Select All Buildings” or “Clear All Buildings” as needed.)
6. In the **Run Type** option, select either to simply “Verify EMIS Reportable only” records or to “Update (Delete all and create)” new records.
7. Optional: If you selected the verify process and want to change the number of courses that display on each page of the verify results, in the **Number of Courses Per Page** drop-down list, select the number (or “All” students).
8. Click **Submit**.

### Verify/Update Courses

If you selected the verify process, results display in a grid at the bottom of the screen.

- Optional: If errors display in the verify results, in the row of each error, click the **Course Code** or **Course Name** link, and make the needed correction(s).

Building IRN	Building	Course Code	Course Name	EMIS Subject Code
		<a href="#">005</a>		
Course Messages:		<ul style="list-style-type: none"> <li>- Error 3: Subject code not selected</li> <li>- Error 4: Hours of Instruction must be greater than zero</li> </ul>		
Course Section Messages:		<ul style="list-style-type: none"> <li>- <a href="#">17</a> Error 52: No teacher history record found for this course section.</li> </ul>		
		<a href="#">039</a>		050160
Course Section Messages:		<ul style="list-style-type: none"> <li>- <a href="#">4</a> Error 52: No teacher history record found for this course section.</li> <li>- <a href="#">30</a> Error 52: No teacher history record found for this course section.</li> </ul>		

### Errors – Verify Courses

## Transfer Course Data

Navigation: StudentInformation – EMIS – Staff/Course Reporting Collection (L)

- On the **Staff/Course Transfer - Collection (L)** screen **Request Type** tab, select “Transfer Staff/Course Data.”
- Click **Next**.

StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### Staff/Course Transfer - Collection (L)

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type **Program Selection**

Verify Staff/Course Data

Transfer Staff/Course Data

#### Transfer Course Data

3. On the **Program Selection** tab, select the transfer(s) of course data that you want to run. Or, to select all available transfers, click **Select all transfers**.
4. In the **Transfer Type** option, select how you want to transfer the extracted data:
  - **Flat file transfer** – Creates a flat file that you can manually transfer into the Data Collector
  - **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with your district's unique district code

**Note:** If you are not sure which **Transfer Type** to choose, please contact your ITC.

5. Click **Submit**.

StudentInformation > EMIS > Staff/Course Reporting Collection (L)

### EMIS - Create Flat Files - Select Files

From this screen, you can transfer Staff/Course Collection (L) records.

Request Type **Program Selection**

Select all transfers

Transfer - Course Master (CN)

Transfer - CTE Correlated Class Record (CV)

Transfer - Mapped Local Classroom Code (CM)

Transfer - Staff Course (CU)

Transfer - Student Course (GN)

**Transfer Type:**

Flat file transfer

Flat file transfer for Data Collector

#### Program Selection Tab

The extract creates a file with the selected course record data.

# Calendar Reporting Collection (C)

Use Calendar Reporting Collection (C) to report district or building calendar information for the next school year. The state uses the calendar to validate building days in session and student attendance. Refer to the appropriate section:

- To maintain manual exception days that fall outside the school year, see [“Maintain Manual Exception Days.”](#)
- To monitor your district’s EMIS processes and transfers of calendar data, see [“Verify EMIS Run Requests for Calendar Data.”](#)
- To create the extract to transfer your calendar data, see [“Transfer Calendar Data.”](#)

**Note:** You can update the subcalendar start and end dates, and the updated dates will be reflected in the DL transfer that is part of the calendar reporting. (For more information, see *ProgressBook StudentInformation Attendance and Calendar Guide*.)

---

## Maintain Manual Exception Days

Manual exception days are days that fall outside the school year (such as teachers coming to school in August before the start of school). You can maintain manual exception days in the following ways:

- To view manual exception days, see [“View Manual Exception Days.”](#)
- To add a new manual exception day, see [“Add Manual Exception Days.”](#)
- To edit an existing manual exception day, see [“Edit Manual Exception Days.”](#)
- To delete a manual exception day, see [“Delete Manual Exception Days.”](#)

## View Manual Exception Days

**Navigation:** StudentInformation – EMIS – Calendar Reporting Collection (C) – Manual Exception Days

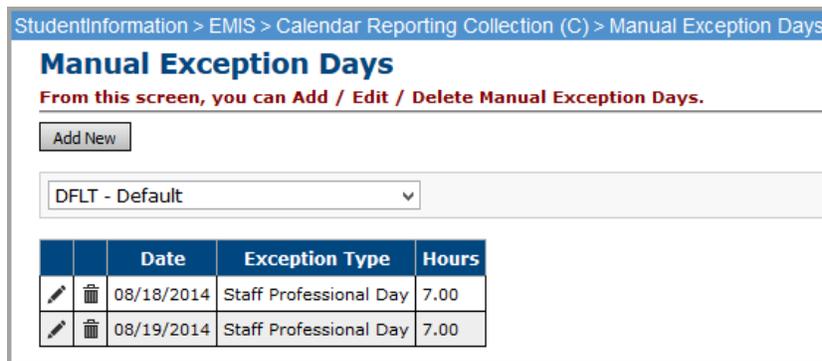
With the district in context on the **Manual Exception Days** screen, in the drop-down list, select the school/subcalendar for which you want to view manual exception days.

**Note:** You would typically select the default calendar for the school.



Select Subcalendar

The sub-calendar's manual exception days display.



View Manual Exception Days

## Add Manual Exception Days

Navigation: StudentInformation – EMIS – Calendar Reporting Collection (C) – Manual Exception Days

1. With the district in context on the **Manual Exception Days** screen, in the drop-down list, select the school/subcalendar for which you want to add a manual exception day.

**Note:** You would typically select the default calendar for the school.

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

Add New

Select Calendar

- Select Calendar
- ORRVILLE HIGH SCHOOL**
- DFLT - Default
- DNAC - Default Non-attending Calendar
- ORRVILLE MIDDLE SCHOOL**
- DFLT - Default
- DNAC - Default Non-attending Calendar

#### Select Subcalendar

- Click **Add New**.

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

Add New

DFLT - Default

	Date	Exception Type	Hours
 	08/18/2014	Staff Professional Day	7.00

#### Add Manual Exception Days

The add version of the screen displays.

- In the **Date** field, enter or select the date of the exception day you want to add.
- In the **Exception Type** drop-down list, select the EMIS-defined category that describes the reason for the exception day.
- In the **Hours** field, enter the number of hours related to the exception day activity.
- Click **Save**.

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

Calendar: DFLT - Default

Date: 08/19/2014

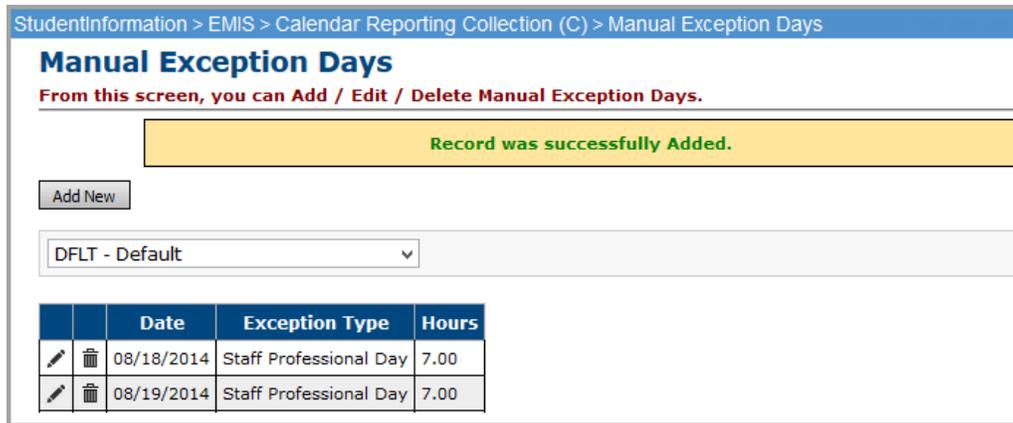
Exception Type: Staff Professional Day

Hours: 7.0

Save Cancel

#### Add Manual Exception Day

A confirmation message displays, and the new manual exception day displays in the list.

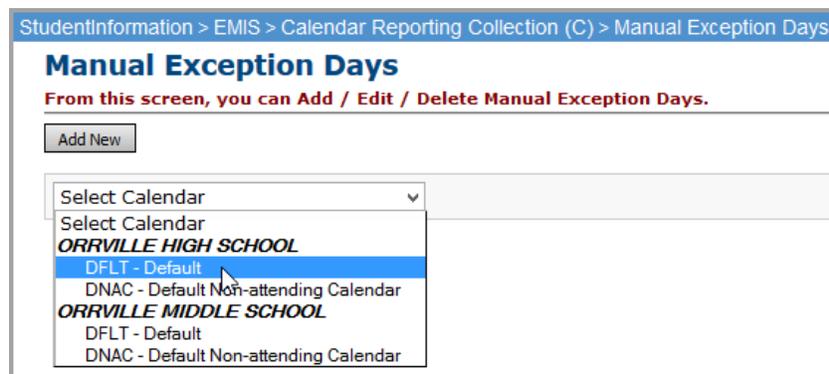


Confirmation of Added Manual Exception Day

## Edit Manual Exception Days

Navigation: StudentInformation – EMIS – Calendar Reporting Collection (C) – Manual Exception Days

1. With the district in context on the **Manual Exception Days** screen, in the drop-down list, select the school/subcalendar for which you want to edit a manual exception day.



Select Subcalendar

2. In the row of the manual exception day you want to edit, click .

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

Add New

DFLT - Default

	Date	Exception Type	Hours
	08/18/2014	Staff Professional Day	7.00
	08/19/2014	Staff Professional Day	7.00

### Edit Manual Exception Days

The edit version of the screen displays.

3. Make any needed changes, and click **Save**.

**Note:** You cannot change the **Date**.

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

Calendar: DFLT - Default

Date: 08/19/2014

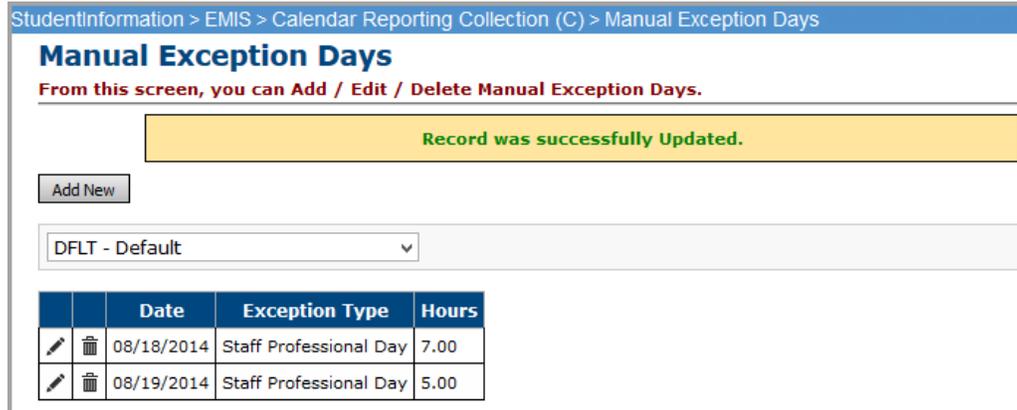
Exception Type: Staff Professional Day

Hours: 5.0

Save Cancel

### Edit Manual Exception Day

A confirmation message displays, and the edited manual exception day displays in the list.

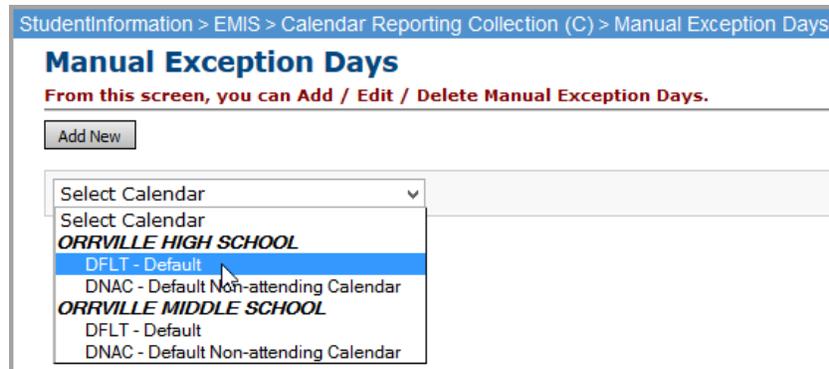


Confirmation of Edited Manual Exception Day

## Delete Manual Exception Days

Navigation: StudentInformation – EMIS – Calendar Reporting Collection (C) – Manual Exception Days

1. With the district in context on the **Manual Exception Days** screen, in the drop-down list, select the school/subcalendar for which you want to delete a manual exception day.



Select Subcalendar

2. In the row of the manual exception day you want to delete, click .

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

Add New

DFLT - Default

	Date	Exception Type	Hours
 	08/18/2014	Staff Professional Day	7.00
 	08/19/2014	Staff Professional Day	5.00

#### Delete Manual Exception Day

A message displays, asking if you are sure you want to delete the manual exception day.

3. Click **Delete**.

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

Are you sure you want to delete the following?

08/18/2014 - Staff Professional Day-7.00

#### Confirm Delete

A confirmation message displays, and the manual exception day no longer displays in the list.

StudentInformation > EMIS > Calendar Reporting Collection (C) > Manual Exception Days

### Manual Exception Days

From this screen, you can Add / Edit / Delete Manual Exception Days.

The record was successfully deleted.

Add New

DFLT - Default

	Date	Exception Type	Hours
 	08/19/2014	Staff Professional Day	5.00

#### Confirmation of Deleted Manual Exception Day

## Verify EMIS Run Requests for Calendar Data

You can run this verify process at any time to monitor your district's outstanding EMIS processes and transfers of calendar data. This process reports on the history of these processes, showing when they were run and who ran them.

### Navigation: StudentInformation – EMIS – Calendar Reporting Collection (C) – Calendar Collection Transfer

1. On the **Calendar Transfer - Reporting Collection (C)** screen **Request Type** tab, select "Verify Calendar Data."
2. Click **Next**.



StudentInformation > EMIS > Calendar Reporting Collection (C) > Calendar Collection Transfer

### Calendar Transfer - Reporting Collection (C)

From this screen, you can transfer Reporting Period (C) Calendar records.

Request Type Program Selection

Verify Calendar Data

Transfer Calendar Data

Next > Cancel

#### Verify Calendar Data

3. On the **Program Selection** tab, select "Verify - EMIS Run Requests (CHECK\_EMIS)."
4. Click **Next**.



StudentInformation > EMIS > Calendar Reporting Collection (C) > Calendar Collection Transfer

### Calendar Verify/Update - Reporting Collection (C)

From this screen, you can transfer Reporting Period (C) Calendar records.

Request Type Program Selection

Verify - EMIS Run Requests (CHECK\_EMIS)

Verify - Reported Calendars and Exception Days

< Back Next > Cancel

#### Verify EMIS Run Requests

5. On the **EMIS Run Requests (CHECK\_EMIS)** screen, in the **District** section, select the check box beside each building for which you want to run this process. (You can also select the option to "Select All Buildings" or "Clear All Buildings" as needed.)
6. Select whether to view those processes that are "Not Run," "Already Run" (lists the last time each process was run) or a "History" (lists every time each process was run) for this reporting collection.
7. Optional: If you selected "Not Run," and you want to exclude verifications and/or transfers from the results, deselect the "Verification Not Run" and/or "Transfer Not Run" options as appropriate.

8. Optional: For any of the process options, if you want to exclude from the results processes run prior to a specific date, in the **Exclude Runs Prior To** field, enter or select that date.
9. Click **Submit**.

StudentInformation > EMIS > Verify EMIS Run Requests

### EMIS Run Requests (CHECK\_EMIS)

From this screen, you can verify which EMIS programs have or have not been run.

Reporting Collection:

District: Dalton Local Schools  
 Select All Buildings  Clear All Buildings

DADA - DALTON ELEMENTARY  DAJH - DALTON INTERMEDIATE  
 DAHS - DALTON HIGH SCHOOL  DAKI - KIDRON ELEMENTARY

Not Run  Already Run  History

**Include the Following Potential Problems:**  
 Verification Not Run  
 Transfer Not Run

**Required:**  
 Calendar Collection Transfer - Building and Grade Calendar (DN/DL)

**Required (Not Available Yet):**  
 Calendar Collection Verify - Reported Calendars and Exception Days

Exclude Runs Prior To:

### Submit EMIS Run Requests

Results display in a grid at the bottom of the screen based on your selections. (See examples that follow.)

Not Run  Already Run  History

**Include the Following Potential Problems:**  
 Verification Not Run  
 Transfer Not Run

**Required:**  
 Calendar Collection Transfer - Building and Grade Calendar (DN/DL)

**Required (Not Available Yet):**  
 Calendar Collection Verify - Reported Calendars and Exception Days

Exclude Runs Prior To:

Dalton Local Schools

Building	Module	Program	Run Date	Issue
DALTON ELEMENTARY	Calendar Collection	Building and Grade Calendar (DN/DL)		Transfer not run
DALTON HIGH SCHOOL	Calendar Collection	Building and Grade Calendar (DN/DL)		Transfer not run
DALTON INTERMEDIATE	Calendar Collection	Building and Grade Calendar (DN/DL)		Transfer not run
KIDRON ELEMENTARY	Calendar Collection	Building and Grade Calendar (DN/DL)		Transfer not run

### EMIS Requests Not Run

Not Run
  **Already Run**
 History

Exclude Runs Prior To:

Building	Module	Program	Verify Run Date	Verify	Update Run Date	Update	Transfer Run Date	Transfer
	Calendar Collection	Building and Grade Calendar (DN/DL)		<input type="checkbox"/>		<input type="checkbox"/>	06/16/2014 10:07 AM	<input checked="" type="checkbox"/>
	Calendar Collection	Building and Grade Calendar (DN/DL)		<input type="checkbox"/>		<input type="checkbox"/>	06/16/2014 10:07 AM	<input checked="" type="checkbox"/>
	Calendar Collection	Building and Grade Calendar (DN/DL)		<input type="checkbox"/>		<input type="checkbox"/>	06/16/2014 10:07 AM	<input checked="" type="checkbox"/>
	Calendar Collection	Building and Grade Calendar (DN/DL)		<input type="checkbox"/>		<input type="checkbox"/>	06/16/2014 10:07 AM	<input checked="" type="checkbox"/>

**EMIS Requests Already Run**

Not Run
  Already Run
  **History**

Exclude Runs Prior To:

**16 Records Displayed**

Building	Module	Program	Action	User	Run Date
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:07 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:05 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:05 AM
	Calendar Collection	Building and Grade Calendar (DN/DL)	Transfer		06/16/2014 10:05 AM

**History of EMIS Run Requests**

## Transfer Calendar Data

Navigation: StudentInformation – EMIS – Calendar Reporting Collection (C) – Calendar Collection Transfer

1. On the **Calendar Transfer - Reporting Collection (C)** screen **Request Type** tab, select "Transfer Calendar Data."
2. Click **Next**.

**Calendar Transfer Reporting Collection (C) Screen – Request Type Tab**

3. On the **Program Selection** tab, select the transfer(s) of calendar data that you want to run. Or to select all available transfers, click **Select all transfers.**”
4. In the **Transfer Type** option, select how you want to transfer the extracted data:
  - **Flat file transfer** – Creates a flat file that you can manually transfer into the Data Collector
  - **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with your district’s unique district code

***Note:** If you are not sure which **Transfer Type** to choose, please contact your ITC.*

5. Click **Submit**.

**Program Selection Tab**

The extract creates a file with the selected assessment record data.

This page intentionally left blank.

# Graduate Reporting Period (G)

Use Graduate Reporting Period (G) to report details about students who were enrolled at any point during the school year and graduated. This includes both regular graduates and summer graduates. Specifically, these students' latest FN record has a **Graduation Date** that is between the first day of school in the current school year and the day before the first day of school in the next school year.

You must report this information between late May and mid-November in the following school year.

Refer to the appropriate section as follows:

- To verify the graduate data that you plan to report, see [“Verify and Update Graduate Data.”](#)
- To transfer graduate data to the Data Collector, see [“Transfer Graduate Data.”](#)
- To review a history of the district's Period G EMIS processes and transfers and those that are still outstanding, see [“Review Period G Process Runs.”](#)
- To maintain EMIS GC-Student Graduation-CORE Summary records for spring or summer graduates, see [“Maintain Graduate CORE Summary Records.”](#)
- To run a report showing graduating students and their credits, see [“Run Period G Student Core Summary Report.”](#)

---

## Verify and Update Graduate Data

Before transferring graduate data, you can verify and/or update the following types of information for each graduating student:

- Demographics (GI record) (See [“Verify Graduate Demographic / Attributes.”](#))
- Graduate attributes (a limited subset of fields on the FN record) – Mostly data that you report only once upon a student's graduation. You enter this data on the **Student Profile – FN-Graduate** tab. This data is not school year or reporting period specific, as you may start collecting some data items as early as the 7th grade. (See [“Verify Graduate Demographic / Attributes.”](#))
- Ohio Graduation Test (OGT) (FA record) – Reported for students who took an OGT test during the summer and qualified for graduation (that is, certain summer graduates). (See [“Verify Student Ohio Graduation Test.”](#))
- Student Graduation-CORE Summary Records (GC record) – New records providing a student's total credits by CORE Subject Area that the student has accumulated over the years to qualify for graduation. (See [“Verify/Update Graduate CORE Summary.”](#))

## Verify Graduate Demographic / Attributes

Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G)

The **Verify Graduate Demographic / Attributes** process includes the following groups of students:

### Students withdrawn as graduating:

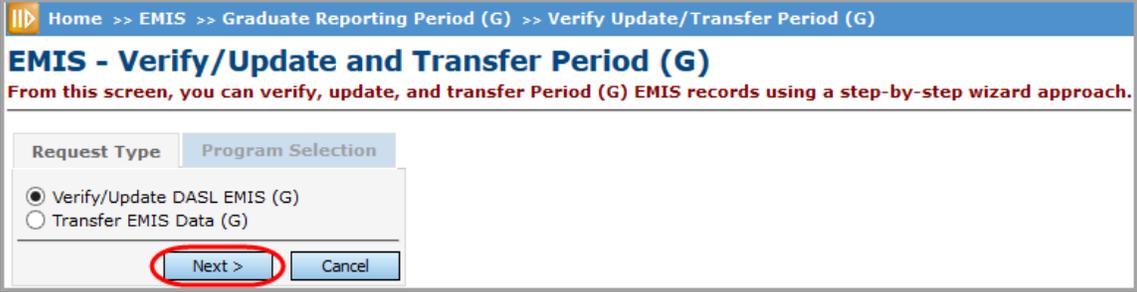
- Enrolled at some point during the enrollment window (current school year)
- **Graduation Date** is within the graduation window (first day of current school year up to the day before the first day of school in the next school year)
- **How Received** value does not = 2 (in-state, non-resident, career-technical contract student)

### Students with a graduation date but not correctly withdrawn as graduating:

- Enrolled at some point during the enrollment window (current school year)
- **Graduation Date** is within the graduation window (first day of current school year up to the day before the first day of school in the next school year)

To run the verify process:

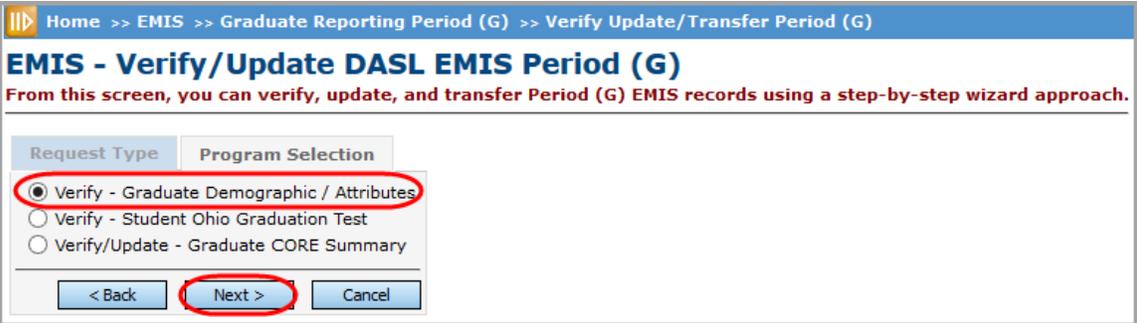
1. With the correct school year in context, on the **EMIS - Verify/Update and Transfer Period (G)** screen **Request Type** tab, select “Verify/Update DASL EMIS (G).”
2. Click **Next**.



The screenshot shows the 'Request Type' tab selected. There are two radio button options: 'Verify/Update DASL EMIS (G)' which is selected, and 'Transfer EMIS Data (G)'. Below the options are two buttons: 'Next >' and 'Cancel'. The 'Next >' button is circled in red.

### Verify/Update DASL EMIS (G)

3. On the **Program Selection** tab, select “Verify - Graduate Demographic / Attributes.”
4. Click **Next**.



The screenshot shows the 'Program Selection' tab selected. There are three radio button options: 'Verify - Graduate Demographic / Attributes' which is selected, 'Verify - Student Ohio Graduation Test', and 'Verify/Update - Graduate CORE Summary'. Below the options are three buttons: '< Back', 'Next >', and 'Cancel'. Both the 'Verify - Graduate Demographic / Attributes' radio button and the 'Next >' button are circled in red.

### Verify - Graduate Demographic/Attributes Option

- On the **Graduate Demographic / Attributes Verify** screen, in the **Include Buildings** section, select the check box beside each building whose graduate data you want to verify. Or, to include all buildings, select the “Select All Buildings” option.
- Optional: To change the number of students that display on each page of the verify results, in the **Number of Students Per Page** drop-down list, select the number (or “All” students).
- Click **Verify**.

### Graduate Demographic / Attributes Verify Screen

Any error or warning messages appear at the bottom of the screen. Following is an example:

“FNG06E - Student has a Diploma Date, has been withdrawn as graduating but the Withdraw Date is not within the correct time frame” indicates:

- **FNG** – Record Type
  - **06**– Error Number
  - **E** – Error; W = Warning
  - **Error Message** – Student has a Diploma Date, has been withdrawn as graduating but the Withdraw Date is not within the correct time frame.
- Optional: To access a student’s profile to correct an error or review a warning, click the student’s name.

Building IRN	Building	Student	Student Number	EMIS ID
010199		<a href="#">Smith, Steven</a>		
EMIS Verify: - FNG06E - Student has a Diploma Date, has been withdrawn as graduating but the Withdraw Date is not within the correct timeframe				
010199		<a href="#">Student84145, JORDYN</a>		
EMIS Verify: - FNG03E - Diploma Type must not = * for a graduating student. - FNG04E - Student has a Diploma Date but is still enrolled				

### Example Graduate Demographic/Attributes Verify Results

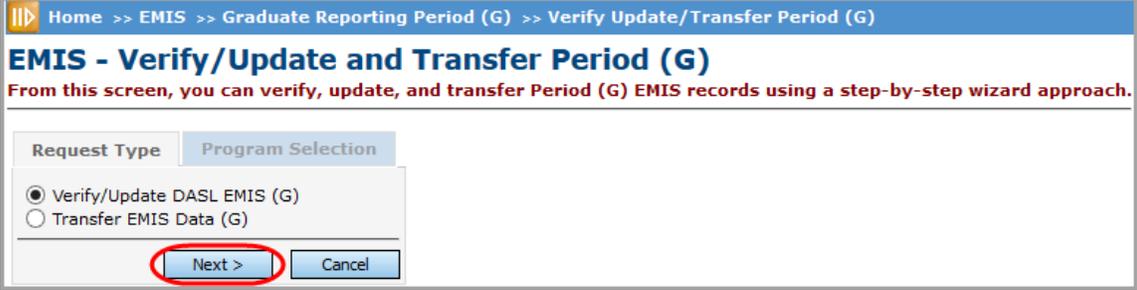
**Note:** If there is no calendar master defined for the next school year, a warning displays, and the verify process uses the last day of the current school year to prevent summer graduates from being considered with no next year calendar master.

## Verify Student Ohio Graduation Test

Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G)

**Caution:** The Graduate/Summer OGT Verify process currently is not functional and does not verify Graduate/Summer OGT results.

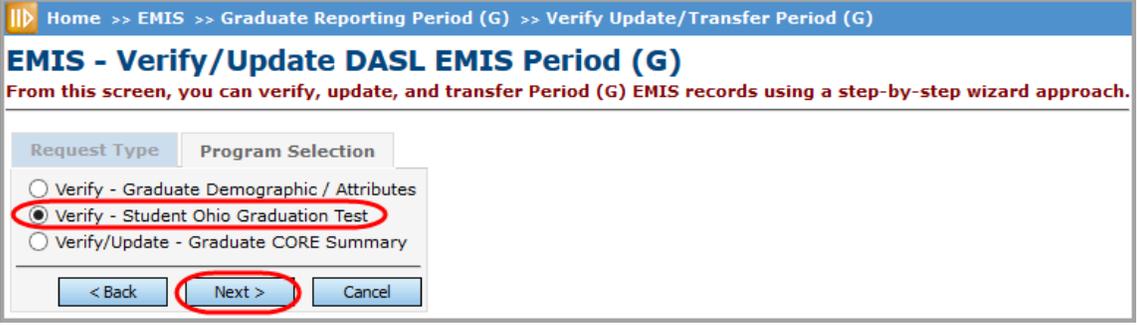
1. With the correct school year in context, on the **EMIS - Verify/Update and Transfer Period (G)** screen **Request Type** tab, select “Verify/Update DASL EMIS (G).”
2. Click **Next**.



The screenshot shows the 'EMIS - Verify/Update and Transfer Period (G)' screen. The breadcrumb trail is 'Home >> EMIS >> Graduate Reporting Period (G) >> Verify Update/Transfer Period (G)'. The title is 'EMIS - Verify/Update and Transfer Period (G)'. Below the title is a red instruction: 'From this screen, you can verify, update, and transfer Period (G) EMIS records using a step-by-step wizard approach.' There are two tabs: 'Request Type' (selected) and 'Program Selection'. Under 'Request Type', there are two radio buttons: 'Verify/Update DASL EMIS (G)' (selected) and 'Transfer EMIS Data (G)'. At the bottom, there are three buttons: '< Back', 'Next >' (circled in red), and 'Cancel'.

### Verify/Update DASL EMIS (G)

3. On the **Program Selection** tab, select “Verify - Student Ohio Graduation Test.”
4. Click **Next**.



The screenshot shows the 'EMIS - Verify/Update DASL EMIS Period (G)' screen. The breadcrumb trail is 'Home >> EMIS >> Graduate Reporting Period (G) >> Verify Update/Transfer Period (G)'. The title is 'EMIS - Verify/Update DASL EMIS Period (G)'. Below the title is a red instruction: 'From this screen, you can verify, update, and transfer Period (G) EMIS records using a step-by-step wizard approach.' There are two tabs: 'Request Type' and 'Program Selection' (selected). Under 'Program Selection', there are three radio buttons: 'Verify - Graduate Demographic / Attributes', 'Verify - Student Ohio Graduation Test' (selected and circled in red), and 'Verify/Update - Graduate CORE Summary'. At the bottom, there are three buttons: '< Back', 'Next >' (circled in red), and 'Cancel'.

### Verify - Student Ohio Graduation Test Option

5. On the **Graduate/Summary OGT Verify** screen, in the **Include Buildings** section, select the check box beside each building whose graduate data you want to verify. Or, to include all buildings, select the “Select All Buildings” option.
6. Click **Verify**.

Graduate/Summary OGT Verify Screen

## Verify/Update Graduate CORE Summary

Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G)

**Note:** Prior to running the verification process, you should run the **Bulk Update Course Core Subject Area** and **Bulk Update Manual Course Core Subject Area** processes as needed. These two ad-hoc updates allow you to update the CORE subject area on courses and manually entered course records. (See [“Bulk Update Courses”](#) and/or [“Bulk Update Manual Courses.”](#))

1. With the correct school year in context, on the **EMIS - Verify/Update and Transfer Period (G)** screen **Request Type** tab, select “Verify/Update DASL EMIS (G).”
2. Click **Next**.

Verify/Update DASL EMIS (G)

3. On the **Program Selection** tab, select “Verify/Update - Graduate CORE Summary.”
4. Click **Next**.

**Verify/Update - Graduate CORE Summary Option**

5. On the **Graduate CORE Summary OGT Verify / Update** screen, in the **Include Buildings** section, select the check box beside each building whose graduate data you want to verify/update. Or, to include all buildings, select the “Select All Buildings” option.
6. For the **Run Type** option, select either to simply “Verify” records or to “Update” (delete and create new) records.
7. Optional: To change the number of courses or student records that display on each page of the verify/update results, in the **Number of Courses/Students Per Page** drop-down list, select the number (or “All” courses or students).
8. For the **Verify Mode** option, to verify course records, select “Course Verify.” Or, to verify student records, select “Student Verify.”
9. Optional: If you selected a **Verify Mode** of “Course Verify” and you want to verify courses for school years in addition to the school year in context, select the school year(s) in the **School Years** multiselect list and move to the **School Years to Verify** list.
10. Click **Submit**.

**Graduate CORE Summary Verify / Update Screen**

The update process creates an EMIS CORE summary record for Period G for each graduating student by summing the earned credits by CORE subject area for each student, from both:

- Manually entered courses where **Is High School Credit** is selected.
- Course section assignments for students where the course has **Is High School Credit** selected, for all school years.

**Note:** For manually entered course records and course section assignments that have **Is High School Credit** selected but no CORE subject area, the course credit is not included in the summary.

Any error or warning messages appear at the bottom of the screen. For guidance on interpreting these messages, refer to the following example:

“GC01E - CORE Subject Area not specified” indicates:

- **GC** – Record Type
- **01**– Error Number
- **E** – Error; W = Warning
- **Error Message** – CORE Subject Area not specified

11. Optional: To review a warning or correct an error, do the following:

- Course verify – To access a course in the indicated school year, click the school year.

Building IRN	Building	Course Code	Course Name	EMIS Subject Code
008003	DAHS	001R	ENGLISH 9R	050160
		<i>Course Messages:</i> - <a href="#">2013-2014</a> GC01E - CORE Subject Area not specified		
008003	DAHS	AK FIT WELL	AK FITNESS AND WELLNESS	
		<i>Course Messages:</i> - <a href="#">2013-2014</a> GC01E - CORE Subject Area not specified		
008003	DAHS	AK HUM REL	HUMAN RELATIONS	
		<i>Course Messages:</i> - <a href="#">2013-2014</a> GC01E - CORE Subject Area not specified		
008003	DAHS	AK MED TERM	MEDICAL TERMINOLOGY	
		<i>Course Messages:</i> - <a href="#">2013-2014</a> GC01E - CORE Subject Area not specified		

**Example Course Verify Results**

- Student verify – To access a student’s profile, click the student’s name.

Building IRN	Building	Student Name	Student Number	EMIS ID
010199	.HS	Student70243, PAUL (PAUL)		
		Total Credits Messages:	- <a href="#">GC13E - Sum of Earned Credits is 0</a>	
010199	.HS	Student84737, RICHELLE		
		Manually Entered Course Messages:	- <a href="#">2007-2008 - ELHS - CPO 2 - CPO 2 LAB -</a> GC10E - CORE Subject Area not specified - <a href="#">2007-2008 - ELHS - CPO 2 - CPO 2 RELATED -</a> GC10E - CORE Subject Area not specified - <a href="#">2007-2008 - ELHS - INT EN - INT ENG IV -</a> GC10E - CORE Subject Area not specified	

### Example Student Verify Results

**Note:** Course groups do not require a CORE Subject Area, although the courses inside the course group may require a CORE Subject Area.

## Transfer Graduate Data

Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G)

1. With the correct school year in context, on the **EMIS - Verify/Update and Transfer Period (G)** screen **Request Type** tab, select “Transfer EMIS Data (G).”
2. Click **Next**.

Home >> EMIS >> Graduate Reporting Period (G) >> Verify Update/Transfer Period (G)

### EMIS - Verify/Update and Transfer Period (G)

From this screen, you can verify, update, and transfer Period (G) EMIS records using a step-by-step wizard approach.

Request Type    Program Selection

Verify/Update DASL EMIS (G)

**Transfer EMIS Data (G)**

### Transfer EMIS Data (G)

3. On the **Program Selection** tab, select the check box beside the type of data you want to transfer. Or, to select all types, select the “Select all transfers” check box.
4. In the **Transfer Type** option, select how you want to transfer the extracted data:
  - **Flat file transfer** – Creates a flat file that you can manually transfer into the Data Collector
  - **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with your district’s unique district code

**Note:** If you are not sure which **Transfer Type** to choose, please contact your ITC or see the appropriate reporting period checklist.

5. Click **Submit**.

StudentInformation > EMIS > Graduate Reporting Period (G) > Verify Update/Transfer Period (G)

### EMIS - Create Flat Files - Select Files

From this screen, you can verify, update, and transfer Period (G) EMIS records using a step-by-step wizard approach.

Request Type | Program Selection

Select all transfers

Transfer - Student Assessment

Transfer - Student Graduate CORE Summary

Transfer - Student Graduate Demographic/Attributes

Transfer - Student Special Ed. Graduation Requirement

**Transfer Type:**

Flat file transfer ⚡

Flat file transfer for Data Collector

< Back   **Submit**   Cancel

#### Transfer Graduate Data

The graduate data transfer process creates records for students based on rules specific to the type of data being transferred.

The **Transfer - Student Graduate Demographic/Attributes** process creates one Period G GI record and one Period G FN record for students withdrawn as graduating, based on the following criteria:

- Enrolled at some point during the enrollment window (current school year)
- **Graduation Date** is within the graduation window (first day of current school year up to the day before the first day of school in the next school year)
- **How Received** value does not = 2 (in-state, non-resident, career-technical contract student)

**Fields Included on the GI-Student Demographics Record in Period G**

Number	Position	Name	PIC/Size
GI001	1-7	Record Number	PIC 9(7)
GI005	8	Record Status	PIC X
		A - Add/Update	
GI010	9-10	Sort Type	PIC X(2)
		Always "GI"	
GI015	11	Record Format Indicator	PIC X
		"K" to indicate Format K	
GI020	12-15	Fiscal Year, e.g., 2009 (CCYY)	PIC X(4)
GI030	16	Reporting Period (G-Graduate)	PIC X
GI040	17-22	Building IRN (use the Attending Building IRN from the most recent FS record, regardless of school year)	PIC X(6)
GI050	23-31	EMIS Student ID Number	PIC X(9)
	42-64	Filler	PIC X(23)
	68-85	Filler	PIC X(18)
GI330	86-115	First Name (Optional)	PIC X(30)
GI340	116-145	Middle Name (Optional)	PIC X(30)
GI350	146-175	Last Name (Optional)	PIC X(30)
	206-300	Filler	PIC X(95)

**Fields Included on the FN – Student Attributes – No Date Record in Period G**

Number	Position	Name	PIC/Size
	1-8	Filler	PIC 9(8)
FN010	9-10	Sort Type (always "FN")	PIC X(2)
	11	Filler	PIC X
FN020	12-15	Fiscal Year, e.g., 2009 (CCYY)	PIC X(4)
FN030	16	Reporting Period: G - Graduate N - Yearend K - October	PIC X
FN040	17-22	District IRN	PIC X(6)
FN050	23-31	EMIS Student ID Number	PIC X(9)
	32-35	Filler	PIC X(4)
FN090	36-43	Diploma Date: 00000000 - Not applicable CCYYMMDD Date	PIC 9(8)

**Fields Included on the FN – Student Attributes – No Date Record in Period G**

Number	Position	Name	PIC/Size
FN100	44	Diploma Type: * - Not Applicable 1 - Regular Diploma 2 - Diploma with Honors 3 - Diploma received in another state via Military Compact	PIC X
FN110	45-48	Fiscal year student began 9th grade (from the Period N time-period record in the current school year): 0000 - Not applicable CCYY - Fiscal year	PIC 9(4)
FN120	49	OGT Graduation Alternative: 0 - Not used 1 - Used for one test not yet passed	PIC 9
	50-78	Filler	PIC X(29)
FN230	79-87	Yearend Reported State Student ID (SSID) Element (use the SSID from the most recent FS record, regardless of school year)	PIC X(9)
FN240	88	CORE Economics and Financial Literacy Requirement Met	PIC X
FN250	89	CORE Fine Arts Requirement Met	PIC X
FN260	90	Exempted from Physical Education Graduation Requirement	PIC X
	91-97	Filler	PIC X(7)
FN300	98	CORE Graduation Requirement Exception	PIC X
FN310	99	Military Compact Graduation Alternative	PIC 9
	100-300	Filler	PIC X(200)

The **Transfer - Student Assessment** process creates one Period G FA record including assessment records with a summer test date for students who are considered summer graduates based on the following criteria:

- Have an enrollment in the next school year (within the district) and have a district withdrawal date between July 1 of the fiscal year and the day before the earliest first day of any school enrollments next year (found by looking at the student's next school year enrollments and looking at the first day of the master calendar).
- **Graduation Date** is before the first day of school in the next school year

**Note:** The assessment transfer process for period G includes only summer test results for summer graduates. All other test results for seniors who had passed all parts as of the end of the school year were reported in a previous period.

*Graduate Reporting Period (G)*

The **Transfer - Student Graduate CORE Summary** process creates one Period G GC record for each graduating student. Following is the GC record layout:

**Student Graduation – Core Summary Record (GC) Layout**

<b>Number</b>	<b>Position</b>	<b>Name</b>	<b>PIC/Size</b>
GC001	1-8	Filler	PIC 9 (8)
GC010	9-10	Sort Type (always "GC")	PIC X (2)
	11	Filler	PIC X
GC020	12-15	Fiscal Year, e.g., 2009 (CCYY)	PIC X (4)
GC030	16	Reporting Period: K – October G – Graduate	PIC X
GC040	17-22	District IRN	PIC X (6)
GC050	23-31	EMIS Student ID Number:	PIC X (9)
GC060	32-34	CORE Area Code BUS – Business units CTA – Career/Technical units ELE – Elective units ENG – English Language Arts units FAR – Fine Arts units FLR – Foreign Language units HEC – Family and Consumer Sciences (Non- Career-Technical) units HTH – Health Education units JTC – JROTC - Junior Reserve Office Training Corps MTA – Mathematics - Algebra II or Equivalent units MTO – Mathematics units Other than Algebra II or Equivalent PHE – Physical Education units SCA – Science - Advanced Science units SCL – Science - Life Science units SCO – Science units Other than Physical, Life, or Advanced Science SCP – Science - Physical Science units SOG – Social Studies- American Government units SOH – Social Studies- American History units SOO – Social Studies units Other than American History & Government TEC – Technology Education/Computer Science units	PIC X (3)
GC070	35-38	CORE Area Count	PIC 99V99
	39-300	Filler	PIC X (262)

---

## Review Period G Process Runs

### Navigation: Home – EMIS – Graduate Reporting Period (G) – Review District EMIS Run Requests

You can review a history of a district's Period (G) processes and transfers and those that are still outstanding. This is useful if you are an EMIS coordinator or ITC staff who has placed the responsibility for running some of these processes at the building level. This tool shows a history of who ran each process and when.

1. With the correct school year in context on the **Review District EMIS Run Requests** screen, ensure that "G" is selected as the **Reporting Period**.
2. In the **District** section, select the check box beside each building for which you want to review Period G process run requests. Or, to include all buildings, select the "Select All Buildings" option.
3. Select whether to view those processes that are "Not Run," those that are "Already Run" or a "History" showing all processes run for the selected building(s), including the user and run date/time.
4. Only if you selected to view the processes that are "Not Run," in the **Include the Following Potential Problems** area, select the check box beside each problem situation to include in the results:
  - **Verification Not Run** – Process not run in Verify mode
  - **Update Not Run** – Process not run in Update mode
  - **Transfer Not Run** – Transfer not processed to transfer records from StudentInformation to EMIS
  - **Transfer Not Run After Update** – Update process to create the records has been run, but new records have not been transferred to EMIS
  - **Run Too Early** – Process run prior to when it should be
5. Optional: To limit your results to a period from a certain start date to the present, in the **Exclude Runs Prior To** field, enter or select a start date.
6. Click **Submit**.

Home >> EMIS >> Run Requests

### Review District EMIS Run Requests

From this screen, you can verify which EMIS programs have been run.

Reporting Period:

District: Dalton Local Schools  
 Select All Buildings  Clear All Buildings

DADA - DALTON ELEMENTARY  DAJH - DALTON INTERMEDIATE  
 DAHS - DALTON HIGH SCHOOL  DAKI - KIDRON ELEMENTARY

Not Run  Already Run  History

**Include the Following Potential Problems:**

Verification Not Run  
 Update Not Run  
 Transfer Not Run  
 Transfer Not Run After Update  
 Run Too Early

**Required:**

Assessment Transfer - Student Special Ed. Graduation Requirement  
 Assessment Verify - Student Ohio Graduation Test  
 Student Graduate CORE Summary Transfer - Student Graduate CORE Summary  
 Student Graduate CORE Summary Update - Graduate CORE Summary  
 Student Graduate CORE Summary Verify - Graduate CORE Summary  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Attributes  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Demographic  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Demographic/Attributes  
 Student Graduate Demographics / Attributes Verify - Graduate Demographic / Attributes

Exclude Runs Prior To:

### Review District EMIS Run Requests Screen

Results based on your selections display in a grid beneath the selection criteria.

### Sample Output for Not Run Option

Not Run  Already Run  History

**Include the Following Potential Problems:**

Verification Not Run  
 Update Not Run  
 Transfer Not Run  
 Transfer Not Run After Update  
 Run Too Early

**Required:**

Assessment Transfer - Student Special Ed. Graduation Requirement  
 Assessment Verify - Student Ohio Graduation Test  
 Student Graduate CORE Summary Transfer - Student Graduate CORE Summary  
 Student Graduate CORE Summary Update - Graduate CORE Summary  
 Student Graduate CORE Summary Verify - Graduate CORE Summary  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Attributes  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Demographic  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Demographic/Attributes  
 Student Graduate Demographics / Attributes Verify - Graduate Demographic / Attributes

Exclude Runs Prior To:

Dalton Local Schools

Building	Module	Program	Run Date	Issue
DALTON ELEMENTARY	Assessment	Student Ohio Graduation Test		Verify not run
DALTON ELEMENTARY	Assessment	Student Special Ed. Graduation Requirement		Transfer not run
DALTON ELEMENTARY	Student Graduate CORE Summary	Graduate CORE Summary	05/27/2014 05:21 PM	Update not run
DALTON ELEMENTARY	Student Graduate CORE Summary	Student Graduate CORE Summary		Transfer not run
DALTON ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Attributes		Transfer not run
DALTON ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Demographic		Transfer not run

### EMIS Not Run Results

## Sample Output for Already Run Option

Not Run
  Already Run
  History

Exclude Runs Prior To:

Dalton Local Schools

Building	Module	Program	Verify Run Date	Verify	Update Run Date	Update	Transfer Run Date	Transfer
DALTON ELEMENTARY	Assessment	Student Ohio Graduation Test	05/27/2014 04:43 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON ELEMENTARY	Student Graduate CORE Summary	Graduate CORE Summary	05/27/2014 05:21 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON ELEMENTARY	Student Graduate Demographics / Attributes	Graduate Demographic / Attributes	05/27/2014 04:04 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON HIGH SCHOOL	Assessment	Student Ohio Graduation Test	05/27/2014 04:43 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON HIGH SCHOOL	Student Graduate CORE Summary	Graduate CORE Summary	05/27/2014 05:21 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON HIGH SCHOOL	Student Graduate Demographics / Attributes	Graduate Demographic / Attributes	05/27/2014 04:04 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
DALTON INTERMEDIATE	Assessment	Student Ohio Graduation Test	05/27/2014 04:43 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

### EMIS Already Run Results

## Sample Output for History Option

Not Run
  Already Run
  History

Exclude Runs Prior To:

54 Records Displayed

Building	Module	Program	Action	User	Run Date
DALTON ELEMENTARY	Student Graduate CORE Summary	Graduate CORE Summary	Verify		05/27/2014 05:21 PM
DALTON HIGH SCHOOL	Student Graduate CORE Summary	Graduate CORE Summary	Verify		05/27/2014 05:21 PM
DALTON INTERMEDIATE	Student Graduate CORE Summary	Graduate CORE Summary	Verify		05/27/2014 05:21 PM
DALTON ELEMENTARY	Student Graduate CORE Summary	Graduate CORE Summary	Verify		05/27/2014 05:18 PM
DALTON HIGH SCHOOL	Student Graduate CORE Summary	Graduate CORE Summary	Verify		05/27/2014 05:18 PM
DALTON INTERMEDIATE	Student Graduate CORE Summary	Graduate CORE Summary	Verify		05/27/2014 05:18 PM
DALTON ELEMENTARY	Student Graduate CORE Summary	Graduate CORE Summary	Verify		05/27/2014 05:18 PM

### EMIS History Results

## Maintain Graduate CORE Summary Records

CORE summary records report the CORE subject areas in which a student has earned graduation credits/units. This data is populated based on the student's manual course history records as well as courses the student has taken in the district. However, you can add, change or delete these records for summer graduates and for students who graduated with their class in the spring.

**Note:** Use the processes described here only for graduated students for Period G reporting, not to maintain CORE records for other students in grades 9-12.

Refer to the appropriate section as follows:

- To add a new CORE summary record, see [“Add Graduate CORE Summary Records.”](#)
- To edit an existing CORE summary record, see [“Edit Graduate CORE Summary Records.”](#)
- To delete a CORE summary record, see [“Delete Graduate CORE Summary Records.”](#)

## Add Graduate CORE Summary Records

Navigation: Home – EMIS – Graduate Reporting Period (G) – Student Graduate CORE Summary Maint

1. With the appropriate student in context, on the **Student Graduate CORE Summary Maintenance** screen, click **Add CORE Summary Record**.

CORE Area Code ^	CORE Area	CORE Count
There are no records to display		

### Add Graduate CORE Summary Records

The add-edit version of the screen displays.

2. In the **CORE Subject Area** drop-down list, select the CORE subject area for which you are creating the record.
3. In the **Total Credits/Units Earned** field, enter the total number of credits or units the student has earned for this CORE subject area.

**Note:** A student can have only one summary record for each CORE subject area, so you must total the credits for each area into one record.

4. Click **Save**. Or, to continue adding CORE summary records, click **Save and New**.

CORE Subject Area: BUS - Business units

Total Credits/Units Earned: 3.00

Save Save and New Cancel

### Add Graduate CORE Summary Record

A confirmation message displays, and the new graduate CORE summary record displays in the list.

Home >> EMIS >> Graduate Reporting Period (G) >> Student Graduate CORE Summary Maint

### Student Graduate CORE Summary Maintenance

From this screen, you can display, add, change and delete data pertaining to student Graduate CORE Summary records.

The Student CORE Summary Record was saved successfully

Add CORE Summary Record

		CORE Area Code ^	CORE Area	CORE Count
X		BUS	Business units	3.00
<b>Total:</b>				<b>3.00</b>

#### Confirmation of Added Graduate CORE Summary Record

## Edit Graduate CORE Summary Records

Navigation: Home – EMIS – Graduate Reporting Period (G) – Student Graduate CORE Summary Maint

1. With the appropriate student in context, on the **Student Graduate CORE Summary Maintenance** screen, in the row of the graduate CORE summary record you want to edit, click .

Home >> EMIS >> Graduate Reporting Period (G) >> Student Graduate CORE Summary Maint

### Student Graduate CORE Summary Maintenance

From this screen, you can display, add, change and delete data pertaining to student Graduate CORE Summary records.

Add CORE Summary Record

		CORE Area Code ^	CORE Area	CORE Count
X		BUS	Business units	3.00
<b>Total:</b>				<b>3.00</b>

#### Edit Graduate CORE Summary Records

The add-edit version of the screen displays.

2. Make any desired changes, and click **Save**.

**Note:** For more information about the fields on this screen, see [“Add Graduate CORE Summary Records.”](#)

### Edit Graduate CORE Summary Record

A confirmation message displays, and the edited graduate CORE summary record displays in the list.

	CORE Area Code ^	CORE Area	CORE Count
X	CTA	Career/Technical units	3.00
<b>Total:</b>			<b>3.00</b>

### Confirmation of Edited Graduate CORE Summary Record

## Delete Graduate CORE Summary Records

Navigation: Home – EMIS – Graduate Reporting Period (G) – Student Graduate CORE Summary Maint

1. With the appropriate student in context, on the **Student Graduate CORE Summary Maintenance** screen, in the row of the graduate CORE summary record you want to delete, click **X**.

	CORE Area Code ^	CORE Area	CORE Count
X	CTA	Career/Technical units	3.00
<b>Total:</b>			<b>3.00</b>

### Delete Graduate CORE Summary Record

A message displays, asking if you are sure you want to delete the graduate CORE summary record.

2. Click **Ok**.

Home >> EMIS >> Graduate Reporting Period (G) >> Student Graduate CORE Summary Maint

### Student Graduate CORE Summary Maintenance

From this screen, you can display, add, change and delete data pertaining to student Graduate CORE Summary records.

Are you sure you want to delete the following Student CORE Summary Record?  
CTA - Career/Technical units

Ok Cancel

#### Confirm Delete

A confirmation message displays, and the graduate CORE summary record no longer displays in the list.

Home >> EMIS >> Graduate Reporting Period (G) >> Student Graduate CORE Summary Maint

### Student Graduate CORE Summary Maintenance

From this screen, you can display, add, change and delete data pertaining to student Graduate CORE Summary records.

The selected Student CORE Summary Record was successfully deleted

Add CORE Summary Record

CORE Area Code ^	CORE Area	CORE Count
There are no records to display		

#### Confirmation of Deleted Graduate CORE Summary Record

## Run Period G Student Core Summary Report

**Navigation:** Home – Local – Report Builder Links – Report Builder Reports

The **Period G Student Core Summary Report** lists the students graduating in period G and the credits they received for each core area by district and school.

**Note:** For information on running Report Builder reports, see *ProgressBook StudentInformation Report Builder User Guide*.

ProgressBook Student Information							Report Viewer	
Show Setup	Save Setup As...	View Report	Report Name: Period G Student Core Summary Report					
1 of 82							Select a format	Export
Period G Student Core Summary Report								
District	Building Name	Student Number	Last Name	First Name	Middle Name	CORE Area Code	Area Count	Total Area Count
Ashland City Schools	ASHLAND HIGH SCHOOL	129001	RAMOS	TERRY		BUS	0.50	25.000
						CTA	7.50	
						ELE	0.50	
						ENG	4.00	
						FLR	2.00	
						MTA	1.00	
						MTD	3.00	
						PHE	1.00	
						SCP	2.00	
						SDG	0.50	
						SOH	1.00	
						SOD	2.00	
						Total:		
			129002	REYES	GERALD			BUS
						CTA	3.00	
						ENG	4.00	
						FAR	4.00	
						FLR	2.00	
						MTA	2.50	
						MTD	3.00	
						PHE	1.00	
						SCA	2.00	

Period G Student Core Summary Report

Period G Student Core Summary Report								
District	Building Name	Student Number	Last Name	First Name	Middle Name	CORE Area Code	Area Count	Total Area Count
Ashland City Schools	ASHLAND HIGH SCHOOL	129001	RAMOS	TERRY		BUS	0.50	
							Total:	0.500
		129002	REYES	GERALD		BUS	0.50	
							Total:	0.500
		129004	SHAW	VIVIAN		BUS	0.50	
							Total:	0.500
		129005	HOLMES	ROBERTA		BUS	2.00	
							Total:	2.000
		129006	RICE	HOLLY		BUS	0.50	
							Total:	0.500
		129007	ROBERTSON	BRITTANY		BUS	0.50	
							Total:	0.500
		129008	HUNT	WILLIE		BUS	0.50	
							Total:	0.500
129010	ROMERO	MELINDA		BUS	0.50			
					Total:	0.500		
129011	LARSON	ARLENE		BUS	0.50			
					Total:	0.500		
129013	MENDOZA	ALLISON		BUS	0.50			
					Total:	0.500		
129014	MCDANIEL	TERRY		BUS	0.50			
					Total:	0.500		

Period G Student Core Summary Report Filtered by BUS Core Area Code

This page intentionally left blank.

# Power Withdraw

The **Power Withdraw** function in StudentInformation lets you perform a mass withdrawal of students from a school (for instance, to withdraw all graduated students). See [“Mass Withdraw Graduated Students.”](#)

---

## Mass Withdraw Graduated Students

### Navigation: Home – Management – Power Withdraw

You can perform a mass withdrawal of graduated students from a school.

1. On the **Power Withdraw** screen, in the **School** drop-down list, select the school attended by the graduated students you want to mass withdraw.
2. In the **Withdraw Reason** drop-down list, select “99” (completed graduation requirements).
3. In the **Withdraw Date** field, enter or select the students’ graduation date.
4. Search for students to include in the mass withdrawal as follows:
  - a. Select either or both of the following **Search Mode** options:
    - **Search Criteria** – Use as many fields as necessary to find students.
    - **Student Ids** – Enter student ID numbers separated by a comma.
  - b. Optional: To change whether students returned in the search are initially selected for inclusion in the mass withdrawal, select or deselect the **Students Selected by Default** check box.
  - c. Click **Search**.

Home >> Management >> Power Withdraw

## Power Withdraw

This screen allows you to perform a mass withdrawal of students from the district.

School: DAHS - DALTON HIGH SCHOOL ▾

Withdraw Reason: 99 - Completed HS Grad require./course requir. & passed ▾ ⚡

Withdraw Date: 06/05/2014 📅 ⚡

Withdrawn to IRN: \*\*\*\*\* - 📍

Search Mode:  Search Criteria  Student Ids

Grade Level: 12 - 12 ▾

Grade Next Year: ▾

Home School IRN: - 📍

Homeroom: ▾ Homeroom Date: 📅

Teacher: ▾

Course Section: ▾ ...

Ad-Hoc Membership: -- Select an Ad-Hoc Membership -- ▾ ...

Public And Private

Membership Group: ▾

Membership: ▾

EMIS Situation: ▾

How Received: ▾

Students Selected by Default

### Mass Withdraw Graduated Students on Power Withdraw Screen

Students matching your search criteria display in a grid at the bottom of the screen.

- Review the matching students. If necessary, select the check box beside a student to include the student in the mass withdrawal. Or deselect the check box to exclude the student.
- To add the selected students to the mass withdrawal, click **Withdraw**.

**Caution:** Use extreme caution when using this functionality. Be sure that **ONLY** the students you want to mass withdraw are selected! If you have not made the right selections, you could inadvertently mass withdraw all students!

	Student Name	Student Number	Grade Level Code
<input checked="" type="checkbox"/>	ACEVEDO, VANESSA	00140580	12
<input checked="" type="checkbox"/>	ANDERSON, BENJAMIN	00140129	12
<input checked="" type="checkbox"/>	BAILEY, ANGELA	00140530	12
<input checked="" type="checkbox"/>	BAILEY, CYNTHIA	00140130	12
<input checked="" type="checkbox"/>	BARNETT, BETTY	00140215	12
<input checked="" type="checkbox"/>	BEASLEY, JAMES	00140026	12
<input checked="" type="checkbox"/>	BEST, BRAD	00140010	12
<input checked="" type="checkbox"/>	BOWERS, DUSTIN	00140170	12
<input checked="" type="checkbox"/>	BRIDGES, ARMANDO	00130535	12
<input checked="" type="checkbox"/>	BRIDGES, HEIDI	00140051	12
<input checked="" type="checkbox"/>	BRIDGES, MARY	00140162	12
<input checked="" type="checkbox"/>	BRIDGES, VIOLA	00140510	12

**Withdraw Selected Students**

A confirmation message displays.

Home >> Management >> Power Withdraw

**Power Withdraw**

This screen allows you to perform a mass withdrawal of students from the district.

All selected students were successfully withdrawn

**Confirmation of Withdrawn Students**

**Note:** This process updates the **District Withdraw Reason** and **District Withdraw Date** on the student profile **FS-Standing** tab to the values you selected on the **Power Withdraw** screen. In the case of graduated students (**Withdraw Code** of "99"), the **District Withdraw Date** on the student profile is automatically set to the last date of the school year.

This page intentionally left blank.

# Appendix A – StudentInformation Crosswalk

The following sections list all EMIS elements and where they reside in StudentInformation by reporting period or reporting collection. Refer to the appropriate section as follows:

- [“Reporting Collection S”](#)
- [“Reporting Collection A”](#)
- [“Reporting Period L”](#)
- [“Reporting Collection C”](#)
- [“Reporting Period R”](#)
- [“Reporting Period G”](#)

## Reporting Collection S

### Student Demographic Record (GI)

EMIS Element	Location in StudentInformation
	These elements are located on various student profile tab(s) as listed below.
Building IRN	Additional – Primary Building AND FS-Standing – Attending Building IRN
EMIS Student ID Number	FS-Standing
Date of Birth	General – Birthdate
Gender	General – Gender
Racial/Ethnic Group	General – Summative Race
Native Language	General – Native Language
First Name	General – First Name and/or Private – Legal First Name
Middle Name	General – Middle Name and/or Private – Legal Middle Name
Last Name	General – Last Name and/or Private – Legal Last Name
Student Birth Place City	General – Birthplace City
Student Home Language	General – Home Language
Hispanic/Latino	General – Hispanic/Latino

**Student Demographic - Race Detail Record (GJ)**

EMIS Element	Location in Student Information
EMIS Student ID Number	FS Standing
Racial Group	General – Racial Groups (1 record created for each group checked)

**Student Standing Record (FS)**

EMIS Element	Location in Student Information
	These elements are located on various student profile tab(s) as listed below.
Effective Start Date	FS-Standing – Effective Start Date
Admission Date	FS-Standing – District Admission Date
Student Admission Reason	FS-Standing – Admission Reason
Admitted From IRN	FS-Standing – Admitted From IRN
Effective End Date	FS-Standing – Effective End Date
Withdrawal Reason	FS-Standing – Withdraw Reason
Withdrawn To IRN	FS-Standing – Withdrawn To IRN
State Student ID (SSID)	FS-Standing – State Student ID (SSID)
Student Percent of Time	FS-Standing – Percent of Time
Tuition Type	FS-Standing – Tuition Type
District Relationship	FS-Standing – District Relationship
Legal District of Residence	FS-Standing – District of Residence
Attending Building IRN	FS-Standing – Attending Building IRN
Assigned Building Area IRN	FS-Standing – Assigned Building IRN
How Received	FS-Standing – How Received
How Received IRN	FS-Standing – How Received IRN
Sent Reason 1	FS-Standing – Sent To Reason 1
Sent To IRN 1	FS-Standing – Sent to IRN 1
Sent To Percent of Time 1	FS-Standing – Percent of Time 1
Sent Reason 2	FS-Standing – Sent To Reason 2
Sent To IRN 2	FS-Standing – Sent To IRN 2
Sent To Percent of Time 2	FS-Standing – Sent To Percent of Time 2
County of Residence	FS-Standing – County of Residence
October Count Week Attendance Days	FS-Attendance – October CW: Attendance Days
October Count Week Excused Absence Days	FS-Attendance – October CW: Excused Absence Days
October Count Week Unexcused Absence Days	FS-Attendance – October CW: Unexcused Absence Days
School Year Attendance Days	FS-Attendance – School Year: Attendance Days
School Year Excused Absence Days	FS-Attendance – School Year: Excused Absence Days
School Year Unexcused Absence Days	FS-Attendance – School Year: Unexcused Absence Days

**Student Attributes – Effective Date Record (FD)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	These elements are located on various student profile tab(s) as listed below.
Effective Start Date	FD-Attributes – Effective Start Date
Effective End Date	FD-Attributes
Grade Level	FD-Attributes – EMIS Grade Level
State Equivalent Grade Level	FD-Attributes – State Equivalent Grade
Attendance Pattern	FD-Attributes – Attendance Pattern
Disadvantagement	FD-Attributes – Disadvantagement
Preschool Poverty Level	FD-Attributes – Preschool Poverty Level
Disability Condition	FD-Attributes – Disability Condition
Student being served by 504 Plan	FD-Attributes – Section 504 Plan
Homeless Status	FD-Attributes – Homeless Status
Homeless Unaccompanied Youth	FD-Attributes – Homeless Unaccompanied Youth
Limited English Proficiency	FD-Attributes – Limited English Proficiency
Migrant Status	FD-Attributes – Migrant Status
Foreign Exchange Student Graduation Plan	FD-Attributes – Foreign Exchange Graduation Plan
Immigrant Status	FD-Attributes – Immigrant Status

**Student Attributes – No Date Record (FN)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	These elements are located on various student profile tab(s) as listed below.
Non-Attending Reason	FS-Attendance – October CW: Non-Attending Reason
Retained Status	FN-Attributes – Retained Status
Fiscal year student began 9th grade	FN-Attributes – Fiscal Year Began 9th
Accountability IRN	FN-Attributes – Accountability IRN
Attending Building IRN Next Year	FN-Attributes – Attending Building IRN Next Year
Third Grade Reading Guarantee	FN-Attributes – Third Grade Reading Guarantee
Limited English Proficient Reclassification Date	FD-Attributes – LEP Reclass Date
Majority of Attendance IRN	FN-Attributes – Majority of Attendance IRN
CORE Economics and Financial Literacy Requirement Met	FN-Graduate – Economics and Financial Literacy Requirement Met
CORE Fine Arts Requirement Met	FN-Graduate – Fine Arts Requirement Met
CORE Graduation Requirement Exemption Code	FN-Graduate – CORE Graduation Requirement Exemption
Exempted from Physical Education Graduation Requirement	FN-Graduate – Exempted from Physical Education Graduation Requirement

**Student Attributes – No Date Record (FN)**

EMIS Element	Location in Student Information
Diploma Date	FN-Graduate – Graduation Date
Diploma Type	FN-Graduate – Diploma Type
OGT Graduation Alternative	FN-Graduate – OGT Graduation Alternative
Military Compact Graduation Alternative Count	FN-Graduate – Military Compact Graduation Alternative
Updated Dec 1 IEP Outcome	FN-Attributes – Updated Dec 1 IEP Outcome
Tech Prep Completer	FN-Attributes – Tech Prep Completer
CTE Program of Concentration	FN-Attributes – CTE Program of Concentration
Attending District IRN Last October	FN-Attributes – Attending District IRN Last October

**Student Acceleration Record (FB)**

EMIS Element	Location in Student Information
	These elements are located on the Student Acceleration (FB) screen.
Subject Area Code	Student Acceleration (FB) – Assessment Area Code
Accelerated Level Count	Student Acceleration (FB) – Accelerated Level Count
Accelerated Assessment Flag	Student Acceleration (FB) – Accelerated Assessment Flag
Accelerated Assessment Accountability IRN	Student Acceleration (FB) – Accelerated Assessment Accountability IRN

**Student Special Education Graduation Requirement Record (FE)**

EMIS Element	Location in Student Information
District IRN	District IRN
EMIS Student ID Number	FS – EMIS ID
IEP Date Type	Special Education – Grad Requirement – Date Type
IEP Date	Special Education – Grad Requirement – IEP Date
Assessment Type Code	Always “STR”.
Assessment Area Code	Special Education – Grad Requirement – Assessment – Assessment Area
Exemption Flag	Special Education – Grad Requirement – Assessment – Exemption Flag

**Student Program Record (GQ)**

EMIS Element	Location in Student Information
Program Code	Student Memberships – EMIS Program Code Note(s): The 215xxx codes that are reported as part of the GQ record are also located on the Services tab on the Special Education screen.
Employee ID	The ID comes from the Staff record in Security based on the Student Memberships – Staff Member.
Program Provider IRN	Student Memberships – Program Provider IRN

**Student Program Record (GQ)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
Program Enrollment Start Date	Student Memberships – Start Date
Program Enrollment End Date	Student Memberships – Stop Date

**Student Gifted Education Record (GG)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	All elements are on the Student Gifted Record screen.
Gifted Screening – Superior Cognitive ability	Screening: Superior Cognitive Ability
Gifted Screening – (SAA) - Mathematics	Screening: Specific Academic Ability – Math
Gifted Screening – (SAA) - Science	Screening: Specific Academic Ability – Science
Gifted Screening – (SAA) - Reading/Writing	Screening: Specific Academic Ability – Reading/Writing
Gifted Screening – (SAA) - Social Studies	Screening: Specific Academic Ability – Social Studies
Gifted Screening – Creative Thinking Ability	Screening: Creative Thinking Ability
Gifted Screening – Visual/Performing Arts	Screening: Visual/Performing Arts
Gifted Assessment – Superior Cognitive Ability	Assessment: Superior Cognitive Ability
Gifted Assessment – (SAA) – Mathematics	Assessment: Specific Academic Ability – Math
Gifted Assessment – (SAA) – Science	Assessment: Specific Academic Ability – Science
Gifted Assessment – (SAA) – Reading, Writing	Assessment: Specific Academic Ability – Reading/Writing
Gifted Assessment – (SAA) - Social Studies	Assessment: Specific Academic Ability – Social Studies
Gifted Assessment – Creative Thinking Ability	Assessment: Creative Thinking Ability
Gifted Assessment – Visual/Performing Arts	Assessment: Visual/Performing Arts
Gifted Identification – Superior Cognitive Ability	Identified: Superior Cognitive Ability
Gifted Identification – (SAA) – Mathematics	Identified: Specific Academic Ability – Math
Gifted Identification – (SAA) – Science	Identified: Specific Academic Ability – Science
Gifted Identification – (SAA) – Reading/Writing	Identified: Specific Academic Ability – Reading/Writing
Gifted Identification v (SAA) – Social Studies	Identified: Specific Academic Ability – Social Studies
Gifted Identification – Creative Thinking Ability	Identified: Creative Thinking Ability
Gifted Identification – Visual/Performing Arts	Identified: Visual/Performing Arts
Gifted Identification Date – Superior Cognitive Ability	Identified Date: Superior Cognitive Ability
Gifted Identification Date – (SAA) – Mathematics	Identified Date: Specific Academic Ability – Math

**Student Gifted Education Record (GG)**

EMIS Element	Location in Student Information
Gifted Identification Date – (SAA) - Science	Identified Date: Specific Academic Ability – Science
Gifted Identification Date – (SAA) – Reading/Writing	Identified Date: Specific Academic Ability – Reading/Writing
Gifted Identification Date – (SAA) – Social Studies	Identified Date: Specific Academic Ability – Social Studies
Gifted Identification Date – Creative Thinking Ability	Identified Date: Creative Thinking Ability
Gifted Identification Date – Visual / Performing Arts	Identified Date: Visual/Performing Arts
Gifted Served - Superior Cognitive Ability	Gifted Served: Superior Cognitive Ability
Gifted Served – (SAA) – Mathematics	Gifted Served: Specific Academic Ability – Math
Gifted Served – (SAA) – Science	Gifted Served: Specific Academic Ability – Science
Gifted Served – (SAA) – Reading/Writing	Gifted Served: Specific Academic Ability – Reading/Writing
Gifted Served – (SAA) – Social Studies	Gifted Served: Specific Academic Ability – Social Studies
Gifted Served – Creative Thinking Ability	Gifted Served: Creative Thinking Ability
Gifted Served – Visual/Performing Arts	Gifted Served: Visual/Performing Arts

**Student Special Education Record (GE)**

EMIS Element	Location in Student Information
	All elements are on the Student – Special Education screen
Date Type	Date Type
Date	Event Date
Outcome ID	Outcome Id
Non-compliance ID	Non-Compliance Id
Outcome Beginning Date	Outcome Begin Date
Outcome End Date	Outcome End Date
IEP Test Type	IEP Test Type
Secondary Planning	Secondary Planning

**Student Discipline Record (GD)**

EMIS Element	Location in Student Information
Date of Discipline	Discipline Incidents – Action record – Action Start Date
Type of Discipline	Discipline Incidents – Action Incident – Action Type
Discipline Reason	Discipline Incidents – Infraction Record – Infraction Type. Up to 5 reasons may be reported. If more than 5 exist on the infraction record, the first 5 will be reported.
Discipline Sequence number	Calculated based on multiple actions with the same date and action type.
Total Discipline Days	Discipline Incidents – Student Incident – Action record – Number of Days
Discipline Modified	Discipline Incidents – Student Incident – Action record – Modified

**Student Discipline Record (GD)**

EMIS Element	Location in StudentInformation
Referred for Alternate Educational Services	Discipline Incidents – Student Incident – Action record – Alternative Program
Building IRN where discipline incident took place	Discipline Incidents – Building IRN where discipline incident took place

**District Testing – Yearend Record (DT)**

EMIS Element	Location in StudentInformation
	All elements are on the District and Building Information screen – District Testing - Year End (DT) tab
Grade Level Assessed	Grade Level Assessed
Local Assessment Number	Local Assessment Number
Number Of Students Taking Assessment	Number Of Students Taking Assessment
Assessed Students With Disabilities Head Count	Assessed Students With Disabilities Head Count
Administered with Accommodations/Modifications	Administered with Accommodations/Modifications
Accommodations/Modifications Head Count	Accommodations/Modifications Head Count
Alternate Assessments Provided	Alternate Assessments Provided
Alternate Assessment Head Count	Alternate Assessment Head Count

**Organization General Information Record (DN)**

Attribute	EMIS Element	Location in StudentInformation
		All elements are on the District and Building Information screen – District Organization Info (DN) tab and Building Organization Info (DN) tab
INFOTECIRN	Attribute Name	Reporting ITC IRN
STUKGBRDAY	Attribute Name	Date student is required to be five years old to be admitted into kindergarten
STUHOMESCL	Attribute Name	Count of home schooled resident students
STUELGEXAC	Attribute Name	Amount of time a student is required to attend district to be eligible for extracurricular activities
STUNPNTSRV	Attribute Name	Count of resident and non-resident nonpublic students within district boundaries eligible for Special Education services but not being served by the district
CWDAYSOPEN	Attribute Text	Count week days open
FEEDERSCHL	Attribute Text	Feeder school
PRFSNLMEET	Attribute Text Attribute Number	Professional teacher meetings FTE
PTCONFERN	Attribute Text Attribute Number	Parent-teacher conference FTE
PRFSNLMEET	Attribute Text Attribute Number	Professional teacher meeting hours (community schools only)

**Organization General Information Record (DN)**

Attribute	EMIS Element	Location in StudentInformation
PTCONFERN	Attribute Text Attribute Number	Parent-teacher conference hours (community schools only)
STUNPNTL	Attribute Name	Count of resident and non-resident nonpublic students within district boundaries evaluated and determined ineligible for special education services
STUPSTCB	Attribute Name	Count of preschool transition conferences held by 3rd birthday, no disability suspected, no additional evaluation
STUPSTCA	Attribute Name	Count of preschool transition conferences held after 3rd birthday, no disability suspected, no additional evaluation
SIGEXTNDY	Attribute Number	Increased learning time by extending the school year
SIGEXTND	Attribute Number	Increased learning time by extending the school day
SIGBEFNA	Attribute Number	Increased learning time in before and after school settings
SIGWEEKEN	Attribute Number	Increased learning time on the weekend
SIGSUMRS	Attribute Number	Increased learning time in summer school
SIGOTHER	Attribute Number	Increased learning time in some other time frame not listed above
CLMTYTAK	Attribute Number	Calamity days taken
SHORTENW	Attribute Number	Shortened days due to weather
CLMTYMDE	Attribute Number	Calamity days made up
SHORTENO	Attribute Number	Shortened days, non-weather
FRSTNEXT	Attribute Name	First day next year
C_STUEEP	Attribute Text	Early Entrance for KG (community schools only)

**SOES Transportation (FP)**

EMIS Element	Location in StudentInformation
	All elements are on the Edit Student Profile screen – Transportation tab.
Student Transported Monday of Countweek	Countweek Transportation Days – Monday
Student Transported Tuesday of Countweek	Countweek Transportation Days – Tuesday
Student Transported Wednesday of Countweek	Countweek Transportation Days – Wednesday
Student Transported Thursday of Countweek	Countweek Transportation Days – Thursday
Student Transported Friday of Countweek	Countweek Transportation Days – Friday
Distance Transported	Countweek Transportation Days – Distance Transported

## Reporting Collection A

### Student Achievement Test Record (FA-GA)

EMIS Element	Location in StudentInformation
	All elements are stored on the Assessment – Student Achievement screen.
Assessment Type Code	Always “GA”
Test Grade Level	Test Grade
Assessment Area Code	Part
Test Date	Test Date
Required Test Type	Reqd Test Type
Grade Level of Student at Time of Test	Grade at time of test
Type of Accommodations	Accomm
Score Not Reported	Score Not Reported
Score	Scaled Score for (STE), Raw Score for (ALT)

### Student Ohio Graduation Test (OGT) Record (FA-GX)

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Student Assessment – OGT Assessment screen.
Assessment Type Code	Always “GX”
Test Grade Level	Always “10”
Assessment Area Code	Part
Test Date	Test Date
Required Test Type	Test Type
Grade Level of Student at Time of Test	Grade at Test Time
Type of Accommodations	Accomm
Score Not Reported	Score Not Reported
Score	Scaled Score (for STR Test Type), Raw Score (for ALT Test Type)

### CTE Student Assessment Record (FA-GY)

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Student Assessment – CTE Student Assessment Record screen.
Assessment Type Code	Always “GY”
Test Grade Level	Always “***”
Assessment Area Code	CTE Student Assessment Code from CTE Student Assessment screen

**CTE Student Assessment Record (FA-GY)**

EMIS Element	Location in StudentInformation
Test Date	Always Jan 1
Required Test Type	Always “STR”
Grade Level of Student at Time of Test	Always “**”
Type of Accommodations	Always “**”
Score Not Reported	Always “*”
Score	CTE Technical Score If Assessment Area code = “14TP” then CTE Teaching Professions Portfolio Score

**Student Kindergarten Readiness Assessment Record (FA-GO)**

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Student Assessment – K-RAL Assessment screen
Assessment Type Code	Always “GO”
Test Grade Level	Always “KG”
Assessment Area Code	Always “R” for Reading
Test Date	Test Date
Required Test Type	Always “STR”
Grade Level of Student at Time of Test	Always “KG”
Type of Accommodations	Accommodations
Score Not Reported	Score Not Reported
Score	Test Score

**Student Preschool Assessment Record (FA-GB)**

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Preschool GGG screen
Assessment Type Code	Always “GB”
Test Grade Level	Always “PS”
Assessment Area Code	Assessment – Preschool GGG – Picture Naming, Rhyming, Alliteration
Test Date	Test Date
Required Test Type	Always “STR”
Grade Level of Student at Time of Test	Always “PS”
Type of Accommodations	Accommodations
Score Not Reported	Score Not Reported
Score	Picture Naming Score (PCNM) Rhyming Score (RHYM) Alliteration Score (ALLT)

**Student Preschool ASQ/SE Assessment Record (FA-GS)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	All elements located on the Assessment – Preschool ASQ/SE screen
Assessment Type Code	Always “GS”
Test Grade Level	Always “PS”
Assessment Area Code	Test Level (03, 04, 05, 30)
Test Date	Test Date
Required Test Type	Always “STR”
Grade Level of Student at Time of Test	Always “PS”
Type of Accommodations	Always “***”
Score Not Reported	Score Not Reported
Score	Score

**Student Preschool ECO Assessment Record (FA-GM)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	All elements located on the Assessment – Preschool ECO screen
Assessment Type Code	Always “GM”
Test Grade Level	Always “PS”
Assessment Area Code	E - Social Emotional Skills (EPRG) K - Acquiring and Using Knowledge & Skills (KPRG) T - Taking Appropriate Action to Meet Needs (TPRG) EPRG - Social Emotional Skills Progress KPRG - Acquiring and Using Knowledge * Skills TRPG - Taking Appropriate Action to Meet Needs
Test Date	Test Date
Required Test Type	Always “STR”
Grade Level of Student at Time of Test	Always “PS”
Type of Accommodations	Always “***”
Score Not Reported	Score Not Reported
Score	Score (where Assessment Area Code = E, K or T) Progress (where Assessment Area Code = EPRT, KPRG, TPRG)

**Ohio Test of English Language Acquisition Assessment Record (FA-GF)**

EMIS Element	Location in StudentInformation
	All Elements on the Assessment – OTELA Assessment screen
Assessment Type Code	Always “GF”
Test Grade Level	Always “***”
Assessment Area Code	Reading (R) Writing (W) Listening (LIST) Speaking (SPKG)
Test Date	Test Date
Required Test Type	Always “STR”
Grade Level of Student at Time of Test	Grade Level at Time of Test
Type of Accommodations	Accommodations
Score Not Reported	Score Not Reported
Score	Reading Scaled Score (R) Writing Scaled Score (W) Listening Scaled Score (LIST) Speaking Scaled Score (SPKG)

**Student CTE Industry Assessment Record (FA-GU)**

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – CTE Industry Assessment screen
Assessment Type Code	Always “GU”
Test Grade Level	Always “***”
Assessment Area Code	CTE Student Assessment Code
Test Date	Always Jan 1
Required Test Type	Always “STR”
Grade Level of Student at Time of Test	Always “***”
Type of Accommodations	Always “***”
Score Not Reported	Always “***”
Score	CTE Industry Assessment Result

**Reporting Period L**

**Student Course Record (GN)**

EMIS Element	Location in StudentInformation
Local Classroom Code	Constructed by CTRMEMIS using School Code + Course ID + Section
High School Credit Earned	Student Subject Record – High School Credit Earned

**Student Course Record (GN)**

EMIS Element	Location in Student Information
Partial/Override Credit	Student Subject Record – High School Credit Amount
Course Enrollment Start Date	Student Subject Record – Course Start Date
Course Enrollment End Date	Student Subject Record – Course Stop Date

**Course Master Record (CN)**

EMIS Element	Location in Student Information
	Course Master Records are made up of elements from Courses, Course Sections, Security Staff, and Highly Qualified Teacher data.
District IRN	District IRN
Subject Code	Courses – EMIS tab – EMIS Subject Code
Local Classroom Code	Constructed by CTRMEMIS – School code + Course ID + Section (from course sections)
Course Level	Courses – EMIS tab – EMIS Course Level
Semester Code	Course Section - Course Term
Length of Scheduled Instruction	Courses - EMIS tab
Location IRN number	Courses – EMIS tab – EMIS Location IRN
High School Credit	Student Subject Record – High School Credit Amount
Subject Area for Credit	Courses – EMIS tab – EMIS Subject Area for Credit
Language Used in Teaching Course	Courses – EMIS tab – EMIS Language Used
Course Start Date	Course Terms – Start Date for term assigned to course section
Course End Date	Course Terms – Stop Date for term assigned to course section
CTE College Credit	Courses – EMIS tab – CTE College Credit
Curriculum	Courses – EMIS tab – Curriculum
Delivery Method	Courses – EMIS tab – Delivery Method
Educational Option	Courses – EMIS tab – Educational Option
Student Population	Courses – EMIS tab – Student Population
Credit Flexibility	Courses – EMIS tab – Credit Flex

**Career-Technical Education Correlated Class Record (CV)**

EMIS Element	Location in Student Information
	All elements are on the Vocational Correlated Records screen
Anchor/Lab/Co-op Local Classroom Code	Anchor Classroom
First Correlated Academic or Technical Related Local Classroom Code	First Correlated Classroom
Second Correlated Academic or Technical Related Local Classroom Code	Second Correlated Classroom

**Mapped Local Classroom Code Record (CM)**

EMIS Element	Location in StudentInformation
	All elements are on the Mapped Local Classroom Codes screen
Mapped From Local Classroom Code	Mapped From Classroom Code
Mapped To Local Classroom Code	Mapped To Classroom Code

**Staff Course Record (CU)**

EMIS Element	Location in StudentInformation
	Staff Course Records are made up of elements from Courses, Course Sections, Security, and Highly Qualified Teacher data.
District IRN	District IRN
Employee ID	Security – Staff – State Staff ID associated with the staff member assigned on Course Sections
Local Classroom Code	Constructed by CTRMEMIS - School code + Course ID + Section (from course sections)
Staff Course Start Date	Course Sections – Teacher History – Start Date
Staff Course End Date	Course Sections – Teacher History – Stop Date
Staff Role Code	Course Sections – Teacher History – Role
HQT Definition	Highly Qualified Teacher Update Maintenance – HQ Definition
Highly Qualified Teacher IRN	Courses – EMIS tab – Highly Qualified Teacher IRN
Staff Provider IRN	Courses – EMIS tab – EMIS Staff Provider IRN

**Reporting Collection C**

**Grade Schedule Record (DL)**

EMIS Element	Location in StudentInformation
Building IRN	Building IRN
Grade Code	State Grade Code
Attendance Pattern	Attendance Pattern Code
First day of school	First Day of School
Last day of school	Last Day of School
Hours Per Day	Hours Per Day
Annual Days in Session	Annual Days in Session
Annual Hours in Session	Annual Hours in Session
Date of Spring Administration – Math Test	Date of Spring Administration Math Test

### Organization General Information Record (DN)

Attribute	EMIS Element	Location in StudentInformation
		All elements are on the Sub-Calendar Maintenance screen.
CLDRTYPE	Attribute Text	Indicates if the calendar is hours or days
PRFLMEET	Attribute Text Attribute Number	Professional teacher meeting hours this day
PTCONFRC	Attribute Text Attribute Number	Parent-teacher conference hours this day
DCMTYTKN	Attribute Number	Calamity days taken
DPLANNED	Attribute Number	Planned day off
DNOTPLAN	Attribute Number	Unplanned day off, excluding calamity days
DBLZZARD	Attribute Number	Unplanned “Blizzard Bag” day
YWKENDSA	Attribute Number	Students regularly attending on Saturdays
YWKENDSU	Attribute Number	Students regularly attending on Sundays
YWKDAYMN	Attribute Number	Students not regularly attending on Mondays
YWKDAYTU	Attribute Number	Students not regularly attending on Tuesdays
YWKDAYWD	Attribute Number	Students not regularly attending on Wednesdays
YWKDAYTH	Attribute Number	Students not regularly attending on Thursdays
YWKDAYFR	Attribute Number	Students not regularly attending on Fridays
HRSWKEND	Attribute Number	Students attending on weekend who do not regularly attend on weekends
HSHTWEA	Attribute Number	Hours interrupted by weather
HSHTPLN	Attribute Number	Hours shortened for planned reason other than weather
HSHTNOP	Attribute Number	Hours shortened for unplanned reason other than weather
HRSLNGTH	Attribute Number	Actual hours in session for calamity makeup or other reason added to scheduled hours

## Reporting Period R

### Student Graduation - Core Summary Record (GC) - Period R

EMIS Element	Location in StudentInformation
District IRN	District IRN
EMIS Student ID Number	FS Standing – EMIS
CORE Area Code	EMIS Maintenance – Student Non-Graduate Core Summary – CORE Area Code
CORE Area Count	EMIS Maintenance – Student Non-Graduate Core Summary – CORE Count

---

## Reporting Period G

### Student Graduation - Core Summary Record (GC) - Period G

EMIS Element	Location in StudentInformation
District IRN	District IRN
EMIS Student ID Number	FS Standing – EMIS ID
CORE Area Code	Graduate Reporting Period (G) – Student Graduate Core Summary Maintenance – Student Non-Graduate Core Summary – CORE Area Code
CORE Area Count	Graduate Reporting Period (G) – Student Graduate Core Summary Maintenance – Student Non-Graduate Core Summary – CORE Count

---

## Non Reporting Period Specific

### Graduation-Only Test Record (GP)

EMIS Element	Location in StudentInformation
	This record is not currently stored in StudentInformation.

### CTE Workforce Development Follow-up Record (GV)

EMIS Element	Location in StudentInformation
	This record is not currently stored in StudentInformation.

---

# ProgressBook StudentInformation EMIS Guide



# **ProgressBook StudentInformation EMIS Guide**

(This document is current for ProgressBook StudentInformation v14.4.0 or later.)

© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

# Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook StudentInformation EMIS Guide* have been made.

Product Version	Heading	Page	Reason
14.4.0	Throughout Guide	N/A	Updated dates to be generic with regards to school year.
14.4.0	<i>"EMIS Overview"</i>	5	Updated image of <b>Maintenance</b> screen by adding the <b>Student Summer Withdrawal Record</b> option, which had been missing.
14.4.0	<i>"Student Assessment Transfer (FA)"</i>	56	Added ACT, AP, SAT and IB to list of assessment records included in the transfer. Added transfer rules for ACT, AP and SAT.
14.4.0	<i>"Verify – Student Special Education and Student Special Education Graduation Requirement"</i>	68	Added new warning message for students with disability outcome but no disability condition on profile.
14.4.0	<i>"Student Ohio Graduation Test Verify and Transfer"</i>	78	Updated images and text to eliminate deprecated <b>Transfer to Alpha</b> option and show missing <b>Transfer - Student Special Ed. Graduation Requirement</b> option.
14.4.0	<i>"Graduate CORE Summary Verify/Update and Transfer"</i>	81	Updated images and text to eliminate deprecated <b>Transfer to Alpha</b> option and show missing <b>Transfer - Student Special Ed. Graduation Requirement</b> option.
14.4.0	<i>"Graduate Demographic/Attributes Verify/Update and Transfer"</i>	88	Updated images and text to eliminate deprecated <b>Transfer to Alpha</b> option and show missing <b>Transfer - Student Special Ed. Graduation Requirement</b> option.
14.4.0	<i>"Calendar Reporting Period (C)"</i>	101	Added section.
14.4.0	<i>"District Organization Information (DN) – Period N"</i>	122	Updated image to show new <b>Comprehensive Eye Exams</b> section.
14.2.0	<i>"Student Demographics (UNCLEMIS)"</i>	15	Added new situations for the FN22W UNCLEMIS check.
14.2.0	<i>"Building Organization Information (DN) – Period K"</i>	123	Updated screen shot to reflect removed <b>PE Performance Measures</b> section.
14.1.1	<i>"District Organization Information (DN) – Period K"</i>	121	Updated screen shot to show new <b>Preschool Special Education Agreements</b> and <b>District Transportation</b> sections.
14.1.0	<i>"EMIS – Transfer EMIS Data"</i>	9	Updated screen shot and removed references to Alpha transfer type.
14.1.0	<i>"Non-Reportable Students"</i>	65	Updated screen shot of Non-Reportable Students report to show the added <b>Admission Date</b> and <b>Withdrawal Date</b> columns.
14.1.0	<i>"District Organization Information (DN) – Period N"</i>	122	Updated screen shot of District Organization Information in Period N to show added Free and Reduced Lunch fields.

---

## Change Log

<b>Product Version</b>	<b>Heading</b>	<b>Page</b>	<b>Reason</b>
14.1.0	<i>"District Organization Information (DN) – Period K"</i>	121	Updated screen shot of District Organization Information in Period K to show added Free and Reduced Lunch fields.
14.0.0	<i>"Student Membership Copy"</i>	197	Updated image of Student Memberships screen to remove 215xxx code and added note that the codes are not available to copy in this process.
13.6.0	<i>"Student Demographics (UNCLEMIS)"</i>	15	Added description of verification checks for invalid Attending Building IRN Next Year and Third Grade Reading Guarantee fields.
13.6.0	<i>"Building Organization Information (DN) – Period K"</i>	123	Updated screen shot to show revised PE Performance Measures informational text.
13.6.0	<i>"Building Organization Information (DN) – Period N"</i>	124	Updated screen shot to show revised PE Performance Measures informational text.
13.5.0	<i>"Student Special Education Events and Student Special Education Graduation Requirement (FE)"</i>	68	Added new Grade Level column to the file outputs and replaced example results screen shot.
13.5.0	<i>"District Organization Information (DN) – Period K"</i>	121	Updated image to show new Local Wellness Policy section.
13.5.0	<i>"District Organization Information (DN) – Period N"</i>	122	Updated image to show new Local Wellness Policy section.
13.5.0	<i>"Building Organization Information (DN) – Period K"</i>	123	Updated image to show new PE Performance Measures section.
13.5.0	<i>"Building Organization Information (DN) – Period N"</i>	124	Updated image to show new PE Performance Measures section.
13.5.0	<i>"Student Attributes – No Date Record (FN)"</i>	209	Added Attending Building IRN Next Year and Third Grade Reading Guarantee to table.

---

# Table of Contents

<b>Change Log</b>	<b>i</b>
<b>StudentInformation EMIS Guide Overview</b>	<b>1</b>
Understanding the EMIS Module .....	1
EMIS Outline and Flow .....	2
<b>EMIS Overview</b>	<b>5</b>
EMIS Menu .....	6
Verify/Update DASL EMIS .....	6
EMIS – Transfer EMIS Data.....	9
Selection of StudentInformation Reporting Period .....	11
Selection of StudentInformation Reporting Period Prior to FY09.....	12
Common Functionality .....	13
Selection of Buildings.....	13
<b>EMIS Verify/Update Programs</b>	<b>15</b>
Student Demographics (UNCLEMIS).....	15
Course & Class List (CLISEMIS/CTRMEMIS).....	19
CTRMEMIS.....	19
CLISEMIS .....	22
Teacher History Assignment Checks .....	25
Invalid Subject (INVSUBJ).....	26
Memberships (MEMBEMIS) .....	28
Attendance (ATTUPEMIS).....	33
DASL Options .....	33
Absence Type Maintenance.....	34
Verify/Update – Student Attendance (ATTUPEMIS) .....	35
Discipline (DISCEMIS).....	39
File Download Options.....	42
Majority of Attendance (MAJOREMIS) .....	44
File Download Options.....	47
Review District EMIS Runs (CHECK_EMIS) .....	48
Assessment .....	53
Student Assessment Transfer (FA) .....	56
Student Acceleration Transfer (FB).....	63

Assessment Transfer – Student Proficiency .....	64
Non-Reportable Students.....	65
Reportable Courses .....	66
Student Special Education Events and Student Special Education Graduation Requirement (FE).....	68
Verify – Student Special Education and Student Special Education Graduation Requirement .....	68
File Download Options.....	70
File Outputs.....	71
Transfer - Student Special Education (GE) .....	73
Transfer – Student Special Ed Graduation Requirement (FE) .....	73
Student Gifted Records.....	74
<b>Graduate Reporting Period (G)</b>	<b>77</b>
Student Ohio Graduation Test Verify and Transfer .....	78
Verify .....	80
Transfer .....	80
Graduate CORE Summary Verify/Update and Transfer .....	81
Course Verify .....	83
Student Verify .....	85
Transfer .....	86
Graduate Demographic/Attributes Verify/Update and Transfer .....	88
Verify .....	90
Transfer .....	93
Review District EMIS Run Requests (G) .....	95
Student Graduate CORE Summary Maintenance .....	99
Add CORE Summary Record .....	100
<b>Calendar Reporting Period (C)</b>	<b>101</b>
Calendar Transfer .....	101
<b>EMIS Maintenance</b>	<b>103</b>
Student Staff Classroom .....	103
Teacher .....	104
Local Classroom Code.....	104
Student Subject Record By Class .....	105
Student Program Record .....	108
Student Discipline Record.....	109
Student Subject Record .....	110

Vocational Correlated Records .....	111
Add/Edit Vocational Correlated Record .....	112
Mapped Local Classroom Codes.....	113
Types of Mapping.....	114
Student Non-graduate CORE Summary .....	115
Add CORE Summary Record .....	116
District and Building Information .....	117
Grade Schedule (DL).....	118
District Testing – Yearend – (DT) .....	120
District Organization Information (DN) – Period K .....	121
District Organization Information (DN) – Period N .....	122
Building Organization Information (DN) – Period K .....	123
Building Organization Information (DN) – Period N .....	124
Teacher History Maintenance .....	125
Modify Teacher History Start and Stop Dates .....	126
Recreate Teacher History Records .....	127
Add Missing Records .....	128
Student Missing Override Record .....	129
Add a Student Missing Override Record.....	129
Edit a Student Missing Override Record .....	130
Delete a Student Missing Override Record.....	131
Transfer - Student Missing Override Record (FC).....	131
<b>Student Special Education</b> .....	<b>133</b>
Events Tab .....	133
Add Special Education Event.....	134
Grad Requirement Tab.....	135
Add Student Special Ed Graduation Requirement Record .....	136
Services Tab .....	136
Add Special Education Services .....	137
Setting Special Education Service Defaults .....	138
Set a Service Default to Inactive.....	140
<b>Power Withdraw</b> .....	<b>143</b>
Search Mode – Search Criteria.....	144
Search Mode – Student IDs.....	146

<b>Gifted</b>	<b>149</b>
Gifted Rules Maintenance.....	150
District Level .....	150
Building Level.....	151
Edit/Add Gifted Rule .....	152
View Gifted Rules Detail (Click Magnifying Glass).....	153
Gifted Mass Update .....	154
Mass Update of Gifted Rules .....	155
Reset Served Values .....	156
Student Gifted Record.....	157
Gifted Initialization.....	159
Report – Gifted Area Students .....	160
Report – Gifted Student Courses .....	162
Report – Gifted Student Detail Report .....	165
Report – Gifted Students Missing Records .....	169
<b>HQT</b>	<b>171</b>
Highly Qualified Teacher Worksheet.....	171
Highly Qualified Teacher Instruction Sheet .....	174
Highly Qualified Teacher Report .....	175
Highly Qualified Teacher Update Maintenance.....	177
Add/Edit Highly Qualified Teacher Update Record .....	178
Delete Highly Qualified Teacher Update Record .....	179
<b>Ad-Hoc Updates</b>	<b>181</b>
Update Graduation Date.....	181
Status Search Tab.....	182
Ad-Hoc Membership Tab .....	183
Create Ad-Hoc Membership Group for Seniors .....	184
Update Diploma Type .....	186
Bulk Update Course Core Subject Area .....	187
Course Filters.....	188
Update Directives.....	189
Sort Courses .....	189
Course Preview.....	190
Bulk Update Manual Course Core Subject Area.....	191
Choose School Years Tab.....	191
Choose Originating Schools Tab.....	192

---

Choose Filters Tab .....	193
View Courses and Update Records Tab .....	194
View summary Tab.....	195
Bulk Update Fall Initialization Blocks .....	195
Student Membership Copy .....	197
<b>Reports</b>	<b>199</b>
Period G Student Core Summary Report.....	199
Period K Non-Graduate Core Summary Report .....	202
<b>Appendix A – Student Registration and Withdrawal Scenarios</b>	<b>205</b>
<b>Appendix B – StudentInformation Crosswalk</b>	<b>207</b>
<b>Appendix C – EMIS Situation History (prior to FY09)</b>	<b>225</b>
Add/Edit EMIS Situation History Record.....	226

---

This page intentionally left blank.

# StudentInformation EMIS Guide

## Overview

The StudentInformation EMIS module is used by school personnel to enter EMIS information for student-related data. Once the EMIS data has been gathered, formatted and checked for errors, it can then be moved to EMIS to be submitted to the Ohio Department of Education (ODE) to complete a district's EMIS reporting requirements.

Buildings and/or districts are required to report detailed EMIS records for students in all grade levels. The data requested in these records is required to meet the reporting requirements of federal and state laws for all students, including those with disabilities. School personnel should refer to the *EMIS Manual* found at ODE's website for specific details regarding reporting requirements. Questions should be directed to ITC personnel.

Many EMIS functions within StudentInformation are accomplished by users at the school level through the daily maintenance of student records and validation of those records to insure accuracy. When it comes time to start gathering this information together for reporting to ODE, processes are run at the district data in preparation for the transfer to the Data Collector. Some ITC level functions exist to assist the ITC staff in providing the necessary processes for each EMIS reporting period, performing cleanups of the data in preparation for the next reporting period as well as EMIS code maintenance.

This document explains the functions most often performed by building and/or district-level personnel. The *ProgressBook StudentInformation ITC EMIS Guide* discusses functions normally performed by ITC personnel.

---

## Understanding the EMIS Module

EMIS and SIS are integrated within StudentInformation. The Demographic information is part of the Student Profile screens. Course Section Override screens provide the user the ability to modify fields which are specifically needed for EMIS reporting of courses. These are just some examples of how the two are intertwined.

The EMIS Maintenance module provides the user the ability to view data in preparation for submitting to ODE. Data from the SIS side of StudentInformation is used to create the records in the EMIS Maintenance module. The district should run the update programs to populate data in these areas. For example, running the Discipline update (DISCEMIS), will fill in the EMIS Maintenance record for Student Discipline. If corrections are needed, the user should make them at the appropriate StudentInformation SIS source. If an update program should not be re-run (either due to the time of year or because other manual changes have been made in the corresponding Maintenance screen), then the user will need to make corrections in both StudentInformation SIS and the EMIS Maintenance screen.

The EMIS module has four main areas – the FS/FD/FN tabs on the Student Profile Screen, Verify/Update programs, EMIS Maintenance, and Transfer.

## EMIS Outline and Flow

1. EMIS Overview
  - a. EMIS Home Page – Main EMIS menu for running Verify/Update and Transfer programs.
    - i. Verify/Update StudentInformation EMIS
    - ii. Transfer EMIS Data
  - b. Selection of StudentInformation Reporting Period – How to change the Working School, School Year, or Reporting Period.
  - c. Common Functionality – Show common functionality in StudentInformation EMIS.
2. EMIS Verify/Update Programs
  - a. Student Demographics (UNCLEMIS) – Verify StudentInformation EMIS Demographic and Attendance data.
  - b. Course and Class List (CLISEMIS, CTRMEMIS) – Verify StudentInformation Course and Class List data and update to EMIS. Staff Course records (CU) are created and updated.
  - c. Subject Codes (INVSUBJ) – Identify and correct invalid course subject codes.
  - d. Membership Programs (MEMBEMIS) – Verify StudentInformation Student Memberships and update to EMIS.
  - e. Student Attendance (ATTUPEMIS) – Verify StudentInformation Student Attendance and update to the FS-Attendance tab on the student profile.
  - f. Discipline (DISCEMIS) – Verify StudentInformation Student Discipline and update to EMIS.
  - g. Majority of Attendance (MAJOREMIS) – Verify and update the Majority of Attendance IRN EMIS field on student records.
  - h. Review District EMIS Run Requests (CHECK\_EMIS) – Review history of programs processed and see what needs to be run.
  - i. Student Assessment – Verify StudentInformation Student Assessment.
  - j. Non-Reportable Students – Check Students not marked “Report to EMIS”, and update that flag if needed.
  - k. Reportable Courses – Check course “Report to EMIS” flags, and update if needed.
  - l. Student Special Education Events – Verify Student Special Education events.
  - m. Student Gifted Records – Verify Student Gifted Records.
3. Graduate Reporting Period (G)
  - a. Graduate/Summer OGT Verify and Transfer - Verify and Transfer StudentInformation EMIS Graduate/Summer OGT data.
  - b. CORE Summary Verify/Update and Transfer – Verify and Transfer StudentInformation EMIS Core Summary Student and Course data.
  - c. Graduate Demographic/Attributes Verify/Update and Transfer – Verify and Transfer StudentInformation EMIS Graduate Demographic/Attributes data.

- d. Review District EMIS Run Requests (G) – Review history of Reporting Period (G) processes and see what needs to be run.
4. EMIS Maintenance
  - a. Student Staff Classroom – View and Edit Student Staff Classroom Record in EMIS.
  - b. Student Subject Record by Class – View and Edit Student Subject (Course) Records by Class in EMIS.
  - c. Student Program Record – View and Edit Student Program Records in EMIS.
  - d. Student Discipline Record – View and Edit Student Discipline Records in EMIS.
  - e. Student Subject Record – View and Edit Student Subject (Course) Records in EMIS by student.
  - f. Vocational Correlated Records – View and Edit Vocational Correlated Records in EMIS.
  - g. Mapped Local Classroom Codes – View and Edit Mapped Local Classroom Code Records in EMIS.
  - h. Student Non-Graduate CORE Summary – View and Edit Student Non-Graduate CORE Summary Records in EMIS.
  - i. District and Building Information – View and Edit District and Building Records in EMIS.
  - j. Teacher History Maintenance – Modify the start and/or stop date in the teacher history for all course sections by a specified start and/or stop date.
5. Student Special Education - View and Edit Student Special Education Event records.
6. Power Withdraw – Allows you to perform a mass withdrawal of selected students.
7. Gifted
  - a. A. Gifted Rules Maintenance – Allows you to define default Gifted values for one grade level or all grade levels at a district or building.
  - b. B. Gifted Mass Updates – Restore Student Gifted Records to the Gifted Rules defaults for the specific district, building, and/or grade level.
  - c. C. Student Gifted Record – Allows you to maintain a single student’s Gifted records for the district.
  - d. D. Gifted Initialization – This screen allows Student Gifted Served values to be copied from one school year to the next.
8. HQT
  - a. A. Highly Qualified Teacher Worksheet – The Highly Qualified Teacher Worksheet will produce the teacher’s HQT Worksheet. This report is a listing of the teachers that are required to report HQT data and is intended to be used as a verification sheet for the teachers.
  - b. B. Highly Qualified Teacher Report – The Highly Qualified Teacher Report will generate a listing of the teachers that are required to enter the Highly Qualified Teacher data.
9. Ad-Hoc Updates

- a. Update Graduation Date – Allows you to apply a graduation date to all 12th grade students with a given status or all students in an Ad-Hoc Membership.
- b. Update Diploma Type – Allows you to update the EMIS Diploma Type for all students with a given graduation date.
- c. Bulk Update Course Core Subject Area – This screen is used to bulk update the CORE Subject Area for courses in the context school and selected school years.
- d. Bulk Update Manual Course Core Subject Area – Allows you to bulk update the CORE Subject Area for manually entered courses.
- e. Bulk Update Fall Initialization Blocks - Allows you to perform a bulk update to set/unset the “Exclude from Fall Initialization” flags on the Student Profile – FS, FD, and FN tabs.
- f. Student Membership Copy – Allows you to copy selected student membership assignments from the previous school year to the current year in context.

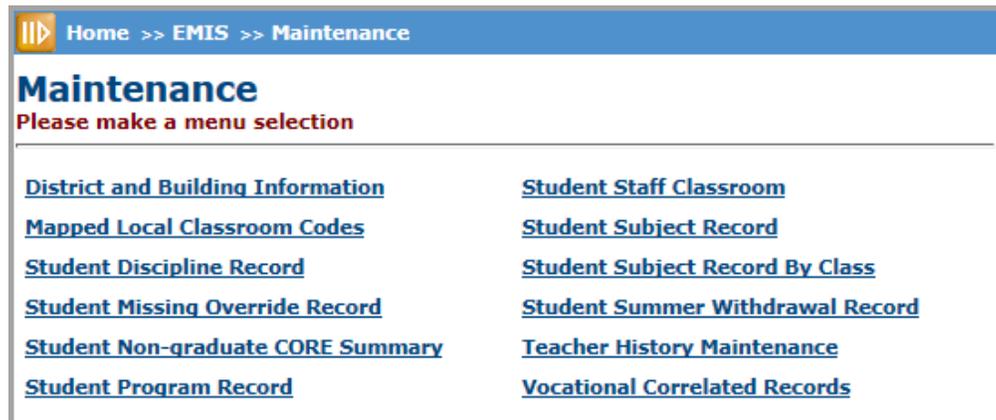
# EMIS Overview

The EMIS FS Student Standing, FS Student Attendance, FD Student Attributes Effective Date, and FN Student Attributes No Date data is found on separate tabs on the SIS – Student – Edit Profile Screen.



## Edit Student Profile Screen

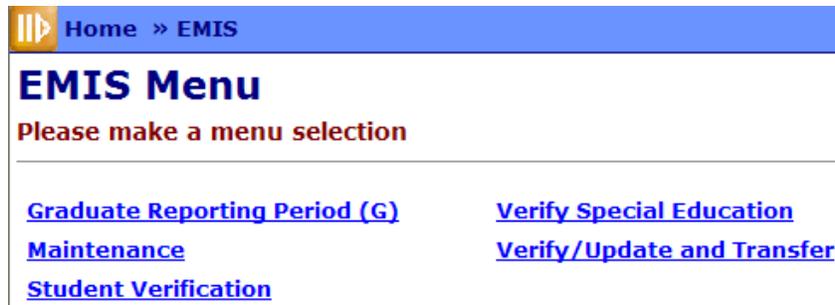
In StudentInformation EMIS, there are EMIS Maintenance screens for the other types of EMIS data, such as the Student Staff Classroom, Student Subject Records, Program Codes, Discipline, and Vocational Correlated Records. The information found in the EMIS Maintenance screens will normally come from data input into StudentInformation SIS. Then an Update program will be run to move the information from StudentInformation SIS into the EMIS Maintenance screens.



## EMIS Maintenance Menu

## EMIS Menu

Navigation: Home – EMIS



### EMIS Menu

The EMIS Menu provides access to EMIS functionality. See the following sections in the *ProgressBook StudentInformation EMIS Guide* for additional details.

- Graduate Reporting Period (G) – See “[Graduate Reporting Period \(G\)](#)”
- Maintenance – See “[EMIS Maintenance](#)”
- Student Verification – See “[Student Demographics \(UNCLEMIS\)](#)”
- Verify Special Education – See “[Student Special Education Events and Student Special Education Graduation Requirement \(FE\)](#)”
- Verify/Update and Transfer – See “[EMIS Verify/Update Programs](#)”

## Verify/Update DASL EMIS

Navigation: Home – EMIS – Verify/Update and Transfer – Verify/Update DASL EMIS

The Verify/Update and Transfer and Transfer EMIS Data menus provide the user with the necessary processes to complete EMIS reporting requirements for each period. As a school completes its reporting requirements throughout the year, the options on the menus change depending on the EMIS reporting period in context. This ensures that the user runs the correct processes for the reporting period and does not process something that is not needed.

The Verify/Update DASL EMIS menu includes the programs the user must process to complete reporting requirements. Once the data has been updated, the user will move to the Transfer EMIS Data menu to transfer the data to the Data Collector to submit to the Ohio Department of Education (ODE).

**Note:** *Period G (Graduate) Verify/Update and Transfers are handled separately from the EMIS – Graduate Reporting Period (G) Menu. See “[Graduate Reporting Period \(G\)](#)” for more information.*

## Request Type Tab

The screenshot shows the 'Request Type' tab selected. It contains two radio button options: 'Verify/Update DASL EMIS' (which is selected) and 'Transfer EMIS Data'. Below the options are two buttons: 'Next >' and 'Cancel'.

### Request Type Tab on the EMIS – Verify/Update and Transfer Screen

Selecting the Verify/Update DASL EMIS option and clicking **Next>** will take you to the Update/Verify DASL EMIS Menu on the Program Selection tab.

## Program Selection Tab

The Program Selection tab lists programs applicable to the EMIS reporting period in context. These options are controlled by the ITC. Each of the programs enables you to verify the data prior to updating it. Different options display in each EMIS reporting period.

The screenshot shows the 'Program Selection' tab selected. At the top, there is a 'Reporting Period:' dropdown menu with 'K' selected. Below this is a list of radio button options for different programs to be verified or updated. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

### Program Selection Tab on the EMIS – Verify/Update DASL EMIS Screen

The user may select a different reporting period by clicking the drop-down list and choosing another available period. The choices of programs to be verified or updated will depend on the reporting period selected and the settings chosen by your ITC (see the *ProgressBook*

StudentInformation ITC EMIS Guide for more information on program selection).

When you are ready to run one of the verify or update processes, select the process you want to run. Click **Next>** or click **<Back** if you wish to go back to the Request Type tab. Click **Cancel** if you want to cancel this EMIS procedure.

Home > EMIS > Student Verification

### Verify Student Demographics - (K) DASL Local SD

From this screen, you can verify student demographic and attendance data.

**Include Buildings**

Select All Buildings  Clear All Buildings

DAEL - DASL ELEMENTARY SCHOOL  DAMS - DASL MIDDLE SCHOOL ⚡

DAHS - DASL HIGH SCHOOL

Number of Students Per Page: 50

Verify Cancel

#### Verify Student Demographics Screen

Most verify and update processes will have the same prompts on each page. Here are the common prompts available for the verify and update processes. They will not be repeated on each program page in the documentation.

**Include Buildings** (required) – You may select all buildings, clear all buildings, or select individual buildings for a run of the verify/update program by clicking on the appropriate buttons and/or boxes. When processing a program in Update mode, all buildings must be selected.

**Number of Students Per Page** (required) – Enter the number of students to display per page. The default value is 50. If printing all errors generated, you may want to select the “All” option.

**Verify** – Run the program as selected in verify mode only. This is the error checking run. No updates are performed in Verify mode. It is important to verify and correct errors prior to rerunning a program in Update mode.

**Cancel** – Do not run the program.

**Caution:** When a program is running, you will see a processing icon that indicates that the program is processing. Wait until the program has finished processing before performing any other actions.

**Note:** Some programs in the Verify/Update menu only verify data and do not do any updating. These processes may be run any time without any consequences to the data. UNCLEMIS is an example of a program that can only be run in Verify Mode. Other programs can be run in either Verify or Update Mode. With most programs, you will be required to process the program in verify mode before you are allowed to proceed to Update mode. Update mode assumes that you have already corrected errors and are ready to create records in StudentInformation EMIS maintenance for further processing.

## EMIS – Transfer EMIS Data

### Navigation: Home – EMIS – Verify/Update and Transfer – Transfer EMIS Data

Once the user has verified data and updated it to StudentInformation EMIS Maintenance, the EMIS data must be transferred to be reported. FY11G is the last reporting period in which you can transfer EMIS data to the Alpha EMIS. Starting with the FY12K reporting period, data in all future reporting periods will be reported to the Ohio Department of Education (ODE) through the Data Collector. The transfer file, also known as a flat file, is created in StudentInformation and then transferred from StudentInformation to the Data Collector. The data is transferred “as is” meaning that no data elements are manipulated in the flat file creation process.

### Request Type Tab

The screenshot shows a web application interface. At the top, there is a blue navigation bar with the text "Home » EMIS » Verify/Update and Transfer" and a "Advar" button on the right. Below the navigation bar, the main heading is "EMIS - Verify/Update and Transfer" in blue. Underneath the heading is a red text instruction: "From this screen, you can verify, update, and transfer EMIS records using a step-by-step wizard approach." Below this instruction is a form with two tabs: "Request Type" (active) and "Program Selection". The "Request Type" tab contains two radio button options: "Verify/Update DASL EMIS" (unselected) and "Transfer EMIS Data" (selected). At the bottom of the form are two buttons: "Next >" and "Cancel".

#### Request Type Tab on the EMIS – Verify/Update and Transfer Screen

Select the Transfer EMIS Data option and then click **Next>** to open the Program Selection tab on the EMIS – Create Flat Files – Select Files screen. The options available on the Program Selection tab correspond to the required data elements to be reported for the selected reporting period. Select the Select all transfers option and the Flat File for Data Collector transfer type option. Selecting the Select all transfers option ensures that all the listed options are included in the flat file transfer to the Data Collector.

## Program Selection Tab

Home » EMIS » Verify/Update and Transfer

### EMIS - Create Flat Files - Select Files

From this screen, you can verify, update, and transfer EMIS records using a step-b

Request Type    Program Selection

Reporting Period:    K (Live) ▼

Select all transfers

Transfer - CORE Summary (GC)

Transfer - Course Master and Staff Course (CN,CU)

Transfer - District and Building Information (DL, DN, DT)

Transfer - Mapped Local Classroom Codes (CM)

Transfer - Student Assessment (FA)

Transfer - Student Course (GN)

Transfer - Student Dem/Stand/Att (FD, FN, FS, GI, GJ)

Transfer - Student Missing Override Record (FC)

Transfer - Student Program (GQ)

Transfer - Student Special Ed. Graduation Requirement (FE)

Transfer - Student Special Education (GE)

Transfer - Summer Withdrawal (FL)

Transfer - Vocational Correlated Records (CV)

Transfer Type:

Flat file transfer

Flat file transfer for Data Collector

< Back    Submit    Cancel

### Program Selection Tab on the EMIS – Create Flat Files – Select Files Screen

**Reporting Period** (required) – Select the reporting period that needs to be transferred from the drop-down list.

**Options** – The records available for transfer depend on the reporting period selected and your ITC’s program selection settings. See the *ProgressBook StudentInformation ITC EMIS Guide* for more information on program selection. Select the files that you want to transfer. Options may include:

- Course Master and Staff Course (K, N)
- District and Building Information (K, N)
- CORE Summary (K)
- Student Gifted Education (N)
- Student Missing Override Record (K, N)
- Student Discipline (N)
- Student Program (K, N)
- Student Special Education (K, N)
- Student Special Ed Graduation Requirement (K, N)
- Student Demographics/Standing/Attributes (K, N)
- Student Acceleration (N)
- Student Assessment (K, N)

- Vocational Correlated Records (K, N)
- Mapped Local Classroom Codes (N)
- Summer Withdrawal (K)

**Note:** When using the “Flat file transfer” option with the Data Collector, it is recommended that you select all appropriate transfer options for that reporting period, so only one flat file is created. If you create separate flat files for each record type, you will need to append all the files together into one file or load each file separately into the Data Collector. StudentInformation State Support recommends creating one flat file per reporting period for use with the Data Collector.

**Transfer Type (required)** – Choose one of the following options:

- **Flat file transfer** – Creates a flat file to be manually loaded into the Data Collector.
- **Flat file transfer for Data Collector** – Creates a flat file, moves the flat file into the Data Collector and stores it in a subdirectory named with the district’s unique district code. Please contact your ITC, or see the appropriate Reporting Period Checklist if you are not sure which transfer type should be collected.

Flat files created by the Flat file transfer and Flat file transfer for Data Collector options are named in the convention “[District Code]\_[YearEMISReportingPeriod]\_[Date Time Stamp].txt.” An example flat file name is ASHC\_11N\_2011-02-15-11-58-57.txt

**Submit** – Submit the specified transfer process.

**<Back** – Go back to the Request Type tab.

**Cancel** – Cancel this EMIS process.

You will receive a message on the submission page that your process has been successfully submitted. If you have chosen the Flat file transfer option, a job will be submitted to the Mgmt screen. Once the job is completed, open the file that was created and save it to the location of your choice with a meaningful name – i.e. PeriodKStudentData091609 – that signifies the reporting period, type of data, and the date. This file is now ready to use with the Data Collector. Flat files created using the Flat file transfer for Data Collector option can also be renamed and saved to a location of your choice if desired.

**Note:** Please see the appropriate Reporting Period Checklist for details on how to use the Data Collector.

## Selection of StudentInformation Reporting Period

Navigation: Home



Click on the working school or school year/reporting period found in the upper right corner of the screen.

**Note:** The Graduate Reporting Period (G) will never be displayed as a live reporting period. See “[Graduate Reporting Period \(G\)](#)” for more information.

Home

## Change Working School

Select your working school and school year

School Year: 2008-2009

Working School: - ADA ELEMENTARY  Save as Default School

Finished Cancel

### Change Working School Screen

As of FY09 and after, the reporting period is no longer selected on the Change Working School screen.

**Finished** – Make changes to Working School and School Year as specified.

**Cancel** – Do not make changes.

## Selection of Student Information Reporting Period Prior to FY09

### Navigation: Home

Reporting period selection allows the user to specify which reporting period they wish to work with. Prior to a snapshot, the user will be working in (LIVE) as a preparation period for the upcoming snapshot. Once the snapshot has been taken for an EMIS reporting period, the reporting period will be available for selection on the EMIS reporting period menu. You must select the reporting period you wish to work with in order for your changes to be made in the proper record set.

**DASL Local SD**

**2005-2006 (LIVE)**

Click on the Working School or reporting period in the upper right corner of the screen.

Home » EMIS

## Change Working School

Select your working school and school year

Working School:   Save as Default School

School Year:  ⚡

EMIS Reporting Period:

### Change Working School Screen

On the Change Working School screen, you can select the reporting period. The Transfer page reporting period will default to the reporting period you selected in context, however, a different reporting period may be selected from the drop-down list.

**Finished** – Make changes to Working School, School Year, and/or EMIS Reporting Period as specified.

**Cancel** – Do not make changes.

## Common Functionality

Some features are common on a number of the EMIS screens.

### Selection of Buildings

The functionality to select all or specific buildings is on many screens.

**Include Buildings**

Select All Buildings  Clear All Buildings

---

DAEL - DASL ELEMENTARY SCHOOL  DAMS - DASL MIDDLE SCHOOL ⚡

DAHS - DASL HIGH SCHOOL

### Include Buildings Area

You can select all buildings or clear all buildings, and also select or deselect individual buildings.

### Back, Next and Cancel Buttons

**<Back** – Return to the previous screen or tab.

**Next>** – Proceed to the next screen or tab.

**Cancel** – Return to the menu.

This page intentionally left blank.

# EMIS Verify/Update Programs

Please note that most of the EMIS Verify/Update Programs present the error and warning messages online. Clicking on the interactive link takes you to the proper record (student, EMIS, etc.) to correct the error. In order for the interactive link to work properly, please make sure that pop-up blockers are turned off and that your browser is properly configured to handle pop-ups.

For example, in Internet Explorer 9:

- Select **Tools > Internet Options**.
- Click **Settings** in the Tabs area of the General tab.
- Choose the proper option in the When a pop-up is encountered section. It is suggested to choose one of the following options: Always open pop-ups in a new window or Always open pop-ups in a new tab.

---

## Student Demographics (UNCLEMIS)

**Navigation: Home – EMIS – Verify/Update and Transfer - Verify- Student Demographics (UNCLEMIS)**

The Student Demographics verification process is used to verify the student's EMIS data prior to transferring the data to State EMIS. This process may be run as many times as needed to ensure the accuracy of your data. The UNCLEMIS process looks only at the data stored on the Student Profile page to perform error checking. Student Demographic and Attendance information is entered through the FS-Standing, FS-Attendance, FD-Attributes, and FN-Attributes tabs on the Student Profile.

As of DASL v10.3.0, UNCLEMIS excludes students that have no Admission History, FS, FD, or FN records. In that case, the student is assumed to not have been registered.

UNCLEMIS performs three different types of checks:

- **EMIS Validation Errors** – Validates the values being reported for EMIS fields. These checks were created to check for specific situations in the data that may be incorrect. Some checks may be performed between multiple fields to ensure that the correct values are reported.
- **LCE Validation Errors** – These checks ensure that the codes used are valid for the current fiscal year. If a field has a blank value, an LCE error will occur if blank is not an acceptable response.
- **SMART Validation Errors** – The Smart validation errors check to ensure that a student is coded correctly for the EMIS situation that has been assigned to him. Smart validations concentrate on the values in the student's District of Residence, How Received, How Received IRN, Sent To Reason 1, Sent To IRN 1, District Relationship, and Tuition Type. These are the elements that make up a student's EMIS situation. A table exists internally within StudentInformation that contains each EMIS situation available for selection as well as the allowed values for each of these fields. If a field contains a value which is not correct for the EMIS situation assigned to him, a SMART validation error will occur.

It is important to note that none of the errors listed on the Student Verification report will keep a

student's data from being included in the transfer files that are submitted to the Ohio Department of Education. Ultimately, it is the district's responsibility to ensure that their data is accurate. UNCLEMIS is only a tool to assist the user in verifying the data.

As of FY13 and beyond, the student's county of residence is required in the FS record. The following verification warning and error are provided to ensure this information is included in each student's FS record:

- **FS - [Date] - ERROR: County of Residence not specified.** – Indicates that the County of Residence list is blank or null in the student's profile.
- **FS33E - [Date] - Warning: County of Residence is incorrect on the student's residence zip code.** – Indicates the zip code in the student's address is not within the county selected in the County of Residence list. This warning also displays if the value in the County of Residence field is \*\* but the zip code in the student's address is in Ohio.

*Note: UNCLEMIS does not generate this warning if the student's zip code belongs to more than one county as long as the zip code is in one of the applicable counties.*

As of the v14.2.0 release, the following UNCLEMIS checks are added:

- **FN22W - Warning: Invalid Attending Building IRN Next Year for student grade level** – This warning displays in the following circumstances:
  - A student is not withdrawn, does not have a **State Equivalent Grade** of "GR" (on the **FD-Attributes** tab of the student profile) and has the **Attending Building IRN Next Year** set to "\*\*\*\*\*."
  - A student is not withdrawn, has a **State Equivalent Grade** of "12" (on the **FD-Attributes** tab of the student profile), does not have an **EMIS Grade Next Year** of "GR" (on the **FN-Attributes** tab of the student profile) and has the **Attending Building IRN Next Year** set to "\*\*\*\*\*."
  - District Relationship = 1, regardless of Sent To 1 and Sent To 2 and **Attending Building IRN Next Year** set to "\*\*\*\*\*."
  - Sent To 1 = (CT, JV, MR, OS, PI), regardless of District Relationship and Sent To 2 and **Attending Building IRN Next Year** set to "\*\*\*\*\*."
  - Sent To 2 = (CT, JV, MR, OS, PI), regardless of District Relationship and Sent To 1 and **Attending Building IRN Next Year** set to "\*\*\*\*\*".

*Note: The FN22W check is not run for JVSDs or ESCs as they do not report a value for this field.*

- **FN19E - ERROR: Invalid math diagnostics score value for student grade level** – Indicates that a student with a state equivalent grade level higher than 3rd grade does not have the required **Math Diagnostic Result Code** of "\*\*\* - Not Required."
- **FN20E - ERROR: Invalid reading diagnostics score value for student grade level** – Indicates that a student with a state equivalent grade level higher than 3rd grade does not have the required **Reading Diagnostic Result Code** of "\*\*\* - Not Required."
- **FN21E - ERROR: Invalid writing diagnostics score value for student grade level** – Indicates that a student with a state equivalent grade level higher than 3rd grade does not have the required **Writing Diagnostic Result Code** of "\*\*\* - Not Required."

Select **Verify - Student Demographics (UNCLEMIS)**

Click **Next>**.

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by clicking on the appropriate buttons and/or boxes. You must select at least one building.

**Number of Students Per Page** (required) – Enter the number of students to display per page. The default value is 50.

**Verify** – Run the verification selected.

**Cancel** – Do not run the verification.

**Verify Student Demographics Screen**

Once required fields are completed, click on Verify to run the procedure. If there are errors found when verifying the Demographic or Attendance record, the user will be provided with an interactive report of errors to work with. Click on one of the students in error and you will be taken to the Edit Student Profile page with the student you selected in context. Corrections can be made and then the user can go back to the report to choose another student who was in error. Please refer to the UNCLEMIS Error Resolution document which is located on the web documentation page - Procedural Checklists – EMIS section.

Home » EMIS » Student Verification Advanced Search | Feedback | Mgmt | Help | Version | Pr

### Verify Student Demographics - (K) Local SD

From this screen, you can verify student demographic and attendance data.

**Include Buildings**  
 Select All Buildings  Clear All Buildings

ELEE - Elementary Kindergarten School  ELIN - Intermediate School   
 ELGO - Elementary School  ELMS - Middle School   
 ELHS - High School

Number of Students Per Page: 50

Verify Cancel

<< First < Previous 1 | 2 | 3 | 4 | 5 ... Next > Last >> 724 Students With Errors

Building IRN	Building	Student	Student Number	EMIS ID
	ELEE	<a href="#">Smart, Roger</a>		
<b>UNCLEMIS:</b> <ul style="list-style-type: none"> <li>- FS10E - 08/25/2008 - ERROR: If Sent To Reason 2 not = NA then IRN must be a valid IRN or 999999</li> <li>- FD04E - 08/25/2008 - ERROR: PS or KG student must not have an Attendance Pattern of NA (08/25/2008)</li> </ul>				
<b>LCE:</b> <ul style="list-style-type: none"> <li>- FS - 8/25/2008 - State Student ID (SSID) is not specified</li> </ul>				
	ELEE	<a href="#">Student66976, BRANDON</a>		
<b>UNCLEMIS:</b> <ul style="list-style-type: none"> <li>- FD09E - 07/01/2008 - ERROR: Preschool Poverty Level cannot be N for PS student</li> </ul>				
<b>SMART:</b> <ul style="list-style-type: none"> <li>- 7/1/2008 - District Relationship is not specified</li> <li>- 7/1/2008 - Sent-To IRN has an invalid County IRN specified</li> </ul>				
<b>LCE:</b> <ul style="list-style-type: none"> <li>- FS - 7/1/2008 - District Relationship is not specified</li> </ul>				

### Example Verify Student Demographics Verify Result

Click on a student's name to go to that student's Edit Student Profile screen.

The error and warning messages are grouped by UNCLEMIS, LCE, and SMART. The error message is preceded by an error code that signifies the record type, error number, error type, and effective date of the record in error.

**Example:** FS10E above indicates:

- FS – Record Type
- 10 – Error Number
- E – Error; W = Warning
- 8/25/08 – Effective Date of FS Record in question
- Error Message

Home » SIS » Student » Edit Profile FY09

### Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General Additional Custom Private FS-Standing FS-Attendance FD-Attributes FN-Attributes FN-Graduate Transportation

Save Cancel

Last Modified: 12/13/2010 11:02 PM by User: dstover

Student Number: 00014460  Auto-Assign Student Status: A - ACTIVE RES

First Name: RANDY Middle Name: D  
Last Name: Student12686 Called Name:  
Last Name Suffix: JR

Gender: M Birthdate: 11/9/1994 Age: 16  
Local Ethnic Category: B - BLACK, NON-HISP Verified With: B - BIRTH CERT  
Hispanic/Latino: N - No, the student is not Hispanic/Latino Birthplace City: SHELBY  
Racial Group(s):  A-Asian  B-Black or African American  I-American Indian or Alaska Native  P-Native Hawaiian or Other Pacific Islander  W-White  
Summative Race: B - Black or African American/Non-Hispanic  
Native Language: ENG - English (Default) Home Language: \*\*\* - Neither LEP no

Address of Residence (For Address Verification) Mailing Address  Use Address of Residence  
Street: 645 S Main St Street: 645 S Main St  
City, State, Zip: Lima OH 45804-1241 City, State, Zip: Lima OH 45804-1241  
 Bypass Address Standardization/Verification  Bypass Address Standardization

Phone Number: (555) 555-5555  Unlisted Email:  
Building Grade: 10 - 10 Grade Next Year: 11 - 11  
EMIS Grade: 10 EMIS Grade Next Year: 11  
Changing the Building Grade does not change the State Equivalent Grade. The FD tab can be used to change the State Equivalent Grade. Changing the Grade Next Year does not change the EMIS Grade Next Year. The FN tab can be used to change the EMIS Grade Next Year.

Program: 15 - Other Health Imped. Minor Home school IRN:  
Home School:  
Attendance Calendar: 1 (Default) Report to EMIS:

### General Tab on Edit Student Profile Screen

Once the demographic information has been verified, it is ready to be included in the transfer of flat files to the state reporting package for viewing, correction of Level 1 errors, and eventually for submission to ODE. (See the sections on Verify/Update and Transfer in this document.)

**Caution:** Each time the flat files are moved into the state reporting package and then submitted to ODE, the newly submitted data replaces the data that was previously stored at ODE.

## Course & Class List (CLISEMIS/CTRMEMIS)

Navigation: Home – EMIS – Verify/Update and Transfer – Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)

### CTRMEMIS

The Course Information in StudentInformation in the Courses records, Course Sections, Highly Qualified Teacher data and the Student Course Section Assignments is used by the CLISEMIS/CTRMEMIS process. Two separate processes are actually performed.

The CTRMEMIS portion deals with the Course records, the Course Sections and the Teacher Highly Qualified Teacher data to create the Staff Course records in EMIS Maintenance. All these records are maintained on the SIS side of StudentInformation as part of regular daily procedures and maintenance.

Staff Course records are created if the following conditions exist:

- The Report to EMIS field is selected on the Course record.
- A valid subject code is selected in the EMIS Subject Code field on the EMIS Override tab for the course section, if defined; otherwise, a valid subject code is selected in the EMIS Subject Code field on the EMIS tab for the course
- For vocational courses (Curriculum value begins with V), CTRMEMIS creates a record regardless of whether or not students are assigned to the course section. Additionally, non-vocational courses where the EMIS Override tab has a Curriculum value that begins with V for a particular section, CTRMEMIS creates a record whether or not the students are assigned to that course section.

Each course section must have at least one teacher of record specified on the Course Section record. If multiple teachers of record are flagged on a course section, then multiple Staff Course records will be created – one for each teacher, but only one Course Master record will be created.

The Teacher EMIS ID is stored on the Staff record, which can be updated under the security module. Each Staff member has a Credential ID that is stored in the State Staff ID field. CTRMEMIS uses the Credential ID when creating Staff Classroom records for new course sections. Verify with your payroll department that they have specified the Credential ID as the EMIS ID when moving staff data over to EMIS. If provider IRN contains an IRN outside the district, this indicates a contracted staff member, and the Credential ID will be used automatically for that Staff Course record.

CTRMEMIS Verify logic checks for the existence of a credential ID on any staff member assigned to a course section that is EMIS reportable. If the credential ID is blank, a message (Warning – Staff Member is missing a Credential ID on Staff record.) displays along with the Course ID and Section, Course Name, and Teacher Name.

The CTRMEMIS process uses the School code, Course ID code (10 characters) and Course Section number to create a Local Classroom code. Due to EMIS reporting requirements, Course ID codes are truncated to 10 characters before being used. For this reason, use Course ID codes that are no longer than 10 characters, when setting up courses in systems where the CTRMEMIS process will be used.

Two courses reportable to EMIS for the same school in which the first ten characters of the course code match generates the following error: “First 10 characters of course code are not unique. CTRMEMIS UPDATE PROCESS WILL NOT RUN.”

The Credit Flexibility value is part of the Course Master record (CN) and the Course Master Transfer.

The Staff Course Record (CU) is part of the Course Master Transfer and includes the staff information that was previously included in the Course Master Record (CN).

Home » EMIS » Maintenance » Student Staff Classroom Advanced Search | Fe

### Student Staff Classroom

From this screen, you can display, add, change and delete data pertaining to staff classroom records.

Reporting Period: K

Teacher: DARYL ATTERHOLT (AU1006724)
  Local Classroom Code:

<b>Emis Subject:</b>	151201	<b>Local Classroom Code:</b>	ASJH-7115-02
<b>Subject Code Description:</b>	Social Studies (7-8)	<b>Length/Scheduled Instruction:</b>	123
<b>Course Level:</b>	*	<b>Semester Code:</b>	3
<b>High School Credit Amount:</b>	0.00	<b>Subject Area for Credit:</b>	***
<b>Language Used:</b>	E	<b>Credit Flex:</b>	N
<b>Building Name:</b>	ASHLAND MIDDLE SCHOOL	<b>Location IRN:</b>	001099
<b>Course Start Date:</b>	8/23/2011	<b>CTE College Credit:</b>	N
<b>Course End Date:</b>	5/31/2012	<b>Curriculum:</b>	OT
<b>Delivery Method:</b>	FF	<b>Educational Option:</b>	NO
<b>Student Population:</b>	RG		

Teacher Name	Staff Role Code	HQT Definition	Highly Qualified Teacher IRN	Staff Provider IRN
ATTERHOLT,DARYL	LT-Lead Teacher	I-Not core course OR type of course isn't eval. for HQT	*****	*****

Student Staff Classroom Screen

## CTRMEMIS Processing by Reporting Period

CTRMEMIS processes differently for each reporting period. Because of the ever changing of the records throughout the year, reporting staff class master records is an on-going process.

**For Period K** – CTRMEMIS starts fresh creating staff class master records for any course section that fits the previous criteria. All course sections, regardless of when they meet during the school year, will be reported. This means that Second Semester courses, which have not started yet, will be reported. This is especially important for CTE funding. Prior to processing CTRMEMIS for period K, it is important that the following records have been created/updated:

- **Course** – All values on the EMIS tab for each EMIS reportable course be updated to the correct values.
- **Course Sections** – The course section be completely defined and at least one teacher of record assigned. If any of the following EMIS values for the course section differ from those defined for the corresponding course, you must define those values on the EMIS Override tab for the course section: EMIS Staff Provider IRN, EMIS Subject Code, Curriculum, Delivery Method, Student Population and Highly Qualified Teacher IRN.
- **Highly Qualified Teacher** – The correct highly qualified values entered for each subject code of the course sections or courses each teacher (listed on the Teacher History tab) is teaching.
- Staff record updated with State Staff ID.

Failure to complete any of these requirements may result in records not being created when CTRMEMIS is processed in Update Mode.

**For Period N** – CTRMEMIS processes all course sections for the school year.

When running CTRMEMIS in update mode for period N:

- Course sections scheduled and reported in period K and then removed are reported in period N with a stop date equal to the start date.
- Course sections added again after being scheduled and reported in period K and then removed are reported in period N with the correct start and stop dates.
- Course sections added again after being scheduled and reported in period K and then removed are not reported twice for the student in the period N transfer if the removed and added course section student records have the same start dates.
- Course sections added again after being scheduled and reported in period K and then removed are reported twice for the student in the period N transfer if the removed and added course section student records have different start dates.

Course sections, reported in period K but removed from students before the course sections began in period N, are given a stop date equal to the start date.

## CLISEMIS

The CLISEMIS portion of the process has the task of creating the student subject records. Student subject records are a result of the student Course Section Assignments for which the student is scheduled. Student subject records are only created for courses that are EMIS reportable courses ("Report to EMIS" field selected). The Report to EMIS field must also be selected for the student on the Student Profile record.

Student Course (GN) records are created for all course section drops regardless of when in the school year they occur.

Two GN records with the same local classroom code but different start and stop dates for a single student are allowed.

GN records for a student now contain start and/or stop dates for course sections if they differ from the standard course section start and stop dates.

Duplicate GN records are not created when two or more co-teachers are marked as teacher of record. The multiple teachers are associated with one set of GN records.

### CLISEMIS Processing by Reporting Period

CLISEMIS processes differently depending on the EMIS reporting period being processed.

**For Period K** – CLISEMIS creates student subject records for any EMIS reportable course section the student is scheduled into regardless of when it meets. For example, a student is scheduled into second semester only classes, which have not begun yet. Even though the course section has not begun yet, it is assumed that the student will take and complete the course.

**For Period N** – CLISEMIS creates subject records for any EMIS reportable course section the student took at any time during the school year. At this point, all course sections are completed, however, this does not mean that the student completed the course section. If the student dropped the course section prior to the ending date of the course, a student subject record will still be reported but with an effective stop date of the date the student dropped the course, meaning the student did not complete the course.

Since courses and class lists are tied together, there is one screen to use for verifications and processing these records. The user should run a verification of the Class Master and Student Subject records. When each record is error free, an update should be processed at which time the these records will be ready to be included in the complete transfer of flat files to the Data Collector for viewing, correction of Level 1 errors, and eventually submission to the Ohio Department of Education.

## PS and KG-23 Students

The CTRMEMIS/CLISEMIS Update process uses the following logic for determining which Student Subject records are created by the update:

- For PS students, if the student is enrolled as of 12/1 (a withdraw on 12/1 counts as enrolled on 12/1) or was enrolled at any time in the school year prior to 12/1, then report the Student Subject records.
- For KG-23 students, if the student is enrolled as of count week Friday (a withdraw on count week Friday counts as enrolled) and a course is not dropped prior to count week Friday, then report the course. This applies to Period K.
- Removed courses are not reported.

### Verify/Update – Course and Class List (CLISEMIS/CTRMEMIS) Option

Select **Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)**. Click **Next>**.

**Verify/Update Course Terms & Class List Screen**

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by clicking on the appropriate buttons and/or boxes.

**Run Type** (required) – Choose whether you would like to Verify EMIS Reportable information only or Update Records (which deletes all records and re-creates them). The verification run of CTRMEMIS/CLISEMIS will produce an interactive error report. The user may work with this page to correct all errors before updating. The process must be run in Verify mode first before it may be processed in Update mode. No listing of errors will be produced when processing in Update mode.

**Note:** *Specific vocational courses also require that each student’s status as a CTE Concentrator indicator be reported for the June period.*

CLISEMIS will update all of this information into the EMIS Maintenance Student Subject Record screens. CLISEMIS creates a subject record for each student in the class for the course and two Staff Course (CU) records for the local classroom code—one for each teacher of record. If multiple teachers are assigned to the course, each teacher is listed as a co-teacher on their respective CU record.

**Number of Courses Per Page** (required) – Enter the number of courses to display per page. The default value is 10. This field is not used for Update. If you are planning to print a screen shot of all of the errors, you may want to set the number higher.

**Submit** – Run the procedure.

**Caution:** *This procedure will delete all Class Master and Student Subject Records for the entire district on the alpha, then reload with information from StudentInformation.*

**Cancel** – Do not run the procedure.

Submit

Cancel

1 - 10 | **11 - 12** | [Next](#)

Building IRN	Building	Course Code	Course Name	EMIS Subject Code
020511	DAHS	<a href="#">052</a>	<a href="#">LANGUAGE ARTS</a>	059999
<i>Staff Messages:</i>		- <a href="#">LAURA LAYMAN</a> Invalid highly qualified definition code		
020511	DAHS	<a href="#">182</a>	<a href="#">FRENCH I</a>	060230
<i>Staff Messages:</i>		- <a href="#">LINDA WALTERS</a> Teacher Highly Qualified Definition is not specified for core course		
020511	DAHS	<a href="#">2007</a>	<a href="#">ART</a>	
<i>Course Messages:</i>		- Course Level is not specified (F)		
		- Course Type is not specified (F)		
		- Subject code not selected		

Example CLISEMIS/CTRMEMIS Verify Mode Results

## Teacher History Assignment Checks

One of the verification mode checks performed by the CLISEMIS/CTRMEMIS process is for the following invalid teacher history assignment scenarios:

- More than one lead teacher assigned to a course section. (Only one lead teacher or multiple co-teachers allowed.)
- A lead and co-teacher assigned to a course section. (Only one lead teacher or multiple co-teachers allowed.)
- Only one co-teacher assigned to a course section. (Only one lead teacher or multiple co-teachers allowed.)
- No teacher assigned to a course section.
- No teacher assigned to a course section for a course term.
- No teacher assigned to a course section on Friday of count week.
- No teacher assigned to a preschool course section on the first day of December.
- The start date of a replacement lead teacher precedes the end date of the replaced lead teacher. (Only one lead teacher allowed at any time.)

If any of these scenarios are found, the CLISEMIS/CTRMEMIS process fails and generates a unique error for each of the scenarios found. Resolve the problems, and perform this process again.

## Invalid Subject (INVSUBJ)

### Navigation: Home – EMIS – Verify/Update and Transfer – Verify - Subject Codes (INVSUBJ)

INVSUBJ checks for missing or invalid course subject codes for all EMIS reportable courses and course sections defined for the school year. Course subject codes must be selected from a list of valid codes defined by the Ohio Department of Education (ODE) each year. The list of valid course codes is relatively static from year to year, but codes may be added or rescinded each year. The ODE provides a list of codes to be removed, and these will be validated against the course subject codes used in StudentInformation. Courses or course sections defined with these old subject codes must be updated with a valid course subject code. INVSUBJ does not update any records; it only locates and lists the courses and course sections with codes that are no longer valid.

INVSUBJ may be executed any time after the list of rescinded course subject codes is updated for the present EMIS fiscal year. INVSUBJ is available for periods K and N.

The screenshot shows a web application interface for EMIS. At the top, there is a navigation breadcrumb: Home » EMIS » Verify/Update and Transfer. Below this is the main title 'EMIS - Verify/Update DASL EMIS' and a subtitle 'From this screen, you can verify, update, and transfer EMIS records using a step'. The interface has two tabs: 'Request Type' and 'Program Selection'. Under 'Request Type', there is a dropdown menu for 'Reporting Period' set to 'K (Live)'. Below this is a list of radio button options for different request types. The option 'Verify - Subject Codes (INVSUBJ)' is selected. At the bottom of the form, there are three buttons: '< Back', 'Next >', and 'Cancel'.

### Verify – Subject Codes (INVSUBJ) Option

Select **Verify - Subject Codes (INVSUBJ)**. Click **Next>**.

Home » EMIS » Identify Invalid Subjects

## Identify Invalid Subjects - (K) DASL Local SD

From this screen, you can find invalid subject codes

**Include Buildings:**

Select All Buildings  Clear All Buildings

DAEL - DASL ELEMENTARY SCHOOL  DAMS - DASL MIDDLE SCHOOL 

DAHS - DASL HIGH SCHOOL

### Identify Invalid Subjects Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by clicking on the appropriate buttons and/or boxes.

**Submit** – Run the procedure.

The Verify - Subject Codes (INVSUBJ) process returns invalid subject code records in the following two grids on the Identify Invalid Subjects screen:

- **Course Subjects** – Displays those courses in which an invalid value exists in the EMIS Subject Code field on the EMIS tab for the course.
- **Course Section Override Subjects** – Displays those course sections in which an invalid value exists in the EMIS Subject Code field on the EMIS Override tab for a course section.

Home » EMIS » Identify Invalid Subjects

## Identify Invalid Subjects - (N) Ashland City Schools

From this screen, you can find invalid subject codes

**Include Buildings:**

Select All Buildings  Clear All Buildings

ASHS - ASHLAND HIGH SCHOOL  ASMO - MONTGOMERY ELEMENTARY SCHOOL 

ASJH - ASHLAND MIDDLE SCHOOL  ASOS - OSBORN ELEMENTARY SCHOOL

ASED - EDISON ELEMENTARY SCHOOL  ASTA - TAFT ELEMENTARY SCHOOL

ASLI - LINCOLN ELEMENTARY

**2 Records Displayed**

Course Subjects				
Building IRN	Building	Course Code	Course Name	EMIS Course Subject Code
001081	ASHS	885A	HEALTH	
001081	ASHS	008C	CHAMBER MUSIC	

**1 Record Displayed**

Course Section Override Subjects					
Building IRN	Building	Course Code	Course Name	EMIS Course Subject Code	Section Number
001081	ASHS	761	SPANISH I	000000	4

### Identify Invalid Subjects Screen

You can then select the correct value for the current school year in the EMIS Subject Code field on the EMIS tab for the course or on the EMIS Override tab for the course section, whichever is applicable to the returned error. If the course is not EMIS reportable, then deselect Report To EMIS for the course.

EMIS Subject Code Field on Courses Screen

## Memberships (MEMBEMIS)

### Navigation: Home – EMIS – Verify/Update and Transfer – Verify/Update - Membership Programs (MEMBEMIS)

MEMBEMIS creates Student Program records in EMIS Maintenance from Student memberships in StudentInformation. When Membership Group Member codes are defined, the user may indicate that the membership code is one that gets reported to EMIS. The corresponding EMIS program code number is defined at that point for the membership. Any student with a student membership record for this EMIS reportable membership will get a student program record created when MEMBEMIS is processed in update mode. For FY11 and beyond, the October Reporting Period K was updated so student program records are generated for school age students with a disability for any membership with a start date on or before December 1. Student Programs define the services a student is receiving or special activities they are participating in.

For certain Program codes, EMIS requires that a staff member be reported to indicate the staff member providing the service. The Membership Group Member codes page allows the user to assign a default staff member to the membership code. An additional check box on the record indicates whether a staff member ID is required or not. If specified, the default staff member will be reported on the Student Program record of any student with a corresponding membership record. If provider IRN contains an IRN outside the district, this indicates a contracted staff member, and the Credential ID will be used automatically for that student program record (GQ).

Student membership records are not EMIS reporting period specific, however, the Student program records that get created by MEMBEMIS when processing in Update mode are specific to the reporting period being processed. Not every membership is reported in every reporting period. Your ITC will code the membership for the proper reporting period per the EMIS Manual.

### **MEMBEMIS Update/Transfer Rules as of DASL v9.1.3.10290**

- Select only EMIS Memberships for the current school year where the Membership Code is active (ignore Start and Stop Dates at this point.) Note: Memberships in Inactive groups should be included.
- Narrow down to those Program Codes that have to be reported in the selected Reporting Period
- Narrow these further to those with a Start Date on or before the Reporting Period Cutoff Date (note Period K has various cutoff dates depending upon the Program Code and student's Grade, see below).
- Select candidate programs to be reported:
  - For all Program Codes, if there are duplicates then the process will choose the Program Code with the most recent Start Date (only one must be reported)
  - For Program Code 220100, report the Start and End Date from the Membership record, for all other Program Codes report the Start and End Date as "00000000".

#### **Reporting Period Cutoff Dates**

<b>Period</b>	<b>Period Cutoff Date</b>
K (all other programs)	Grades PS-23 - December 1
N	End of Fiscal Year

### **Assumptions**

Memberships are pulled from every (selected) school within the district in which a student is or was enrolled during the current school year, without considering primary vs. non-primary.

Home » EMIS » Verify/Update and Transfer

### EMIS - Verify/Update DASL EMIS

From this screen, you can verify, update, and transfer EMIS records using a step

Request Type | Program Selection

Reporting Period: K (Live) ▼

- Verify - Non-Reportable Students
- Verify - Reportable Courses
- Verify - Review District EMIS Run Requests (CHECK\_EMIS)
- Verify - Student Assessment
- Verify - Student Demographics (UNCLEMIS)
- Verify - Student Special Education Events
- Verify - Subject Codes (INVSUBJ)
- Verify/Update - CORE Summary
- Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)
- Verify/Update - Membership Programs (MEMBEMIS)
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back | Next > | Cancel

**Verify/Update – Membership Programs (MEMBEMIS)**

Select **Verify/Update – Membership Programs (MEMBEMIS)**. Click **Next>**.

Home » EMIS » Verify/Update Memberships

### Verify/Update Memberships - (K) Ashland City Schools

From this screen, you can verify and update student memberships.

ASHS - ASHLAND HIGH SCHOOL (Update not run yet)  
ASJH - ASHLAND MIDDLE SCHOOL (Update not run yet)  
ASED - EDISON ELEMENTARY SCHOOL (Update not run yet)  
ASLI - LINCOLN ELEMENTARY (Update not run yet)  
ASMO - MONTGOMERY ELEMENTARY SCHOOL (Update not run yet)  
ASOS - OSBORN ELEMENTARY SCHOOL (Update not run yet)  
ASTA - TAFT ELEMENTARY SCHOOL (Update not run yet)

Run Type:  Verify Memberships  Verify Special Education Services  Update Memberships

File Download Options

Select A File Type ▼ | Select A Download Method ▼

Submit | Cancel

**Verify/Update Memberships Screen**

**Run Type** – Select whether you want to Verify Memberships, Verify Special Education Services, or Update Memberships for EMIS. It is suggested that you verify first and correct any problems prior to updating.

**Caution:** When you run this procedure in Update mode, StudentInformation will delete all Student Programs records in EMIS Maintenance for the entire district and overwrite them with the new data.

**Note:** The Verify Special Education Services option only displays on the Verify/Update - Memberships screen if FY13 and later is in context. In prior years, Special Education services are verified using the Verify Memberships option.

**File Download Options** – An interactive report is generated to assist the user in correcting errors. You can also choose File Type CSV, HTML, or TAB and Download Method of Download or Email.

**Submit** – Run the procedure and generate an online report.

**Cancel** – Do not run the procedure.

4 Records Displayed

Building IRN	Building	Group Code	Group Name	Memb. Code	Memb. Name	Program Code	Message	Student Count
020511	DAHS	11	Intervention	110001	Mathematics	110001	Membership is mapped to an invalid EMIS Program code	1
020511	DAHS	11	Intervention	110002	Reading	110002	Membership is mapped to an invalid EMIS Program code	2
020511	DAHS	80	COMMUNITY SERVICE	800006	Big Brother/Big Sis	800006	Membership is mapped to an invalid EMIS Program code	1
020511	DAHS	80	COMMUNITY SERVICE	800011	Junior Achievement	800011	Membership is mapped to an invalid EMIS Program code	1

### Example Verify Memberships Results

When running Verify Memberships, three possible types of error messages are produced for assisting the user in cleaning up errors:

- Program codes that are marked on the Membership Group Maintenance screen as requiring an Employee ID, yet no Employee ID has been filled in.
- Program codes that are shown as mapped to an EMIS program code, yet that EMIS program code is not valid for the current school year. This can also be corrected through the Membership Group Maintenance screen. An error message (Membership is mapped to an invalid EMIS Program code) is displayed.
- Student memberships that are outside of the current fiscal year – an error message (Student Membership outside the range of the fiscal year.) is displayed. To find these student memberships, go to SIS – School – Membership Members. Select the Membership Group and Membership with the Show Members option using blank From and To dates. This will provide you with a list of students in that membership with dates that can be reviewed.

**Note:** When the Verify Memberships option is selected in FY13 and after, StudentInformation does not verify memberships containing 215xxx codes (Special Education services).

**Note:** When Verify/Update Memberships is run in Update mode in FY13 and after, StudentInformation does not update membership records for the 215xxx codes (Special Education services). The 215xxx service codes are now located on the Services tab on Special Education screen. The transfer will pull the data for the 215xxx service codes from this screen to include in the Programs (GQ) transfer file.

Clicking on the Membership Name will take you to the Memberships Maintenance screen. Adjust the information on this screen as necessary.

- Check the box Required Staff Member if a staff member is required to be reported. If a staff member is required, select a default staff member from the Default Staff Member drop down. If more than one staff member provides the service, specify one staff member as a default and then select the appropriate staff member who is providing the service on the individual student membership record.
- If the code is not EMIS reportable, change the “EMIS Program Code” box to show a blank.

Home » Management » School Administration » Membership Groups » Memberships » Advanced Search

### Memberships Maintenance - Vocational Programs

From this screen, you can display, add, change and delete data pertaining to memberships.

Code: 305003

EMIS Program Code: 305003

Require Staff Member:

Require Dates:

Default Staff Member: [Empty dropdown]

Default Program Provider IRN: [Empty]

Name: Career Assessment - requires employee State ID

Description: [Empty text area]

Is Active:

Save Cancel

### Memberships Maintenance Screen

When running Verify Special Education Services, errors are returned in the Special Education Services grid on the Verify/Update Memberships screen. StudentInformation checks Special Education services for the following types of errors:

- Program Provider IRN is invalid.
- A Service is mapped to an invalid EMIS Program code.
- Duplicate service records exist for the same EMIS ID, Service Code, and Start Date.

Returned errors contain a link that navigates to the Services tab on the Special Education screen for the student, enabling users to immediately correct the error.

The File Download option will provide a list of the students with 215xxx codes on the Services tab of the Special Education screen.

Special Education Services				
Building IRN	Building	Student	Student Number	EMIS ID
010025	ASED	ALLISON, GERALD	00190823	A28237190
Special Education Services:- <a href="#">215008</a> - Program Provider IRN is invalid				
001081	ASHS	ALLISON, PETER	00590203	283727985
Special Education Services:- <a href="#">789123</a> - Membership is mapped to an invalid EMIS Program code				
Special Education Services:- <a href="#">789123</a> - Membership is mapped to an invalid EMIS Program code				
Special Education Services:- <a href="#">789123</a> - Membership is mapped to an invalid EMIS Program code				
Special Education Services:- <a href="#">789123</a> - Program Provider IRN is invalid				
Special Education Services:- <a href="#">123456</a> - Membership is mapped to an invalid EMIS Program code				
Special Education Services:- <a href="#">123456</a> - Program Provider IRN is invalid				
001081	ASHS	ALLISON, VINCENT	00196062	A20627196
Special Education Services:- <a href="#">215006</a> - Program Provider IRN is invalid				

**Special Education Services Errors on Verify/Update Memberships Screen**

## Attendance (ATTUPEMIS)

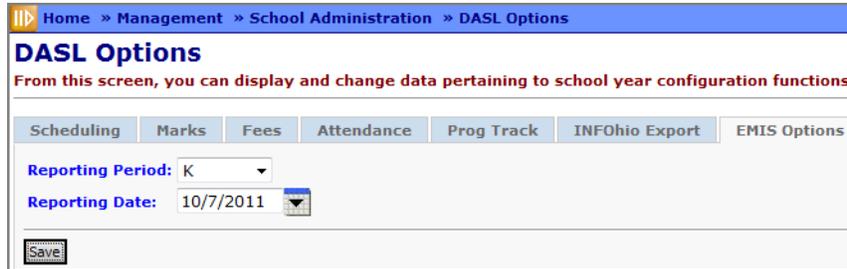
### Navigation: Home – EMIS – Verify/Update and Transfer – Verify/Update - Student Attendance (ATTUPEMIS)

ATTUPEMIS calculates attendance information for all students and updates each student's FS record for the effective start date to end date range. For each reporting period, the YTD attendance fields are updated on each closed student FS record. The process will produce an output file describing the attendance field updates to be performed. The process should be run in verify mode first and attendance checked for accuracy. At the appropriate time, the program should be run in Update mode to update the attendance and absence fields on the Student Profile – FS Attendance tab.

ATTUPEMIS uses the daily attendance records to report EMIS attendance for all students. If a school is keeping period attendance, StudentInformation creates daily attendance records throughout the school year as period attendance records are maintained. If changes are made on a student's period absence records that may change the student from having a full or half day absence to no absence, the daily absence records are adjusted at the time the period absence records are corrected or deleted.

## DASL Options

For each reporting period, a specified time period is used to calculate the attendance. For period K, the state's official count week is used unless the school specifies an alternate count week in DASL options. If the school uses the official count week specified by Ohio Department of Education, no entry in DASL options is necessary.



**EMIS Options Tab on DASL Options Screen**

For period N, attendance is calculated for the entire school year. No entry in DASL Options is used for this period.

## Absence Type Maintenance

ATTUPEMIS checks the absence type codes defined in each school to determine which student absences to include in the totals for reporting to EMIS. The Absence type code records contain flags that must be set for the absence to be counted properly.

- **Is Excused** – Indicates whether the absence is an authorized or unauthorized absence. If “Is Excused” is checked, an absence counts as an authorized absence.
- **Report to EMIS** – Must be checked for an absence type to be included in the calculation of days absent. It is not necessary to mark Tardies/Lates as Report to EMIS since these types of absences are not reported.



## Absence Type Maintenance

From this screen, you can display, add, change and delete data pertaining to absence types.

Add Absence Type

	Code	Name ^	Description	Qualifier	Is Excused	Use for Daily Attendance	Use for Period Attendance	Report to EMIS	Active
		E	EXCUSED	EXCUSED ABSENCE	Absent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		I	ISS	IN-SCHOOL SUSPENSION	Non-absence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		O	OTHER	OTHER APPROVED/JDC	Non-absence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		P	PARENT/CP	PARENT CALL PENDING	Absent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		S	SCHOOL REL	SCHOOL RELATED/FIELD TRIP	Non-absence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		T	TARDY	TARDY ARRIVAL	Late/Tardy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		U	UNEXCUSED	UNEXCUSED ABSENCE	Absent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Show Active Only

**Absence Type Maintenance Screen**

## Verify/Update – Student Attendance (ATTUPEMIS)

Each building has the ability to first verify their absence totals. Students who have been enrolled in more than one building within the district will be included on the report created for each building indicating the total number of absences and days present for that specific building. When processed for the entire district, the student will appear on the report once for each FS record, however, attendance from all buildings will be combined when updating the attendance fields on the student profile record.

ATTUPEMIS depends on combination of the student's calendar history and the FS effective start and end date ranges to determine exactly how many days the student attended during the school year. No attendance days accumulate for the time a student is assigned to a non-attending calendar.

DASL v10.1.0.14806 changed the selection of students and buildings to select only students who were enrolled at least one day in the school year for the building.

### Verify/Update – Student Attendance (ATTUPEMIS) Option

Select **Verify/Update - Student Attendance (ATTUPEMIS)**. Click **Next>**.

Home > EMIS > Verify/Update Student Attendance

## Verify/Update Student Attendance - (K) DASL Ex Vill SD

From this screen, you can verify and update student attendance data.

**Include Buildings:**

Select All Buildings  Clear All Buildings

AVEL - DASL ELEMENTARY (Update not run yet) ⚡

AVHS - DASL HIGH SCHOOL (Update not run yet)

**Run Type:**  Verify Attendance  Update Attendance

**File Download Options**

CSV

Submit Cancel

### Verify/Update Student Attendance Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

***Note:** The Apply Percent of Time to Days Attended and Apply Percent of Time to Absences columns are updated on the Sub-Calendar Maintenance.*

**Run Type** – Select whether you want to Verify Attendance or Update Attendance for EMIS. You must first verify attendance data and correct any problems prior to updating. All buildings should be selected when running Update Attendance.

Choosing the Update option will update the attendance and absence fields on the Student Profile – FS-Attendance tab.

**File Download Options** – ATTUPEMIS generates both interactive error messages and an Attendance Summary Report output file. Select CSV, HTML, or TAB as your file option for the output file.

**Submit** – Run the procedure and generate the interactive error messages and submit the batch report that will generate the output file.

**Cancel** – Do not run the procedure.

### Interactive Report of Error and Informational Messages

Error messages will appear on the interactive report. This interactive report also generates informational messages that require no correction (Student is active in more than one building so attendance is being calculated for all buildings. for example).

Run Type:  Verify Attendance  Update Attendance

File Download Options

CSV

Submit Cancel

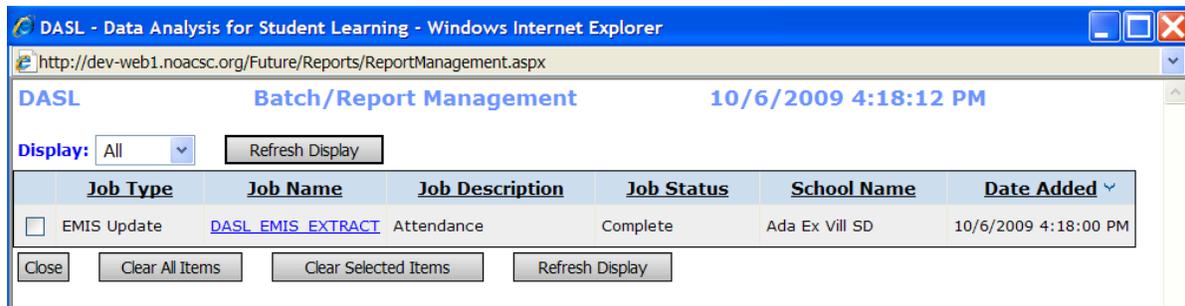
3 Records Displayed

Building	EMIS ID	Student Number	Student Name	Percent of Time	Issue
AVEL	000	004	SARAH		District Admission Date (FS) is before corresponding Admission History admission date. Cannot determine calendar for 08/26/2009 to 08/26/2009.
AVHS	406	558	CASSITY		District admission date (07/01/2009) is earlier than effective date (08/26/2009) for first FS record of admission or first FS record after a withdrawal.
AVEL	402	899	BRANDON		District admission date (07/01/2009) is earlier than effective date (08/26/2009) for first FS record of admission or first FS record after a withdrawal.

Example Interactive Report

### Output File

A DASL\_EMIS\_EXTRACT job (as shown below) will be submitted to the Batch/Report Management screen. This job will generate the Attendance Summary Report output file. Once the Job Status is Complete, click on the job name to view the output file.



Batch/Report Management Screen

The Output File contains the following fields:

- Student Number
- EMISId
- DisplayName
- EffectiveDate
- EffectiveEndDate
- IRN
- Building
- DaysEnrolled
- TotalDaysAttended
- TotalExcusedAbsences
- TotalUnexcusedAbsences
- OctDaysAttended
- OctExcusedAbsences
- OctUnexcusedAbsences
- GradeLevel
- PercentOfTime
- Message

StudentNu	EMISId	DisplayName	EffectiveDate	EffectiveEndDate	IRN	Building	DaysEnroll	TotalDays	TotalExcus	TotalUnexc	OctDay	OctExc	OctUn	Percent	Message
14788	221643714	Student66951, ALEX					175	169	6	0	5	0	0		
24317	215561010	Student67556, FREDERICK					53	26.5	2.5	24	4.5	0.5	0		
10000	205528888	Student68382, BILLIE IFAN					53	45.5	3.5	4	4	1	0		
34788	221643714	Student66951, ALEX	7/1/2008 0:00	6/30/2009 0:00	59	AVEL	175	169	6	0	5	0	0	100	
34788	221643714	Student66951, ALEX				59	AVEL	175	169	6	0	5	0	0	
5994	205527241	Student68383, MAKAYLA	10/21/2008 0:00	6/30/2009 0:00	59	AVFI	138	135	3	0	0	0	0	100	
5994	205527241	Student68383, MAKAYLA				59	AVEL	138	135	3	0	0	0	0	
5878	204812573	Student68419, CHYANNE	8/27/2008 0:00	2/3/2009 0:00	59	AVEL	94	91.5	2.5	0	4.5	0.5	0	100	
5878	204812573	Student68419, CHYANNE				59	AVLL	12	10	0	2	0	0	100	
5878	204812573	Student68419, CHYANNE	2/4/2009 0:00	2/20/2009 0:00	59	AVFI	106	101.5	2.5	2	4.5	0.5	0		

**Example DASL\_EMIS\_EXTRACT Report**

There are two sections of this report. A summary section at the beginning of the downloaded file (highlighted in yellow) lists a single record for every student with their total attendance information. A detail section at the end of the downloaded file (highlighted in green) shows each student’s FS record along with a summary of all FS records for that student. A student will always have at least two records in the detail section of the report and additional records if the student has more than one FS record.

**Manually Added Attendance**

You can manually enter attendance for non-preschool students who attend the Educational Service Center (ESC) and Mental Retardation/Developmentally Disabled (MRDD), as well as for post-secondary and non-public students who are placed at district expense. Enter manually added attendance information at the end of the year for Period N on the Student Profile screen, on the FS-Attendance tab in the Other Entity School Year: section as shown in the following figure. The values in the Other Entity School Year section do not change when you run ATTUPEMIS in update mode. Therefore, you can enter attendance values in this section at any time.

**Other Entity School Year:**

**Attendance Days:**  ▲ ▼ ⚡

**Excused Absence Days:**  ▲ ▼ ⚡

**Unexcused Absence Days:**  ▲ ▼ ⚡

Other Entity School Year Area of FS-Standing Tab

## Discipline (DISCEMIS)

**Navigation: Home – EMIS – Verify/Update and Transfer – Verify/Update - Discipline (DISCEMIS)**

**Note:** All districts and buildings will utilize the discipline module as the source for entering discipline information.

Student Discipline records report discipline incident information to EMIS for period N. Student discipline records report the details of a student's infractions and actions as they relate to a specific incident. Other details, such as the date, infractions that occurred, discipline action taken against the student and duration of the punishment are also reported as part of the record. Only those incidents where at least one Infraction is flagged as reportable to EMIS, and the action is reportable to EMIS, are reported. Discipline incidents having an EMIS-reportable action code but not an EMIS-reportable infraction code generate errors during the verify process and are not included in the transfer file. Assign an EMIS-reportable infraction code to these discipline incidents, which causes them to be included in the transfer files after the update has completed. Discipline incidents having action codes that are not EMIS reportable are not reported to EMIS. Student discipline records are building level records. If a student attends more than one building within the district during a school year, the student could have records from each building he/she has attended. The data is to be reported by the building administering the discipline. Discipline records are also school year specific. Student EMIS discipline records on EMIS maintenance will be created by the DISCEMIS program.

If a student receives two discipline actions for the same incident, only one action may be reported per incident for EMIS. The DISCEMIS program will report the most severe punishment the student received. This is determined by the severity order as defined in the *Ohio Department of Education's EMIS Guide*. Refer to *Ohio Department of Education's EMIS Guide* for the rules for reporting incidents.

Infraction codes are defined in Discipline Maintenance in each school. Any infraction code with an EMIS code value listed in the EMIS code column becomes an EMIS-reportable infraction.

### Infraction Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to infraction codes.

Add Infraction Code

		Code ^	Name	Description	EMIS Code	Active
X		01	Truancy	Truancy	01	
X		02	Behavioral problems	Behavioral problems	18	
X		03	Fighting/Violence	Fighting/Violence	03	
X		04	Vandalism	Vandalism	04	
X		05	Theft	Theft	05	

Infraction Codes Maintenance Screen

Each year, schools should review the codes they have defined to ensure that they are capturing all EMIS reportable infractions.

DISCEMIS uses the Action codes defined in Discipline Maintenance to determine which actions are EMIS reportable actions.

### Action Codes Maintenance

From this screen, you can display, add, change and delete data pertaining to action codes.

Add Action Code

		Code ^	Name	Description	EMIS Code	Is Corporal	Active
X		1	expulsion	expulsion	1	<input type="checkbox"/>	
X		10	Warning	Warning		<input type="checkbox"/>	
X		11	Removal from Bus	Removal from Bus		<input type="checkbox"/>	
X		12	Emergency Removal	Emergency Removal	6	<input type="checkbox"/>	
X		13	Removal by Hearing Officer	Removal by Hearing Officer	7	<input type="checkbox"/>	
X		2	Out of school suspension	Out of school suspension	2	<input type="checkbox"/>	

Action Codes Maintenance Screen

If a code has an EMIS code assigned to it, this is considered an EMIS reportable action code.

The screenshot shows a web application interface for EMIS. At the top, there is a breadcrumb trail: Home » EMIS » Verify/Update and Transfer. Below this is the main heading "EMIS - Verify/Update DASL EMIS" and a sub-heading "From this screen, you can verify, update, and transfer EMIS records". The interface is divided into two tabs: "Request Type" and "Program Selection". Under the "Request Type" tab, there is a "Reporting Period:" dropdown menu set to "N (Live)". Below this is a list of radio button options for different EMIS record types. The option "Verify/Update - Discipline (DISCEMIS)" is selected. At the bottom of the form, there are three buttons: "< Back", "Next >", and "Cancel".

Home » EMIS » Verify/Update and Transfer

### EMIS - Verify/Update DASL EMIS

From this screen, you can verify, update, and transfer EMIS records

Request Type | Program Selection

Reporting Period: N (Live) ▼

- Verify - Non-Reportable Students
- Verify - Reportable Courses
- Verify - Review District EMIS Run Requests (CHECK\_EMIS)
- Verify - Student Assessment
- Verify - Student Demographics (UNCLEMIS)
- Verify - Student Gifted Records
- Verify - Student Special Education
- Verify - Subject Codes (INVSUBJ)
- Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)
- Verify/Update - Discipline (DISCEMIS)
- Verify/Update - Graduation Credit Units (COHIEMIS)
- Verify/Update - Majority of Attendance IRN (MAJOREMIS)
- Verify/Update - Membership Programs (MEMBEMIS)
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back | Next > | Cancel

#### Verify/Update – Discipline (DISCEMIS) Option

Select **Verify/Update - Discipline (DISCEMIS)**. Click **Next>**.

Home » EMIS » Verify/Update Discipline Information

## Verify/Update Discipline Information - (N) DASL Local SD

From this screen, you can verify and update discipline information.

**Include Buildings:**

Select All Buildings  Clear All Buildings

DAEL - DASL ELEMENTARY SCHOOL (Update not run yet) ⚡

DAHS - DASL HIGH SCHOOL (Update not run yet)

DAMS - DASL MIDDLE SCHOOL (Update not run yet)

**Run Type:**  Verify  Update

**Number of Students Per Page:** 50

**File Download Options**

Select A File Type  Select A Download Method

Submit Cancel

### Verify/Update Discipline Information Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

**Run Type** (required) – Select whether you want to Verify or Update for EMIS. It is suggested that you verify first and correct any problems prior to updating. Update mode will update the Student Discipline Record found under EMIS Maintenance.

**Number of Students Per Page** (required) – Enter the number of students that you wish to appear on the interactive report

### File Download Options

**Select a File Type** – Choose from CSV (.csv), HTML (.html), TAB (.txt).

**Select A Download Method** – Choose from Download or Email. Download will create a dasl\_data.xls, dasl\_data.csv, or dasl\_data.txt file depending on the file type you choose. You may save this file to any location available. Email will send the selected File Type as an email attachment to the email address specified for this StudentInformation user.

The Downloadable report provides information as to what incidents will be updated when DISCEMIS is run in update mode.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Building	IRN	Student Number	EMISId	DisplayName	Discipline Date	DisciplineType	Discipline Reason1	Discipline Reason2	Discipline Reason3	Discipline Reason4	Discipline Reason5	Discipline Days	Alt Program	Modified	Discipline Sequence Number
1	FNBH	42804	303136822	717253265	Student13102, Zarrick	9/21/2009 0:00	3	5	**	**	**	**	0.5	*	N	1
2	FNBH	42804	5652350	594178422	Student25850, Wesley	10/19/2009 0:00	2	3	**	**	**	**	1	*	*	1
3	FNBH	42804	5652350	594178422	Student25850, Wesley	10/22/2009 0:00	3	18	**	**	**	**	1	*	*	1
4	FNBH	42804	196183	523859538	Student34825, Jerome	12/11/2009 0:00	2	18	**	**	**	**	1	*	*	1
5	FNBH	42804	196183	523859538	Student34825, Jerome	12/15/2009 0:00	2	18	**	**	**	**	1	*	*	1
6	FNBH	42804	196183	523859538	Student34825, Jerome	12/15/2009 0:00	2	18	**	**	**	**	1	*	*	1

**Example Downloadable Report Results**

**Submit** – Run the procedure and generate an online report.

The online report will show students that may not be reported and the various reasons why they may not be reported. If necessary, these students’ discipline records can be updated and corrected. By clicking a student’s name the user will be taken to a pop-up screen to proceed to make changes to that student’s discipline record.

1 - 1 | Next

Building IRN	Building	Student	Student Number	EMIS ID	
020511	DAHS	CONTRARY, MARY M.	00005001	376873245	
<i>Incident Messages:</i>		- <a href="#">12 - dress inappropriate</a> No infractions exist for the incident			

1 - 1 | Next

**Example Online Report Results**

**Caution:** When Updating, this procedure will delete all Student Discipline records for the entire district in EMIS Maintenance. This means that if one school enters records manually in ProgressBook StudentInformation EMIS Maintenance, they must wait until after DISCEMIS has been processed in Update mode for the other buildings that are using the discipline incident records in StudentInformation SIS, to enter their manual records. Once the manual records are entered, DISCEMIS should not be rerun in Update mode. This is not the recommended way to complete reporting requirements.

The discipline sequence number generated for the report is always one except when two or more separate incidents occur on the same day for the same student and the same disciplinary action is used. In this case, the sequence number increments by one each time. For example, when two incidents occur on the same day for the same student but different disciplinary actions are used, each incident receives a disciplinary sequence number of one.

**Cancel** – Do not run the procedure.

## Majority of Attendance (MAJOREMIS)

### Navigation: Home – EMIS – Verify/Update and Transfer – Verify/Update - Majority of Attendance IRN (MAJOREMIS)

The Majority of Attendance IRN is reported at yearend. The program MAJOREMIS is run to help districts verify and then update the Majority of Attendance IRN field which is found under the Student Profile – FN-Attributes tab.

MAJOREMIS uses admission history. It uses the FS date ranges and EMIS situation changes to determine whether a student has been continuously enrolled. MAJOREMIS uses the dates specified for each grade level in the EMIS guide as the time period for determining enrollment. If there are any breaks in the enrollment time period recorded on the FS Date Effective records, the program examines each record to determine whether or not the break counts against the student in the calculation. Students who are taking the alternate assessment use a different ending date range for the time period used to calculate continuous enrollment.

**Caution:** MAJOREMIS does the best that it can with the information stored in StudentInformation for each student to determine Majority of attendance, however, not all situations may be accounted for in StudentInformation. It is important that each district examine the values calculated for each student to determine whether or not it is accurate.

MAJOREMIS now takes Attendance Percentage and Sent To Reasons 1 and 2 into consideration when determining whether students were continuously enrolled. For students taking an alternate assessment, a different date range, as defined in the EMIS Manual, is to be used to determine continuous enrollment. To accomplish this, an ad-hoc membership group must be created of all students who took an alternate assessment. Then when processing MAJOREMIS, select the ad-hoc membership group. For any student included in this group, MAJOREMIS will use the alternate date range for calculation of continuous enrollment. MAJOREMIS uses the grade level from the most recent FD record and is aware of Count Week Overrides when calculating the Majority of Attendance period.

Home » EMIS » Verify/Update and Transfer

## EMIS - Verify/Update DASL EMIS

From this screen, you can verify, update, and transfer EMIS records using a step-by-step wizard approach.

Request Type | Program Selection

Reporting Period: N

- Student Ohio Graduation Test
- Verify - Non-Reportable Students
- Verify - Reportable Courses
- Verify - Review District EMIS Run Requests (CHECK\_EMIS)
- Verify - Student Assessment
- Verify - Student Demographics (UNCLEMIS)
- Verify - Student Gifted Records
- Verify - Student Special Education Events
- Verify - Subject Codes (INVSUBJ)
- Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)
- Verify/Update - Discipline (DISCEMIS)
- Verify/Update - Majority of Attendance IRN (MAJOREMIS)
- Verify/Update - Membership Programs (MEMBEMIS)
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back | Next > | Cancel

### Verify/Update – Majority of Attendance IRN (MAJOREMIS) Option

Select **Verify/Update - Majority of Attendance IRN (MAJOREMIS)**. Click **Next>**.

### Verify/Update Majority of Attendance IRN Screen

**Include Buildings** (required) – You may select Select All buildings, Clear All Buildings, and turn individual buildings “on” or “off” for this process by selecting on the appropriate options. When you run this process in update mode, you must select Select All Buildings.

**Ad-Hoc Membership** (required if using Alternate Assessment) – You may select an Ad-Hoc Membership to use in this run. If you select an Ad-Hoc Membership, the MAJOREMIS calculation will use the appropriate dates for students who took alternate assessment.

**Note:** In FY07, ODE changed the date range to be used determining Majority of attendance for students taking an alternate assessment. It is important that you define an ad-hoc membership group specifically for these students and use it when running MAJOREMIS.

**Note:** All students in the district will be included in each processing of MAJOREMIS. Only those students in the specified ad-hoc group will have the alternate date range used for their calculation.

**Public And Private** – Yes or No. Include public Ad-Hoc Memberships in the Ad-Hoc Membership drop-down menu.

**Run Type** – Select whether you want to Verify or Update for EMIS. The user may run the program in Verify mode for one or more buildings. It is suggested that all buildings run MAJOREMIS in Verify Mode to check the data prior to running the program in Update Mode. If Verify is chosen, a file download method must be selected. All buildings must be checked in order to run the program in Update mode.

## File Download Options

**Select a File Type** – Choose from CSV (.csv), HTML (.html), TAB (.txt).

**Select A Download Method** – Choose Download or Email. Download will create a dasl\_data.xls, dasl\_data.csv, or dasl\_data.txt file depending on the file type you choose. You may save this file to any location available. Email will send the selected File Type as an email attachment to the email address specified for this StudentInformation user.

**Submit** – Run the procedure.

**Cancel** – Do not run the procedure.

If Run Type = Verify and a file type / download method is selected, the results will be output to the selected file type as follows.

StudentNumber	EMISId	DisplayName	IRN	Building	StateEquivalentGradeLevel	TakingAlternativeAssessment	IRNMajorityAttendance	MatchTypeId
18225	725849387	Student10002, DAVONTE'	36350	ELEE	5	FALSE	*****	3
18219	725810487	Student10013, SHYAH	36350	ELEE	5	FALSE	36350	1
18218	725808222	Student10015, JILLIAN	36350	ELEE	5	FALSE	36350	1

**Example Verify Majority of Attendance Results**

## Output File Fields

- Student Number
- EMIS ID
- Display Name – formatted “Last name, First name (Nickname)”
- Building IRN
- Building Code
- State Equivalent Grade Level
- Taking Alternate Assessment
- Majority of Attendance IRN
- Match Type ID

1. The student is continuously enrolled in the district during the MOA enrollment time period (i.e. does not withdraw) and the Attending Building IRN does not change. Attending Building IRN.
2. The student is continuously enrolled in the district during the MOA enrollment time period (i.e. does not withdraw) but the Attending Building IRN changes. District IRN.
3. All other situations “\*\*\*\*\*”.

## Review District EMIS Runs (CHECK\_EMIS)

### Navigation: Home – EMIS – Verify/Update and Transfer – Verify - Review District EMIS Run Requests (CHECK\_EMIS)

CHECK\_EMIS is a program that allows the EMIS coordinator, or ITC staff to monitor the EMIS processes and transfers that need to be completed for each reporting period. When programs are processed multiple times, it is sometimes hard to keep track whether all the proper steps have been taken or not. And when districts place the responsibility of running some of these EMIS processes at the building level, it helps to have a tool that shows the history of these processes, when they were run and who ran the process. There are times when a process maybe be run too early for the reporting cycle, or has not been processed by all buildings within the district. CHECK\_EMIS assists the user by providing the needed history.

It is also helpful to make sure that all the necessary transfers for state reporting were performed after an update process was run.

***Note:** There is a separate Review District EMIS Run Requests for Graduate Report Period (G). Please see Section 3) Graduate Reporting Period (G) for more information.*

**CHECK\_EMIS** can be processed at any time during the reporting period and will help with the following:

- School EMIS personnel will be able to view the programs they must run and the status of those programs for the current reporting period.
- District EMIS Coordinators will be able to monitor the programs that must be run by all schools in the district and the status of those programs for each school for the current reporting period.
- ITC staff will be able to view the programs that must be run by each district in the ITC and each school in each district and the status of those programs for each district and school for the current reporting period.
- User will be able to view just the programs that have been run or run too soon.
- User will be able to view just the programs that still must be run.
- CHECK\_EMIS will be able to provide historical information to identify the user that executed a specific instance of a program.
- CHECK\_EMIS will be able to provide historical information to identify the version number of each program execution.
- CHECK\_EMIS will be able to provide historical information to identify the date/time each program execution was performed.
- CHECK\_EMIS will be able to provide historical information to identify the mode (Verify/Update) that each execution of a specific program performed.
- Application will provide a list of all required programs that have not been run for any district or building within a ITC.

Home » EMIS » Verify/Update and Transfer

## EMIS - Verify/Update DASL EMIS

From this screen, you can verify, update, and transfer EMIS records

Request Type    Program Selection

Reporting Period: K

- Verify - Non-Reportable Students
- Verify - Reportable Courses
- Verify - Review District EMIS Run Requests (CHECK\_EMIS)
- Verify - Student Assessment
- Verify - Student Demographics (UNCLEMIS)
- Verify - Student Special Education
- Verify - Subject Codes (INVSUBJ)
- Verify/Update - CORE Summary
- Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)
- Verify/Update - Membership Programs (MEMBEMIS)
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back    Next >    Cancel

### Verify – Review District EMIS Run Requests (CHECK\_EMIS) Option

- Select **Verify Review District EMIS Run Requests (CHECK\_EMIS)**.
- Click **Next>**.

### Review District EMIS Run Requests Screen

**District** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

**Run Options** (required) – There are a number of options for how the user would like to run CHECK\_EMIS. Choose Not Run, Already Run, or History.

**Include the Following Potential Problems** (optional) – Choose one or more potential problems to be highlighted.

The **Verification Not Run** option shows any process for the selected reporting period that where the program has not been processed in Verify mode.

The **Update Not Run** option shows any process for the selected reporting period where the process has not been run in Update mode.

The **Transfer Not Run** option will indicate any transfer that has not been processed to transfer EMIS records from StudentInformation to State EMIS

The **Transfer Not Run After Update** will indicate any transfer where the Update process that creates the records has been run, however, those new records have not yet been transferred to the data collector for processing and submission to the Ohio Department of Education.

The **Run Too Early** will show programs that were run, but prior to when they should be run.

**Exclude Runs Prior To** (optional) – Enter a date to exclude programs that were run prior to a specific date.

**Submit** – Run the procedure and generate an online report.

**Cancel** – Do not run the procedure.

**Sample Report for History Option**

Not Run  
  Already Run  
  History

Exclude Runs Prior To:

**6 Records Displayed**

Building	Module	Program	Action	User	Run Date <span style="font-size: small;">▼</span>
BLACK RIVER ELEMENTARY SCHOOL	Assessment	Student Assessment (FA)	Transfer	Emhoff, Heidi	01/14/2013 12:53 PM
BLACK RIVER HIGH SCHOOL	Assessment	Student Assessment (FA)	Transfer	Emhoff, Heidi	01/14/2013 12:53 PM
BLACK RIVER MIDDLE SCHOOL	Assessment	Student Assessment (FA)	Transfer	Emhoff, Heidi	01/14/2013 12:53 PM
BLACK RIVER ELEMENTARY SCHOOL	Assessment	Student Assessment	Verify	Emhoff, Heidi	01/14/2013 12:52 PM
BLACK RIVER HIGH SCHOOL	Assessment	Student Assessment	Verify	Emhoff, Heidi	01/14/2013 12:52 PM
BLACK RIVER MIDDLE SCHOOL	Assessment	Student Assessment	Verify	Emhoff, Heidi	01/14/2013 12:52 PM

**Example History Option Results**

### Sample Report for Not Run Option

Home » EMIS » Run Requests
Advanced

#### Review District EMIS Run Requests

From this screen, you can verify which EMIS programs have been run.

Reporting Period:

District: Black River Local

Select All Buildings  
  Clear All Buildings

BRES - BLACK RIVER ELEMENTARY SCHOOL  
  BRJH - BLACK RIVER MIDDLE SCHOOL  

BRHS - BLACK RIVER HIGH SCHOOL

Not Run  
  Already Run  
  History

**Include the Following Potential Problems:**

Verification Not Run  
 Update Not Run  
 Transfer Not Run  
 Transfer Not Run After Update  
 Run Too Early

**Required:**

Assessment Transfer - Course Master and Staff Course (CN,CU)  
 Assessment Transfer - District and Building Information (DL, DN, DT)  
 Assessment Transfer - Student Assessment (FA)  
 Assessment Transfer - Student Special Ed. Graduation Requirement (FE)  
 Attendance Record Update - Student Attendance (ATTUPEMIS)  
 Attendance Record Verify - Student Attendance (ATTUPEMIS)  
 CORE Summary Transfer - CORE Summary (GC)  
 CTRMEMIS/CLISEMIS Transfer - Vocational Correlated Records (CV)  
 CTRMEMIS/CLISEMIS Update - Course and Class List (CLISEMIS/CTRMEMIS)  
 CTRMEMIS/CLISEMIS Verify - Course and Class List (CLISEMIS/CTRMEMIS)  
 MEMBEMIS Transfer - Student Program (GQ)  
 MEMBEMIS Update - Membership Programs (MEMBEMIS)  
 MEMBEMIS Verify - Membership Programs (MEMBEMIS)  
 Special Education Transfer - Student Special Education (GE)  
 Student Demographics / Standing / Attributes Transfer - Student Dem/Stand/Att (FD, FN, FS, GI, GJ)  
 Student Demographics / Standing / Attributes Transfer - Student Demographics (GI)

Exclude Runs Prior To:

Black River Local

Building	Module	Program	Run Date	Issue
BLACK RIVER ELEMENTARY SCHOOL	Assessment	Course Master and Staff Course (CN,CU)		Transfer not run
BLACK RIVER ELEMENTARY SCHOOL	Assessment	District and Building Information (DL, DN, DT)		Transfer not run
BLACK RIVER ELEMENTARY SCHOOL	Assessment	Student Assessment (FA)		Transfer not run
BLACK RIVER ELEMENTARY SCHOOL	Assessment	Student Special Ed. Graduation Requirement (FE)		Transfer not run
BLACK RIVER ELEMENTARY SCHOOL	Attendance Record	Student Attendance (ATTUPEMIS)		Verify/Update not run
BLACK RIVER ELEMENTARY SCHOOL	CORE Summary	CORE Summary (GC)		Transfer not run

**Example Not Run Option Results**

## Sample Report for Already Run Option

Not Run
  Already Run
  History

Exclude Runs Prior To:

Black River Local

Building	Module	Program	Verify Run Date	Verify	Update Run Date	Update	Transfer Run Date	Transfer
BLACK RIVER ELEMENTARY SCHOOL	Assessment	Student Assessment	01/14/2013 12:52 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
BLACK RIVER ELEMENTARY SCHOOL	Assessment	Student Assessment (FA)		<input type="checkbox"/>		<input type="checkbox"/>	01/14/2013 12:53 PM	<input checked="" type="checkbox"/>
BLACK RIVER HIGH SCHOOL	Assessment	Student Assessment	01/14/2013 12:52 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
BLACK RIVER HIGH SCHOOL	Assessment	Student Assessment (FA)		<input type="checkbox"/>		<input type="checkbox"/>	01/14/2013 12:53 PM	<input checked="" type="checkbox"/>
BLACK RIVER MIDDLE SCHOOL	Assessment	Student Assessment	01/14/2013 12:52 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
BLACK RIVER MIDDLE SCHOOL	Assessment	Student Assessment (FA)		<input type="checkbox"/>		<input type="checkbox"/>	01/14/2013 12:53 PM	<input checked="" type="checkbox"/>

Example Already Run Option Results

## Assessment

### Navigation: Home – EMIS – Verify/Update and Transfer – Verify - Student Assessment

The following student assessment records are stored and maintained under SIS – Student – Assessment:

- Achievement
- Ohio Graduation Test (OGT)
- KRA-L
- OTELA
- Preschool ECO
- Preschool GGG
- Preschool ASQ/SE
- Preschool Assessment (not available on EMIS-Verify Student Assessment)
- CTE Industry Assessment (not available on EMIS-Verify Student Assessment)
- CTE Student Assessment (OCTCA) (not available on EMIS-Verify Student Assessment)

The user may run a verification process on these records, as shown in the image below. The verification process checks to make sure that students have the required records to be reported. It also checks for some error conditions. Please note that Proficiency assessments will no longer be verified and reported in FY10 and beyond.

Home » EMIS » Verify/Update and Transfer

### EMIS - Verify/Update DASL EMIS

From this screen, you can verify, update, and transfer EMIS records.

**Request Type** | **Program Selection**

**Reporting Period:** N (Live) ▼

- Verify - Non-Reportable Students
- Verify - Reportable Courses
- Verify - Review District EMIS Run Requests (CHECK\_EMIS)
- Verify - Student Assessment**
- Verify - Student Demographics (UNCLEMIS)
- Verify - Student Gifted Records
- Verify - Student Special Education
- Verify - Subject Codes (INVSUBJ)
- Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)
- Verify/Update - Discipline (DISCEMIS)
- Verify/Update - Majority of Attendance IRN (MAJOREMIS)
- Verify/Update - Membership Programs (MEMBEMIS)
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back   Next >   Cancel

**Verify – Student Assessment Option**

Select **Verify Student Assessment**. Click **Next>**.

Home » EMIS » Verify Assessment

### Verify Assessment - (N) Ashland City Schools

From this screen, you can verify student assessment data.

**Include Buildings:**

Select All Buildings    Clear All Buildings

- ASHS - ASHLAND HIGH SCHOOL
- ASMO - MONTGOMERY ELEMENTARY SCHOOL
- ASJH - ASHLAND MIDDLE SCHOOL
- ASOS - OSBORN ELEMENTARY SCHOOL
- ASED - EDISON ELEMENTARY SCHOOL
- ASTA - TAFT ELEMENTARY SCHOOL
- ASLI - LINCOLN ELEMENTARY

**Test Type:**

- Student Achievement
- Student Ohio Graduation Test
- Kindergarten Readiness Assessment (K-RAL)
- OTELA
- Preschool ECO
- Preschool GGG
- Preschool ASQ/SE

Verify   Cancel

**Verify Assessment Screen**

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

**Test Type** – Select Student Achievement, Student Ohio Graduation Test, Kindergarten Readiness Assessment (KRA-L), OTELA, Preschool ECO, Preschool GGG and Preschool ASQ/SE.

**Verify** – Run the Verify procedure.

**Cancel** – Do not run the procedure.

Once the user clicks **Verify**, a report will be generated with any validation errors – invalid options found on the records. For example, if a student is showing as being in 3<sup>rd</sup> grade at the time of the 4<sup>th</sup> grade Achievement test, an error message (Student Grade Level at time of test has an invalid option specified: 03()). will be generated.

**Note:** Once the user is ready, the Assessment records must be transferred to the data collector for processing and submission to the Ohio Department of Education.

Starting in period N of FY12, all assessment records are transferred in one file using the Transfer – Student Assessment (FA) option.

Building IRN	Building	EMIS ID	Student Number	Name	Severity	Issue
002782	BLACK RIVER HIGH SCHOOL	281174025	00380409	ABBOTT, ASHLEY	F	Student is missing required test record for test part Math
002782	BLACK RIVER HIGH SCHOOL	281174025	00380409	ABBOTT, ASHLEY	F	Student is missing required test record for test part Reading
002782	BLACK RIVER HIGH SCHOOL	281174025	00380409	ABBOTT, ASHLEY	F	Student is missing required test record for test part Social Studies / Citizenship
002782	BLACK RIVER HIGH SCHOOL	281174025	00380409	ABBOTT, ASHLEY	F	Student is missing required test record for test part Science
002782	BLACK RIVER HIGH SCHOOL	281174025	00380409	ABBOTT, ASHLEY	F	Student is missing required test record for test part Writing
002782	BLACK RIVER HIGH SCHOOL	A28977777	00380410	ABBOTT, PEDRO	F	Student is missing required test record for test part Math
002782	BLACK RIVER HIGH SCHOOL	A28977777	00380410	ABBOTT, PEDRO	F	Student is missing required test record for test part Reading
002782	BLACK RIVER HIGH SCHOOL	A28977777	00380410	ABBOTT, PEDRO	F	Student is missing required test record for test part Social Studies / Citizenship
002782	BLACK RIVER HIGH SCHOOL	A28977777	00380410	ABBOTT, PEDRO	F	Student is missing required test record for test part Science
002782	BLACK RIVER HIGH SCHOOL	A28977777	00380410	ABBOTT, PEDRO	F	Student is missing required test record for test part Writing
002782	BLACK RIVER HIGH SCHOOL	X04602236	00236460	ADAMS, MINNIE	F	Student is missing required test record for test part Math
002782	BLACK RIVER HIGH SCHOOL	X04602236	00236460	ADAMS, MINNIE	F	Student is missing required test record for test part Reading
002782	BLACK RIVER HIGH SCHOOL	X04602236	00236460	ADAMS, MINNIE	F	Student is missing required test record for test part Social Studies / Citizenship
002782	BLACK RIVER HIGH SCHOOL	X04602236	00236460	ADAMS, MINNIE	F	Student is missing required test record for test part Science
002782	BLACK RIVER HIGH SCHOOL	X04602236	00236460	ADAMS, MINNIE	F	Student is missing required test record for test part Writing

### Example Verify Assessment Results

The Assessment Error Resolution v12.0.0 document is available to explain the various warning and error messages. It is available with the StudentInformation Procedural Checklists under the EMIS section.

## **Student Assessment Transfer (FA)**

### **Navigation: Home – EMIS – Verify/Update and Transfer – Transfer EMIS Data**

The Student Assessment (FA) Transfer reports the following assessment records for a district when run in the indicated reporting periods:

- Student Achievement Assessment (GA) (Period N)
- Ohio Test of English Language Acquisition (GF) (Period N)
- Student Ohio Graduation Test (GX) (Periods N and G)
- Student Preschool ASQ/SE Assessment (GS) (Periods K and N)
- Student Kindergarten Readiness Assessment – Literacy (GO) (Period K)
- Student Preschool GGG Assessment (GB) (Periods K and N)
- Student Preschool ECO Assessment (GM) (Periods K and N)
- Student CTE Industry Assessment (GU) (Period N)
- CTE Student Assessment (GY) (Period N)
- ACT Assessment (Period N)
- AP Exam (Period N)
- SAT Assessment (Period N)
- International Baccalaureate (IB) Assessment (Period N)

**EMIS - Create Flat Files - Select Files**  
 From this screen, you can verify, update, and transfer EMIS re

Request Type    Program Selection

Reporting Period: N (Live) ▼

Select all transfers

Transfer - Course Master

Transfer - Student Acceleration (FB)

Transfer - Student Assessment (FA)

Transfer - Student Course (GN)

Transfer - Student Dem/Stand/Att (FD, FN, FS, GI, GJ)

Transfer - Student Discipline (GD)

Transfer - Student Gifted Education (GG)

Transfer - Student Missing Override Record (FC)

Transfer - Student Proficiency

Transfer - Student Program (GQ)

Transfer - Student Special Ed. Graduation Requirement (FE)

Transfer - Student Special Education (GE)

Transfer - Vocational Correlated Records (CV)

**Transfer Type:**

Transfer to Alpha

Flat file transfer

Flat file transfer for Data Collector

< Back    Submit    Cancel

### Transfer – Student Assessment (FA) Option

Assessment records are listed in the transfer file in the following format:

- Sort Type
- Fiscal Year
- Reporting Period
- District IRN
- EMIS Student ID
- Assessment Type
- Test Grade Level
- Assessment Area
- Test Date
- Required Test Type
- Grade Level at Time of Test
- Accommodations
- Score Not Reported
- Score

## **KRA-L**

All student Kindergarten Readiness Assessment (KRA-L) records for a district are transferred.

### ***Kindergarten Readiness Assessment Transfer Rules***

- KRA-L is only reported for Reporting Period K.
- If the student has more than one KRA-L record, only the record with the earliest test date for each test part will be included.
- If the student has a retained status of “1” on his student EMIS record, the KRA-L record will not be included in the transfer file.
- KRA-L has to be administered to students no earlier than four weeks prior to the first day of school and no later than the first day of October. Only records within the date range of July 1 – October 1 will be transferred.
- If the FD State Equivalent Grade Level field is set to “KG”, the student will be included in the K-RAL EMIS Transfer.

## **OAA**

All Student Achievement (OAA) records for a district are transferred.

### ***Ohio Achievement Assessment (OAA) Transfer Rules***

- The OAA is only reported during Period N and will only be included in the FA Assessment transfer file during Period N.
- All records will be transferred (even if there are records for spring and fall) with test dates that fall during the school year.
- If there are duplicate records for the same test date and test part, the transfer will use the assessment record with the most recent Modified Date.
- Because accelerated placement, it is possible that records for a test grade level may exist beyond grade 08. If a student is accelerated to the 9<sup>th</sup> grade for math, a 9<sup>th</sup> grade achievement test record must be reported, even though there is no actual 9<sup>th</sup> grade achievement test. Valid test grade levels are 03, 04, 05, 06, 07, 08, 09, 10, 11 and 12.
- The scaled score in the GA record is reported as the score when the required test type is set to STR.
- The raw score in the GA record is reported as the score when the required test type is set to ALT.

## **OTELA**

All OTELA records for a district are transferred.

### ***Ohio Test of English Language Acquisition (OTELA) Transfer Rules***

- This process currently uses the same transfer logic as the Student Achievement (OAA) Transfer.
- OTELA is only taken once per year. Only one record is to be submitted by the district that administers the OTELA test.
- OTELA scores must be right-justified and require leading zeroes.

## OGT

All Period N Ohio Graduation Test (OGT) records for a district are transferred.

**Note:** OGT Transfers for Graduate Reporting Period (G) are available under the EMIS – Graduate Reporting Period (G) Menu. See [“Graduate Reporting Period \(G\)”](#) for more information.

### **Period N - Student Ohio Graduation Test (OGT) Transfer Rules**

StudentInformation transfers OGT files based on the following:

- Student’s primary building enrollment for StudentInformation logic
- Student’s EMIS records effective on 6/30 of current school year
- The Report To EMIS flag is set to true for the student
- Student’s EMIS Grade Level/State Equivalent Grade Level = 10, 11, 12, 13 or 23

Records to send:

- Current School Year Records must have a testing date between June 1 of the prior year and May 31 of the current year. All records with testing dates in this date range are sent.
- Prior School Year OGT records will no longer be included in the transfer of OGT assessment records.
- Students should have at least 1 record for each of the 5 test parts not passed during an earlier school year, but may have more if the student took the test part more than once during the current school year.
- Only OGT records for the current school are transferred. OGT records for JVS students are transferred if the student is directly enrolled in the JVS in context when this feature is used.

As of DASL 10.4.0, the OGT EMIS Transfer will include any records marked for re-reporting for the Fiscal Year in Period G. This “Re-report Time Period” field is found on the SIS – Student – Assessment – OGT screen.

Other rules:

- The scaled score in the GX record is reported as the score when the required test type is set to STR.
- The raw score in the GX record is reported as the score when the required test type is set to ALT.

### **Preschool ASQ/SE**

All Student Preschool ASQ/SE records for a district are transferred.

### **Student Preschool ASQ/SE Transfer Rules**

Preschool ASQ/SE records are transferred for Reporting Period K and N.

### Reporting Period K

- All Preschool ASQ/SE records taken between July 1 and December 1 (inclusive) will be transferred for all students that have an FD record indicating disability between 7/1 and 12/1. If the date is prior to July 1, only records with test level element value = 30 will be transferred.
  - If the student was enrolled last year, the most recent score inside these dates will be reported.
  - If the student was not enrolled last year, the first score within these dates will be reported.
- Preschool students ages three through five (as of December 1) with disabilities and any of the following conditions that must report an ASQ/SE record:
  - Enrolled in a preschool Special Education center based program
  - Receiving itinerate worker services
  - Receiving only Special Education services
  - Enrolled in a state funded Early Childhood Education (ECE) program
- Preschool students without disabilities enrolled in an ECE program are required to report an ASQ/SE record during period K if the student was enrolled for one or more days between the first day of school and December 1.
- Typically-developing preschool students that are enrolled in the Special Education program and are being counted as eligible under the district's ECE program are reporting ASQ/SE records.

### Reporting Period N

- Reporting Period N – All Preschool ASQ/SE records taken between December 2 and May 15 (inclusive) will be transferred with the following conditions:
  - If the student has score for period K (July 1 – December 1 of this school year), the most recent score will be reported.
  - If the student has no scores reported for K, the earliest score will be reported.
- Preschool students ages three through five (as of end of school year) with disabilities and any of the following conditions that must report an ASQ/SE record:
  - Enrolled in a preschool Special Education center based program
  - Receiving itinerate worker services
  - Receiving only Special Education services
  - Enrolled in a state funded Early Childhood Education (ECE) program
- Preschool students without disabilities enrolled in an ECE program are required to report an ASQ/SE record during period K if the student was enrolled for one or more days between the end of period K and the end of the school year (How Received value = E).

## Preschool (GGG)

All Student Preschool Assessment (GGG) records for a district are transferred.

### **Student Preschool Assessment Transfer Rules**

- Preschool records are transferred for Reporting Period K and N.
- Reporting Period K – Transfer all Preschool records dated from the first day of school through November 14 (inclusive).
- Reporting Period N – Transfer all Preschool records dated from March 23 through May 1 (inclusive).
- If a student has multiple fall or spring results for any test part, only records with the earliest test date on the assessment record will be included in the transfer file.
- Preschool (GGG) scores must be right justified with leading zeros.

## Preschool ECO

All Student Preschool ECO records for a district are transferred.

### **Student Preschool ECO Assessment Transfer Rules**

- Records are required only for Preschool students with a disability condition not = “\*\*\*”. Preschool students with a disability = “\*\*\*” may have a record, but their results are not reported to EMIS.
- Any Preschool student with a disability condition other than “\*\*\*” enrolled for one or more days between the first day of the district’s October count week and December 1 will be required to have a test record reported in October. Likewise, if a preschool child with a disability condition other than “\*\*\*” is enrolled one or more days after December 1, a test record will be reported during the period N Yearend Reporting Period.
  - If a child is enrolled for one or more days between the first day of the district’s count week and December 1, the student’s assessment record will be included in the transfer file for Reporting Period K.
  - If a child is enrolled one or more days after December 1, a test record will be reported during the June period N Reporting Period.
  - If multiple test records exist between the time period of July 1 and December 1, the following applies for records to be included in the transfer file:
    - For a student enrolled starting in FY09, report only the first set of scores in the transfer file.
    - For a child enrolled the previous year, report the score from the most recent assessment (or last score) as of December 1.
  - If the assessment is given multiple times between December 2 and year end, the following applies:
    - For a student enrolled starting in FY09, report only the first set of scores.
    - For a student enrolled prior to December 2 who has fall scores reported in the October (K) reporting period, report the final score as of May 15.
- If a student was withdrawn and then re-enrolled during the school year, report an ECO score during reporting period N.
- Students are excluded if they were withdrawn before the first day of school.

## **CTE Industry**

- All Student CTE Industry records for a district are transferred.
- A student must have a CTE Program of Concentration Area other than "\*\*\*" for Period N for the CTE Industry Assessment to be included in the FA Assessment transfer.

### ***CTE Industry Transfer Rules***

- When multiple CTE Industry Assessment records exist for the same assessment code, the latest record is transferred.
- All transferred CTE Industry Assessment records are given a test date of January 1.

## **CTE Student**

All CTE Student records for a district are transferred.

### ***CTE Student Transfer Rules***

- CTE Technical Score and CTE Teaching Professions Portfolio Score field values are reported as separate records in the FA transfer file. CTE Technical Scores are reported as a separate record with the correct assessment code. CTE Teaching Professions Portfolio Scores are reported as a separate records with an assessment code of 14TP.
- If the Reason Portfolio Score not Reported value is set to F, a separate FA record with an assessment code of 14TP and portfolio score of \*\*\* is included in the transfer.
- When multiple CTE Student Assessment (OCTCA) records exist for the same assessment code, the latest record is transferred.
- All transferred CTE Student Assessment records are given a test date of January 1.

## **ACT**

All Period N ACT records for a district are transferred.

### ***ACT Transfer Rules***

- The following subjects are included:
  - Reading
  - Mathematics
  - Writing
  - English
  - Science
- Subscores are not included.

## **AP**

All Period N AP records for a district are transferred.

### ***AP Transfer Rules***

- Only May test dates are included in the transfer.
- Past scores for the following subjects are excluded:
  - Computer Science AB
  - French Literature
  - Latin Literature
  - Latin: Vergil
  - MT AURAL Component Subscore
  - MT Nonaural Component Subscore
  - Physics C
  - Studio Art

## **SAT**

All Period N SAT records for a district are transferred.

### ***SAT Transfer Rules***

- The following subjects are included:
  - Reading
  - Writing
  - Math
- Subscores are not included.

## **Student Acceleration Transfer (FB)**

**Navigation: Home – EMIS – Verify/Update and Transfer – Transfer EMIS Data**

This process will transfer all Student Acceleration records for a district.

### **Student Acceleration Transfer Rules**

- Student Acceleration records are transferred for Reporting Period N.
- Only one record per assessment area can be transferred per year.

The following Acceleration options are available:

- Writing
- Math
- Science
- Reading
- Social Studies

**EMIS - Create Flat Files - Select Files**  
From this screen, you can verify, update, and transfer EMIS re

Request Type | Program Selection

Reporting Period: N (Live) ▾

Select all transfers

Transfer - Course Master

Transfer - Student Acceleration (FB)

Transfer - Student Assessment (FA)

Transfer - Student Course (GN)

Transfer - Student Dem/Stand/Att (FD, FN, FS, GI, GJ)

Transfer - Student Discipline (GD)

Transfer - Student Gifted Education (GG)

Transfer - Student Missing Override Record (FC)

Transfer - Student Proficiency

Transfer - Student Program (GQ)

Transfer - Student Special Ed. Graduation Requirement (FE)

Transfer - Student Special Education (GE)

Transfer - Vocational Correlated Records (CV)

**Transfer Type:**

Transfer to Alpha

Flat file transfer

Flat file transfer for Data Collector

< Back | Submit | Cancel

**Transfer – Student Acceleration (FB) Option**

## Assessment Transfer – Student Proficiency

Navigation: Home – EMIS – Verify/Update and Transfer – Transfer EMIS Data

This process will transfer all Student Proficiency records for a district.

**IMPORTANT! This Transfer is no longer valid for FY10 and forward.**

## Non-Reportable Students

**Navigation: Home – EMIS – Verify/Update and Transfer – Verify - Non-Reportable Students**

The user may run a verification process to find any students not marked “Report to EMIS” and to verify or mark these students.

**Verify – Non-Reportable Students Option**

Select **Verify - Non-Reportable Students**. Click **Next>**.

**Verify Non-Reportable Students Screen**

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

**Verify** – Run the Verify procedure.

**Cancel** – Do not run the procedure.

Once the user clicks **Verify**, a report will be generated with any students not marked as “Report to EMIS”.

Report to EMIS	Building ^	Student Number	Student Name	How Received	Percent of Time	EMIS Situation	Admission Date	Withdrawal Date	Status
<input type="checkbox"/>	MAES	275090296	HULL, ROSE	*	0	154 - Resident attends a special ed coop F/T	08/18/2011		R-RES A/ELSE
<input type="checkbox"/>	MAES	275090301	OWEN, MELVIN	*	0	145 - Resident attending ESC PS unit F/T	08/18/2011		R-RES A/ELSE

Select all students

### Example Verify Non-Reportable Students Screen

**Report to EMIS** – Check this box to mark this student as “Report to EMIS”.

**Select all students** – Check this box to mark all students as “Report to EMIS”.

**Student Name** – Click on a student’s name to edit that student’s profile in a new window.

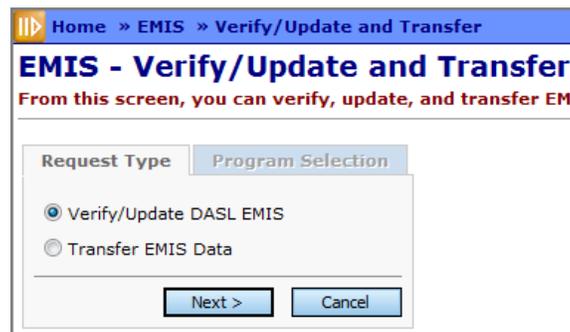
**Save Report to EMIS** – Click this button to save any changes you made to the students’ “Report to EMIS” status. You will see a confirmation message:

**Report to EMIS flag was successfully updated for the selected students(s).**

## Reportable Courses

**Navigation: Home – EMIS – Verify/Update and Transfer – Verify - Reportable Courses**

The user may run a verification process to find any courses marked or not marked “Report to EMIS”, and verify or mark/unmark these courses.



### Request Type Tab on EMIS – Verify/Update and Transfer Screen

1. Select **Verify/Update DASL EMIS** in the Request type tab.
2. Click **Next>**.

The screenshot shows the 'EMIS - Verify/Update DASL EMIS' interface. At the top, there is a breadcrumb trail: 'Home » EMIS » Verify/Update and Transfer'. Below this is the title 'EMIS - Verify/Update DASL EMIS' and a sub-header: 'From this screen, you can verify, update, and transfer EMIS records using a step'. The main content area has two tabs: 'Request Type' and 'Program Selection'. Under the 'Program Selection' tab, there is a 'Reporting Period' dropdown menu set to 'K (Live)'. Below this is a list of radio button options for different verification and update tasks. The 'Verify - Reportable Courses' option is selected. At the bottom of the form, there are three buttons: '< Back', 'Next >', and 'Cancel'.

**Program Selection Tab on EMIS – Verify/Update DASL EMIS Screen**

3. Select **Verify – Reportable Courses**.
4. Click **Next>**.

The screenshot shows the 'Verify Reportable Courses - (K) DASL Local SD' interface. At the top, there is a breadcrumb trail: 'Home » EMIS » Verify Reportable Courses'. Below this is the title 'Verify Reportable Courses - (K) DASL Local SD' and a sub-header: 'From this screen, you can verify courses marked reportable to EMIS.'. The main content area has two radio button options: 'Select All Buildings' (selected) and 'Clear All Buildings'. Below this is a list of checkboxes for buildings: 'DAEL - DASL ELEMENTARY SCHOOL', 'DAMS - DASL MIDDLE SCHOOL', and 'DAHS - DASL HIGH SCHOOL'. All three are checked. Below the building list are three radio button options for course types: 'All Courses', 'Only Reportable Courses', and 'Only Non-Reportable Courses' (selected). At the bottom of the form, there are two buttons: 'Verify' and 'Cancel'.

**Verify Reportable Courses Screen**

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

**Course Type** – Select All Courses, Only Reportable Courses, or Only Non-Reportable Courses.

**Verify** – Run the Verify procedure.

**Cancel** – Do not run the procedure.

Once the user clicks Verify, a report will be generated listing any courses of the selected type.

Home » EMIS » Verify Reportable Courses Advanced Search | Feedback | Mgmt | Help | Version | Print

**Verify Reportable Courses - (N) Black River Local**  
 From this screen, you can verify courses marked reportable to EMIS.

Select All Buildings  Clear All Buildings

BRES - BLACK RIVER ELEMENTARY SCHOOL  BRJH - BLACK RIVER MIDDLE SCHOOL 

BRHS - BLACK RIVER HIGH SCHOOL

All Courses  Only Reportable Courses  Only Non-Reportable Courses

80 Records Displayed

Report to EMIS	Building ^	Course Code	Course Name	Curriculum	Delivery Method	Educational Option	Student Population	EMIS Subject Code	Section Exists	CSA Exists	Is Active
<input type="checkbox"/>	BRES	170	PERSONAL ACHIEVEMENT 1	**	**	**	**		yes	no	
<input type="checkbox"/>	BRES	180	ADMINISTRATION 1	OT	FF	NO	RG		yes	no	
<input type="checkbox"/>	BRES	270	PERSONAL ACHIEVEMENT 2	OT	FF	NO	RG		yes	no	
<input type="checkbox"/>	BRES	280	ADMINISTRATION 2	OT	FF	NO	RG		yes	no	
<input type="checkbox"/>	BRES	370	PERSONAL ACHIEVEMENT 3	OT	FF	NO	RG		yes	no	
<input type="checkbox"/>	BRES	380	ADMINISTRATION 3	OT	FF	NO	RG		yes	no	
<input type="checkbox"/>	BRES	470	PERSONAL ACHIEVEMENT 4	OT	FF	NO	RG		yes	no	

**Example Verify Reportable Courses Results**

**Report to EMIS** – Check this box to mark this course as “Report to EMIS”.

**Select all courses** – Check this box to mark all courses listed as “Report to EMIS”.

**LCH B** – Click on a course code to edit that course record in a new window.

**Save Report to EMIS** – Click this button to save any changes you made to the classes’ “Report to EMIS” status. You will see a confirmation message:

**Report to EMIS flag was successfully updated for all courses.**

## Student Special Education Events and Student Special Education Graduation Requirement (FE)

### Verify – Student Special Education and Student Special Education Graduation Requirement

**Navigation: Home – EMIS – Verify/Update and Transfer – Verify - Student Special Education**

The user may run a verification process on student Special Education events and Student Special Education Graduation Requirements. Special Education status and records will be evaluated during the verification process for the following students:

- All students who have a student annual record in the current school year and one of the selected schools.
- All students whose live EMIS record is marked as Report to EMIS.
- All students with events that fall within the proper date range regardless of whether or not the students have a disability condition.

To run the Student Special Education verification process, click **Verify - Student Special Education** on the EMIS - Verify/Update DASL EMIS screen, and then click **Next>**.

### Verify – Student Special Education Option

The Verify Special Education screen displays.

### Verify Special Education Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings and turn individual buildings on or off for this process by selecting the appropriate options.

**Run Date** (required) – Minimum date allowed is June 1 of the school year. Maximum date allowed is May 31 of the fiscal year. The date will default to today’s date. If you are running Verify Special Education for a specific reporting period, such as Period K, populate the Run Date with the last reportable date for that period. For reporting period K, the last reportable date would be 12/1/XX (current school year).

**Number of Students Per Page** (required) – Enter the number of students that you wish to appear on the online interactive report.

**Download File** – Choose to include Verification messages, Student Special Ed Events or Student Special Ed Grad Reg in a download file.

**Event Range** (required if Student Special Ed Events is chosen as the Download File) – If Student Special Ed Events is chosen for the Download File, enter the date range for those Student Special Ed Events. This field does not display if Verification Messages or Student Special Ed. Grad. Req. selections are chosen as the Download File.

***Note:** The event range filters on the Event Date, not the Start Date or End Date of the Special Education Event.*

## File Download Options

**Select a File Type** – Choose CSV (.csv), HTML (.html) or TAB (.txt). This will generate an output file with either the Verification Messages, Student Special Ed Events or Student Special Education Graduation Requirements in addition to the online interactive report.

**Select A Download Method** – Choose Download or Email. Download will create a dasl\_data.html, dasl\_data.csv or dasl\_data.txt file depending on the file type you choose. You may save this file to any location available. Email will send the selected File Type as an e-mail attachment to the e-mail address specified for this StudentInformation user.

**Submit** – Run the procedure and display the results on the screen and optionally generate a download file if chosen.

**Cancel** – Do not run the procedure.

The data will display on the screen. By clicking on a student’s name on the screen’s error listing, the user will be taken to the Special Education screen for that student so that the error can be corrected.

Warning messages include:

- A Special Education event is required when student has handicap condition.
- Special Education Event is missing the date.
- Date Type is missing or is invalid.
- OutComeID is missing or is invalid.
- Non-Compliance ID is missing or is invalid.
- No matching special education event for a graduation exemption requirement record.
- An active special education event is required when student has a disability condition.
- Student has an event record with date type {RETR, IETR or TETR} and no disability condition.

Building IRN	Building	Student	Student Number	EMIS ID	Grade Level
007997	DADA	BARRY, JOHNNY	00210365	264888085	04
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
007997	DADA	IRWIN, DELORES	00210138	277894085	04
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					
007997	DADA	LOTT, BRIAN	00210346	286152085	03
<i>Event Message:</i> - <a href="#">Click Here to Add</a> An active special education event is required when student has disability condition.					

### Example Verify Special Education Results

Click [Click Here to Add](#) to add the appropriate Special Education Event for that student. You will be taken to SIS – Student – Special Education – Special Education screen for that student so the errors can be fixed.

## File Outputs

If a download file is generated, the following file layouts are used:

Verification Messages (sorted by Building ascending, Last Name/First Name ascending):

- Student Last Name, Student First Name
- EMIS ID
- Student Number
- Building
- IRN
- Verification Message
- Grade Level.

Student Special Education Events (sorted by Building ascending, Last Name/First Name ascending, Event Date ascending):

- IRN Attending Building
- Building
- School Name
- First Name
- Middle Name
- Last Name
- Student Number
- EMIS ID
- Date
- Date Indicator
- Outcome ID
- Noncompliance ID
- Description
- Outcome Begin Date
- Outcome End Date
- IEP Test Type
- Secondary Planning
- Grade Level.

Student Special Education Graduation Requirements:

- IRN Attending Building
- Building
- School Name
- First Name
- Middle Name
- Last Name
- Student Number
- EMIS ID
- Fiscal Year
- Reporting Period
- District IRN
- IEP Date Type
- IEP Date
- Assessment Area
- Exemption Flag
- Grade Level.

## Transfer - Student Special Education (GE)

### Navigation: Home – EMIS – Verify/Update and Transfer – Transfer - Student Special Education

StudentInformation generates a Student Special Education (GE) record for students who have Special Education events regardless of whether or not the student has a disability condition based on the following conditions:

- For non-public students with events June 1 through December 1 in Period K or June 1 through May 31 in Period N.
- For newly enrolled students in the current school year and will include events dating back to September 1 of the previous school year.

The student's Report to EMIS flag must be checked on the Student Profile – General tab.

Special Education events are not transferred for non-public students who receive services only (Situation 12, 139 and 123). Use EMIS Situation 407 for non-public students receiving services only and create a valid Date Type event. These special education events will transfer.

Special Education events are included for newly enrolled students in the current school year from July 1 of the previous school year through the last date of the current reporting period.

All Special Education events for Preschool students are included in the transfer, even events from prior year(s) up to and including event dates through the last date of the current reporting period.

**Note:** For the following Event and Outcome situations, the Special Education record Transfer will copy the Event Date to both the Outcome Begin Date and the Outcome End Date in the record:

- IEP events with Outcome IDs IENS, IEPR, and IEDP
- RIEP events with Outcome IDs IENS, IEPR, IEDP, and IEEX
- TIEP events with Outcome IDs IENS, IEPR, and IEDP
- AIEP events with Outcome IDs IENS, IEPR, and IEDP
- RISP events with Outcome IDs IENS, IEPR, and IEDP
- IISP events with Outcome IDs IENS, IEPR, and IEDP

## Transfer – Student Special Ed Graduation Requirement (FE)

### Navigation: Home – EMIS – Verify/Update and Transfer – Transfer - Student Special Ed Graduation Requirement

StudentInformation generates the Student Special Education Graduation Requirement record (FE) for students with a Special Education Graduation Requirement record. The FE records that are transferred depend on the reporting period for which the transfer is run as described below:

- For Period K, the most recent record per assessment area on or before December 1 is transferred.
- For Period N, the most recent record per assessment area is transferred.

## Student Gifted Records

### Navigation: Home – EMIS – Verify/Update and Transfer – Verify - Student Gifted Records

The Gifted transfer will create a transfer file to take the gifted records from StudentInformation to the data collector for processing and submission to the Ohio Department of Education. Gifted records will only be transferred for those students in grades KG through 12 that have an FTE greater than 0. The exception to this is students who are attending elsewhere full time at a JVS, ESC, or post secondary institution, MRDD students, autism scholarship program students, and non-public at district expense students.

**Note:** The Gifted Transfer allows student gifted records to be transferred for any EMIS reporting period.

Home » EMIS » Verify/Update and Transfer

### EMIS - Verify/Update DASL EMIS

From this screen, you can verify, update, and transfer EMIS reco

Request Type | Program Selection

Reporting Period: N (Live) ▼

- Verify - Non-Reportable Students
- Verify - Reportable Courses
- Verify - Review District EMIS Run Requests (CHECK\_EMIS)
- Verify - Student Assessment
- Verify - Student Demographics (UNCLEMIS)
- Verify - Student Gifted Records
- Verify - Student Special Education
- Verify - Subject Codes (INVSUBJ)
- Verify/Update - Course and Class List (CLISEMIS/CTRMEMIS)
- Verify/Update - Discipline (DISCEMIS)
- Verify/Update - Majority of Attendance IRN (MAJOREMIS)
- Verify/Update - Membership Programs (MEMBEMIS)
- Verify/Update - Student Attendance (ATTUPEMIS)

< Back | Next > | Cancel

### Verify – Student Gifted Records Option

Select **Verify – Student Gifted Records**. Click **Next>**.

Home » EMIS » Verify Student Gifted

## Verify Student Gifted - (K) DASL Local SD

From this screen, you can verify gifted rules for grade levels.

Select All Buildings     Clear All Buildings

---

DAEL - DASL ELEMENTARY SCHOOL     DAMS - DASL MIDDLE SCHOOL ⚡  
 DAHS - DASL HIGH SCHOOL

### Verify Student Gifted Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

**Verify** - Will display the default Gifted Rule that applies to each grade level in each building selected for verification and the number of students affected. This can be used to verify that the necessary default Gifted Rules are defined for each grade level.

**13 Records Displayed**

School Name ^	Grade Level Code	Default Rule Name	Students In Grade
DASL ELEMENTARY SCHOOL	03	District Rule	10
DASL ELEMENTARY SCHOOL	02	District Rule	5
DASL ELEMENTARY SCHOOL	04	District Rule	9
DASL ELEMENTARY SCHOOL	01	District Rule	1

### Example Verify Student Gifted Results

This page intentionally left blank.

# Graduate Reporting Period (G)

## Navigation: Home – EMIS – Graduate Reporting Period (G)

The purpose of this reporting period is to report details about graduating students, both regular graduates (previously reported in Period N) and summer graduates (previously reported in the following year's Period K).

The reporting window for Period G is late May through mid November in the following school year. This window overlaps all of Period N and much of the following year's Period K. **Because of this, a specific Period G that can be set to live will not be implemented in StudentInformation. Users will be able to perform the maintenance, verify, update and transfer tasks for Period G independent of the Period that is currently live.** However, the correct school year must be in context to perform these tasks correctly. So for this first reporting of Period G data the 08-09 school year must be in context as this data is for Period 09G.

The following details are reported for each graduating student in Period G:

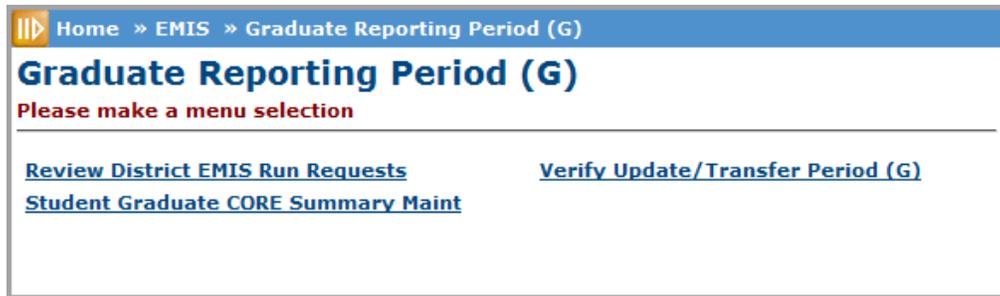
- Demographics (GI record)
- Graduate Attributes (a limited subset of fields on the FN record) - Mostly data that is only reported once upon a student graduating. This data will be entered on the Student Profile – FN-Graduate tab which is not school year or reporting period specific, as some data items may start being collected as early as the 7<sup>th</sup> grade.
- Student Graduation-CORE Summary Records (GC record) - New records providing a student's total credits by CORE Subject Area that have been accumulated over the years to qualify for graduation.
- Ohio Graduation Test (OGT) (FA record) - Reported for students who took an OGT test during summer and qualified for graduation (i.e. certain summer graduates).

There is now a new option under the EMIS Menu for Graduate Reporting Period (G).



### Graduate Reporting Period (G) Menu Option

The Graduate Reporting Period (G) menu contains the verify, update and transfer processes for Period G. All verification and transfers will be performed from this menu for the school year in context. Please note that this may require that you change the school year in context once you have set your live period to the new school year. For example, if your live period is Period K in FY11-12, you will need to change your school year to FY10-11 for Graduate Reporting Period (G) verification and transfers.



Graduate Reporting Period (G) Menu

## Student Ohio Graduation Test Verify and Transfer

**Navigation:** Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G) – Verify/Update DASL EMIS (G) – Verify - Student Ohio Graduation Test

**Navigation:** Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G) – Transfer EMIS Data (G) – Transfer - Student Ohio Graduation Test

The summer OGT scores for summer graduates are now submitted in Period G. They are no longer submitted in Period K.

### FY09 Period G OGT Verify and Transfer Changes

For students who are summer graduates (i.e. Withdraw Reason = 99 and Withdraw Date between July 1 in the following fiscal year and the day before the first day of school in the next fiscal year), any OGT records with a Test Date after June 1 need to be verified and transferred in Period G.

### FY10 Period K OGT Verify and Transfer Changes

The summer OGT records for summer graduates (i.e. Withdraw Reason = 99 and Withdraw Date between July 1 in the following fiscal year and the day before the first day of school in the following fiscal year) are no longer transferred in Period K.

### Period G – Student Ohio Graduation Test (OGT) Transfer Rules

Students whose OGT records are included in the transfer:

- Student must also have an enrollment in the next school year (within the district) and student must have a district withdrawal date between July 1 of the fiscal year and the day before the earliest first day of any school enrollments next year (this is found by looking at the student's next school year enrollments and looking at the first day of the master calendar).
- The student's withdrawal reason must be 99.

Records to Send:

- Only those OGT test records with a summer test date will be included for summer graduates.

**Note:** The OGT assessment transfer process for period G ONLY includes summer OGT test results for Summer graduates. All other OGT test results for seniors who had passed all parts as of the end of the school year were reported in period 09N. ODE requested that for period G, we only report the test records for those parts taken in the summer that resulted in a student graduating over the summer as ODE has all their prior test results already on file.

**Note:** The transfer file format for the OGT records has been updated to the FA Assessment Record format.

The Verify - Student Ohio Graduation Test option is located in the following path: EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G). On the EMIS - Verify/Update and Transfer Period (G) screen, select Verify/Update DASL EMIS (G), and then click Next.

#### Verify - Student Ohio Graduation Test Option

The Transfer - Student Ohio Graduation Test option is located in the following path: EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G). On the EMIS - Verify/Update and Transfer Period (G) screen, select Transfer EMIS Data (G), and then click Next.

#### Transfer - Student Ohio Graduation Test Option

## Verify

Home >> EMIS >> Graduate Reporting Period (G) >> Graduate/Summer OGT Verify

### Graduate/Summer OGT Verify - Ex Vill SD

From this screen, you can verify student assessment data.

**Include Buildings:**

Select All Buildings  Clear All Buildings

ELEMENTARY  HIGH SCHOOL ⚡

Verify Cancel

### Graduate/Summer OGT Verify Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options. You must select at least one building.

**Verify** – Run the verification as selected.

**Caution:** The Graduate/Summer OGT Verify process currently is not functional and does not verify Graduate/Summer OGT results.

**Cancel** – Do not run the verification.

## Transfer

Home >> EMIS >> Graduate Reporting Period (G) >> Verify Update/Transfer Period (G)

### EMIS - Create Flat Files - Select Files

From this screen, you can verify, update, and transfer Period (G) EMIS records using a step-by-step wizard approach.

**Request Type** **Program Selection**

Select all transfers

Transfer - Student Graduate CORE Summary

Transfer - Student Graduate Demographic/Attributes

Transfer - Student Ohio Graduation Test

Transfer - Student Special Ed. Graduation Requirement

**Transfer Type:**

Flat file transfer ⚡

Flat file transfer for Data Collector

< Back Submit Cancel

### Transfer - Student Ohio Graduation Test Option

**Select all Transfers** – Selects all transfer programs for Period G. To create the transfer file for student OGT scores in Period G, you must at least select Transfer - Student Ohio Graduation Test.

**Transfer Type (required)** – Choose one of the following options:

- **Flat file transfer** – Creates a flat file for use with the Data Collector and manually moves that file into the Data Collector.
- **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with the district's unique district code. Please contact your ITC or see the appropriate Reporting Period Checklist if you are not sure which Transfer Type should be collected.

Flat files created by the “Flat file transfer” and “Flat file transfer for Data Collector” option are named in the convention “[District Code]\_[YearEMISReportingPeriod]\_[Date Time Stamp].txt.” An example flat file name is ASHC\_11N\_2011-02-15-11-58-57.txt.

**<Back** – Return to the EMIS - Verify/Update and Transfer Period (G) screen.

**Submit** – Process the transfer.

**Cancel** – Cancel this transfer.

---

## Graduate CORE Summary Verify/Update and Transfer

**Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G) – Verify/Update - Student Graduate CORE Summary**

**Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G) – Transfer EMIS Data (G) – Transfer - Graduate CORE Summary**

Students to be included in the Verify and Update processes in Period G are those students that were enrolled at any point during the current school year and graduated; this includes both regular and summer graduates. Specifically these student's latest FS record (regardless of school year will have a District Withdraw Reason = “99” and a Withdraw Date that is between the first day of school in the current school year and the day before the first day of school in the next school year. For example, this time period might extend from around 8/28/XX (first day of school in the current school year) to somewhere around 8/26/XX (day before the first day of school in the new school year). The exact dates will vary by district and building.

The Verify screen will allow the user to:

- Choose which schools to verify.
- Choose either to verify Course records (Course Groups are not verified) or Student Records.
- Choose which School Years to verify (only an option when verifying courses).

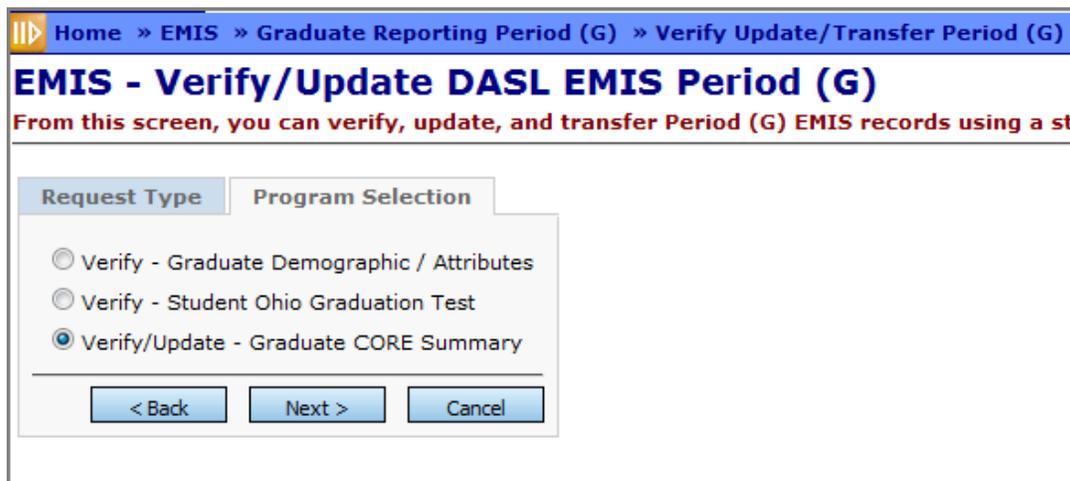
The Update process will create an EMIS CORE Summary Record for Period G for each graduating student. This is done by summing the earned credits by CORE Subject Area, for each student, from both:

- Manually Entered Courses where Is High School Credit is selected.
- Course section assignments for students where the course has Is High School Credit is selected, for all school years.

If a Manually Entered Course record or Course Section Assignment for a course is found that has “Is High School Credit” is checked, but no CORE Subject Area, then the course credit will not be included in the summary.

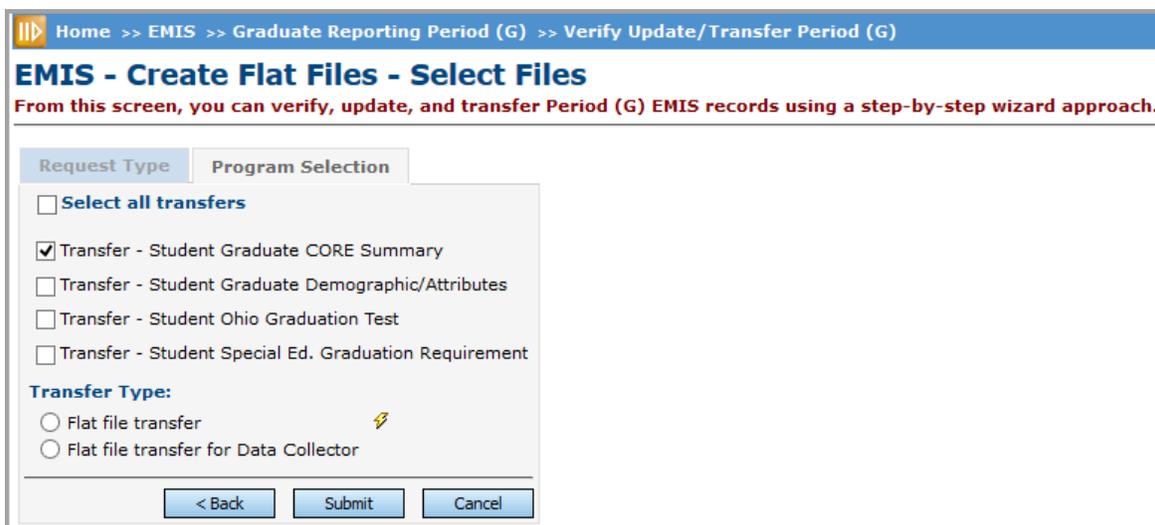
Prior to running these verification and transfers, the Bulk Update Course Core Subject Area and Bulk Update Manual Course Core Subj Area processes should have been run as needed. These two Ad-Hoc Updates will allow the user to update the CORE Subject Area on courses and manually entered course records. See the Step by Step Checklists for these processes for more information.

The Verify/Update - Graduate Core Summary option is located in the following path: EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G). On the EMIS - Verify/Update DASL EMIS Period (G) screen, select Verify/Update DASL EMIS (G), and then click Next.



### Verify/Update Graduate CORE Summary

The Transfer - Graduate Core Summary option is located in the following path: EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G). On the EMIS - Verify/Update DASL EMIS Period (G) screen, select Transfer EMIS Data (G), and then click Next.



### Transfer - Student Graduate CORE Summary Option

## Course Verify

Home » EMIS » Graduate Reporting Period (G) » Graduate CORE Summary Verify / Update

### Graduate CORE Summary Verify / Update - (G) DASL SD

From this screen, you can verify and update Graduate CORE Summary records.

**Include Buildings:**

Select All Buildings  Clear All Buildings

AVEL - DASL ELEMENTARY (Update not run yet) ⚡

AVHS - DASL HIGH SCHOOL (Update not run yet)

**Run Type:**  Verify  Update (Delete all and create)

**Number of Courses/Students Per Page:** 10

**Verify Mode:**  Course Verify  Student Verify

**School Years**

2008-2009	↑
2007-2008	↔
2006-2007	↔
2005-2006	↓

**School Years To Verify**

The Course Verify will perform the verifications for all courses within all school years chosen in the 'School Years to Verify' dual select, as well as the context school year.

### Course Verify Option on Graduate CORE Summary Verify/Update Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options. You must select at least one building. In almost all cases, only the High School Building will be included.

**Run Type** (required) – Choose to run in Verify mode (course or student) or in Update mode.

**Number of Courses/Students Per Page** (required) – Enter the number of students or courses to display per page. The default value is 10.

**Verify Mode** (required) – If verifying courses, select Course Verify.

**School Years To Verify** (optional) – The Course Verify will automatically perform the verifications for all courses within in the context school year. To verify additional school years, move the appropriate year(s) from the School Years side of the dual select box to the School Years to Verify.

**Verify** – Run the verification as selected.

**153 Courses With Errors**

<< First < Previous 1 | **2** | 3 | 4 | 5 ... Next > Last >>

Building IRN	Building	Course Code	Course Name	EMIS Subject Code
000067	AVHS	0110	YEARBOOK	059999
<i>Course Messages:</i>		-	<a href="#">2008-2009</a>	GC01E - CORE Subject Area not specified
		-	<a href="#">2007-2008</a>	GC01E - CORE Subject Area not specified
000067	AVHS	0111	ENGLISH 9	050160
<i>Course Messages:</i>		-	<a href="#">2008-2009</a>	GC01E - CORE Subject Area not specified
		-	<a href="#">2007-2008</a>	GC01E - CORE Subject Area not specified
000067	AVHS	0121	ENGLISH 10	050170
<i>Course Messages:</i>		-	<a href="#">2008-2009</a>	GC01E - CORE Subject Area not specified
		-	<a href="#">2007-2008</a>	GC01E - CORE Subject Area not specified

### Example Course Verify Results

Click on a school year to go to the Courses screen in that School Year where you can correct the error or review the warning. The error message is preceded by an error code that signifies the record type, error number, error type, and error message. Course Groups do not require a CORE Subject Area, although the courses inside the course group may require a CORE Subject Area.

**Example:** GC01E above indicates:

- **GC** – Record Type
- **01** – Error Number
- **E** – Error; W = Warning
- **Error Message** – “CORE Subject Area not specified”

**Cancel** – Do not run the verification.

## Student Verify

Home » EMIS » Graduate Reporting Period (G) » Graduate CORE Summary Verify / Update

### Graduate CORE Summary Verify / Update - (G)

Ex Vill SD

From this screen, you can verify and update Graduate CORE Summary records.

---

**Include Buildings:**

Select All Buildings   
  Clear All Buildings

---

. ELEMENTARY (Update not run yet)

. HIGH SCHOOL (Update not run yet)

**Run Type:**   
  Verify   
  Update (Delete all and create)

**Number of Courses/Students Per Page:**   

**Verify Mode:**   
  Course Verify   
  Student Verify

### Student Verify Option on Graduate CORE Summary Verify/Update Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options. You must select at least one building.

**Run Type** (required) - Choose to run in Verify mode (course or student) or in Update mode.

**Number of Courses/Students Per Page** (required) – Enter the number of students or courses to display per page. The default value is 10.

**Verify Mode** (required) – If verifying students, select Student Verify.

**Verify** – Run the verification as selected.

2 Students With Errors

Building IRN	Building	Student Name	Student Number	EMIS ID
010199	.HS	Student70243, PAUL (PAUL)		
		<i>Total Credits Messages:</i> - <a href="#">GC13E - Sum of Earned Credits is 0</a>		
010199	.HS	Student84737, RICHELLE		
		<i>Manually Entered Course Messages:</i> - <a href="#">2007-2008 - ELHS - CPO 2 - CPO 2 LAB -</a> GC10E - CORE Subject Area not specified - <a href="#">2007-2008 - ELHS - CPO 2 - CPO 2 RELATED -</a> GC10E - CORE Subject Area not specified - <a href="#">2007-2008 - ELHS - INT EN - INT ENG IV -</a> GC10E - CORE Subject Area not specified		

### Example Student Verify Results

Click on a manually entered course link to go to the Manually Entered Courses screen in that school year where you can correct the error or review the warning. The error message is preceded by an error code that signifies the record type, error number, error type, and error message.

**Example:** GC10E above indicates:

- **GC** – Record Type
- **10** – Error Number
- **E** – Error; W = Warning
- **Error Message** – “CORE Subject Area not specified”

**Cancel** – Do not run the verification.

## Transfer

Home >> EMIS >> Graduate Reporting Period (G) >> Verify Update/Transfer Period (G)

### EMIS - Create Flat Files - Select Files

From this screen, you can verify, update, and transfer Period (G) EMIS records using a step-by-step wizard approach.

Request Type | Program Selection

Select all transfers

Transfer - Student Graduate CORE Summary

Transfer - Student Graduate Demographic/Attributes

Transfer - Student Ohio Graduation Test

Transfer - Student Special Ed. Graduation Requirement

**Transfer Type:**

Flat file transfer

Flat file transfer for Data Collector

< Back | Submit | Cancel

### Transfer - Student Graduate Core Summary Option

**Select all Transfers** – Selects all transfer programs for Period G. To create the transfer file for Period G Student Graduate CORE Summary, you must at least select Transfer - Student Graduate CORE Summary.

**Transfer Type (required)** – Choose one of the following options:

- **Flat file transfer** – Creates a flat file for use with the Data Collector and manually moves that file into the Data Collector.
- **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with the district’s unique district code. Please contact your ITC or see the appropriate Reporting Period Checklist if you are not sure which Transfer Type should be collected.

Flat files created by the Flat file transfer and Flat file transfer for Data Collector options are named in the convention “[District Code]\_[YearEMISReportingPeriod]\_[Date Time Stamp].txt.” An example flat file name is ASHC\_11N\_2011-02-15-11-58-57.txt.

**<Back** – Return to the EMIS - Verify/Update and Transfer Period (G) screen.

**Submit** – Process the transfer.

**Cancel** – Cancel this transfer.

### Student Graduation – Core Summary Record (GC) Layout

Number	Position	Name	PIC/Size
GC001	1-8	Filler	PIC 9 (8)
GC010	9-10	Sort Type (always “GC”)	PIC X (2)
	11	Filler	PIC X
GC020	12-15	Fiscal Year, e.g., 2009 (CCYY)	PIC X (4)
GC030	16	Reporting Period: K – October G – Graduate	PIC X
GC040	17-22	District IRN	PIC X (6)
GC050	23-31	EMIS Student ID Number:	PIC X (9)
GC060	32-34	CORE Area Code BUS – Business units CTA – Career/Technical units ELE – Elective units ENG – English Language Arts units FAR – Fine Arts units FLR – Foreign Language units HEC – Family and Consumer Sciences (Non- Career-Technical) units HTH – Health Education units JTC – JROTC - Junior Reserve Office Training Corps MTA – Mathematics - Algebra II or Equivalent units MTO – Mathematics units Other than Algebra II or Equivalent PHE – Physical Education units SCA – Science - Advanced Science units SCL – Science - Life Science units SCO – Science units Other than Physical, Life, or Advanced Science SCP – Science - Physical Science units SOG – Social Studies- American Government units SOH – Social Studies- American History units SOO – Social Studies units Other than American History & Government TEC – Technology Education/Computer Science units	PIC X (3)
GC070	35-38	CORE Area Count	PIC 99V99
	39-300	Filler	PIC X (262)

## Graduate Demographic/Attributes Verify/Update and Transfer

**Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G) – Verify/Update DASL EMIS (G) – Verify - Graduate Demographic / Attributes**

**Navigation: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G) – Transfer EMIS Data (G) – Transfer - Student Graduate Demographic / Attributes**

For the purpose of describing the students that must be considered by the Period G Graduate Demographic/Attributes verify and transfer processes there are two date ranges that are significant:

- **Graduation Window** – This is from the first day of school in the current school year up to the day before the first day of school in the next school year, inclusive. For example, this time period might extend from around 8/28/XX (first day of school in the current school year) through to somewhere around 8/26/XX (day before the first day of school in the new school year). The exact dates will vary by district and building.
- **Enrollment Window** – This is from the first day of school in the current school year through to the last day, inclusive.

There are then two groups of students that must be considered by the verify process (groups 1 and 2) and one by the transfer process (group 1):

1. **Students Withdrawn as Graduating** – These students were enrolled at some point during the Enrollment Window and the most recent FS record (regardless of school year) has a Withdraw Date within the Graduation Window and a Withdraw Reason = 99 (i.e. graduated). Students with How Received = 2 (in-state, non-resident, career-technical contract student) will be excluded.
2. **Students with a Diploma Date but not correctly Withdrawn as Graduating** – These students were enrolled at some point during the Enrollment Window, have a Diploma Date within the Graduation Window but the most recent FS record (regardless of school year) indicates that:
  - The student has not been withdrawn (i.e. Withdraw Reason = \*\*).
  - The student has been withdrawn with a Withdraw Date during the Graduation Window but not with Withdraw Reason = 99.
  - The student has been withdrawn (i.e. Withdraw Reason not = \*\*) but the Withdraw Date is not within the Graduation Window.

The Verify - Graduate Demographic/Attributes option is located in the following path: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G). On the EMIS - Verify/Update and Transfer Period (G) screen, select Verify/Update DASL EMIS, and then click Next.

**Verify - Graduate Demographic/Attributes Option**

The Transfer - Graduate Demographic/Attributes option is located in the following path: Home – EMIS – Graduate Reporting Period (G) – Verify Update/Transfer Period (G). On the EMIS - Verify/Update and Transfer Period (G) screen, click Transfer EMIS Data (G), and then click Next.

**Transfer - Student Graduate Demographic/Attributes Option**

## Verify

Home » EMIS » Graduate Reporting Period (G) » Graduate Demographic / Attributes Verify

### Graduate Demographic / Attributes Verify - Ex Vill SD

From this screen, you can verify student graduate demographic and attribute data.

**Include Buildings**

Select All Buildings  Clear All Buildings

ELEMENTARY  HIGH SCHOOL

Number of Students Per Page: 50

Verify Cancel

### Graduate Demographic/Attributes Verify Screen

**Include Buildings** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options. You must select at least one building.

**Number of Students Per Page** (required) – Enter the number of students or courses to display per page. The default value is 50.

**Verify** – Run the verification as selected. Please note that the verify will run if there is no calendar master for the future year, however, a warning message will appear stating that there is no calendar master for the next school year. The verify will use the last day of the current school year to prevent summer graduates from being considered with no next year calendar master.

Warning and error messages will appear at the bottom of the screen.

< Previous 1 | 2 | 3 Next > 133 Students With Errors

Building IRN	Building	Student	Student Number	EMIS ID
010199		<a href="#">Smith, Steven</a>		
EMIS Verify: - FNG06E - Student has a Diploma Date, has been withdrawn as graduating but the Withdraw Date is not within the correct timeframe				
010199		<a href="#">Student84145, JORDYN</a>		
EMIS Verify: - FNG03E - Diploma Type must not = * for a graduating student. - FNG04E - Student has a Diploma Date but is still enrolled				
010199		<a href="#">Student84697, CAITLIN</a>		
EMIS Verify: - FNG05E - Student has a Diploma Date but has not been withdrawn as graduating (Withdraw Reason = 99)				

### Example Graduate Demographic/Attributes Verify Results

Click on a student name to go to the student’s edit profile where you can correct the error or review the warning. The error message is preceded by an error code that signifies the record type, error number, error type, and error message.

**Example:** FNG06E above indicates:

- **FNG** – Record Type
- **06**– Error Number
- **E** – Error; W = Warning
- **Error Message** – Student has a Diploma Date, has been withdrawn as graduating but the Withdraw Date is not within the correct time frame.

**Cancel** – Do not run the verification.

**Helpful Hint:** If you are transferring Student Demographics/Attributes for period G but your transfer file is empty, the school may not have their master calendar defined in the new school year yet. The student transfer depends on the master calendar to exist in new school year to determine the day before the first day of school for summer graduates. Here is a list of all the things the transfer uses to determine which students to include in the transfer:

- GradWindowStart = previous school year calendar master start date
- GradWindowStop = new school year calendar master start date minus 1 day
- EnrollWindowStart = previous school year calendar master start date
- EnrollWindowStop = previous school year calendar master stop date

Examine each student's FS records from schools in my district where the following is true:

- Any FS effective date between EnrollWindowStart and EnrollWindowStop (student was enrolled this year)
- Most recent FS Attending Building IRN is the same as the School IRN
- Most recent FS District Withdrawal Reason is "99"
- Most recent FS District Withdrawal Date is between GradWindowStart and GradWindowStop
- Most recent FS How Received must not be "2".
- The Verify process reviews students in both groups 1 and 2 as described above and performs the specified LCE checks.

## LCE Checks

Nbr./Type	Check	Warn/Error	Message	Period
LCE	Perform LCE checks on the following fields: FN090-Graduation Date FN100-Diploma Type FN110-Fiscal Year Began 9 <sup>th</sup> (on the Time Period record) FN120-OGT Graduation Alternative FN240-CORE Economics and Financial Literacy Requirement Met FN250-CORE Fine Arts Requirement Met FN260-Exempted from Physical Education Graduation Requirement	E	LCE: <i>Field Name</i> has an invalid value. (or however UNCLEMIS shows these messages)	G
FNG01E	If Diploma Date = null (Applies to group 1 only) (replaces FN03E and FN04E)	E	Diploma Date must be specified for a graduating student	G
FNG02E	If Diploma Date not null and not within the Graduation Window (Applies to group 1 only)	E	Diploma Date is not within the correct time frame	G
FNG03E	If Diploma Type = * (Applies to group 1 and 2) (replaces FN03E and FN04E)	E	Diploma Type must not = * for a graduating student.	G
FNG04E	If Diploma Date not = null and most recent FS record (regardless of school year) has Withdraw Reason = ** (Applies to group 2 only) (replaces FN13W)	E	Student has a Diploma Date but is still enrolled	G
FNG05E	If Diploma Date not = null and most recent FS record (regardless of school year) has Withdraw Reason not = 99 and Withdraw Date within the Graduation Window (Applies to group 2 only)	E	Student has a Diploma Date but has not been withdrawn as graduating (Withdraw Reason = 99)	G
FNG06E	If Diploma Date not = null and most recent FS record (regardless of school year) has Withdraw Reason = 99 but the Withdraw Date is outside the Graduation Window (Applies to group 2 only)	E	Student has a Diploma Date, has been withdrawn as graduating but the Withdraw Date is not within the correct time frame	G
FNG07E	If Diploma Date not = null and most recent FS record (regardless of school year) has Withdraw Reason not = 99 (do not include reason ** either) and the Withdraw Date is outside the Graduation Window (Applies to group 2 only)	E	Student has a Diploma Date, has been withdrawn as other than graduating and the Withdraw Date is not within the correct time frame	G

## Transfer

### Graduate Demographic/Attributes Transfer Options Screen

**Select all Transfers** – Selects all transfer programs for Period G. To create the transfer file for Period G Student Graduate Demographic/Attributes, you must at least select Transfer - Student Graduate Demographic/Attributes.

**Transfer Type (required)** – Choose one of the following options:

- **Flat file transfer** – Creates a flat file for use with the Data Collector and manually moves that file into the Data Collector.
- **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with the district's unique district code. Please contact your ITC or see the appropriate Reporting Period Checklist if you are not sure which Transfer Type should be collected.

Flat files created by the Flat file transfer and Flat file transfer for Data Collector options are named in the convention “[District Code]\_[YearEMISReportingPeriod]\_[Date Time Stamp].txt.” An example flat file name is ASHC\_11N\_2011-02-15-11-58-57.txt

The Transfer process will create one Period G GI record and one Period G FN record for each student in group 1.

**<Back** – Return to the EMIS - Verify/Update and Transfer Period (G) screen.

**Submit** – Process the Transfer.

**Cancel** – Cancel this transfer.

**Fields to be Included on the GI-Student Demographics Record in Period G**

Number	Position	Name	PIC/Size
GI001	1-7	Record Number	PIC 9(7)
GI005	8	Record Status	PIC X
		A - Add/Update	
GI010	9-10	Sort Type	PIC X(2)
		Always "GI"	
GI015	11	Record Format Indicator	PIC X
		"K" to indicate Format K	
GI020	12-15	Fiscal Year, e.g., 2009 (CCYY)	PIC X(4)
GI030	16	Reporting Period (G-Graduate)	PIC X
GI040	17-22	Building IRN (use the Attending Building IRN from the most recent FS record, regardless of school year)	PIC X(6)
GI050	23-31	EMIS Student ID Number	PIC X(9)
	42-64	Filler	PIC X(23)
	68-85	Filler	PIC X(18)
GI330	86-115	First Name (Optional)	PIC X(30)
GI340	116-145	Middle Name (Optional)	PIC X(30)
GI350	146-175	Last Name (Optional)	PIC X(30)
	206-300	Filler	PIC X(95)

**Fields to be Included on the FN – Student Attributes – No Date Record in Period G**

Number	Position	Name	PIC/Size
	1-8	Filler	PIC 9(8)
FN010	9-10	Sort Type (always "FN")	PIC X(2)
	11	Filler	PIC X
FN020	12-15	Fiscal Year, e.g., 2009 (CCYY)	PIC X(4)
FN030	16	Reporting Period: G - Graduate N - Yearend K - October	PIC X
FN040	17-22	District IRN	PIC X(6)
FN050	23-31	EMIS Student ID Number	PIC X(9)
	32-35	Filler	PIC X(4)
FN090	36-43	Diploma Date: 00000000 - Not applicable CCYYMMDD Date	PIC 9(8)

**Fields to be Included on the FN – Student Attributes – No Date Record in Period G**

Number	Position	Name	PIC/Size
FN100	44	Diploma Type: * - Not Applicable 1 - Regular Diploma 2 - Diploma with Honors 3 - Diploma received in another state via Military Compact	PIC X
FN110	45-48	Fiscal year student began 9th grade (from the Period N time-period record in the current school year): 0000 - Not applicable CCYY - Fiscal year	PIC 9(4)
FN120	49	OGT Graduation Alternative: 0 - Not used 1 - Used for one test not yet passed	PIC 9
	50-78	Filler	PIC X(29)
FN230	79-87	Yearend Reported State Student ID (SSID) Element (use the SSID from the most recent FS record, regardless of school year)	PIC X(9)
FN240	88	CORE Economics and Financial Literacy Requirement Met	PIC X
FN250	89	CORE Fine Arts Requirement Met	PIC X
FN260	90	Exempted from Physical Education Graduation Requirement	PIC X
	91-97	Filler	PIC X(7)
FN300	98	CORE Graduation Requirement Exception	PIC X
FN310	99	Military Compact Graduation Alternative	PIC 9
	100-300	Filler	PIC X(200)

**Review District EMIS Run Requests (G)****Navigation: Home – EMIS – Graduate Reporting Period (G) – Review District EMIS Run Requests**

The Review District EMIS Run Requests (G) allows the EMIS coordinator, or ITC staff to monitor the Graduate Reporting Period EMIS processes and transfers that need to be completed for Period G. When programs are processed multiple times, it is sometimes hard to keep track whether all the proper steps have been taken or not. And when districts place the responsibility of running some of these EMIS processes at the building level, it helps to have a tool that shows the history of these processes, when they were run and who ran the process. There are times when a process maybe be run too early for the reporting cycle, or has not been processed by all buildings within the district. Review District EMIS Run Requests (G) assists the user by providing the needed history.

It is also helpful to make sure that all the necessary transfers to State EMIS were performed after an update process was run.

**Review District EMIS Run Requests (G)** will help with the following:

- School EMIS personnel will be able to view the programs they must run and the status of those programs for the current reporting period.
- District EMIS Coordinators will be able to monitor the programs that must be run by all schools in the district and the status of those programs for each school for the current reporting period.
- ITC staff will be able to view the programs that must be run by each district in the ITC and each school in each district and the status of those programs for each district and school for the current reporting period.
- User will be able to view just the programs that have been run or run too soon.
- User will be able to view just the programs that still must be run.
- Review District EMIS Run Requests (G) will be able to provide historical information to identify the user that executed a specific instance of a program.
- Review District EMIS Run Requests (G) will be able to provide historical information to identify the version number of each program execution.
- Review District EMIS Run Requests (G) will be able to provide historical information to identify the date/time each program execution was performed.
- Review District EMIS Run Requests (G) will be able to provide historical information to identify the mode (Verify/Update) that each execution of a specific program performed.
- Application will provide a list of all required programs that have not been run for any district or building within a ITC.

The Review District EMIS Run Requests for Reporting Period G is a menu option under EMIS – Graduate Reporting Period (G).

Home > EMIS > Graduate Reporting Period (G)

## Graduate Reporting Period (G)

Please make a menu selection

<a href="#">Graduate CORE Summary Transfer</a>	<a href="#">Graduate/Summer OGT Transfer</a>
<a href="#">Graduate CORE Summary Verify / Update</a>	<a href="#">Graduate/Summer OGT Verify</a>
<a href="#">Graduate Demographic / Attributes Trans</a>	<a href="#">Review District EMIS Run Requests</a>
<a href="#">Graduate Demographic / Attributes Verify</a>	<a href="#">Student Graduate CORE Summary Maint</a>

### Review District EMIS Run Requests Menu Option

Home » EMIS » Run Requests

### Review District EMIS Run Requests

From this screen, you can verify which EMIS programs have been run.

Reporting Period:

District: Ada Ex Vill SD

Select All Buildings  Clear All Buildings

AVEL - ELEMENTARY  AVHS - HIGH SCHOOL

Not Run  Already Run  History

**Include the Following Potential Problems:**

Verification Not Run  
 Update Not Run  
 Transfer Not Run  
 Transfer Not Run After Update  
 Run Too Early

**Required:**

Assessment Transfer - Student Ohio Graduation Test  
 Assessment Verify - Student Ohio Graduation Test  
 Student Graduate CORE Summary Transfer - Student Graduate CORE Summary  
 Student Graduate CORE Summary Update - Graduate CORE Summary  
 Student Graduate CORE Summary Verify - Graduate CORE Summary  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Attributes  
 Student Graduate Demographics / Attributes Transfer - Student Graduate Demographic  
 Student Graduate Demographics / Attributes Verify - Graduate Demographic / Attributes

Exclude Runs Prior To:

### Review District EMIS Run Requests Screen

**Reporting Period** (required) – Any reporting period can be chosen to review the District EMIS Run Requests. However, the examples in this section pertain to Reporting Period G.

**District** (required) – You may select all buildings, clear all buildings, and turn individual buildings “on” or “off” for this process by selecting the appropriate options.

**Run Options** (required) – There are a number of options for how the user would like to run the Review District EMIS Run Requests (G). Choose Not Run, Already Run or History.

**Include the Following Potential Problems** (optional) – Choose one or more potential problems to be highlighted.

- The **Verification Not Run** option shows any process for the selected reporting period where the program has not been processed in Verify mode.
- The **Update Not Run** option shows any process for the selected reporting period where the process has not been run in Update mode.
- The **Transfer Not Run** option will indicate any transfer that has not been processed to transfer EMIS records from StudentInformation to State EMIS.
- The **Transfer Not Run After Update** will indicate any transfer where the Update process that creates the records has been run, however, those new records have not yet been transferred to State EMIS.
- The **Run Too Early** will show programs that were run, but prior to when they should be run.

**Exclude Runs Prior To** (optional) – Enter a date to look for processes that were run prior to a specific date.

**Submit** – Run the procedure and generate an online report.

**Cancel** – Do not run the procedure.

### Sample Output for Not Run Option

Not Run  
  Already Run  
  History

**Include the Following Potential Problems:**

- Verification Not Run
- Update Not Run
- Transfer Not Run
- Transfer Not Run After Update
- Run Too Early

**Exclude Runs Prior To:**  

**Required:**

- Assessment Transfer - Student Ohio Graduation Test
- Assessment Verify - Student Ohio Graduation Test
- Student Graduate CORE Summary Transfer - Student Graduate CORE Summary
- Student Graduate CORE Summary Update - Graduate CORE Summary
- Student Graduate CORE Summary Verify - Graduate CORE Summary
- Student Graduate Demographics / Attributes Transfer - Student Graduate Attributes
- Student Graduate Demographics / Attributes Transfer - Student Graduate Demographic
- Student Graduate Demographics / Attributes Verify - Graduate Demographic / Attributes

Vill SD

Building	Module	Program	Run Date	Issue
ELEMENTARY	Assessment	Student Ohio Graduation Test		Verify/Transfer not run
ELEMENTARY	Student Graduate CORE Summary	Graduate CORE Summary		Verify/Update not run
HIGH SCHOOL	Assessment	Student Ohio Graduation Test		Verify/Transfer not run

### Example Not Run Option Results

### Sample Output for Already Run Option

Not Run  
  Already Run  
  History

**Exclude Runs Prior To:**  

Vill SD

Building	Module	Program	Verify Run Date	Verify	Update Run Date	Update	Transfer Run Date	Transfer
ELEMENTARY	Student Graduate CORE Summary	Student Graduate CORE Summary		<input type="checkbox"/>		<input type="checkbox"/>	08/06/2009 11:12 AM	<input checked="" type="checkbox"/>
ELEMENTARY	Student Graduate Demographics / Attributes	Graduate Demographic / Attributes	10/07/2009 12:42 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Attributes		<input type="checkbox"/>		<input type="checkbox"/>	10/07/2009 11:29 AM	<input checked="" type="checkbox"/>
ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Demographic		<input type="checkbox"/>		<input type="checkbox"/>	10/07/2009 11:29 AM	<input checked="" type="checkbox"/>
HIGH SCHOOL	Student Graduate CORE Summary	Graduate CORE Summary	08/06/2009 10:05 AM	<input checked="" type="checkbox"/>	08/06/2009 10:07 AM	<input checked="" type="checkbox"/>		<input type="checkbox"/>
HIGH SCHOOL	Student Graduate CORE Summary	Student Graduate CORE Summary		<input type="checkbox"/>		<input type="checkbox"/>	08/06/2009 11:12 AM	<input checked="" type="checkbox"/>
HIGH SCHOOL	Student Graduate Demographics / Attributes	Graduate Demographic / Attributes	10/07/2009 12:42 PM	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
HIGH SCHOOL	Student Graduate Demographics / Attributes	Student Graduate Attributes		<input type="checkbox"/>		<input type="checkbox"/>	10/07/2009 11:29 AM	<input checked="" type="checkbox"/>
HIGH SCHOOL	Student Graduate Demographics / Attributes	Student Graduate Demographic		<input type="checkbox"/>		<input type="checkbox"/>	10/07/2009 11:29 AM	<input checked="" type="checkbox"/>

### Example Already Run Option Results

## Sample Output for History Option

Not Run
  Already Run
  History

Exclude Runs Prior To:  

81 Records Displayed

Building	Module	Program	Action	User	Run Date
ELEMENTARY	Student Graduate Demographics / Attributes	Graduate Demographic / Attributes	Verify	Admin, Health	10/07/2009 12:42 PM
HIGH SCHOOL	Student Graduate Demographics / Attributes	Graduate Demographic / Attributes	Verify	Admin, Health	10/07/2009 12:42 PM
ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Attributes	Transfer	Admin, Health	10/07/2009 11:29 AM
ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Demographic	Transfer	Admin, Health	10/07/2009 11:29 AM
HIGH SCHOOL	Student Graduate Demographics / Attributes	Student Graduate Attributes	Transfer	Admin, Health	10/07/2009 11:29 AM
HIGH SCHOOL	Student Graduate Demographics / Attributes	Student Graduate Demographic	Transfer	Admin, Health	10/07/2009 11:29 AM
HIGH SCHOOL	Student Graduate Demographics / Attributes	Graduate Demographic / Attributes	Verify	Admin, Health	10/07/2009 11:28 AM
ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Attributes	Transfer	Admin, Health	08/06/2009 11:16 AM
ELEMENTARY	Student Graduate Demographics / Attributes	Student Graduate Demographic	Transfer	Admin, Health	08/06/2009 11:16 AM

### Example History Option Results

## Student Graduate CORE Summary Maintenance

### Navigation: Home – EMIS – Graduate Reporting Period (G) – Student Graduate CORE Summary Maint

The Student Graduate CORE Summary Maintenance screen allows a user to add, change, or delete the EMIS GC-Student Graduation-CORE Summary records for summer graduates or for students who graduated with their class in the spring. The CORE Summary records are used to report the CORE Subject Areas in which a student has earned graduation credits/units. Each CORE Subject Area may only appear once for a student. The Student Graduate CORE Summary Maintenance data is populated based on the CORE values in the student's manual course history records and courses they have taken in the district.

The Student Graduate CORE Summary Maintenance screen is only for graduated students for Period G reporting. The CORE records for students in 9-12 for Period K reporting are located under EMIS – Maintenance – Student CORE Summary Record.

[Home](#) » [EMIS](#) » [Graduate Reporting Period \(G\)](#) » [Student Graduate CORE Summary Maint](#)

### Student Graduate CORE Summary Maintenance

From this screen, you can display, add, change and delete data pertaining to student Graduate CORE Summary records.

	CORE Area Code ^	CORE Area	CORE Count
 	BUS	Business units	3.00
<b>Total:</b>			<b>3.00</b>

### Student Graduate CORE Summary Maintenance Screen

This page has standard add record, edit record and delete record controls. Refer to *ProgressBook Student Information General Use Guide* for more information.

**Add CORE Summary Record** – Add a new CORE Summary Record.

## Add CORE Summary Record

Home » EMIS » Graduate Reporting Period (G) » Student Graduate CORE Summary Maint

### Student Graduate CORE Summary Maintenance

From this screen, you can display, add, change and delete data pertaining to student Graduate CORE Summary records.

CORE Subject Area:

Total Credits/Units Earned:

### Add Student Graduate CORE Summary Maintenance Screen

**Core Subject Area** (required) – Select the Core Subject Area from the drop-down list.

**Total Credits / Units Earned** (required) – Enter the total credits/units earned for this CORE Subject Area. Each CORE Subject Area may only appear once for a student.

# Calendar Reporting Period (C)

The purpose of Calendar Reporting Period C is to report district or building calendar information for the next school year. This information must be reported by May of the current school year. The state uses the calendar to validate building days in session and student attendance. The calendar information is combined with the building grade schedule first and last days of school to provide a complete picture of the school calendar for an individual student.

---

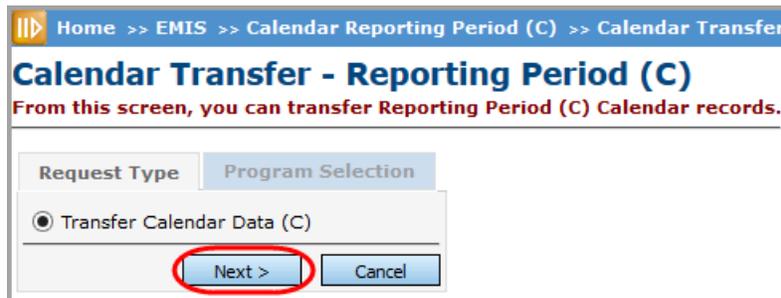
## Calendar Transfer

**Navigation: Home – EMIS – Calendar Reporting Period (C) – Calendar Transfer**

The calendar extract in StudentInformation contains DL and DN records.

On the **Calendar Transfer - Reporting Period (C)** screen, the option on the **Request Type** tab to “Transfer Calendar Data (C)” is automatically selected.

1. Click **Next**.



**Calendar Transfer Screen – Request Type Tab**

On the **Program Selection** tab, the option to “Transfer - Building and Grade Calendar (DN/DL)” is automatically selected.

2. In the **Transfer Type** option, select how you want to transfer the extracted data:
  - **Flat file transfer** – Creates a flat file for use with the Data Collector and manually moves that file into the Data Collector.
  - **Flat file transfer for Data Collector** – Creates a flat file for use with the Data Collector and stores it in a subdirectory named with the district’s unique district code.

**Note:** *If you are not sure which **Transfer Type** to choose, please contact your ITC or see the appropriate reporting period checklist.*

3. Click **Submit**.

Home >> EMIS >> Calendar Reporting Period (C) >> Calendar Transfer

### EMIS - Create Flat Files - Select Files

From this screen, you can transfer Reporting Period (C) Calendar records.

Request Type    Program Selection

Transfer - Building and Grade Calendar (DN/DL)

**Transfer Type:**

Flat file transfer

Flat file transfer for Data Collector

< Back    Submit    Cancel

**Program Selection Tab**

The extract creates a file with DN and DL record data.

# EMIS Maintenance

## Navigation: Home – EMIS – Maintenance

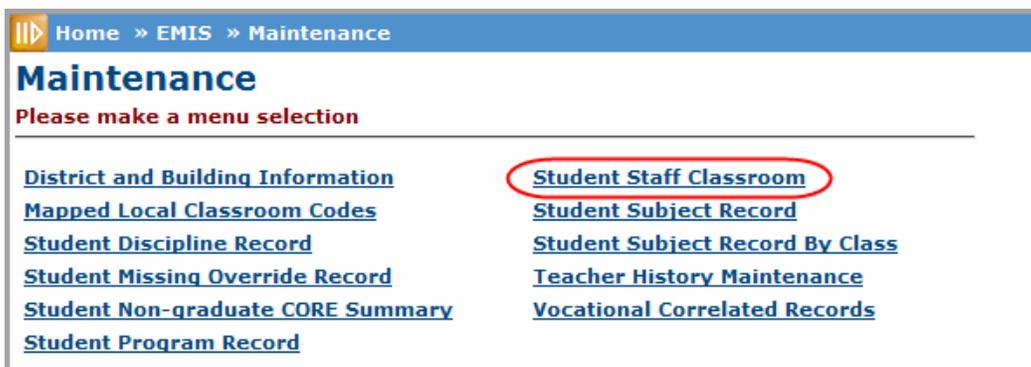
The EMIS Maintenance screens will normally be populated by running the appropriate Update program. For example, running MEMBEMIS in update mode will pull information from the StudentInformation SIS Membership screens to the Student Program Record in EMIS Maintenance. Users are encouraged to update the source data and run the Update. This is the preferred method so that both the source data and the EMIS screens are updated with the same information.

**Caution:** Due to the EMIS Redesign, it is very important to no longer make manual updates to certain EMIS Maintenance records. Do NOT make corrections on the EMIS Maintenance screens, except for the following records: Mapped Local Classroom Codes, Student Non-graduate CORE Summary, Vocational Correlated Records, and District and Building Records

---

## Student Staff Classroom

### Navigation: Home – EMIS – Maintenance – Student Staff Classroom



**Student Staff Classroom Menu Option**

**Caution:** Due to the EMIS Redesign, it is very important to no longer make manual updates to the Student Staff Classroom Records. Make all corrections to the source data (Course Sections, Course Maintenance, HQT Maintenance, and Course Terms). The EMIS – Maintenance – Student Staff Classroom Record should only be used to view these records.

From this screen, the user may access the Student Staff Classroom records, which include the Course Master (CN) and Staff Course (CU) records. The user can choose to look up courses by teacher or local classroom code.

## Teacher

**Teacher** – If the Teacher option is selected, the user can click on the teacher drop-down list and select a teacher. Click **Search** to display the first Staff Classroom record for that teacher. The Teacher Name, Staff Role Code, Highly Qualified Teacher Definition, Highly Qualified Teacher IRN and Staff Provider IRN [which is part of the Staff Course (CU) record] display in a grid under the main portion of the screen.

The screenshot shows the 'Student Staff Classroom' interface. At the top, there is a breadcrumb trail: Home » EMIS » Maintenance » Student Staff Classroom. Below this, the title 'Student Staff Classroom' is displayed, followed by a sub-header: 'From this screen, you can display, add, change and delete data pertaining to staff classroom records.' The search area includes a 'Reporting Period' dropdown set to 'K', a radio button for 'Teacher' (which is selected), and a dropdown menu containing 'NAME XX1111111'. There is also a radio button for 'Local Classroom Code' and a 'Search' button. Below the search area are '< Previous' and 'Next >' navigation buttons. The main content area displays a list of attributes for a selected record, such as 'Emis Subject: 111200', 'Subject Code Description: Geometry', 'Course Level: \*', 'High School Credit Amount: 1.00', 'Language Used: E', 'Building Name: SCHOOL High School', 'Course Start Date: 8/18/2011', 'Course End Date: 5/17/2012', 'Delivery Method: FF', 'Student Population: RG', 'Local Classroom Code: XXX-000X-00', 'Length/Scheduled Instruction: 152', 'Semester Code: 3', 'Subject Area for Credit: MTO', 'Credit Flex: N', 'Location IRN: 000000', 'CTE College Credit: N', 'Curriculum: OT', and 'Educational Option: NO'. At the bottom, a table displays the following data:

Teacher Name	Staff Role Code	HQT Definition	Highly Qualified Teacher IRN	Staff Provider IRN
NAME	LT-Lead Teacher	2-Academic major or 30 hours in content area	000000	*****

Teacher Option on Student Staff Classroom Screen

## Local Classroom Code

**Local Classroom Code** – If the Local classroom code button is marked, the user can click on classroom code drop-down list and select a course. Click **Search** to display the selected course. The Teacher Name, Staff Role Code, Highly Qualified Teacher Definition, Highly Qualified Teacher IRN and Staff Provider IRN (which is part of the Staff Course (CU) record) displays in a grid under the main portion of the screen.

Home » EMIS » Maintenance » Student Staff Classroom Advanced Search | Fe

### Student Staff Classroom

From this screen, you can display, add, change and delete data pertaining to staff classroom records.

Reporting Period:

Teacher:   
 Local Classroom Code:

<b>Emis Subject:</b>	888888	<b>Local Classroom Code:</b>	XXXX-0000-11
<b>Subject Code Description:</b>	Career Exploration	<b>Length/Scheduled Instruction:</b>	152
<b>Course Level:</b>	1	<b>Semester Code:</b>	3
<b>High School Credit Amount:</b>	1.00	<b>Subject Area for Credit:</b>	ELE
<b>Language Used:</b>	E	<b>Credit Flex:</b>	N
<b>Building Name:</b>	XXXXXXXXXX High School	<b>Location IRN:</b>	000000
<b>Course Start Date:</b>	8/18/2011	<b>CTE College Credit:</b>	N
<b>Course End Date:</b>	5/17/2012	<b>Curriculum:</b>	OT
<b>Delivery Method:</b>	FF	<b>Educational Option:</b>	NO
<b>Student Population:</b>	RG		

Teacher Name	Staff Role Code	HQT Definition	Highly Qualified Teacher IRN	Staff Provider IRN
KIBLER,MR	CT-Co-Teacher	I-Not core course OR type of course isn't eval. for HQT	*****	*****
DEANGELIS,MS	CT-Co-Teacher	I-Not core course OR type of course isn't eval. for HQT	*****	*****

#### Local Classroom Code Option on Student Staff Classroom Screen

**<Previous** – Look back to the previous course.

**Next>** – Look ahead to the next course.

**Note:** The original course selected in the Local Classroom Code list does not change, but the course being accessed does (top right-hand side of the course box).

## Student Subject Record By Class

Navigation: Home – EMIS – Maintenance – Student Subject Record By Class

Home » EMIS » Maintenance

### Maintenance

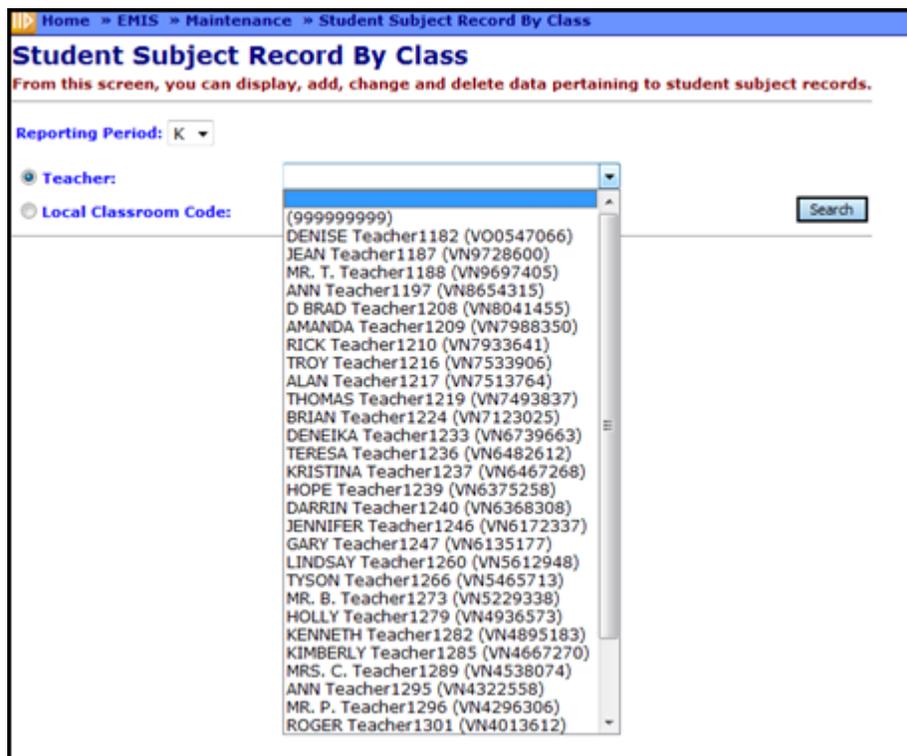
Please make a menu selection

<a href="#">District and Building Information</a>	<a href="#">Student Staff Classroom</a>
<a href="#">Mapped Local Classroom Codes</a>	<a href="#">Student Subject Record</a>
<a href="#">Student Discipline Record</a>	<a href="#">Student Subject Record By Class</a>
<a href="#">Student Missing Override Record</a>	<a href="#">Teacher History Maintenance</a>
<a href="#">Student Non-graduate CORE Summary</a>	<a href="#">Vocational Correlated Records</a>
<a href="#">Student Program Record</a>	

#### Student Subject Record By Class Menu Option

**Caution:** Due to the EMIS Redesign, it is very important to no longer make manual updates to the Student Subject Records by Class. Make all corrections to

the source data (Course Section Assignments). The EMIS – Maintenance – Student Subject Records by Class should only be used to view these records.

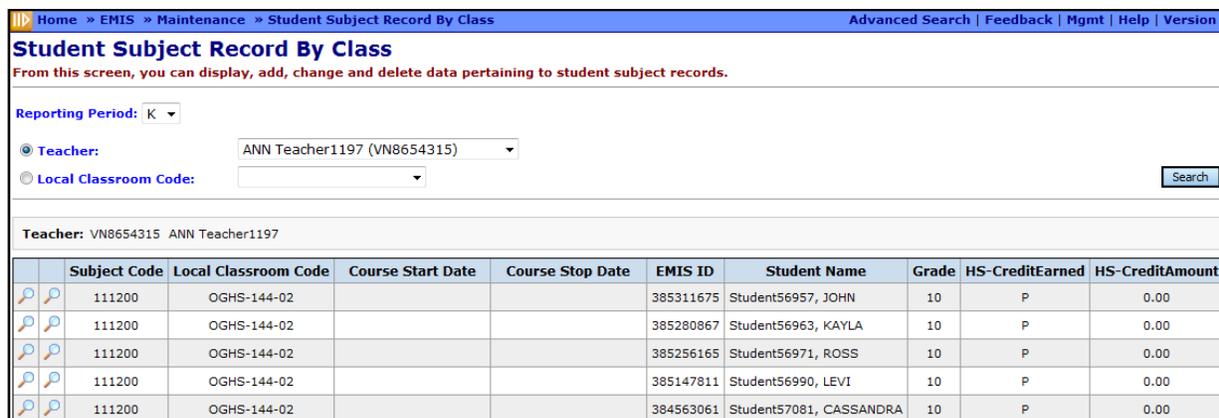


**Teacher Option on Student Subject Record By Class Screen**

**Teacher button** – If the Teacher button is marked, the user can click on the teacher drop-down list and select a teacher.

**Local Classroom Code button** – If the Local Classroom Code button is marked, the user can click on classroom code drop-down list and select a course.

Click **Search** to display the selected Teacher or Course.



**Search Results on Student Subject Record By Class Screen**

**Note:** As of FY11 and beyond, the CBIP and Concentrator columns were removed from the display.

Click the first  icon to view that particular student's EMIS Student Subject Records.

For example, by clicking on the left-hand magnifying glass on the first line above, the student's EMIS Student Subject records appear as shown in the following figure.

Home » EMIS » Maintenance » Student Subject Record <span style="float: right;">Advanced Search</span>						
<b>Student Subject Record</b>						
From this screen, you can display, add, change and delete data pertaining to student subject records.						
Reporting Period: K ▼						
<input type="button" value="Add Subject Record"/>						
		Local Classroom Code ^	Course Start Date	Course Stop Date	HS-CreditEarned	HS-CreditAmount
		OGHS-069-07			P	0.00
		OGHS-121-05			P	0.00
		OGHS-143-03			P	0.00
		OGHS-144-02			P	0.00
		OGHS-166-04			P	0.00
		OGHS-167-08			P	0.00
		OGHS-182-01			P	0.00
		OGHS-206-09			P	0.00

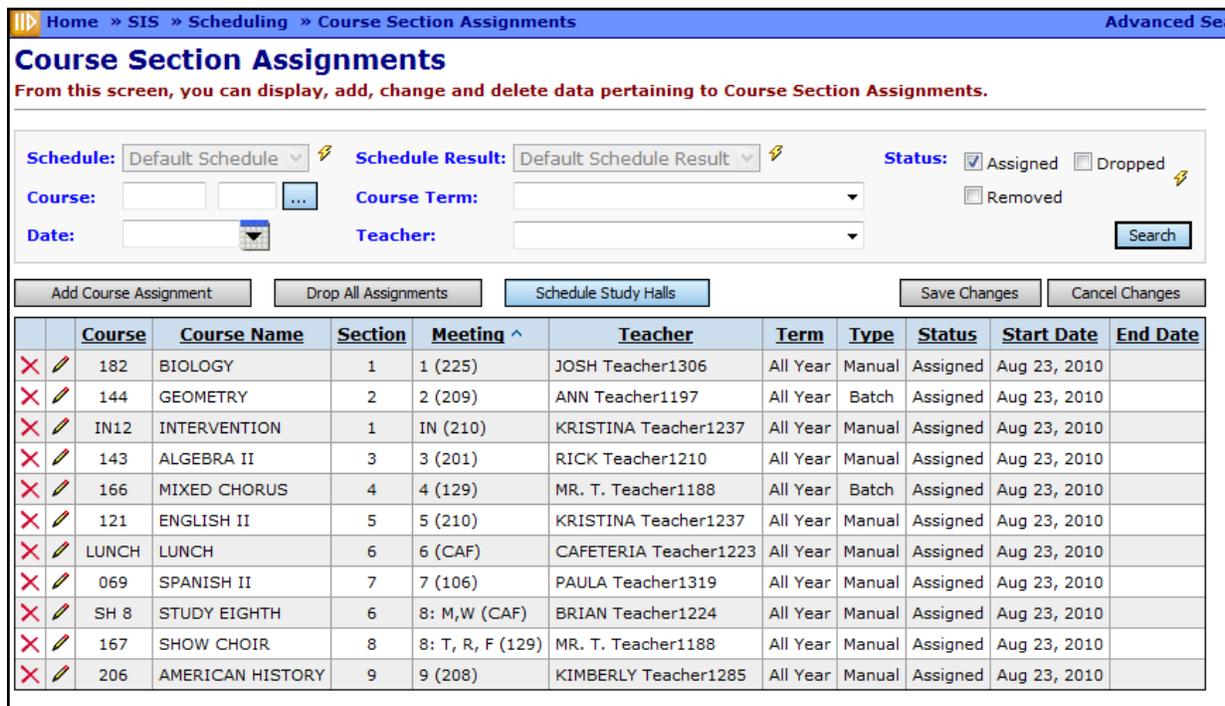
### Student Subject Record Screen

Please see section 3E. Student Subject Records for additional information on using this screen.

Home » EMIS » Maintenance » Student Subject Record By Class <span style="float: right;">Advanced Search   Feedback   Mgmt   Help   Version</span>										
<b>Student Subject Record By Class</b>										
From this screen, you can display, add, change and delete data pertaining to student subject records.										
Reporting Period: K ▼										
<input checked="" type="radio"/> Teacher: ANN Teacher1197 (VN8654315) ▼ <input type="radio"/> Local Classroom Code: ▼ <input type="button" value="Search"/>										
Teacher: VN8654315 ANN Teacher1197										
		Subject Code	Local Classroom Code	Course Start Date	Course Stop Date	EMIS ID	Student Name	Grade	HS-CreditEarned	HS-CreditAmount
		111200	OGHS-144-02			385311675	Student56957, JOHN	10	P	0.00
		111200	OGHS-144-02			385280867	Student56963, KAYLA	10	P	0.00
		111200	OGHS-144-02			385256165	Student56971, ROSS	10	P	0.00
		111200	OGHS-144-02			385147811	Student56990, LEVI	10	P	0.00
		111200	OGHS-144-02			384563061	Student57081, CASSANDRA	10	P	0.00

### Search Results on Student Subject Record Screen

Click the second  icon to view that particular student’s course section assignments.



**Course Section Assignments**  
From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule: Default Schedule ⚡ Schedule Result: Default Schedule Result ⚡ Status:  Assigned  Dropped  Removed ⚡

Course: [ ] [ ] ... Course Term: [ ] Date: [ ] Teacher: [ ] Search

Add Course Assignment Drop All Assignments Schedule Study Halls Save Changes Cancel Changes

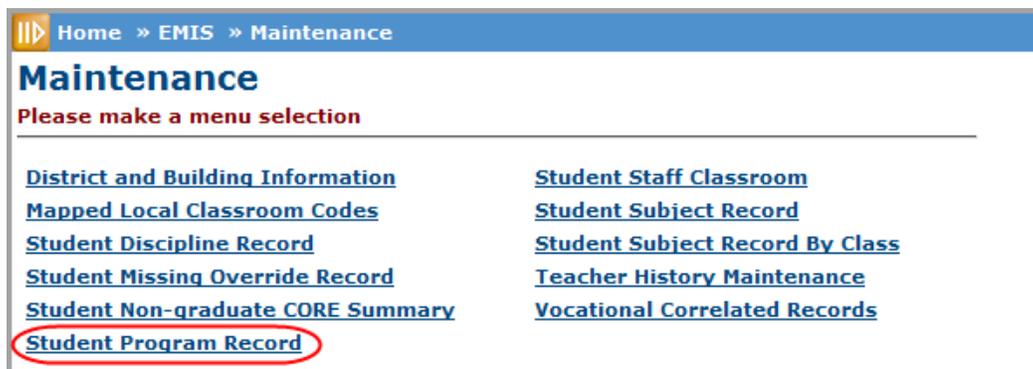
	Course	Course Name	Section	Meeting ^	Teacher	Term	Type	Status	Start Date	End Date
✕	182	BIOLOGY	1	1 (225)	JOSH Teacher1306	All Year	Manual	Assigned	Aug 23, 2010	
✕	144	GEOMETRY	2	2 (209)	ANN Teacher1197	All Year	Batch	Assigned	Aug 23, 2010	
✕	IN12	INTERVENTION	1	IN (210)	KRISTINA Teacher1237	All Year	Manual	Assigned	Aug 23, 2010	
✕	143	ALGEBRA II	3	3 (201)	RICK Teacher1210	All Year	Manual	Assigned	Aug 23, 2010	
✕	166	MIXED CHORUS	4	4 (129)	MR. T. Teacher1188	All Year	Batch	Assigned	Aug 23, 2010	
✕	121	ENGLISH II	5	5 (210)	KRISTINA Teacher1237	All Year	Manual	Assigned	Aug 23, 2010	
✕	LUNCH	LUNCH	6	6 (CAF)	CAFETERIA Teacher1223	All Year	Manual	Assigned	Aug 23, 2010	
✕	069	SPANISH II	7	7 (106)	PAULA Teacher1319	All Year	Manual	Assigned	Aug 23, 2010	
✕	SH 8	STUDY EIGHTH	6	8: M,W (CAF)	BRIAN Teacher1224	All Year	Manual	Assigned	Aug 23, 2010	
✕	167	SHOW CHOIR	8	8: T, R, F (129)	MR. T. Teacher1188	All Year	Manual	Assigned	Aug 23, 2010	
✕	206	AMERICAN HISTORY	9	9 (208)	KIMBERLY Teacher1285	All Year	Manual	Assigned	Aug 23, 2010	

**Student Course Section Assignment Details Screen**

Please see the *ProgressBook StudentInformation Scheduling Guide* for additional information on using the Course Section Assignment screen.

## Student Program Record

Navigation: Home – EMIS – Maintenance – Student Program Record



**Maintenance**  
Please make a menu selection

[District and Building Information](#) [Student Staff Classroom](#)  
[Mapped Local Classroom Codes](#) [Student Subject Record](#)  
[Student Discipline Record](#) [Student Subject Record By Class](#)  
[Student Missing Override Record](#) [Teacher History Maintenance](#)  
[Student Non-graduate CORE Summary](#) [Vocational Correlated Records](#)  
[Student Program Record](#)

**Student Program Record Menu Option**

**Caution:** Due to the EMIS Redesign, it is very important to no longer make manual updates to the Student Program Records. Make all corrections to the

source data (Student Memberships). The EMIS – Maintenance – Student Program Record should only be used to view these records.

After selecting the Student Program Record, the user will be presented with a student search screen and will need to select a student (if a student has not already been selected). The Student Program Record will show which reporting period the user is pointing to and this may be changed in the Reporting Period field.

The screen will display any program codes that a student currently has.

	<u>Program Code</u> ^	<u>Start Date</u>	<u>Stop Date</u>	<u>Employee Id</u>	<u>Prog Prov IRN</u>
X	205075	Sep 01, 2011	Dec 19, 2011	797546350	*****

Student Program Record Screen

Reporting Period: – Change EMIS reporting period in context.

## Student Discipline Record

Navigation: Home – EMIS – Maintenance – Student Discipline Record

Student Discipline Record Menu Option

**Caution:** Due to the EMIS Redesign, it is very important to no longer make manual updates to the Student Discipline Records. Make all corrections to the source data (SIS – Student - Discipline). The EMIS – Maintenance – Student Discipline Record should only be used to view these records.

After selecting the Student Discipline Record, the user will be presented with a student search screen and will need to select a student. The Student Discipline Record will show which reporting period the user is pointing to and this may be changed by clicking in the Reporting Period field.

The screen will display any Discipline records that a student currently has.

### Student Discipline Record Screen

Reporting Period: N – Discipline is only reported in Reporting Period N.

## Student Subject Record

Navigation: Home – EMIS – Maintenance – Student Subject Record

### Student Subject Record Menu Option

**Caution:** Due to the EMIS Redesign, it is very important to no longer make manual updates to the Student Subject Records. Make all corrections to the source data (Course Section Assignments). The EMIS – Maintenance – Student Subject Record should only be used to view these records.

After selecting the Student Subject Record, the user will be presented with a student search screen and will need to select a student. The Student Subject Record will show which reporting period the user is pointing to and this may be changed by clicking in the Reporting Period field.

The screen will display any subject records that a student currently has.

**Note:** As of FY11 and beyond, the CTAE Concentrator column was removed from the display.

	Local Classroom Code ^	Course Start Date	Course Stop Date	HS-CreditEarned	HS-CreditAmount
X	OGHS-069-07			P	0.00
X	OGHS-121-05			P	0.00
X	OGHS-143-03			P	0.00
X	OGHS-144-02			P	0.00
X	OGHS-166-04			P	0.00
X	OGHS-167-08			P	0.00
X	OGHS-182-01			P	0.00
X	OGHS-206-09			P	0.00

**Student Subject Record Screen**

**Reporting Period:** – Change EMIS reporting period in context.

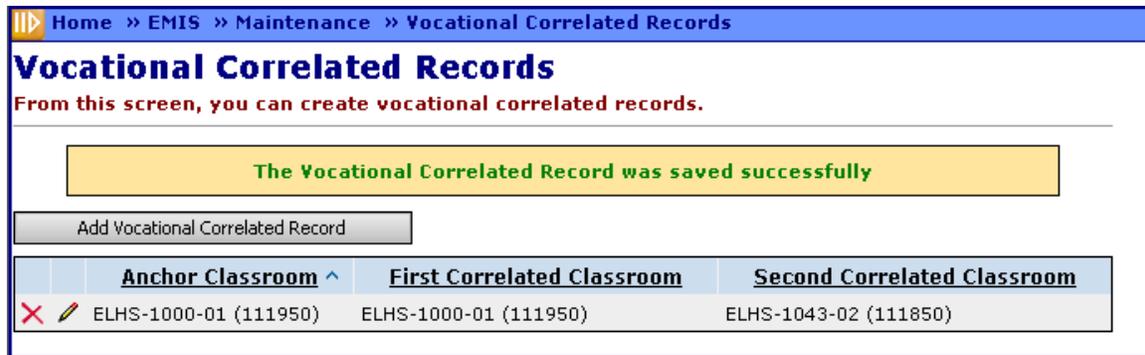
## Vocational Correlated Records

**Navigation:** Home – EMIS – Maintenance – Vocational Correlated Records

Home > EMIS > Maintenance	
<b>Maintenance</b>	
Please make a menu selection	
<a href="#">District and Building Information</a>	<a href="#">Student Staff Classroom</a>
<a href="#">Mapped Local Classroom Codes</a>	<a href="#">Student Subject Record</a>
<a href="#">Student Discipline Record</a>	<a href="#">Student Subject Record By Class</a>
<a href="#">Student Missing Override Record</a>	<a href="#">Teacher History Maintenance</a>
<a href="#">Student Non-graduate CORE Summary</a>	<a href="#">Vocational Correlated Records</a>
<a href="#">Student Program Record</a>	

**Vocational Correlated Records Menu Option**

From this screen, the user may access the Vocational Correlated Records. Vocational Correlated records are used by the CTE department of ODE to show the courses which tie together to create a vocational Program. These records are required for some vocational courses. All records will need to be added manually and are no longer reporting period specific. Once a record is added, it is used for Period N also. The values for each of the three fields use the local classroom codes created by the CTRMEMIS/CLISEMIS process. Once CTRMEMIS/CLISEMIS has been processed in Update mode, the correlated records drop-down lists will be populated from the Listing of local classroom codes in EMIS Maintenance – Student Staff Classroom records.

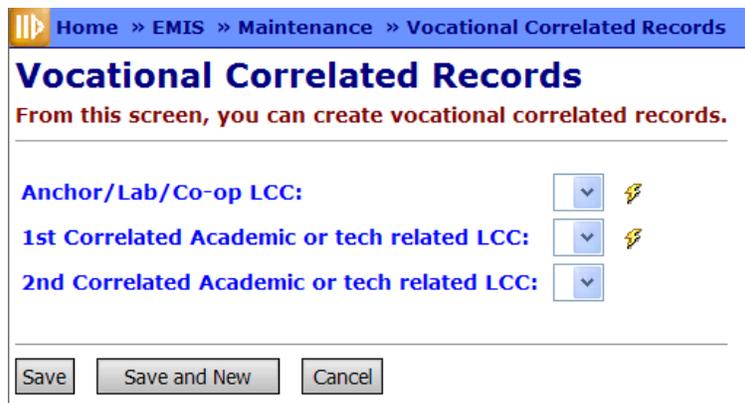


Vocational Correlated Records Screen

This page has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Add Vocational Correlated Record** – Add a new Vocational Correlated Record.

## Add/Edit Vocational Correlated Record

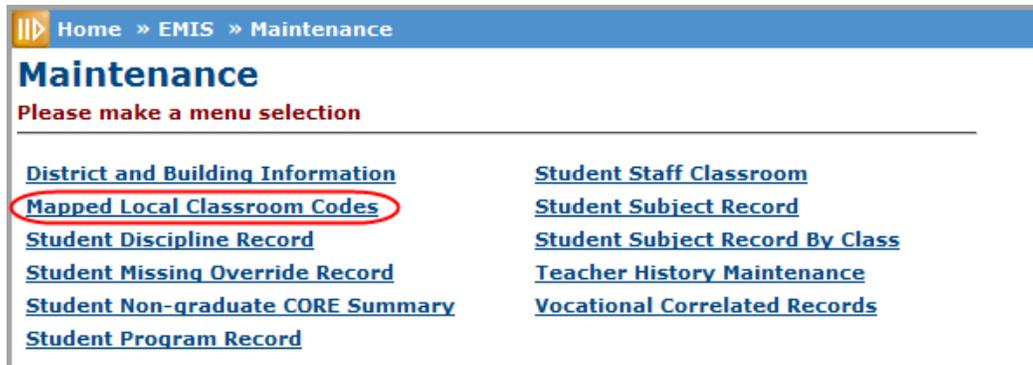


Add/Edit Vocational Correlated Records Screen

**Note:** Only courses with the allowable Curriculum value, according to the EMIS manual, will be available in the drop-down lists.

## Mapped Local Classroom Codes

Navigation: Home – EMIS – Maintenance – Mapped Local Classroom Codes

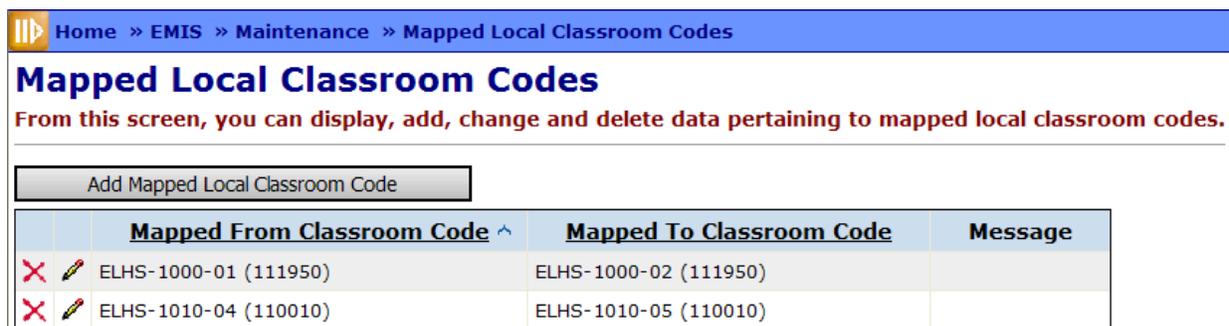


### Mapped Local Classroom Codes Menu Option

The Mapped Local Classroom Codes record allows a district to map (combine) the students from a specific class into another class. Mapping means combining (merging) students from two or more classes in EMIS to look like a single class.

**Note:** *CTRMEMIS is not using the mapping records when creating staff classroom and student subject records. CTRMEMIS must first be processed in update mode before creating mapping records.*

When the user first navigates to the screen, a check that CTRMEMIS has been run is performed to ensure that Student Staff Classroom records exist for the district in context. If the records do not exist, an error message (Student Staff Classroom records do not exist for the current reporting period. CTRMEMIS must be run for the current reporting period before Mapped Local Classroom Code Records can be maintained.) displays.



### Mapped Local Classroom Codes Screen

This page has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Add Mapped Local Classroom Code** – Add a new Mapped Local Classroom Code Record. Please note that as of DASL v10.3, Mapped Local Classroom Codes will no longer require that mapped courses be in the same building. However, it will require them to have the same Building IRN.

Home » EMIS » Maintenance » Mapped Local Classroom Codes

## Mapped Local Classroom Codes

From this screen, you can display, add, change and delete data pertaining to mapped local classroom codes.

Mapped From Classroom Code:   

Mapped To Classroom Code:   

### Add Mapped Local Classroom Code SScreen

**Mapped From Classroom Code** (required) – Select the classroom code from which students will be mapped.

**Mapped To Classroom Code** (required) – Select the classroom code to which students will be mapped.

The students that are reported in the Mapped from Local Classroom Code field will be mapped (moved to the “Mapped To Local Classroom Code” and for EMIS reporting will no longer exist in the Mapped From Local Classroom Code field.

In order to map classes together, both classes must have the same values in the following elements:

- Subject Code
- Curriculum Element
- Employee ID
- Delivery Method
- Educational Option
- Student Population

Only classes with a Semester Code of “1”, “2” or “3” will be eligible to be included in the mapping process.

## Types of Mapping

There are two types of mapping which can be accomplished using the “mapping process.”

- Mapping two classes from the same semester
- Mapping first and second semester classes together

The mapping process will automatically determine which type of mapping is used based on the semester code of both classes.

## Mapping Two Classes from the Same Semester

This type of mapping is used to combine two classes from the same semester which should be reported as one class. For example, juniors and seniors were scheduled separately for a class which is truly one class (taught by the same teacher during the same period), the classes should be reported as a single class. If a student is enrolled in both classes then the student is only included once in the combined class.

## Mapping First and Second Semester Classes Together

This form of mapping may be used when a school district schedules a year long class in two parts (a first and a second semester class). For Vocational Education, some of these classes are required to be reported as a single all year class. A first and a second semester class may be mapped together for reporting to ODE. When this occurs, the mapping process will automatically combine the classes and convert the class into an "All Year" class. The length of scheduled instruction from both classes will be added together and used for the "All Year" class. Students which are enrolled in both the first and second semester classes will only be included once in the combined class.

## Combinations

It is possible to do combinations of the above mappings with a set of classes. For instance, it may be necessary to combine two first semester classes into one class, also combine two second semester classes into one class, and then map the combined classes into a single all year class. In this type of situation the district should map all first semester classes into one class and all second semester classes into one class then map the one first semester class into the one second semester class. A class can only appear once as a "From" class. However, a class can appear multiple times in the "To" field, and a class that has been mapped into can also be mapped to another class.

## Student Non-graduate CORE Summary

Navigation: Home – EMIS – Maintenance – Student Non-graduate CORE Summary

The screenshot shows a web application interface for EMIS Maintenance. At the top, there is a breadcrumb trail: Home » EMIS » Maintenance. Below this is the title 'Maintenance' and a prompt 'Please make a menu selection'. A list of menu items is displayed in two columns. The item 'Student Non-graduate CORE Summary' is circled in red. The other menu items include District and Building Information, Mapped Local Classroom Codes, Student Discipline Record, Student Missing Override Record, Student Program Record, Student Staff Classroom, Student Subject Record, Student Subject Record By Class, Teacher History Maintenance, and Vocational Correlated Records.

Student Non-Graduate CORE Summary Menu Option

The Student Non-graduate CORE Summary screen allows a user to add, change, or delete the EMIS GC-Student Graduation-CORE Summary records for students in grades 9 and above, reportable in Period K. The CORE Summary records are used to report the CORE Subject Areas in which a student has earned graduation credits/units. Each CORE Subject Area may only appear once for a student. The Student Non-graduate CORE Summary data is populated based on the CORE values in the student’s manual course history records and courses they have taken in the district.

The Student Non-graduate CORE Summary screen is only for students in grades 9 - 12 for Period K reporting. The CORE records for summer graduates and students who graduated with their class in the spring are located under EMIS – Graduate Reporting (G) – Student Graduate CORE Summary Maint.

Home » EMIS » Maintenance » Student Non-graduate CORE Summary

### Student Non-graduate CORE Summary

From this screen, you can display, add, change and delete data pertaining to student CORE Summary records.

Add CORE Summary Record

		CORE Area Code ^	CORE Area	CORE Count
X	✎	ENG	English Language Arts Units	2.00
X	✎	FAR	Fine Arts Units	2.00
X	✎	FLR	Foreign Language Units	2.00
X	✎	MTA	Mathematics - Algebra II or Equivalent Units	1.00
X	✎	MTO	Mathematics Units Other than Algebra II or Equivalent	2.00
X	✎	PHE	Physical Education Units	0.75
X	✎	SCA	Science - Advanced Science units	2.00
X	✎	SCO	Science units Other than Physical, Life, or Advanced Science	1.00
X	✎	SOH	Social Studies - American History units	2.00
<b>Total:</b>				<b>14.75</b>

**Student Non-Graduate CORE Summary Screen**

This page has standard add record, edit record and delete record controls. Refer *ProgressBook StudentInformation General Use Guide* for more information.

**Add CORE Summary Record** – Add a new CORE Summary Record.

## Add CORE Summary Record

Home » EMIS » Maintenance » Student Non-graduate CORE Summary

### Student Non-graduate CORE Summary

From this screen, you can display, add, change and delete data pertaining to student CORE Summary records.

CORE Subject Area:

Total Credits/Units Carried:

Save Save and Row Cancel

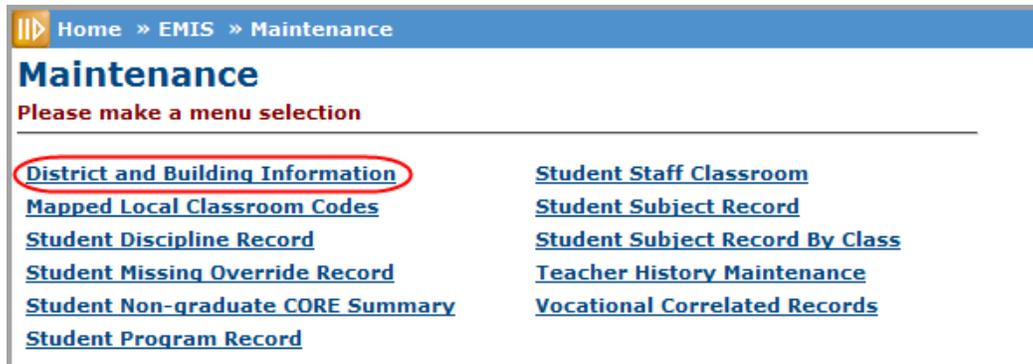
**Add Student Non-Graduate CORE Summary Screen**

**Core Subject Area** (required) – Select the Core Subject Area from the drop-down list.

**Total Credits / Units Earned** (required) – Enter the total credits/units earned for this CORE Subject Area. Each CORE Subject Area may only appear once for a student.

## District and Building Information

Navigation: Home – EMIS – Maintenance – District and Building Information



### District and Building Information Menu Option

The District and Building Information menu is used to enter the following District and Building EMIS records:

- **Grade Schedule (DL)** – Periods K, N
- **District Testing – Yearend (DT)** – Period N
- **Organization General Information (DN)** – Periods K, N

See sections 5.1, 5.2, 5.3, and 5.4 in the *EMIS Manual* for the specific requirements and elements for each of these records.

	Building IRN	State Grade Code	Attendance Pattern Code	First Day of School	Last Day of School	Hours Per Day	Annual Hours in Session	Annual Days in Session	Date of Spring Administration - Math Test
✗	010199	09	N/A	09/06/2011	05/31/2012	7.00	0	180.00	N/A
✗	010199	10	N/A	09/06/2011	05/31/2012	0.00	0	180.00	3/29/2012
✗	036350	KG	HE	09/06/2011	05/31/2012	4.00	0	175.00	N/A
✗	036350	PS	HO	09/05/2011	05/29/2012	4.00	0	172.00	N/A

### District and Building Information Screen

## Grade Schedule (DL)

Home » EMIS » Maintenance » District and Building Information Advanced

### District and Building Information

From this screen, you can update your District and Building Information.

Reporting Period:  Changing the reporting period will adjust the tabs and data accordingly.

Building Grade Schedule (DL) | District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Building IRN:

State Grade Code:

Attendance Pattern Code:

First Day Of School:

Last Day Of School:

Hours Per Day:

Annual Days in Session:

Save a blank date to report the Date of Spring Administration Math Test as "000000".

Date of Spring Administration Math Test:

Only community schools whose contracts are in hours, not days, should report the Annual Hours in Session.

Annual Hours in Session:

### Building Grade Schedule (DL) Tab on District and Building Information Screen

The **Building Grade Schedule – (DL)** tab correlates to the Grade Schedule Record (DL). Users can add, edit and delete district and grade level records. Users can add records for any building in the school district. Information saved in reporting period K is not available in reporting period N. Information saved in reporting period N is not available in reporting period K. All necessary grade levels and information associated with each must be added. See sections 5.1 and 5.2 in the *EMIS Manual* for the specific requirements and elements for this record.

Click **Add New** to add a (DL) record.

### Copy Grade Schedule (DL) Records to Period N

If “N” is selected in the Reporting Period field on the District and Building Information screen, the Copy records from reporting period K button displays which enables you to copy Building Grade Schedule (DL) records from period K to period N.

**District and Building Information**  
From this screen, you can update your District and Building Information.

Reporting Period: N  Changing the reporting period will adjust the tabs and data accordingly.

Building Grade Schedule (DL) | District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Add New

	Building IRN	State Grade Code	Attendance Pattern Code	First Day of School	Last Day of School	Hours Per Day	Annual Hours in Session	Annual Days in Session	Date of Spring Administration - Math Test
X	020552	KG	FE	09/03/2012	05/31/2013	6.00	0	250.00	N/A
X	020552	KG	FE	05/01/2012	05/31/2012	6.00	0	30.00	N/A

### Copy records from reporting period K Button on District and Building Information Screen

To copy DL records to period N:

1. Click **Copy records from reporting period K**.

At the top of the screen, the following message displays: "Are you sure you want to copy records from reporting period K?"

**District and Building Information**  
From this screen, you can update your District and Building Information.

**Are you sure you want to copy records from reporting period K?**  
Records will be copied over from reporting period K for those records which currently do not exist. Existing records will remain unchanged.

Reporting Period: N  Changing the reporting period will adjust the tabs and data accordingly.

Building Grade Schedule (DL) | District Testing - Year End (DT) | District Organization Info (DN) | Building Organization Info (DN)

Add New

	Building IRN	State Grade Code	Attendance Pattern Code	First Day of School	Last Day of School	Hours Per Day	Annual Hours in Session	Annual Days in Session	Date of Spring Administration - Math Test
X	020552	KG	FE	09/03/2012	05/31/2013	6.00	0	250.00	N/A
X	020552	KG	FE	05/01/2012	05/31/2012	6.00	0	30.00	N/A

### Confirmation Message on District and Building Information Screen

2. Click **Ok**.

When the following message displays, the DL records from Period K have been successfully copied to Period N: "Records have been copied from reporting period K successfully."

## District Testing – Yearend – (DT)

**District and Building Information**  
 From this screen, you can update your District and Building Information.

Reporting Period: N Changing the reporting period will adjust the tabs and data accordingly.

Building Grade Schedule (DL) | 
 **District Testing - Year End (DT)** | 
 District Organization Info (DN) | 
 Building Organization Info (DN)

Grade Level Assessed: First Grade

Local Assessment Number: 1

Number Of Students Taking Assessment: 2

Assessed Students With Disabilities Headcount: 3

Administered with Accommodations/Modifications: Yes, Accommodations were available

Accommodations/Modifications Headcount: 2

Alternate Assessments Provided: Yes, Alternate Assessments Were Available

Alternate Assessment Headcount: 1

Save Cancel

### District Testing - Year End (DT) Tab on District and Building Information Screen

The **District Testing - Year End – (DT)** tab correlates to the District Testing – Yearend Record (DT). Users can add, edit and delete district testing records; however the District Testing – Year End (DT) tab is available only in reporting period N. See sections 5.1 and 5.4 in the *EMIS Manual* for the specific requirements and elements for each of these records.

Click **Add Information** above the District Testing - Year End (DT) grid to add a (DT) record.

## District Organization Information (DN) – Period K

Home » EMIS » Maintenance » District and Building Information Advanced

### District and Building Information

From this screen, you can update your District and Building Information.

Reporting Period:   Changing the reporting period will adjust the tabs and data accordingly.

**Information Technology Center Group**

Reporting ITC IRN:

**Student Group**

Date student is required to be five years old to be admitted into kindergarten:

Count of home schooled resident students:

Amount of time a student is required to attend district to be eligible for extracurricular activities:

Count of resident and non-resident nonpublic students within district boundaries eligible for special education services but not being served by the district:

**Preschool Special Education Agreements**

IRN of entity providing Preschool Special Ed Services that district has authorized ODE to transfer funds to:

IRN of entity providing Preschool Special Ed Services that district has NOT authorized ODE to transfer funds to:

**District Transportation**

Count of qualified riders:

Miles students are transported:

**District Organization Info (DN) Tab on District and Building Information Screen for Period K**

## District Organization Information (DN) – Period N

Home >> EMIS >> Maintenance >> District and Building Information

### District and Building Information

From this screen, you can update your District and Building Information.

Reporting Period: N

Building Grade Schedule (DL) | District Testing - Year End (DT) | **District Organization Info (DN)** | Building Organization Info (DN)

Information Technology Center Group

Reporting ITC IRN: 086504 - TCCSA

Student Group

Count of resident and non-resident nonpublic students within district boundaries evaluated and determined ineligible for special education services:

Count of preschool transition conferences held by 3rd birthday, no disability suspected, no additional evaluation:

Count of preschool transition conferences held after 3rd birthday, no disability suspected, no additional evaluation:

Local Wellness Policy

Local Wellness Policy:

Comprehensive Eye Exams

Number of students with an IIEP written within the stated timeframe:

Number of students with an IIEP written within the stated timeframe who received an eye exam within three months of beginning services:

Number of students with an IIEP written within the stated timeframe who received an eye exam more than three months after beginning services:

Number of students with an IIEP written within the stated timeframe who received an eye exam within nine months immediately prior to being identified with disabilities:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to withdrawing within three months of beginning services:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the student's hospitalization:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to parent refusal:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to the lack of a conveniently available provider:

Number of students with an IIEP written within the stated timeframe who have not received an eye exam and are still within three months of beginning services:

Number of students with an IIEP written within the stated timeframe who did not receive an eye exam due to a reason not accounted for by another attribute name:

### District Organization Info (DN) Tab on District and Building Information Screen for Period N

The **District Organization Info – (DN)** tab correlates to the Organization General Information Record (DN). Different fields display on the District Organization Info (DN) tab depending on the reporting period. Information saved in reporting period K is not available in reporting period N and information saved in reporting period N is not available in reporting period K. See sections 5.1 and 5.2 in the *EMIS Manual* for the specific requirements and elements for each of these records.

## Building Organization Information (DN) – Period K

Home » EMIS » Maintenance » District and Building Information Advanced Search | F

### District and Building Information

From this screen, you can update your District and Building Information.

Reporting Period:   Changing the reporting period will adjust the tabs and data accordingly.

School:

**Count Week Days Group**

Please enter one character for each day of count week. Indicate "Y" for open or "N" for closed. Example: "YYYYY" indicates open all week.

Count Week Days Open:

**Feeder School Group**

Feeder School:

**Teacher Group**

Professional Teacher Meetings FTE:  Parent/Teacher conference FTE:

Only community schools whose contracts are in hours, not days, should report the Professional Teacher Meetings hours and the Parent/Teacher conference hours.

Professional Teacher Meetings hours:  Parent/Teacher conference hours:

**SIG Time Extended Group**

Increased learning time by extending the school year:

Increased learning time by extending the school day:

Increased learning time in before and after school settings:

Increased learning time on the week end:

Increased learning time in summer school:

Increased learning time in some other time frame not listed above:

**Free and Reduced Price Lunch**

Free Lunch count:

Reduced Lunch count:

**Building Organization Info (DN) Tab on District and Building Information Screen for Period K**

## Building Organization Information (DN) – Period N

Home » EMIS » Maintenance » District and Building Information Advanced Search | Feedback

### District and Building Information

From this screen, you can update your District and Building Information.

Reporting Period: N  Changing the reporting period will adjust the tabs and data accordingly.

School:

**Feeder School Group**

Feeder School:

**Teacher Group**

Professional Teacher Meetings FTE:  Parent/Teacher conference FTE:

Only community schools whose contracts are in hours, not days, should report the Professional Teacher Meetings hours and the Parent/Teacher conference hours.

Professional Teacher Meetings hours:  Parent/Teacher conference hours:

**Calamity Group**

Calamity days taken:  Calamity days made up:

Shortened days due to weather:  Shortened days, non-weather:

**First Day Next Year Group**

First Day Next Year:

**PE Performance Measures**

Enter counts for grade bands that are needed. Enter zeroes for the remaining fields in the grade band if no values apply.  
Only enter a value for "total students not applicable" if a building in the district includes one or more of the grades in a band, but the students are not evaluated at that building.

KG-02 Total students scoring limited:	<input type="text"/>	06-08 Total students scoring limited:	<input type="text"/>
KG-02 Total students scoring proficient:	<input type="text"/>	06-08 Total students scoring proficient:	<input type="text"/>
KG-02 Total students scoring advanced:	<input type="text"/>	06-08 Total students scoring advanced:	<input type="text"/>
KG-02 Total students not evaluated:	<input type="text"/>	06-08 Total students not evaluated:	<input type="text"/>
KG-02 Total students not applicable:	<input type="text"/>	06-08 Total students not applicable:	<input type="text"/>

03-05 Total students scoring limited:	<input type="text"/>	09-12 Total students scoring limited:	<input type="text"/>
03-05 Total students scoring proficient:	<input type="text"/>	09-12 Total students scoring proficient:	<input type="text"/>
03-05 Total students scoring advanced:	<input type="text"/>	09-12 Total students scoring advanced:	<input type="text"/>
03-05 Total students not evaluated:	<input type="text"/>	09-12 Total students not evaluated:	<input type="text"/>
03-05 Total students not applicable:	<input type="text"/>	09-12 Total students not applicable:	<input type="text"/>

**SIG Time Extended Group**

Increased learning time by extending the school year:

Increased learning time by extending the school day:

Increased learning time in before and after school settings:

Increased learning time on the week end:

Increased learning time in summer school:

Increased learning time in some other time frame not listed above:

**Free and Reduced Price Lunch**

Free Lunch count:

Reduced Lunch count:

### Building Organization Info (DN) Tab on District and Building Information Screen for Period N

The **Building Organization Info – (DN)** tab correlates to the Organization General Information Record (DN). Different fields display on the Building Organization Info (DN) tab depending on the reporting period. See sections 5.1 and 5.3 in the *EMIS Manual* for the specific requirements and elements for this record.

## Teacher History Maintenance

### Navigation: Home – EMIS – Maintenance – Teacher History Maintenance

The Teacher History Maintenance screen enables you to mass update the teacher history records for course sections using the described functions on the following three tabs:

- **Start and Stop Dates** – Changes the start or stop date of the teacher history records for the selected building(s).
- **Wipe And New** – Deletes the existing teacher history records and creates new teacher history records for the course sections in the selected building(s). You can only run the Wipe And New process for buildings in which the schedule has been finalized.
- **Add Missing** – Adds teacher history records for any course sections that do not have a teacher history record for the selected building(s). You can only run the Add Missing process for buildings in which the schedule has been finalized.

If a district is in context, all three tabs list the buildings in the district, and you can select the building(s) for which you want to run the process. To select all of the buildings, select the check box in the heading column of the grid.

Click to select all schools.

<input type="checkbox"/>	Building Name	Last Updated Date	Last User
<input type="checkbox"/>	001081 - ASHLAND HIGH SCHOOL		
<input type="checkbox"/>	001099 - ASHLAND MIDDLE SCHOOL		
<input type="checkbox"/>	010025 - EDISON ELEMENTARY SCHOOL		
<input type="checkbox"/>	020552 - LINCOLN ELEMENTARY	7/24/2012 5:17:00 PM	EmhoffH
<input type="checkbox"/>	025395 - MONTGOMERY ELEMENTARY SCHOOL		
<input type="checkbox"/>	028811 - OSBORN ELEMENTARY SCHOOL		
<input type="checkbox"/>	036806 - TAFT ELEMENTARY SCHOOL		

Start Date to Change:   New Start Date:

Stop Date to Change:   New Stop Date:

Teacher History Maintenance Screen

If a building is in context, all three tabs list only the building in context, and the building is automatically selected, as shown in the following figure.

**Teacher History Maintenance**  
 From this screen, you can adjust teacher history records.

Start and Stop Dates    Wipe And New    Add Missing

<input checked="" type="checkbox"/>	Building Name	Last Updated Date	Last User
<input checked="" type="checkbox"/>	020552 - LINCOLN ELEMENTARY	7/24/2012 5:17:00 PM	EmhoffH
<input type="checkbox"/>			

Start Date to Change: 8/26/2011    New Start Date: 8/13/2011  
 Stop Date to Change:    New Stop Date:   

Submit

**Start and Stop Dates Tab on the Teacher History Maintenance Screen**

**Note:** Once you have completed the Start and Stop Dates, Wipe And New and/or Add Missing processes, you must run the Verify/Update - Course and Class List feature to update the EMIS CU records. See [“Course & Class List \(CLISEMIS/CTRMEMIS\)”](#).

## Modify Teacher History Start and Stop Dates

The Start and Stop Dates tab enables you to mass update the Start Date and/or Stop Date fields on the Teacher History tab of any course sections matching the value entered in the Start Date to Change field and/or Stop Date to Change fields.

1. On the Start and Stop Dates tab on the Teacher History Maintenance screen, select the school(s) for which you want to change the teacher history records.

**Note:** If a building is in context, the building is already selected.

2. Enter the date you want to modify for all of the teacher course history records in the Start Date to Change and/or Stop Date to Change fields.
3. Enter the date to which you want to change all of the teacher history records in the New Start Date and/or New Stop Date fields.

**Note:** Only complete the field for which you entered a date in the corresponding ...to Change field. For example, if you only entered a date in the Start Date to Change field, then you only need to enter a date in the New Start Date field. You do not have to modify both the Start Date and Stop Date fields when you run this process.

#### 4. Click **Submit**.

StudentInformation changes all of the teacher course history records for the date you entered in the Start Date to Change and/or Stop Date to Change field to the date you entered in the New Start Date and/or New Stop Date field. Once the process is complete, a message at the top of the page that indicates the number of teacher history records that were updated or, if none, the message indicates that no teacher history records were updated.

## Recreate Teacher History Records

The Wipe and New process deletes all of the existing teacher history records and creates new teacher history records for the selected building(s). Any course section with missing meeting times is not updated through this process. Once the meeting times information has been added to a course section, you can then run the Add Missing process to create teacher history records for course sections without a teacher history record.

You can only run the Wipe and New process for buildings in which the schedule has been finalized. The Finalized Schedule column indicates whether or not the schedule has been finalized for the building:

- A green check indicates that the schedule has been finalized.
- A red exclamation point indicates that the schedule has not been finalized.

Indicates whether or not the schedule has been finalized.

**Teacher History Maintenance**  
From this screen, you can adjust teacher history records.

Start and Stop Dates    **Wipe And New**    Add Missing

<input type="checkbox"/>	Building Name	Finalized Schedule	Last Updated Date	Last User
<input type="checkbox"/>	001081 - ASHLAND HIGH SCHOOL	✔		
<input type="checkbox"/>	001099 - ASHLAND MIDDLE SCHOOL	✔		
<input type="checkbox"/>	010025 - EDISON ELEMENTARY SCHOOL	✔		
<input type="checkbox"/>	020552 - LINCOLN ELEMENTARY	✔	7/25/2012 12:03:00 PM	EmhoffH
<input type="checkbox"/>	025395 - MONTGOMERY ELEMENTARY SCHOOL	✔		
<input type="checkbox"/>	028811 - OSBORN ELEMENTARY SCHOOL	✔		
<input type="checkbox"/>	036806 - TAFT ELEMENTARY SCHOOL	✔	7/25/2012 12:51:00 PM	EmhoffH

Building has a finalized schedule = ✔

Wipe And New

### Wipe And New Tab on Teacher History Maintenance Screen

1. On the Wipe And New tab on the Teacher History Maintenance screen, select the school(s) for which you want to recreate the teacher history records.

**Note:** If a building is in context, the building is already selected.

## 2. Click **Wipe And New**.

When the Wipe And New process is completed, StudentInformation displays a message at the top of the page that indicates the number of teacher history records that were created.

## Add Missing Records

The Add Missing process adds teacher history records for any course sections that do not have a teacher history record for the selected building(s). The Add Missing process will not create teacher history records for course sections with missing meeting times.

You can only run the Add Missing process for buildings in which the schedule has been finalized. The Finalized Schedule column indicates whether or not the schedule has been finalized for the building:

- A green check indicates that the schedule has been finalized.
- A red exclamation point indicates that the schedule has not been finalized.

Indicates whether or not the schedule has been finalized.

**Teacher History Maintenance**  
From this screen, you can adjust teacher history records.

Start and Stop Dates | **Wipe And New** | **Add Missing**

<input type="checkbox"/>	Building Name	Finalized Schedule	Last Updated Date	Last User
<input type="checkbox"/>	001081 - ASHLAND HIGH SCHOOL	✓		
<input type="checkbox"/>	001099 - ASHLAND MIDDLE SCHOOL	✓	10/23/2012 9:01:00 AM	munyonc
<input type="checkbox"/>	010025 - EDISON ELEMENTARY SCHOOL	!		
<input type="checkbox"/>	020552 - LINCOLN ELEMENTARY	!		
<input type="checkbox"/>	025395 - MONTGOMERY ELEMENTARY SCHOOL	!		
<input type="checkbox"/>	028811 - OSBORN ELEMENTARY SCHOOL	!		
<input type="checkbox"/>	036806 - TAFT ELEMENTARY SCHOOL	!		

Building has a finalized schedule = 1 ✓

Add Missing

### Add Missing Tab on Teacher History Maintenance Screen

1. On the Add Missing tab on the Teacher History Maintenance screen, select the school(s) for which you want to create new teacher history records.

**Note:** If a building is in context, the building is already selected.

2. Click **Add Missing**.

When the Add Missing process is completed, StudentInformation displays a message at the top of the page that indicates the number of teacher history records that were created, or if none, the message indicates that no teacher history records were created.

## Student Missing Override Record

### Navigation: Home – EMIS – Maintenance – Student Missing Override Record

The **Student Missing Override Record** screen enables you to enter the information for students who were withdrawn in a prior year but were not reported as withdrawn in period N. You can then run the Transfer - Student Override Record (FC) process to create the FC transfer file for EMIS reporting. For more information, see [“Transfer - Student Missing Override Record \(FC\).”](#)

The **Student Missing Override Record** screen only displays the missing override records entered in the school year in context.

**Note:** This screen does not validate against records in StudentInformation; you can enter records for students who are not enrolled in the current school year.

	Reporting Period	SSID	Student Last Name	Student First Name	Withdrawal Date	Withdrawal Reason	Comment
X	K	NM824507	Kenobi	Ben	Oct 24, 2012	41 - Transferred to Another Ohio School District	
X	N	XL1021230	Willis	Connie	Jan 04, 2013	74 - Moved	

Student Missing Override Record Screen

## Add a Student Missing Override Record

1. On the **Student Missing Override Record** screen, click **Add Student Missing Override Record**.

The **Add/Edit Student Missing Override Record** screen displays.

Home » EMIS » Maintenance » Student Missing Override Record

### Student Missing Override Record

From this screen, you can display, add, edit and delete data pertaining to student missing override records.

Add Student Missing Override Record

Report in Reporting Period: K

SSID: GX201923

Student Last Name: Joy

Student First Name: Laura

Withdrawal Date: 11/1/2012

Withdrawal Reason: 41 - Transferred to Another Ohio School District

Comment:

Save Save And New Cancel

Add/Edit Student Missing Override Record Screen

2. In the **Report in Reporting Period** drop-down list, select the EMIS reporting period in which you want to report the student, if applicable.

*Note: The Report in Reporting Period drop-down list defaults to the reporting period currently set as live for the district.*

3. In the **SSID** field, enter the student's State Student ID.
4. In the **Student Last Name** field, enter the student's last name.
5. In the **Student First Name** field, enter the student's first name.
6. In the **Withdrawal Date** field, enter the date the student was withdrawn from the district.
7. In the **Withdrawal Reason** drop-down list, select the reason the student was withdrawn from the district.
8. In the **Comment** field, enter a comment about the withdrawal, if desired.
9. Click **Save** to save the record and return to the Student Missing Override Record screen, or click **Save and New** to save the record and create another missing override record for a student.

The following message displays: "The student missing override was successfully saved."

## Edit a Student Missing Override Record

1. On the **Student Missing Override Record** screen, click the edit icon in the row of the record you want to modify.

The **Add/Edit Student Missing Override Record** screen displays.

2. You can perform any of the following tasks:
  - Modify the EMIS reporting period in which you want to report the student in the **Report in Reporting Period** drop-down list.
  - Modify the State Student ID in the **SSID** field.
  - Modify the student's last name in the **Student Last Name** field.
  - Modify the student's first name in the **Student First Name** field.
  - Modify the date the student was withdrawn from the district in the **Withdrawal Date** field.
  - Modify the reason the student was withdrawn from the district in the **Withdrawal Reason** drop-down list.
  - Modify the comment in the **Comment** field.
3. Click **Save** to save the record and return to the Student Missing Override Record screen, or click **Save and New** to save the record and create another missing override record for a student.

The following message displays: "The student missing override was successfully saved."

## Delete a Student Missing Override Record

1. On the **Student Missing Override Record** screen, click the delete icon in the row of the record you want to delete.

The deletion confirmation message displays.

**Student Missing Override Record**

*From this screen, you can display, add, edit and delete data pertaining to student missing override records.*

---

**Are you sure you want to delete this Student Missing Override record?**

Reporting Period: N  
Student: XL1021230 - Willis, Connie  
Withdrawal Reason: 74 - Moved

---

### Deletion Confirmation Message

2. Click **Ok**.

The following message displays: "The selected student missing override was deleted successfully."

## Transfer - Student Missing Override Record (FC)

The Student Missing Override Record (FC) transfer creates the transfer file for the records entered on the **Student Missing Override Record** screen for the district in the school year in context.

Home » EMIS » Verify/Update and Transfer

### EMIS - Create Flat Files - Select Files

From this screen, you can verify, update, and transfer EMIS re

Request Type | Program Selection

Reporting Period: N (Live) ▼

Select all transfers

- Transfer - Course Master
- Transfer - Student Acceleration (FB)
- Transfer - Student Assessment (FA)
- Transfer - Student Course (GN)
- Transfer - Student Dem/Stand/Att (FD, FN, FS, GI, GJ)
- Transfer - Student Discipline (GD)
- Transfer - Student Gifted Education (GG)
- Transfer - Student Missing Override Record (FC)
- Transfer - Student Proficiency
- Transfer - Student Program (GQ)
- Transfer - Student Special Ed. Graduation Requirement (FE)
- Transfer - Student Special Education (GE)
- Transfer - Vocational Correlated Records (CV)

Transfer Type:

- Transfer to Alpha
- Flat file transfer
- Flat file transfer for Data Collector

< Back | Submit | Cancel

**Transfer - Student Missing Override Record (FC) Option**

StudentInformation generates the Student Missing Override Record (FC) transfer file in the format shown in the following figure.

Record Type	School Year	District IRN	State Student ID	Withdrawal Date	Withdrawal Reason Code
FC	2013K	048462	GX201923	20121101	41
FC	2013K	048462	NM824507	20121024	41

**Student Missing Override Record (FC) Transfer File Layout**

# Student Special Education

**Navigation: Home – SIS – Student – Special Education – Special Education**

The Special Education screen is used to track Special Education Event, Graduation Requirement and Service records for students. The records are then reported to the state for EMIS reporting purposes.

## Events Tab

	Event Date	Date Type	Start Date	End Date	IEP Test Type	Secondary Planning	Outcome ID	Non-Compliance ID	Event	Last Modified	Active
	May 03, 2012	RIEP	May 03, 2012	May 02, 2013	ALT	TPCE	IE16 - Public Separate School	** - Not Applicable		06/13/2012 11:30 AM By User: bokersch	
	Sep 16, 2011	RIEP	Sep 16, 2011	Sep 15, 2012	ALT	TPCE	IE16 - Public Separate School	** - Not Applicable		11/21/2011 10:32 AM By User: rabennet	

### Special Education Screen

This screen has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

Records on this screen are not deleted, but are inactivated instead. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Last Modified** – Date and time a user last added a new record or deleted or modified an existing record.

**by User** – User who last added a new record or deleted or modified an existing record.

**Sorting** – You may sort by any column (Event Date, Date Type, Start Date, End Date, IEP Test Type, Secondary Planning, Outcome ID Non-Compliance ID and Active) in ascending or descending order by clicking on the column header.

**From Date** (optional) – Enter a start date from which to filter Special Education Events.

**To** (optional) – Enter an end date to filter Special Education Events.

**Go** – Refresh the data grid, showing only Special Education Events within the specified date range.

– Active Special Education Event entry.

– Inactive Special Education Event entry.

**Show Current Year Only** – If checked, only Special Education Event entries from the current year will be displayed.

**Show Active Events Only** – If checked, will show only active Special Education Events; if not checked, will show both active and inactive Special Education Events.

**Add Event** – Add a new Special Education Event entry.

## Add Special Education Event

Home » SIS » Student » Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | Services

**Event Date:** 2/21/2012 ⚡

**Date Type:** TETR - Transfer Student ETR Adoption Date ⚡

**Outcome Id:** ET09 - Cognitive Disabilities (formerly Mental Retardation or Devel Handic) ⚡

**Outcome Begin Date:** 2/21/2012 ⚡

**Outcome End Date:** 5/11/2014 ⚡

**IEP Test Type:** \*\*\* - Not Applicable

**Secondary Planning:** \*\*\*\* - Not Applicable

**Non-Compliance Id:** \*\* - Not Applicable ⚡

**Event:**

Save Cancel

Events Tab on Special Education Screen

**Event Date** (required) – Enter the date the Special Education event occurred in MM/DD/YYYY format.

**Date Type** (required) – From the drop-down list, select the Date Type element for this Special Education event.

**Outcome Id** (required) – From the drop-down list, select the outcome of this Special Education event.

**Outcome Begin Date** (optional) – Enter the date on which the outcome of the event became effective in MM/DD/YYYY format.

**Outcome End Date** (optional) – Enter the last date on which the outcome of the event will be effective in MM/DD/YYYY format.

**IEP Test Type** (optional) – From the drop-down list, select the format of the test the student is required to take for all tests.

**Secondary Planning** (optional) – From the drop-down list, select the result of transition planning on the IEP for students age 14 and above.

**Non-Compliance ID** (required) – From the drop-down list, select the code identifier for the reason an event has not met federally mandated time lines.

**Event** (optional) – Enter the details of the Special Education event for this student.

Please see the ODE EMIS Manual, Chapter 2 for specifics on the Student Special Education record.

## Grad Requirement Tab

Home » SIS » Student » Special Education Advanced

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | **Grad Requirement** | Services

Add Requirement

		IEP Date ▾	Date Type	Assessment Area	Exemption Flag	Event Match	Last Modified	Active
✗	✎	May 03, 2012	RIEP	C	N	✔	10/15/2012 4:21 PM By User: EmhoffH	💡
✗	✎	May 03, 2012	RIEP	M	N	✔	10/15/2012 4:21 PM By User: EmhoffH	💡
✗	✎	May 03, 2012	RIEP	R	Y	✔	10/15/2012 4:21 PM By User: EmhoffH	💡
✗	✎	May 03, 2012	RIEP	S	N	✔	10/15/2012 4:21 PM By User: EmhoffH	💡
✗	✎	May 03, 2012	RIEP	W	Y	✔	10/15/2012 4:21 PM By User: EmhoffH	💡

Show Active Requirements Only    ✔ = Record has a matching IEP for date on Events tab.

### Grad Requirement Tab on Special Education Screen

This screen has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

Records on this screen are not deleted but are inactivated instead. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Last Modified** – Date and time a user last added a new record or deleted or modified an existing record.

**by User** – User who last added a new record or deleted or modified an existing record.

**Sorting** – You may sort by any column (IEP Date, Date Type, Assessment Area, Exemption Flag, Event Match and Active) in ascending or descending order by clicking on the column header.

💡 – Active Graduation Requirement entry

💡 – Inactive Graduation Requirement entry

**Show Active Requirements Only** – If checked, will show only active Graduation Requirements; if not checked, will show both active and inactive Graduation Requirements.

**Add Requirement** – Add a new Graduation Requirement entry.

## Add Student Special Ed Graduation Requirement Record

Home » SIS » Student » Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | **Grad Requirement** | Services

IEP Date: 9/29/2012

Date Type: RIEP - IEP Completion Date - Periodic Review

Assessment Area: M - Math

Exemption Flag: N - Not Exempt-student must achieve proficient level to graduate

Save Cancel

**Grad Requirement Tab on Special Education Screen**

**IEP Date** (required) – Enter the date the IEP was created in MM/DD/YYYY format.

**Date Type** (required) – From the drop-down list, select the Date Type element for this IEP.

**Assessment Area** (required) – From the drop-down list, select the assessment area of this IEP.

**Exemption Flag** (required) – Select if this student does or does not need to pass this IEP in order to graduate.

## Services Tab

Home » SIS » Student » Special Education

Advanced Search | Feedback | Mgmt | Help

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

Add Service

	Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
X	215011	Reader Services	May 15, 2012	May 14, 2013	MS BARBER	*****	10/15/2012 4:19 PM By User: EmhoffH
X	215002	Aide Services	May 05, 2012	May 04, 2013	MS BOWERS	*****	10/15/2012 4:19 PM By User: EmhoffH

**Services Tab on the Special Education Screen**

The Services tab on the Special Education screen enables you to assign Special Education services (215xxx codes) to the student. This screen has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Note:** The Services tab only displays on the Special Education screen if FY13 and later is in context. In prior years, you must enter the Special Education services on the Edit Student Memberships screen.

## Add Special Education Services

1. On the Services tab on the Special Education screen, click **Add Service**.  
The Add/Edit Services screen displays on the **Services** tab.

Home » SIS » Student » Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

Service: 215010 - Physical Therapy Services

Start Date: 8/24/2012

Stop Date: 5/31/2013

Staff Member: MS CLINE

Program Provider IRN: \*\*\*\*\*

Save Cancel

### Add/Edit Services Screen on the Services Tab

2. In the **Service** drop-down list, select the service you want to assign to the student.
3. In the **Start Date** field, enter the start date for the service. This field is required.
4. In the **Stop Date** field, enter the end date for the service.
5. In the **Staff Member** drop-down list, select the staff member associated to the service.
6. In the **Program Provider IRN** field, enter the IRN of the school or district where the student will receive the service. The value in this field is required and defaults to \*\*\*\*\*.

**Note:** Click  to open the Ohio Department of Education's Organization Search page where you can look up an IRN.

7. Click **Save**.

The new service displays in the grid on the **Services** tab.

Home » SIS » Student » Special Education Advanced Search | Feedback | Mgmt | Help | \

**Special Education**  
From this screen, you can display, add, change and delete Special Education records.

The Special Education Service was saved successfully

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to FY13 report to EMIS from the Memberships page.

Add Service

	Service Code	Service Name	Start Date	Stop Date	Staff Member	Prog Prov IRN	Last Modified
X	215010	Physical Therapy Services	Aug 24, 2012	May 31, 2013	MS CLINE	*****	10/15/2012 5:06 PM By User: EmhoffH
X	215011	Reader Services	May 15, 2012	May 14, 2013	MS BARBER	*****	10/15/2012 4:19 PM By User: EmhoffH
X	215002	Aide Services	May 05, 2012	May 04, 2013	MS BOWERS	*****	10/15/2012 4:19 PM By User: EmhoffH

**New Service on the Services Tab**

## Setting Special Education Service Defaults

The **Services Defaults** screen enables you to set up the default staff member and program provider IRN to display when a user selects a 215xxx service on the **Services** tab on the **Special Education** screen.

***Note:** You can only access this screen when a building is in context.*

The **Service Defaults** screen is located in the following path: Home > Management > School Administration > Service Defaults.

Home » Management » School Administration » Service Defaults Advanced Search | Fe

### Service Defaults

From this screen, you can display, and edit data pertaining to service defaults.

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	<input checked="" type="checkbox"/>
	215003	Attendant Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215004	Audiological Services	MS CARVER	***** - <input type="text"/>	<input checked="" type="checkbox"/>
	215006	Interpreter Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>

Home » SIS » Student » Special Education

### Special Education

From this screen, you can display, add, change and delete Special Education records.

Events | Grad Requirement | **Services**

Special Education Services (215xxx) prior to F13 report to EMIS from the Memberships page.

Service: 215002 - Aide Services

Start Date:

Stop Date:

Staff Member: MS BRADFORD

Program Provider IRN: 043505 - Ashland City SD

An example of how the service defaults enter the default value on the Services tab.

1. On the **Service Defaults** screen, click the **edit icon** in the row of the service for which you want to set the default staff member and program provider IRN.

The row you selected becomes active, which is indicated by the yellow highlighting.

**Note:** When you edit a service default, the record is automatically set as active, as indicated by the check box in the **Active** column.

Home » Management » School Administration » Service Defaults Advanced Search | Feedback | Mgmt | Help

### Service Defaults

From this screen, you can display, and edit data pertaining to service defaults.

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	<input checked="" type="checkbox"/>
	215003	Attendant Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215004	Audiological Services	MS CARVER	***** - <input type="text"/>	<input checked="" type="checkbox"/>
	215006	Interpreter Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>
	215007	Medical Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input checked="" type="checkbox"/>
	215008	Occupational Therapy Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="checkbox"/>

Active Row on the Services Defaults Screen

2. In the **Default Staff Member** column for the selected service, select the default staff member, if applicable.

- In the **Default Program Provider IRN** column, enter the default program provider's IRN.

**Note:** A value is required in this field.

- Click the green check icon to save the defaults for the service.

The following message displays: "The Service Default record was saved successfully."

Home » Management » School Administration » Service Defaults Advanced Search | Feedback | Mgmt | Help

**Service Defaults**  
From this screen, you can display, and edit data pertaining to service defaults.

The Service Default record was saved successfully

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services			
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	
	215003	Attendant Services			
	215004	Audiological Services	MS CARVER	*****	
	215006	Interpreter Services			
	215007	Medical Services	MS BRAY	043505 - Ashland City SD	
	215008	Occupational Therapy Services			

**Active Service Default on the Service Defaults Screen**

## Set a Service Default to Inactive

If you no longer want to apply default values to a particular special education service, you can set it as inactive.

- On the **Service Defaults** screen, click the **edit icon** in the row of the service you want to set as inactive.

The row you selected becomes active, which is indicated by the yellow highlighting.

- Deselect the check box in the **Active** column.

Home » Management » School Administration » Service Defaults Advanced Search | Feedback | Mgmt | Help

**Service Defaults**  
From this screen, you can display, and edit data pertaining to service defaults.

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services			<input type="checkbox"/>
	215002	Aide Services	MS BRADFORD	043505 - Ashland City SD	<input checked="" type="checkbox"/>
	215003	Attendant Services			<input type="checkbox"/>
	215004	Audiological Services	MS CARVER	*****	<input type="checkbox"/>
	215006	Interpreter Services			<input type="checkbox"/>
	215007	Medical Services	MS BRAY	043505 - Ashland City SD	<input type="checkbox"/>
	215008	Occupational Therapy Services			<input type="checkbox"/>

**Active Check Box on the Service Defaults Screen**

- Click the green check icon to save the defaults for the service.

The following message displays: “The Service Default record was saved successfully.”

The service default record is now inactive. The **Staff Member** and **Program Provider IRN** fields on the **Services** tab on the **Special Education** screen no longer default to the specified values when a user selects the modified service.

**Service Defaults**  
From this screen, you can display, and edit data pertaining to service defaults.

The Service Default record was saved successfully

	EMIS Program Code	Description	Default Staff Member	Default Program Provider IRN	Active
	215001	Adapted Physical Education Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215002	Aide Services	MS BRADFORD	043505  - Ashland City SD	
	215003	Attendant Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215004	Audiological Services	MS CARVER	*****  - <input type="text"/>	
	215006	Interpreter Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	
	215007	Medical Services	MS BRAY	043505  - Ashland City SD	
	215008	Occupational Therapy Services	<input type="text"/>	<input type="text"/> - <input type="text"/>	

**Deactivated Service Default on the Service Defaults Screen**

This page intentionally left blank.

# Power Withdraw

## Navigation: Management – Power Withdraw

Power Withdraw allows the user to perform a mass withdrawal of students from the district. A typical use will be withdrawing all graduated seniors. The Power Withdraw will update the selected students' District Withdraw Code and District Withdraw Date on the student's open FS-Standing record which is viewable via the Student Profile – FS Standing tab.

The screenshot shows the 'Power Withdraw' web application interface. At the top, there is a breadcrumb trail: 'Home » Management » Power Withdraw'. Below this is the title 'Power Withdraw' and a subtitle: 'This screen allows you to perform a mass withdrawal of students from the district.' The main form area contains several fields: 'School:' with a dropdown menu showing 'ASHS - ASHLAND HIGH SCHOOL'; 'Withdraw Reason:' with a dropdown menu showing '41 - Transfer to another Ohio Public School district'; 'Withdraw Date:' with a date picker showing '4/16/2012'; and 'Withdrawn to IRN:' with a dropdown menu showing '999999' and a text input field containing 'PSEO/Out of State/Private'. Below these fields is a 'Search Mode:' section with two radio buttons: 'Search Criteria' (selected) and 'Student Ids'. The 'Search Criteria' section includes several dropdown menus and text input fields: 'Grade Level:', 'Grade Next Year:', 'Home School IRN:', 'Homeroom:', 'Teacher:', 'Course Section:', 'Ad-Hoc Membership:' (with a dropdown menu and a 'Public And Private' checkbox), 'Membership Group:', 'Membership:', 'EMIS Situation:', and 'How Received:'. At the bottom right of the form, there is a checkbox labeled 'Students Selected by Default' and a 'Search' button.

**Power Withdraw Screen**

**School** (required) – Choose the school you wish to withdraw students from.

**Withdraw Reason** (required) – Choose the appropriate withdraw reason.

**Withdraw Date** (required) – Enter the withdraw date in MM/DD/YYYY format.

**Withdrawn to IRN** – If a value of 41, 42 or 45 is selected in the Withdraw Reason list, enter the valid IRN of the school to which the students have withdrawn in the Withdrawn to IRN field. If any other value has been selected in the Withdraw Reason list, the default value of \*\*\*\*\* displays in the Withdrawn to IRN field and cannot be edited. If the school or district in context is an educational service center (ESC) or joint vocational school district (JVSD), the default value of \*\*\*\*\* displays in the Withdrawn to IRN field and cannot be edited.

**Search Mode** (required) – Choose to search by one or more criteria or by entering student IDs.

## Search Mode – Search Criteria

The screenshot shows a web-based search interface. At the top, there are two radio buttons for 'Search Mode': 'Search Criteria' (selected) and 'Student Ids'. Below this, there are several input fields and dropdown menus:

- Grade Level:** A dropdown menu.
- Next Grade Level:** A dropdown menu.
- Home School IRN:** A text input field with a search icon on the right.
- Homeroom:** A dropdown menu.
- Homeroom Date:** A date picker.
- Teacher:** A dropdown menu.
- Course Section:** A text input field with an ellipsis button to its right.
- Ad-Hoc Membership:** A dropdown menu with the text '-- Select an Ad-Hoc Membership --' and a checkbox for 'Public And Private'.
- Membership Group:** A dropdown menu.
- Membership:** A dropdown menu.
- EMIS Situation:** A dropdown menu.
- How Received:** A dropdown menu.

At the bottom right, there is a checkbox labeled 'Students Selected by Default' which is checked, and a 'Search' button.

### Search Criteria Search Mode Fields

**Grade Level** (optional) – Choose the Grade Level to filter from the drop-down list.

**Grade Next Year** (optional) – Choose the student's next years grade level to filter from the drop-down list.

**Home School IRN** (optional) – Choose the IRN of the student's home school to filter from the drop-down list.

**Homeroom** (optional) – Choose the Homeroom to filter from the drop-down list.

**Homeroom Date** (optional) – Enter the Homeroom Date by which the homeroom will be determined.

**Teacher** (optional) – Choose the Teacher to filter from the drop-down list.

**Course Section** (optional) – Enter the Course Section to filter. Or use the ellipse button to search for the course section.

**Ad-Hoc Memberships** (optional) – Choose the Ad-Hoc memberships to filter from the drop-down list.

**Membership Group** (optional) – Choose the Membership Group to filter from the drop-down list.

**Membership** (optional) – Choose the Membership to filter from the drop-down list based on the chosen Membership Group.

**EMIS Situation** (optional) – From the drop-down list, choose a EMIS Situation to use as a filter.

**How Received** (optional) – From the drop-down list, choose a How Received code to use as a filter.

**Students Selected by Default** – If this box is checked, any students selected and displayed will have their selection box checked. If this box is unchecked, any students selected and displayed will have their selection box unchecked.

**Search** – Search for students with the selected criteria.

Students Selected by Default

	Student Name	Student Number	Grade Level Code
<input checked="" type="checkbox"/>	Handey, Charles (Jack)	48652557	11
<input checked="" type="checkbox"/>	Rivers, Terrence (Terry)	48652534	10
<input type="checkbox"/>	Smith, Sally (Sally)	00999999	10
<input type="checkbox"/>	Smith, Samantha (Sam)	00001000	09

### Example Search Criteria Results

– Student Selection. If checked, this student is chosen for withdrawal. If unchecked, this student will not be withdrawn.

**Caution:** *This is really powerful, so be sure you have made selections so that ONLY those students who should be Power Withdrawn will be selected! If you have not made the right selections, you could end up Power Withdrawing all students!*

**Withdraw** – Process the Power Withdraw. You will receive the message below.

**All selected students were successfully withdrawn**

**District Withdraw Code** – All students selected will have the District Withdraw Reason on the open FS-Standing record (Student Profile – FS-Standing tab) set to the Withdraw Code selected in the Power Withdraw screen.

**District Withdraw Date** – All students selected will have the District Withdraw Date on the open FS-Standing record (Student Profile – FS-Standing tab) set to the Withdraw Date entered in the Power Withdraw screen. If Withdraw Code 99 “Completed Graduation Requirements” is selected, then the District Withdraw Date on the open FS-Standing record (Student Profile – FS-Standing tab) will automatically be set to the last date for the active school year in the active school.

## Search Mode – Student IDs

**Search Mode:**       Search Criteria       Student Ids

---

4001, 4002, 4003

Students Selected by Default

**Student IDs Search Mode Field**

Enter Student ID(s) in the open text box – separated by commas.

**Students Selected by Default** – If this box is checked, any students selected and displayed will have their selection box checked. If this box is unchecked, any students selected and displayed will have their selection box unchecked.

**Search** – Search for students with the selected criteria.

Students Selected by Default

	Student Name	Student Number	Grade Level Code
<input checked="" type="checkbox"/>	Handey, Charles (Jack)	48652557	11
<input checked="" type="checkbox"/>	Rivers, Terrence (Terry)	48652534	10
<input type="checkbox"/>	Smith, Sally (Sally)	00999999	10
<input type="checkbox"/>	Smith, Samantha (Sam)	00001000	09

**Example Student IDs Reset**

– Student Selection. If checked, this student is chosen for withdraw. If unchecked, this student will not be withdrawn.

**Withdraw** – Process the Power Withdraw. You will receive the message below.

**All selected students were successfully withdrawn**

**District Withdraw Code** – All students selected will have the District Withdraw Reason on the open FS-Standing record (Student Profile – FS-Standing tab) set to the Withdraw Code selected in the Power Withdraw screen.

**District Withdraw Date** – All students selected will have the District Withdraw Date on the open FS-Standing record (Student Profile – FS-Standing tab) set to the Withdraw Date entered in the Power Withdraw screen.

This page intentionally left blank.

# Gifted

The Gifted module allows school and district staff to maintain Gifted information for each student to satisfy their EMIS reporting requirements, and consists of default Gifted Rules, the Gifted Mass Update, Gifted Initialization and the individual Student Gifted Records. The updates are meant to be a bulk update prior to any manual updates. Once manual updates are made, manual updates may be overwritten.

## To properly use the Gifted Module:

1. Set up the appropriate Gifted Rules Maintenance for a district. These rules can be set up and run at the beginning of the school year and then used as the default values for the Gifted Mass Update.
  - **Default rule to create a blank Gifted record** – Use for any student not screened or assessed, or for new students .
  - **District/Grade level rules** – Use when every student in a grade level is screened and/or assessed in certain Gifted areas.
  - **Building/Grade level rules** – Use when every student in a building/grade level is screened and/or assessed in certain Gifted areas.
2. Use the Gifted Mass Update process to set initial values for the school year or to restore students to the Gifted Rule defaults for screening, assessment, and served by district, building, and/or grade level. This is normally done on a yearly basis. This process will undo any screened or assessed values on the student’s gifted record if “Overwrite Existing Student Gifted records” is chosen. If the Reset Served option is chosen, the served values will be reset for the specified grade level. If you have already begun updating records for the current school year, these options will reset anything the districts have done. ITCs can perform this step for the districts or allow the districts to perform this step for themselves. As a district, please check with your ITC StudentInformation Support Staff before proceeding with this step.

Home > Management > School Administration > EMIS > Gifted > Gifted Mass Update

### Gifted Mass Update

This screen allows for a mass update of student gifted records.

**Gifted Rules:**

Gifted Default Rule  
4th grade rule

Overwrite Existing Student Gifted records:

Display results:

Submit

Instructions: Use this section for resetting all served values on student gifted records.

Grade Level:  Reset Served

Gifted Mass Update Screen

3. Adjust individual Student Gifted Records as necessary in preparation for the EMIS Gifted Verification and Transfer.

## Gifted Rules Maintenance

### Navigation: Management – School Administration – EMIS – Gifted – Gifted Rules Maintenance

This page allows the user to set default values to be used when running the Gifted Mass Update. A default record may be defined at the district level or at the building level for each grade level, or for all grade levels. Building level rules override district level rules and building level grade level rules override district level grade level rules.

The Gifted Mass Update will apply the default values in the Gifted Rules Maintenance to the student gifted records. It is very important to have the proper Gifted Rules set up to prevent aggregate errors during the EMIS validation and aggregation process.

### Best Practices

- Every district should have a district default rule set up with a blank grade level and nothing checked for Screening or Assessed. This will be the default rule for all students who do not have a gifted record for the school year including new students coming in to the district. When the Gifted Mass Update rules are processed, any student missing a record will have a record created for them according to the rules processed. In addition, grade level rules may also be defined to update the screening performed for the year. Once the mass update has been applied, rules may be changed if students enrolled after the initial mass update has taken place. These students should receive a record with nothing checked because they were not enrolled at the time of the district wide screening, in essence, a blank gifted record. To do this, make sure to deselect “Overwrite Existing Student Gifted Records”.
- Student gifted records are school year specific with the exception of the identified dates and the served values.
- These Gifted Rules will be set up based on the screening practices for your district and building. As a general rule, almost all other Gifted Rules for district, building, and/or grade level will only have the Screening boxes selected. The exceptions to this would be if you have an entire building and/or grade level with assessed Gifted students.

## District Level



District Level Gifted Rule

If a district is in context, only district level rules will be displayed. District level rules are editable only at the district level. In this case, the default values would apply to all students in all buildings.

**Note:** Once a Screening is checked, the Screened Date becomes a required field.

**Gifted Rules Maintenance**  
From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Rule Name:  ⚡

Grade Level:

Active:

	Screening	Assessment	Screened Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> ⚡
Specific Academic Ability - Math	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Science	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

District Rule Gifted Rules Details Screen

## Building Level

**Gifted Rules Maintenance**  
From this screen, you can display, add, change and delete data pertaining to student gifted rules.

2 Records Displayed

	Grade	School Code	Rule	Active
		DA	District Rule	
	09	DAHS	Building Rule 9	

Show Active Only

Building Level Gifted Rule

If a school building is in context, all school level as well as all district level rules will display. As shown above, district level rules cannot be managed from the school level. The edit and delete icons will be locked. The user may still view the district level rule using the magnifying glass. The rules will be ordered by grade level – with rules not having a specified grade level displaying first.

This page has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information on these controls.

The School Code column identifies the district or building where the rule was created, and is automatically populated when a rule is created.

In the above example, default values on the building level rule for 9th grade would overrule any district 9th grade rules (if there were any).

## Edit/Add Gifted Rule

**Gifted Rules Maintenance**  
From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Rule Name:

Grade Level:

Active:

	Screening	Assessment	Screened Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Math	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Science	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**Building Rule Gifted Rules Details Screen**

**Note:** Once a Screening is checked, the Screened Date becomes a required field.

**Rule Name** (required) – Descriptive name for this Gifted Rule.

**Grade Level** (optional) – Specific grade level that this Gifted Rule applies to. Leave this field blank to apply to all grade levels.

**Active** (optional) – Check indicates this Gifted Rule is active and usable.

**Screening** (optional) – Check the options that apply to the specific Gifted Rule.

**Assessment** (optional) – Check the options that apply to the specific Gifted Rule.

**Screened Date** (required if Screening is checked) – The Gifted Mass Update will only update student gifted records if the student was enrolled in the school as of the Screened Date for each gifted area. If the student was not enrolled as of the Screened Date, a student gifted record with blank values is created.

### View Gifted Rules Detail (Click Magnifying Glass)

Home » Management » School Administration » EMIS » Gifted » Gifted Rules Maintenance

#### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Add Gifted Rule

2 Records Displayed

		Grade	School Code	Rule	Active
			OG	District Default	
		03	OGGE	Third Grade - GL	

Show Active Only

Gifted Rules Maintenance Screen

Home » Management » School Administration » EMIS » Gifted » Gifted Rules Maintenance

#### Gifted Rules Maintenance

From this screen, you can display, add, change and delete data pertaining to student gifted rules.

Rule Name:

Grade Level:

Active:

	Screening	Assessment	Screened Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/1/2010
Specific Academic Ability - Math	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/1/2010
Specific Academic Ability - Science	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/1/2010
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Gifted Rules Details Screen

## Gifted Mass Update

### Navigation: Management – School Administration – EMIS – Gifted – Gifted Mass Update

This page allows the user to restore or set Student Gifted Records to the appropriate screening and assessment defaults by district, building, and/or grade level. Served may be reset by grade level or for all grade levels. The resetting of Screening, Assessment, and Served defaults on Student Gifted Records is performed on an annual basis. Please note that Identified and Identified Date are never reset.

The Gifted Mass Update screen consists of two parts:

**Mass Update of Gifted Rules** – Used to restore the Screening and Assessment values to the appropriate defaults, i.e., this would be the District Default Rule to establish a blank gifted record, or if your 2nd grade students are always screened and assessed for Science, then you want to run this rule annually also.

**Reset Served Values** – Used to reset the Served values for all grade levels or a specific grade level.

***Note:** This process will undo any screened or assessed values on the student's gifted record if "Overwrite Existing Student Gifted records" is chosen. The Identified and Served fields will remain the same. If the Reset Served option is chosen, the served values will be reset as unchecked for the specified grade level. If you have already begun updating records for the current school year, these options will reset anything the districts have done manually. ITCs normally do this step for the districts. As a district, please check with your ITC StudentInformation Support Staff before proceeding with this step.*

### Screened Date

The Gifted Mass Update will only update student gifted records if the student was enrolled in the school as of the Screened Date for each gifted area. The Screened Date is located on the Gifted Rules Maintenance screen. If the student was not enrolled in the school as of the Screened Date for a gifted area, a default gifted record will be created.

### Best Practices

ITCs may want to limit access to the Gifted Mass Update process since it can be used to restore all selected students to default Gifted Rules by district, building, and/or grade level – overriding manual screening, assessment, and served Gifted entries if they have already been made.

## Mass Update of Gifted Rules

**Gifted Mass Update Screen**

**Gifted Rules** (required) – Select (by moving to the right) the Gifted Rule(s) that you wish to use for the Gifted Mass Update. If a District is in context, District Gifted Rules will display and be available. If a Building is in context, Building Gifted Rules will display and be available. Grade level rules will take precedence over non-grade level rules. If a student is enrolled in more than one building, the rule for the student’s primary building or grade level/building will be used.

**Overwrite Existing Student Gifted records** (optional) – If checked, will overwrite Student Gifted records with the Screening and Assessment values from the applicable Gifted Rules. If not checked, existing Student Gifted records will not be updated. The Identified and Served fields will remain the same.

**Display Results** (optional) – If checked, results of the update will be displayed on the screen.

**Submit** – Process the Gifted Mass Update using the selected Gifted Rules. This banner message will appear if no student gifted records were updated

**No student gifted records were updated.**

This banner message will appear if student gifted records were successfully updated.

**The student gifted records have been successfully updated.**

If the Display results option was selected, students will be displayed on the screen as follows:

39 Records Displayed			
Student	Grade Level	Rule	Status
Albert, Sue	11	Building Rule	Updated
Archer, Mike	11	Building Rule	Updated
Banana, Hannah	09	Building Rule	Updated
CONTRARY, JASON WILLIAM	11	Building Rule	Updated
Contrary, Jesse	09	Building Rule	Updated
ANDERSON, PAMELA	06	District Rule	Created
BARRYMORE, DREW	07	District Rule	Created
BEAST, HALIE	07	District Rule	Created
BHAV, KAREN	08	District Rule	Created
BREAD, GINGER	07	District Rule	Created

Example Display Results

### Status

- **Updated** – Indicates a student who had an existing record whose values were updated as part of the Gifted Mass Update.
- **Created** – Indicates a student who did not have a record and the record was created by the Gifted Mass Update.

### Reset Served Values

**Instructions: Use this section for resetting all served values on student gifted records.**

Grade Level:

Reset Saved Values Area of Gifted Mass Update Screen

The Reset Served section of the Gifted Mass Update screen can be used to reset the Served values on the student gifted records. It resets only the Served values.

**Grade Level** – If left blank, Served values for all students will be reset. If a Grade Level is specified, the Served Values for students in that grade will be reset.

**Reset Served** – Reset the Served values for the students in the selected Grade Level or for all students if no Grade Level is selected. You will receive a confirmation message for resetting served values for All Grades or a specific Grade Level.

**Are you sure you want to reset all served values for the following grade level?**

Grade Level: All Grades

---

**Are you sure you want to reset all served values for the following grade level?**

Grade Level: 09

---

Click **Ok** to process the Served reset. You will receive a successful message for either All Grades or a specific Grade Level.

**The served values have been successfully reset for the following grade level: All Grades**

**The served values have been successfully reset for the following grade level: 09**

---

## Student Gifted Record

### Navigation: SIS – Student – Gifted – Student Gifted Record

The student Gifted record is district-specific, allowing EMIS coordinators and other district personnel with appropriate security to maintain Gifted records for a student from year to year. The Student Gifted Record page will load the student gifted grid.

Identified values are not school year specific. If the student has an existing gifted record, these values will be used to populate the student gifted grid.

If a student does not have an existing gifted record for the school year in context, the student gifted grid will not be populated with any data. A banner message appears.

**This student does not have an existing gifted record for this school year**

A Student Gifted Record should be set up manually for new students or the Gifted Mass Update can be ran with the District Gifted Rule (all blanks). “Overwrite Existing Student Gifted records” should be unchecked if the Gifted Mass Update is being run for only new students or students without an existing Student Gifted record.

Home » SIS » Student » Gifted » Student Gifted Record

### Student Gifted Record

From this screen, you can display, add, change and delete data pertaining to a student's gifted record.

**Note: For students identified prior to 2000 with an unknown identified date, enter a date of 1/1/1900.**

	Screening	Assessment	Identified	Served	Identified Date
Superior Cognitive Ability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Math	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Science	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Reading/Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific Academic Ability - Social Studies	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Creative Thinking Ability	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Visual/Performing Arts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Save      Discard Changes      Restore Default

#### Student Gifted Record Screen

**Screening** – Check if the student has been screened for a specific Gifted category.

**Assessment** – Check if the student has been assessed for a specific Gifted category.

**Identified** – Check if the student has been identified for a specific Gifted category. If Identified is checked, an Identified Date must be entered. If an Identified Date is entered, then Identified must be checked.

**Served** – Check if the student is being served for this specific Gifted category.

**Identified Date** – Enter the date in each Gifted category that the student was identified in. If Identified is checked, an Identified Date must be entered. If an Identified Date is entered, Identified must be checked. Please note that the Identified Date is entered as MM/DD/YYYY. However the EMIS transfer will only use the month and year for processing purposes – the day will be ignored.

#### Special Note concerning dates before 2000

For students identified prior to 2000 with an unknown identified date, enter a date of 1/1/1900. The EMIS Transfer process will translate this date to all asterisks (\*\*\*\*\*). Any existing student gifted records with Identified Dates of \*\*\*\*\* will display as 1/1/1900 and will be translated to \*\*\*\*\* during the EMIS Transfer process.

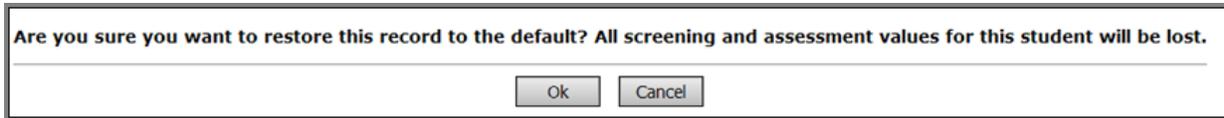
**Save** – Save changes to this student's Gifted values. You will receive this message.

The student gifted record has been successfully saved

**Discard Changes** – Discard any changes since the last save or will restore the default if pressed after the “Restore Default” button was clicked since the last save. This is the same as Cancel. Please note that any Identified checks or dates entered will need to be manually removed as the Discard Changes option does not reset identified fields.

**Restore Default** – Restore the default Screening and Assessment values from the district or building level Gifted Rule defaults. Please Note: Identified checks and Identified Dates will never be reset or restored. Served values are reset using the Gifted Mass Update screen.

A confirmation message will appear asking if you are sure you want to restore the Gifted Record to the Screening and Assessment Gifted Rules defaults.



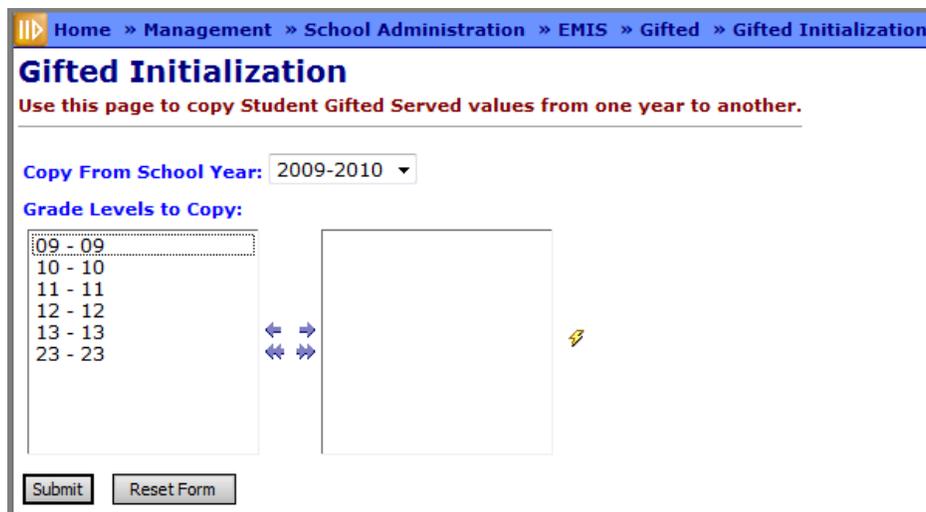
After clicking **OK**, you will receive the following message,



## Gifted Initialization

**Navigation: Management – School Administration – EMIS – Gifted – Gifted Initialization**

This screen allows Student Gifted Served values to be copied from one school year to the next. This process needs to be run at the Building level, not the District level. It will not work correctly if run at the District level.

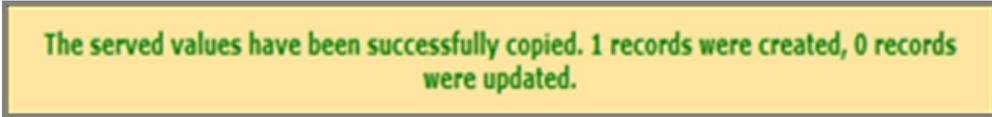


**Gifted Initialization Screen**

**Copy From School Year** (required) – Choose the year from which you want to copy the Student Gifted Served values from. These Student Gifted Served values will be copied to the school year in context. Please Note: The Copy From School Year cannot match the school year in context.

**Grade Levels to Copy** (required) – Move one or more grade levels to the right side of the dual select box. Students in these grade levels will have their Student Gifted Served values copied from the Copy From School Year to the school year in context.

**Submit** – Process the Gifted Initialization. A confirmation message will appear that indicates how many Student Gifted Records were created and how many Student Gifted Records were updated.

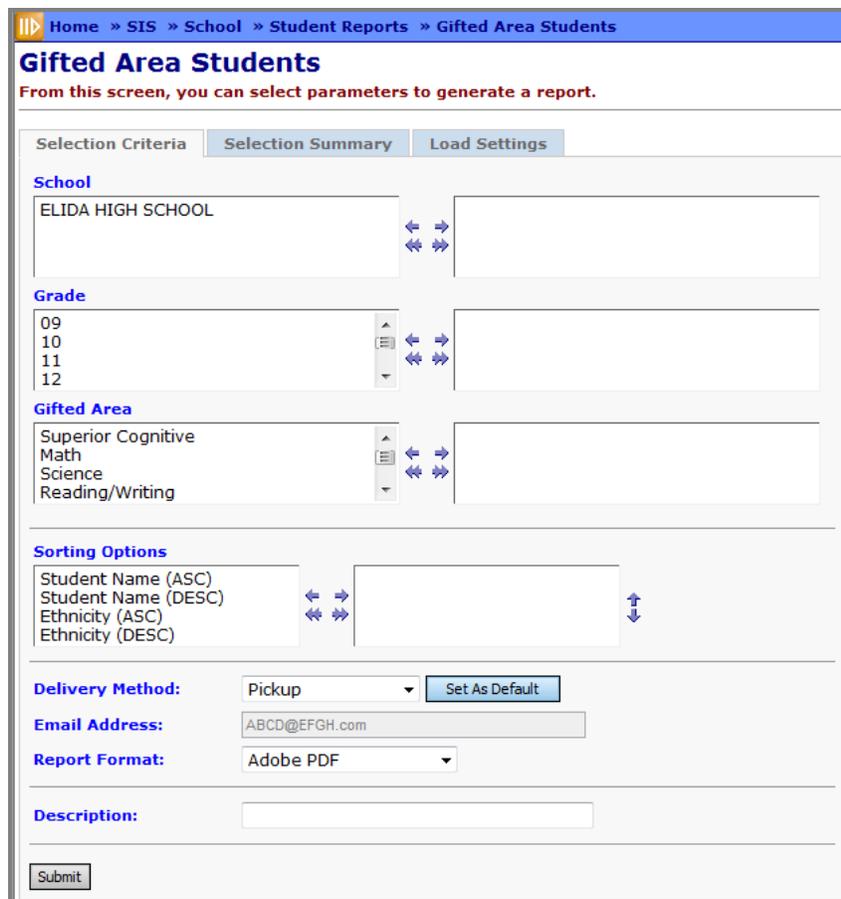


**Reset Form** – Do not process the Gifted Initialization and reset the form to the original values.

## Report – Gifted Area Students

**Navigation: SIS – School – Student Reports – Gifted Area Students**

The Gifted Area Students report displays the selected students by gifted area, school, and grade level. It shows the identified date and served flag for each gifted area that was selected. The output is grouped by school, and grade level. Subtotals on the report included totals by grade level, school, and by gifted area. Detail output on the report includes student number, student name, gender, ethnicity, FTE, identified date, and served flag for each gifted area.

The screenshot shows a web application interface for configuring a report. At the top, a blue breadcrumb trail reads "Home » SIS » School » Student Reports » Gifted Area Students". Below this is the title "Gifted Area Students" and a red instruction: "From this screen, you can select parameters to generate a report." The interface is divided into several sections: 1. "Selection Criteria" with tabs for "Selection Summary" (active) and "Load Settings". 2. "School" section with a text input field containing "ELIDA HIGH SCHOOL" and a list of schools to its right, with double-headed arrows between them. 3. "Grade" section with a list of grades (09, 10, 11, 12) and a list of grades to its right, with double-headed arrows. 4. "Gifted Area" section with a list of areas (Superior Cognitive, Math, Science, Reading/Writing) and a list of areas to its right, with double-headed arrows. 5. "Sorting Options" section with a list of options (Student Name (ASC), Student Name (DESC), Ethnicity (ASC), Ethnicity (DESC)) and a list of options to its right, with double-headed arrows. 6. "Delivery Method" section with a dropdown menu set to "Pickup" and a "Set As Default" button. 7. "Email Address" section with a text input field containing "ABCD@EFGH.com". 8. "Report Format" section with a dropdown menu set to "Adobe PDF". 9. "Description" section with a text input field. At the bottom left is a "Submit" button.

**Gifted Area Students Screen**

**School** (optional) – Choose one or more schools to include in your report. If a school is in context, then only that school will be listed. If a district is in context, all schools in that district will be listed.

If no School(s) are selected, all Schools will be included in the report.

**Grade** (optional) – Choose one or more grade levels to include in your report. The list will include all grade levels configured for the school in the school year in context. If no Grades are selected, all Grades will be included in the report.

**Gifted Area** (optional) – Choose one or more gifted areas to include in your report. Any students identified as gifted in the selected areas (and who match other filters) will be included in the report. If no Gifted Areas are selected, all Gifted Areas will be included in the report.

**Sorting Options** (optional) – Choose a sort option for your report. The report will automatically sort by grade level (ascending) and school name (ascending).

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Email Address** – (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

<i>Report: Gifted Area Students</i> <i>Printed Mon, Jul 13, 2009, 11:42 AM</i>		<b>DASL HIGH SCHOOL</b> 2009-2010 <b>Gifted Area Students</b>					
<u>Student Name</u>		<u>Student Number</u>		<u>Gender</u>	<u>Ethnicity</u>	<u>Full Time Equivalent</u>	
Student48253, ALEXIS		4152		F	WHITE	100	
	Superior Cognitive	Math	Science	Reading/Writing	Social Studies	Creative Thinking	Visual/Performing Arts
Identified Date	5/1/2006	5/1/2006	5/1/2006	5/1/2006			
Served	N	N	N	N	N	N	N
Student48260, CARALEE		4145		F	WHITE	100	
	Superior Cognitive	Math	Science	Reading/Writing	Social Studies	Creative Thinking	Visual/Performing Arts
Identified Date					5/1/2006		
Served	N	N	N	N	N	N	N

**Example Gifted Area Students Report**

## Report – Gifted Student Courses

### Navigation: SIS – School – Student Reports – Gifted Student Courses

The Gifted Student Courses report displays the courses (schedule) for the selected students along with the gifted area flags. Sorting options include student name, grade, or teacher/homeroom. Grouping options include homeroom, teacher, or grade level. Detail output on the report includes student name, student number, gifted area flags, course name, course section, credits, teacher, meeting time, EMIS Subject Code, and Core Subject Area. The total student credits are also displayed. This report is run at the building level.

Gifted Student Courses Screen (Upper Part)



**Period** (optional) – Choose one or more periods to include in your report. The list will include all periods configured for the school in the school year in context. The report will include all students assigned to the selected Teacher in the selected Period on the Homeroom Date selected. If no Periods are selected, all Periods will be included in the report.

**Grade Level** (optional) – Choose one or more grade levels to include in your report. The list will include all grade levels configured for the school in the school year in context. If no Grade Levels are selected, all Grade Levels will be included in the report.

**Ethnicity** (optional) – Choose one or more ethnicities to include in your report. The list will include all ethnicities defined for the school in the school year in context. If no Ethnicities are selected, all Ethnicities will be included in the report.

**Disability Condition** (optional) – Choose one or more disability conditions to include in your report. If no Disability Conditions are selected, all Disability Conditions will be included in the report.

**Screened Only** – Choose one or more Gifted Areas to include in your report. All students that are screened only in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Assessed Only** – Choose one or more Gifted Areas to include in your report. All students that are assessed only in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Identified** – Choose one or more Gifted Areas to include in your report. All students that are identified in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Served** – Choose one or more Gifted Areas to include in your report. All students that are served in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Group By** (optional) – Select from Homeroom, Teacher, or Grade Level.

Homeroom – The report will be grouped and sorted first by Homeroom, and the students within each Homeroom will be sorted based on the selected Sorting Options below.

Teacher – The report will be grouped and sorted first by Teacher, and the students within each Teacher will be sorted based on the selected Sorting Options below.

Grade Level – The report will be grouped and sorted first by Grade Level, and the students within each Grade Level will be sorted based on the selected Sorting Options below.

**Sorting Options** (optional) – Choose a sort option for your report. The report will be grouped and sorted first by the selected in Group By, and the students within each Group By selection will then be sorted based on the selected Sorting Options.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

Report: Gifted Student Courses		DASL HIGH SCHOOL						
Printed Mon, Jul 13, 2009, 1:39 PM		2008-2009						
Gifted Student Courses								
Student	Student Number	Cognitive	Math	Science	Reading/Writing	Social Studies	Creative Thinking	Visual/Performing Arts
<b>Student48948, MACKENZIE</b>	<b>2516</b>	Y	N	Y	Y	N	N	N
Course Name	Course Section	Credits	Teacher	Meeting Time	EMIS Subject Code	Core Subject Area		
HEALTH I	0312-62	0.50	MS. C. Teacher1537	6 (223)	260101	HEC		
ENGLISH 9	0111-8	1.00	MRS. J. Teacher1558	8 (221)	050160	ENG		
GEOMETRY	0522-7	1.00	MRS. R. Teacher1461	7 (225)	111200	MTO		
FRENCH II	0421-4	1.00	MRS. L. Teacher1465	4 (229)	060230	FLR		
CHOIR	0212-5	1.00	MRS. R. Teacher1529	5 (421)	120400	FAR		
CP BIOLOGY	0613-2	1.00	MRS. C. Teacher1473	2 (220)	132230	SCA		
STUDY HALL	SH-12	0.00	MR. K. Teacher1572	1 (CAF)	999370			
US STUDIES I	0721-3	1.00	MR. K. Teacher1495	3 (228)	150810	SOH		
Student Total Credits:		6.50						

Example Gifted Student Courses Report

## Report – Gifted Student Detail Report

### Navigation: SIS – School – Student Reports – Gifted Student Detail Report

The Gifted Student Detail Report displays the detailed gifted area information for each student selected. Sorting options include student name, grade, or teacher/homeroom. Grouping options include homeroom, teacher, or grade level. Detail output on the report includes student name, student number, grade, ethnicity, disability condition, gifted area and screen, assessed, identified, served, and identified date for each gifted area. This report is run at the building level.

Home » SIS » School » Student Reports » Gifted Student Detail Report

### Gifted Student Detail Report

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

Selection Criteria   Selection Summary   Load Settings

Schedule: Default Schedule

Schedule Result: Default Schedule Result

Homeroom Date: 9/14/2011

**Homeroom**

H1 - Teacher2036 (Full Year Term)  
 H100 - Teacher2132 (Full Year Term)  
 H101 - Teacher2090 (Full Year Term)  
 H102 - Teacher2123 (Full Year Term)

**Teacher**

MICHELLE Teacher1854  
 JEFF Teacher1860  
 RYAN Teacher1861  
 SUE Teacher1864

**Period**

Period 00  
 Period 01  
 Period 02  
 Period 03

**Grade Level**

09  
 10  
 11  
 12

**Ethnicity**

A - ASIAN  
 B - BLACK, NON-HISP  
 H - HISPANIC  
 I - INDIAN/ALASKAN

**Disability Condition**

\*\* - Not Applicable  
 01 - Multiple Disabilities (other than Deafness)  
 02 - Deaf-Blindness  
 03 - Deafness (Hearing Impairments)

The filters listed below will only function for selected values. If nothing is selected, then no results will be returned.

**Screened Only**

Superior Cognitive  
 Math  
 Science  
 Reading/Writing

**Assessed Only**

Superior Cognitive  
 Math  
 Science  
 Reading/Writing

**Identified**

Superior Cognitive  
 Math  
 Science  
 Reading/Writing

**Served**

Superior Cognitive  
 Math  
 Science  
 Reading/Writing

**Group By:**

'Homeroom': the report will be grouped and sorted first by Homeroom, and the students within each Homeroom will be sorted based on the selected Sorting Options below.  
 'Homeroom Teacher': the report will be grouped and sorted first by Homeroom Teacher, and the sorting based on the selected Sorting Options below.  
 'Grade Level': the report will be grouped and sorted first by Grade Level, and the sorting based on the selected Sorting Options below.

**Sorting Options**

Student Name (ASC)  
 Student Name (DESC)  
 Grade (ASC)  
 Grade (DESC)

**Delivery Method:** Pickup   Set As Default

**Email Address:** ABCD@EFGH.com

**Report Format:** Adobe PDF

**Description:**

Submit

Gifted Student Detail Report Screen

**Schedule** (required) – Select the Schedule to be used for this report. If the Schedule has been finalized on the DASL Options-Scheduling tab, then this will not be available for selection as the finalized Schedule will be used for this report.

**Schedule Result** (required) – Select the Schedule Result to be used for this report. If the Schedule has been finalized on DASL Options-Scheduling tab, then this will not be available for selection as the finalized Schedule Result will be used for this report.

**Homeroom Date** (required) – Enter the effective Homeroom Date to be used in the Teacher and Period filters. Defaults to today's date.

**Homeroom** (optional) – Choose one or more homerooms to include in your report. The list will include all homerooms configured for the school in the school year in context. The report will include all students assigned to the selected homerooms on the Homeroom Date entered. If no Homerooms are selected, all Homerooms will be included in the report.

**Teacher** (optional) – Choose one or more teachers to include in your report. The list will include all teachers that are actively configured for the school in the school year in context. The report will include all students assigned to the selected teachers on the Homeroom Date entered. If no Teachers are selected, all Teachers will be included in the report.

**Period** (optional) – Choose one or more periods to include in your report. The list will include all periods configured for the school in the school year in context. The report will include all students assigned to the selected Teacher in the selected Period on the Homeroom Date selected. If no Periods are selected, all Periods will be included in the report.

**Grade Level** (optional) – Choose one or more grade levels to include in your report. The list will include all grade levels configured for the school in the school year in context. If no Grade Levels are selected, all Grade Levels will be included in the report.

**Ethnicity** (optional) – Choose one or more ethnicities to include in your report. The list will include all ethnicities defined for the school in the school year in context. If no Ethnicities are selected, all Ethnicities will be included in the report.

**Disability Condition** (optional) – Choose one or more disability conditions to include in your report. If no Disability Conditions are selected, all Disability Conditions will be included in the report.

**Screened Only** – Choose one or more Gifted Areas to include in your report. All students that are screened only in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Assessed Only** – Choose one or more Gifted Areas to include in your report. All students that are assessed only in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Identified** – Choose one or more Gifted Areas to include in your report. All students that are identified in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Served** – Choose one or more Gifted Areas to include in your report. All students that are served in the selected Gifted Areas will be selected. Only selected values will be filtered on.

**Group By** (optional) – Select from Homeroom, Teacher, or Grade Level.

- **Homeroom** – The report will be grouped and sorted first by Homeroom, and the students within each Homeroom will be sorted based on the selected Sorting Options below.
- **Teacher** – The report will be grouped and sorted first by Teacher, and the students within each Teacher will be sorted based on the selected Sorting Options below.
- **Grade Level** – The report will be grouped and sorted first by Grade Level, and the students within each Grade Level will be sorted based on the selected Sorting Options below.

**Sorting Options** (optional) – Choose a sort option for your report. The report will be grouped and sorted first by the selected in Group By, and the students within each Group By selection will then be sorted based on the selected Sorting Options.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** (auto populated from your StudentInformation profile)

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Refer to *ProgressBook StudentInformation General Use Guide* for more information.

Report: Gifted Student Detail		DASL HIGH SCHOOL			
Printed Mon, Jul 13, 2009, 1:42 PM		2008-2009			
Gifted Student Detail					
Student	Student Number	Grade	Ethnicity	Disability Condition	
Student47954, ALEXANDRA	4913	07	WHITE	**	
Gifted Area	Screened	Assessed	Identified	Served	Identified Date
Math	N	N	Y	Y	3/1/2005
Student	Student Number	Grade	Ethnicity	Disability Condition	
Student48038, BRYCE	4832	07	WHITE	**	
Gifted Area	Screened	Assessed	Identified	Served	Identified Date
Creative Thinking	N	N	Y	N	3/1/2005
Student	Student Number	Grade	Ethnicity	Disability Condition	
Student48097, BAILEY	4749	08	WHITE	**	
Gifted Area	Screened	Assessed	Identified	Served	Identified Date
Superior Cognitive	N	N	Y	Y	3/1/2004
Math	N	N	Y	Y	3/1/2004
Science	N	N	Y	Y	3/1/2004
Reading/Writing	N	N	Y	Y	3/1/2005
Social Studies	N	N	Y	Y	3/1/2004

**Example Gifted Student Detail Report**

## Report – Gifted Students Missing Records

### Navigation: SIS – School – Student Reports – Gifted Student Missing Records

The Gifted Students Missing Records report displays a list of students who are missing a gifted record. Sorting options include student name, grade level, ethnicity, and sent to IRN. Detail output on the report includes school code, school name, school IRN, student name, student number, grade, gender, ethnicity, FTE, sent to IRN, admission date, and withdrawal date. The Gifted Students Missing Records report will return all students who are missing a yearly gifted record, whether they have identified data or not. This report can be run at the district or building level.

**Gifted Students Missing Records Screen**

**School** (optional) – Choose one or more schools to include in your report. If a school is in context, then only that school will be listed. If a district is in context, all schools in that district will be listed. If no School(s) are selected, all School(s) will be included in the report.

**Sorting Options** (optional) – Choose a sort option for your report.

**Delivery Method** (required) – See the Batch/Report Management documentation for further details.

**Email Address** – (auto populated from your StudentInformation profile).

**Report Format** - Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

<i>Report: Gifted Students Missing</i>		<b>DASL HIGH SCHOOL</b>							
<i>Printed Mon, Jul 13, 2009, 11:46 AM</i>		2009-2010							
<b>Gifted Students Missing Records</b>									
School Code: AVHS			School Name: DASL HIGH SCHOOL				IRN: 000067		
Name	Student Number	Grade	Gender	Ethnicity	FTE	Sent To IRN	Admission Date	Withdrawal Date	
Student47826, QUINN	5004	07	F	WHITE	100	*****	8/29/2005		
Student48948, MACKENZIE	2516	10	F	WHITE	100	*****	8/28/2006		

**Example Gifted Students Missing Records Report**

# HQT

## Highly Qualified Teacher Worksheet

### Navigation: SIS – School – Highly Qualified Teacher Worksheet

The Highly Qualified Teacher Worksheet will produce the teacher's HQT Worksheet. This report is a listing of the teachers that are required to report HQT data for their courses and is intended to be used as a verification sheet for the teachers. Each teacher's information is printed on a separate page. The report can then be used as a form to be handed out to the teachers for them to review and verify if the information is correct or if any updates or changes need to be made. A signature line is included at the bottom of the page for the teachers to sign off on the report certifying the information is correct prior to being returned to the building principal.

Refer to "[Highly Qualified Teacher Instruction Sheet](#)" for an instruction sheet that can be printed to use with the Highly Qualified Teacher Worksheet.

The screenshot shows the 'Highly Qualified Teacher Worksheet' screen in the DASL Beta system. The navigation bar at the top includes 'Home', 'SIS', 'Teacher Menu', 'EZ Query', 'Management', 'EMIS', and 'My Account'. The main header displays 'DASL Beta' and 'First Last'. A message states 'This Screen does not use a Selected Student'. The breadcrumb trail is 'Home > SIS > School > Highly Qualified Teacher Worksheet'. The title is 'Highly Qualified Teacher Worksheet' with a sub-note: 'From this screen, you can select parameters to generate a report.' Below the title are three tabs: 'Selection Criteria', 'Selection Summary', and 'Load Settings'. The 'School' section features two lists of schools: 'ELKG - Elida Elementary Kindergarten School', 'ELEE - Elida Elementary School', 'ELIN - Elida Intermediate School', and 'ELMS - Elida Middle School' on the left; and 'ELHS - ELIDA HIGH SCHOOL' on the right. Bidirectional arrows between the lists allow for selection. Below the school lists is a text area for 'Teacher SSNs (comma separated):'. There are two checked checkboxes: 'Show teacher SSN on report:' and 'Show teacher Credential Id on report:'. Two dropdown menus for 'Sort Order 1' (Building Name (ASC)) and 'Sort Order 2' (Teacher Name (ASC)) are present. The 'Delivery Method' is set to 'Pickup' with a 'Set As Default' button. The 'Email Address' field contains 'ABCD@EFGH.com' and the 'Report Format' is set to 'Adobe PDF'. A 'Description' field is empty. A 'Submit' button is at the bottom left.

Highly Qualified Teacher Worksheet Screen

**School** (required) – Select one or more school(s) for your report.

**Teacher SSNs (optional)** – Enter the Social Security numbers of the teachers you wish to include on the report. The Social Security numbers must be separated by a comma. Any selected teacher with at least one course section assigned to them where the corresponding subject code is considered a core subject area for HQT will be included in the report.

If no Social Security numbers are entered, all teachers in the buildings selected with at least one course section assigned to them where the corresponding subject code is considered a core subject area for HQT will be included in the report.

**Show teacher SSN on report (optional)** – Check to show teacher Social Security numbers (EMIS ID from staff record) on the report; if unchecked Social Security numbers will not be displayed.

**Show teacher Credential ID on report (optional)** – Check to show teacher Credential ID (state staff ID) on the report; if unchecked, Credential IDs will not be displayed.

**Sort Order 1 (required)** – Choose a primary sort option for your report.

**Sort Order 2 (required)** – Choose a secondary sort option for your report.

**Delivery Method (required)** – See the Batch/Report Management documentation for further details.

**Email Address** – (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description (optional)** – If entered, will show on the Batch/Report Management screen.

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

***Note:** As shown in the following figure, the Highly Qualified Teacher Worksheet Report lists course sections separately if the course section has different values selected in the EMIS Subject Code, Curriculum, Delivery Method or Student Population fields on the EMIS Override tab than those values selected in the same fields on the EMIS tab for the course.*

Report: HQT Worksheet  
Printed Mon, Sep 24, 2012, 12:20 PM

ASHLAND HIGH SCHOOL  
2012-2013  
HQT Worksheet

District IRN / Name: 043505 Ashland City Schools  
Building IRN / Name: 001081 ASHLAND HIGH SCHOOL

Teacher: KNOX, MS  
SSN: 123460429 SSID: OH1416881 CR: Curriculum DM: Delivery Method SP: Student Population

Emis Subject	CR	DM	SP	HQT Def	Change HQT Reason
050300 - Literature 070 - AMERICAN LIT 074 - BRITISH LITERATURE	OT	FF	RG	3	1 2 3 5 6 7 8 9 I N
050300 - Literature 074 - BRITISH LITERATURE - Sect. 9	VA	FF	RG		1 2 3 5 6 7 8 9 I N
050400 - Composition 041 - WRITING WORKSHOP I	OT	FF	RG	3	1 2 3 5 6 7 8 9 I N

(blank rows available below to add new courses)

_____	_____	_____	_____	_____	1 2 3 5 6 7 8 9 I N
_____	_____	_____	_____	_____	1 2 3 5 6 7 8 9 I N
_____	_____	_____	_____	_____	1 2 3 5 6 7 8 9 I N

\_\_\_ "No Changes". Checking this blank means that there have been no changes to your HQT criteria for the course(s) you taught during the previous school year.

I hereby assure that all information presented is correct and is acceptable for reporting for No Child Left Behind Highly Qualified Teacher requirements as stated in section 1111, 1119, and 9101.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Your building administrator may request that you provide backup documentation.

Example Highly Qualified Teacher Worksheet

## Highly Qualified Teacher Instruction Sheet

This instruction sheet can be found on the Ohio Department of Education Web site and printed for use with the Highly Qualified Teacher Worksheet.

OHIO Highly Qualified Teacher - Status Sheet      Page: 1	
School Year 2008-2009 (FY2009)	
-----	
<p>Teachers of core academic subjects should review the chart below to verify meeting the federal definition of a Highly Qualified Teacher. Core Courses as defined by the No Child Left Behind Act include the following: English, Language Arts, Reading, Science, Mathematics, Arts (includes music, visual arts, dance and drama), Foreign Language, Government and Civics, History, Economics, and Geography.</p>	
<p>Please review the HQT criteria for the courses that are scheduled in the 2008-2009 school year. If an HQT Definition value exists for the course, the value is displayed on the worksheet in the HQT DEF column. If there are NO changes to this information, sign the form and check the blank indicating "NO CHANGES." If there are changes please circle the number in the "Change HQT Criteria" column next to each course, and sign the form.</p>	
<p>* A new teacher MUST circle the number of the appropriate reason in the column labeled "Changes to HQT Criteria for 2008-2009".</p>	
<p>* If a teacher does not meet the definition for a particular course, circle "N" next to that course.</p>	
<p>If this report shows a course that you are not teaching, draw a line through the information. Additionally, if you are teaching a course that is missing from the list, write the course name on the form and complete the column "Change HQT Criteria" using numbers 1,2,3,5,6,7,8,9, "I" or "N".</p>	
<p>To meet the Federal definition of Highly Qualified the teacher must have:</p>	
<p>A. A minimum of a bachelor's degree            B. Full state certification/licensure in the teaching area, and            C. One of the following</p>	
<p>1 - NTE/Praxis II - State Lic. Exam            2 - Acad. Maj. or 30 Hrs in Content Area            3 - Master's Degree            5 - Professional Certificate            6 - Permanent Certificate            7 - National Board Certification</p>	<p>8 - HQT Rubric- scored 100 or more            9 - 90 Completed Clock Hours of Professional Development (LPDC)            I - Not core course OR course type not HQT            N - Does NOT meet HQT definition</p>

### Highly Qualified Teacher Instruction Sheet

# Highly Qualified Teacher Report

## Navigation: SIS – School – Highly Qualified Teacher Report

The Highly Qualified Teacher Report will generate a listing of the teachers that are required to enter the Highly Qualified Teacher data. The report will list the teacher's social security numbers and/or credential IDs, subject codes/description, courses, course types and the HQT field. The HQT Report is intended to be only an informational report that can be printed to list all HQT information for a teacher.

**Highly Qualified Teacher Report Screen**

**School** (required) – Select one or more school(s) for your report.

**Teacher SSNs** (optional) – Enter the Social Security numbers of the teachers you wish to include on the report. The teachers Social Security numbers must be separated by a comma. Any selected teacher with at least one course section assigned to them where the corresponding subject code is considered a core subject area for HQT will be included in the report.

If no teachers Social Security numbers are entered, all teachers in the buildings selected with at least one course section assigned to them where the corresponding subject code is considered a core subject area for HQT will be included in the report.

**Included SSN** (optional) – Check to show teacher social security numbers (EMIS ID from staff record) on the report; if unchecked social security numbers will not be displayed.

**Included Credential ID** (optional) – check to show teacher Credential ID (state staff ID) on the report; if unchecked, Credential IDs will not be displayed.

**Sort Order 1** (required) – Choose a primary sort option for your report.

**Sort Order 2** (required) – Choose a secondary sort option for your report.

**Delivery Method** (required) – Refer to *ProgressBook StudentInformation General Use Guide* for more information.

**Email Address** – (auto populated from your StudentInformation profile).

**Report Format** – Select output format from Adobe PDF, Rich Text File (RTF), Text, Excel Spreadsheet or HTML output.

**Description** (optional) – If entered, will show on the Batch/Report Management screen

**Submit** – Will submit this report to the Batch/Report Management application. Please see the Batch/Report Management documentation for further details.

**Note:** *As shown in the following figure, the Highly Qualified Teacher Report lists course sections separately if the course section has different values selected in the EMIS Subject Code, Curriculum, Delivery Method or Student Population fields on the EMIS Override tab than those values selected in the same fields on the EMIS tab for the course.*

Report: HQT Report Printed Mon, Sep 24, 2012, 1:55 PM		<b>ASHLAND HIGH SCHOOL</b> 2012-2013 <b>Ohio Highly Qualified Teacher Report</b>	
<hr/>			
Building IRN / Name: 001081		ASHLAND HIGH SCHOOL	
<hr/>			
Teacher: DALTON, MS			
SSN: 123457396	SSID IN1010452	CR: Curriculum DM: Delivery Method SP: Student Population	
<hr/>			
Emis Subject		CR DM SP	HQT Def
<hr/>			
010001 - Environmental and Agricultural Science 050 - HONORS ENGLISH 10 - Sect. 5		OT FF RG	
<hr/>			
050170 - Integrated English Language Arts II 050 - HONORS ENGLISH 10		OT FF RG	6 - Permanent Certificate
<hr/>			
050300 - Literature 070 - AMERICAN LIT		OT FF RG	
<hr/>			
050400 - Composition 046 - ADVANCED COMPOSITION		OT FF RG	6 - Permanent Certificate
<hr/>			
059999 - Other English/Language Arts Course 072 - POWER READING		OT FF RG	6 - Permanent Certificate
<hr/>			
Teacher: KNOX, MS			
SSN: 123460429	SSID OH1416881	CR: Curriculum DM: Delivery Method SP: Student Population	
<hr/>			
Emis Subject		CR DM SP	HQT Def
<hr/>			
050300 - Literature 070 - AMERICAN LIT 074 - BRITISH LITERATURE		OT FF RG	3 - Masters degree
<hr/>			
050300 - Literature 074 - BRITISH LITERATURE - Sect. 9		VA FF RG	
<hr/>			
050400 - Composition 041 - WRITING WORKSHOP I		OT FF RG	3 - Masters degree
<hr/>			
Page 1 of 1			

### Example Highly Qualified Teacher Report

## Highly Qualified Teacher Update Maintenance

### Navigation: Management – School Administration – Scheduling Administration – Highly Qualified Teacher Update

The Highly Qualified Teacher Update Maintenance is used to update the Highly Qualified Definition for each teacher. The Highly Qualified Teacher Update Maintenance screen will only allow users to create records for course sections where the teacher is the Teacher of Record as noted on the Course Section record.

Home » Management » School Administration » Scheduling Administration » Highly Qualified Teacher Update    Advanced Search | Feedback | Mgmt | Help | Version

### Highly Qualified Teacher Update Maintenance

From this screen, you can display and edit data pertaining to highly qualified teacher values in EMIS.

Filter By Teacher:

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HQ Definition
	060265 - Spanish	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam

### Highly Qualified Teacher Update Maintenance Screen

This page has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information on these controls.

**Filter by Teacher** (required) – Select the teacher from the drop down list.

**Add HQT Definition** – Click to add a Highly Qualified Definition for a unique EMIS Subject/Curriculum /Delivery Method/Student Population combination for this teacher.

### Highly Qualified Definition Grid

A list of the selected teacher’s EMIS Subject/Curriculum/Delivery Method/Student Population combinations with the assigned Highly Qualified Definition is displayed. These are for course sections where the teacher selected is designated as the Teacher of Record on the Teacher History tab.

## Add/Edit Highly Qualified Teacher Update Record

Home » Management » School Administration » Scheduling Administration » Highly Qualified Teacher Update

### Highly Qualified Teacher Update Maintenance

From this screen, you can display and edit data pertaining to highly qualified teacher values in EMIS.

EMIS Definition:     Key: EMIS Subject | Curriculum | Delivery Method | Student Population

EMIS Subject:

Curriculum:

Delivery Method:

Student Population:

How the teacher meets highly qualified definition:

### Add/Edit Highly Qualified Teacher Update Record Screen

**EMIS Definition** – The options for this drop-down list will be derived from the Teacher History tab of the selected teacher’s course section for which the teacher has been marked as the Teacher of Record. There will be one option for each unique EMIS Subject/Curriculum/Delivery Method/Student Population combination taught by the selected teacher. If the teacher already has a Highly Qualified Definition for a unique combination in the school and school year in context, then the unique combination will not be available in the list. This means that only unique combinations that do not have Highly Qualified Definitions will be available in the list.

**EMIS Subject, Curriculum, Delivery Method, Student Population** – The code and description for these read-only fields are displayed from the values selected on the EMIS Override tab for the course section, if defined, or the values selected on the EMIS tab for the course record.

**How the teacher meets highly qualified definition** (required) – Select from the drop-down list. This field indicates specifically how the teacher meets the highly qualified definition and is derived from element CU100 on the Staff Course (CU) record.

**Note:** Use option “I – Not core course OR course type is not eval. For HQT” when one or more of the following is true:

Curriculum Element = PS, PI or OC

Delivery Method = CC, ET, OL, and Ed option =YS or Delivery Method = ID, IM, TO, or CI

Student Population = D8, DP or PR

## Delete Highly Qualified Teacher Update Record

	EMIS Subject	Curriculum	Delivery Method	Stud. Population	HO Definition
X	060265 - Spanish	OT - Curriculum Not Specifically Covered By Another Option	FF - Face to Face Classroom Instruction	RG - Regular/General Students K-12	1 - NTE/Praxis II - State Licensing Exam

### Highly Qualified Teacher Update Maintenance Screen

When deleting a Highly Qualified Definition, a confirmation of the delete will be shown as in the following figure. This confirmation will display all the courses that a teacher teaches and is marked as the Teacher of Record that matches the EMIS Subject/Curriculum/Delivery Method/Student Population combinations.

Course Code ^	Course Name
622	SPANISH II
612	SPANISH I
809	SPANISH I

### Delete Highly Qualified Teacher Record Screen

**Continue** – Delete the Highly Qualified Definition record. A confirmation screen will be displayed.

**Delete of Highly Qualified Teacher Record Successful**

**Cancel** – Do not delete the record and return to the initial Highly Qualified Teacher Update Maintenance screen.

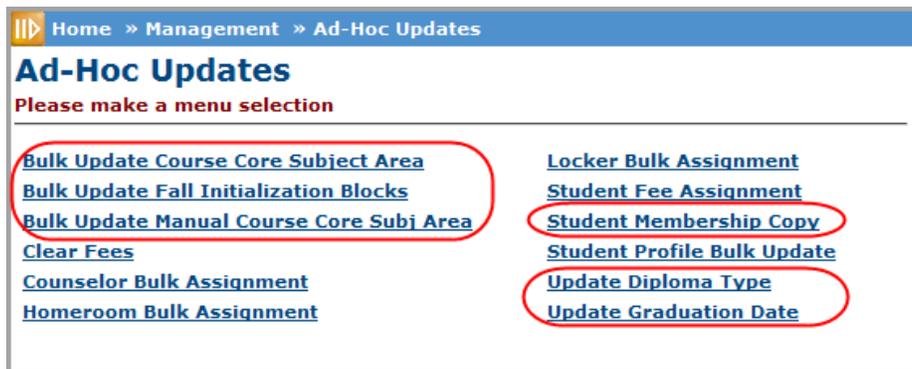
This page intentionally left blank.

# Ad-Hoc Updates

## Navigation: Home – Management – Ad-Hoc Updates

There are six Ad-Hoc Updates available to bulk update various StudentInformation EMIS data.

- Update Graduation Date
- Update Diploma Type
- Bulk Update Course Core Subject Area
- Bulk Update Manual Course Core Subj Area
- Bulk Update Fall Initialization Blocks
- Student Membership Copy



Ad-Hoc Updates Menu - Bulk Options

---

## Update Graduation Date

### Navigation: Home – Management – Ad-Hoc Updates – Update Graduation Date

This screen allows a building to update selected Grade 12 students (seniors) with a specific graduation date. District personnel will then need to modify the graduation date on any exception students that should not have this specific graduation date. Graduation Date is located on the Student Profile – FN-Graduate tab.

You have two options to update Graduation Dates – use the Status Search tab or Ad-Hoc Membership tab.

## Status Search Tab

**Status Search Tab on Bulk Update of Student Graduation Date Screen**

**Select the Student Statuses to be included** (required) – Select one or more Student Statuses to use when selecting students for the bulk update. The Status Search selection will only include Grade 12 students with the selected Student Status(es).

**Select a File Type** – Select from CSV, HTML (.html), or TAB (tab-delimited text file). If verifying (not updating), you must select a file type.

**Select a Download Method** – Select Download (download to your PC or file server) or Email (email as an attachment to yourself or someone else). If verifying (not updating), you must select a download method.

**Graduation Date** (required) – Enter the Graduation Date for this year’s seniors. All 12<sup>th</sup>-grade students with the selected status will be updated with this date on the student profile – FN-Graduate tab.

**Override Existing** (optional) – Check this box if the “new” Graduation Date should override any existing graduation dates for the selected students. If this box is unchecked, any selected student with a graduation date already entered will not be overridden with the “new” Graduation Date.

**Run Type** (required) – Verify will allow you to view the list and no updates will take place; Update will update the student graduation date for each selected student.

**Caution:** Please Run in the verify mode first. There is no “Undo” button.

**Submit** – Run the Verify or Update option selected. If updating (not verifying), you will see a confirmation message telling you how many records were updated.

There were 0 EMIS graduation dates and 0 SIS graduation years updated

## Ad-Hoc Membership Tab

Student Graduation Dates can also be updated for students in a specific Ad-Hoc Membership group.

**Ad-Hoc Memberships Tab on Bulk Update of Student Graduation Date Screen**

**Select Ad-Hoc Membership** (required) – Select an existing Ad-Hoc Membership from the drop-down list or click  to create a new Ad-Hoc Membership list. See “Creating an Ad-Hoc Membership for the Seniors” at the end of this section for more information.

**Select a File Type** – Select from CSV, HTML (.html), or TAB (tab-delimited text file). If verifying (not updating), you must select a file type.

**Select a Download Method** – Select Download (download to your PC or file server) or Email (email as an attachment to yourself or someone else). If verifying (not updating), you must select a download method.

**Graduation Date** (required) – Enter the Graduation Date for this year’s seniors. All seniors with the selected ad-hoc membership group will be updated with this date.

**Override Existing** (optional) – Check this box if the “new” Graduation Date should override any existing graduation dates for the selected students. If this box is unchecked, any selected student with a graduation date already entered will not be overridden with the “new” Graduation Date.

**Run Type** (required) – Verify will allow you to view the list and no updates will take place. Update will update the student graduation date for each selected student.

**Caution:** Please run in the VERIFY mode first - there is no “un-do” button.

**Submit** – Run the Verify or Update option selected. If updating (not verifying), you will see a confirmation message telling you how many records were updated.

There were 0 EMIS graduation dates and 0 SIS graduation years updated

## Create Ad-Hoc Membership Group for Seniors

The screenshot shows a web interface for updating graduation dates. The breadcrumb trail is 'Home » Management » Ad-Hoc Updates » Update Graduation Date'. The main heading is 'Bulk Update of Student Graduation Date' with a sub-note: 'This screen allows for a mass update of student graduation dates'. There are two tabs: 'Status Search' and 'Ad-Hoc Membership', with the latter selected. Below the tabs is a dropdown menu for 'Select Ad-Hoc Membership' with the text '-- Select an Ad-Hoc Membership --' and a 'Browse...' button. A 'File Download Options' section contains two dropdowns: 'Select A File Type' and 'Select A Download Method'. The 'Graduation Date' field has a date picker and a 'Browse...' button. The 'Override Existing' checkbox is checked. The 'Run Type' section has radio buttons for 'Verify' (selected) and 'Update'. A 'Submit' button is at the bottom.

**Ad-Hoc Memberships Tab on Bulk Update of Student Graduation Date Screen**

**Select Ad-Hoc Membership** (required) – Click  to create a new Ad-Hoc Membership list. Click **Add New Ad-Hoc Membership** to add a new Ad-Hoc Membership for seniors.

The screenshot shows the 'Ad Hoc Memberships' page. The breadcrumb trail is 'Home » My Account » Ad Hoc Memberships'. The heading is 'Ad Hoc Memberships' with a sub-note: 'From this page, you can build Ad-Hoc Memberships to be used throughout DASL.'. There are two buttons: 'Add New Ad-Hoc Membership' and 'Return to Previous Page'. Below the buttons is a table with columns 'Membership Name' and 'Active'. The table contains two rows: 'EL - Class of 2011' and 'ELMS - Class of 2011', both with an active status icon (a lightbulb). Below the table are two checkboxes: 'Active Only' (checked) and 'Public and Private' (unchecked).

	Membership Name	Active
  	EL - Class of 2011	
  	ELMS - Class of 2011	

**Add New Ad-Hoc Membership Button**

Add Ad Hoc Memberships Screen

**Membership Name** (required) – Enter your Ad-Hoc Membership Name.

**Search Mode** (required) – Make sure the Search Criteria button is selected.

**Grade** (optional) – Select Grade 12.

Check the “Students Selected by Default” check box and click **Search** to search for all students in Grade 12.

**Student List** - All of your students in Grade 12 will be displayed – all marked as selected. If any of these students should not be reported as your graduates, deselect their selection box. (12<sup>th</sup> graders who are withdrawn will also show on this list, but you can ignore them. They will not show on your Download Report and will not be updated.)

Click **Add Selected Students** to add the selected students to the Membership.

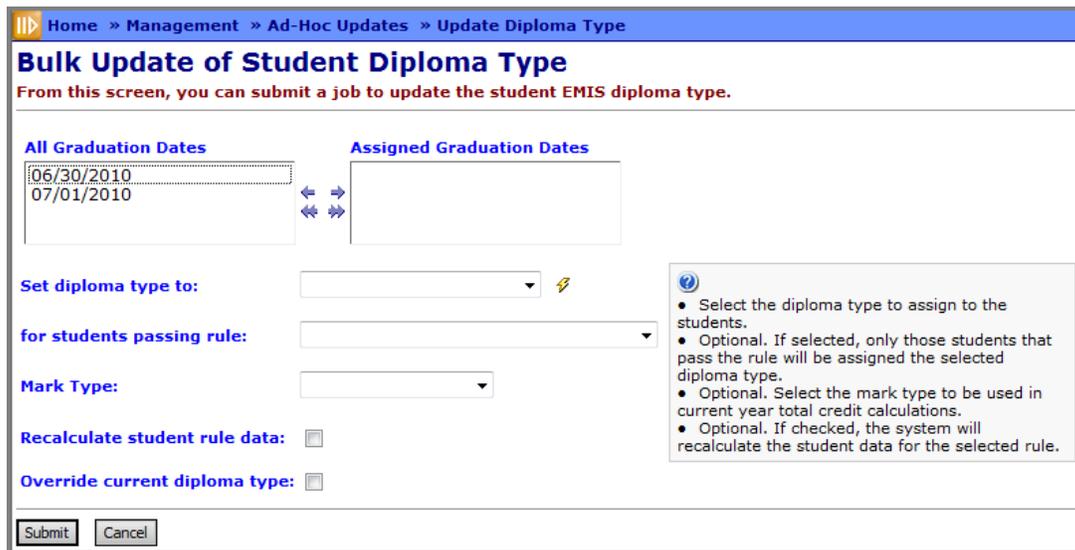
Click **Save** to save the Membership.

Click the  icon for the new Membership to use it on the Bulk Update for Graduation Date screen. Choose the Ad-Hoc tab and enter the name of the Ad-Hoc Membership you created. Complete the rest of the options, choosing Verify and review the report. If the listing is correct, rerun in Update mode.

## Update Diploma Type

### Navigation: Home – Management – Ad-Hoc Updates – Update Diploma Type

With StudentInformation, all students graduating will have had their graduation date field updated with a specific graduation date. The school then will need to process the Update Diploma Type to update those students' Diploma Type for EMIS reporting. The Bulk Update of Student Diploma Type will update selected students Diploma Type (Student Profile – FN-Graduate tab) to “1” – the most common diploma type issued. District personnel will then need to modify the diploma type on any exception students that should not be a diploma type “1”.



**Bulk Update of Student Diploma Type Screen**

**All Graduation Dates** – The left side of this dual-select box lists all graduation dates currently displayed on the FN-Graduate tab of any student's profile for the current school year.

**Assigned Graduation Dates** (optional) – Select one or more of Graduation Dates. The process will only update Diploma Type for students with the selected Graduation Dates. At least one Graduation Date must be selected.

**Set diploma type to** (required) – Select the diploma type to assign to the students. The Diploma Type is found on the student profile – FN-Graduate tab.

**for students passing rule** (optional) – If selected, only those students that pass the selected Graduation/Eligibility Rule will have their Diploma Type updated.

**Recalculate student rule data** (optional) – If selected, students' Graduation/Eligibility Rule status will be recalculated as part of the update process.

**Override current diploma type** (optional) – If selected, existing already-selected Diploma Types will be replaced by the selected Diploma Type. If not selected, any existing Diploma Type will remain unchanged.

**Save** – Process the Student Diploma Type update. You will receive a confirmation message:

**The update student diploma type job has been successfully submitted**

**Cancel** – Do not process the Student Diploma Type update.

## Bulk Update Course Core Subject Area

### Navigation: Management – Ad-Hoc Updates – Bulk Update Course Core Subject Area

This screen is used to bulk update the CORE Subject Area for courses in the context school and selected school years. The GC-Student Graduation-Core Summary is an EMIS record that is reported in two situations.

- **Period G** – For graduating seniors (regular and summer). A CORE Summary record is required for each CORE Subject Area in which a student has accumulated credits/units.
- **Period K** – For any students in grades 9 through 12 who are enrolled in the current school year that have earned accumulated credits/units in a CORE Subject Area in prior years.

Home » Management » Ad-Hoc Updates » Bulk Update Course Core Subject Area
Advanced Search | Feeds

### Bulk Update Course Core Subject Area

From this screen, you can bulk update courses with a CORE Subject Area.

[\[ Hide Course Filters \]](#)

The Course Filter options will allow you to bulk update courses that match search criteria. You will be able to preview courses that match your search, and select/deselect courses for updating with the CORE Subject Area chosen below.

**Note:** If an item is selected in the EMIS Subject Area for Credit dropdown, the EMIS Subject Codes dual select will only be populated with codes associated with the selected EMIS Subject Area for Credit.

**Department:**     **Area Of Study:**   
**Subject Area:**      Is High School Credit Only

**EMIS Subject Area For Credit:**      Report To EMIS Only

**EMIS Subject Codes**

- 010001 - Environmental and Agricultural Science
- 010150 - Annual Bioscience
- 010155 - Plant and Horticultural Science
- 010201 - Agricultural and Industrial Power Technology

**Selected EMIS Subject Codes**

[Preview Courses](#)

[\[ Hide Update Directives \]](#)

The Update Directives options will allow you to provide additional direction for the bulk update of courses.

**School Years**    **School Years To Update**

- 2009-2010
- 2008-2009
- 2007-2008
- 2006-2007

The bulk update will assign the CORE Subject Area to selected courses within all school years chosen in the "School Years to Update" dual select. The course will automatically be updated in the context school year.

[\[ Hide Sort Courses \]](#)

**Course Sorting Options**    **Selected Course Sorting Options**

- Subject Area
- Area Of Study
- EMIS Subject Code
- EMIS Subject Area For Credit

- Course Code
- Course Name

[Sort Courses](#)

Select All    **CORE Subject Area:**     [Update Selected Courses](#)

[\[ Hide Course Preview \]](#)

All courses will be returned if the 'Show Only Courses with no CORE Subject Area' box is unchecked, allowing you to change pre-existing CORE Subject Area values with the bulk update.

### Bulk Update Course Core Subject Area Screen

The following four sections are located on this screen:

- Course Filters
- Update Directives
- Sort Courses
- Course Preview

## Course Filters

Use **Hide Course Filters** and **Show Course Filters** to toggle between showing and hiding the Course Filters.

[ Hide Course Filters ]

The Course Filter options will allow you to bulk update courses that match search criteria. You will be able to preview courses that match your search, and select/deselect courses for updating with the CORE Subject Area chosen below.

**Note:** If an item is selected in the EMIS Subject Area for Credit dropdown, the EMIS Subject Codes dual select will only be populated with codes associated with the selected EMIS Subject Area for Credit.

Department:  Area Of Study:

Subject Area:   Is High School Credit Only

EMIS Subject Area For Credit:   Report To EMIS Only

EMIS Subject Codes

010001 - Environmental and Agricultural Science  
010150 - Annual Bioscience  
010155 - Plant and Horticultural Science  
010201 - Agricultural and Industrial Power Technology

Selected EMIS Subject Codes

Preview Courses

**Course Filters Area on Bulk Update Course Core Subject Area Screen**

The Course Filter options will allow you to bulk update courses that match search criteria. You will be able to preview courses that match your search, and select/deselect courses for updating with the CORE Subject Area chosen.

**Department** (optional) – Select a specific Department to use as a filter.

**Area of Study** (optional) – Select a specific “Area of Study” to use as a filter.

**Subject Area** (optional) – Select a specific “Subject Area” to use as a filter.

**Is High School Credit Only** (optional) – This check box allows the user to specify that only courses with the Is High School Credit option selected will appear in the list.

**EMIS Subject Area for Credit** (optional) – Select a specific “EMIS Subject Area for Credit” to use as a filter. If an item is selected in the “EMIS Subject Area for Credit” drop-down list, the “EMIS Subject Code” dual select is refreshed to include only the EMIS Subject Codes that are associated with the selected “EMIS Subject Area for Credit”.

**Report to EMIS Only** (optional) – This check box allows the user to specify that only courses with the Report to EMIS option selected will appear in the list.

**EMIS Subject Codes** (optional) – One or more “EMIS Subject Codes” can be selected to use as filter criteria. If no “EMIS Subject Codes” are selected, then there will be no filter on “EMIS Subject Codes”. If an item is selected in the “EMIS Subject Area for Credit” drop-down list, the “EMIS Subject Code” dual select is refreshed to include only the EMIS Subject Codes that are associated with the selected “EMIS Subject Area for Credit”.

**Preview Courses** – This button will refresh the Course Preview list in the bottom section of the screen with the courses that meet the filter criteria chosen at the top of the screen.

[ Hide Course Preview ]

	Course Code	Course Name	Hours Of Instruction	Department	Subject Area	Area Of Study	EMIS Subject Code	EMIS Subject Area For Credit	CORE Subject Area
1	<input checked="" type="checkbox"/> 0900	PERSONAL FINANCE	60	BUS		BUS	031500	BUS	BUS
2	<input checked="" type="checkbox"/> 0911	BUSINESS LAW	60	BUS			030900	BUS	BUS
3	<input type="checkbox"/> 0912	ECONOMICS	60	BUS			031800	BUS	BUS

Show Only Courses with no CORE Subject Area

All courses will be returned if the 'Show Only Courses with no CORE Subject Area' box is unchecked, allowing you to change pre-existing CORE Subject Area values with the bulk update.

Course Preview Area with Courses Selected

## Update Directives

Use **Hide Update Directives** and **Show Updated Directives** to toggle between showing and hiding the update directives (i.e. School Years to Update).

[ Hide Update Directives ]

The Update Directives options will allow you to provide additional direction for the bulk update of courses.

School Years	School Years To Update
2009-2010 2008-2009 2007-2008 2006-2007	

The bulk update will assign the CORE Subject Area to selected courses within all school years chosen in the 'School Years to Update' dual select. The course will automatically be updated in the context school year.

Update Directives Area on Bulk Update Course Core Subject Area Screen

The Update Directives options will allow you to provide additional direction for the bulk update of courses.

**School Years** (optional) – The bulk update will assign the CORE Subject Area to selected courses within all school years chosen in the “School Years to Update” dual select. The dual select will contain all school years other than the context year, including both past and future years. The courses will automatically be updated in the context school year.

## Sort Courses

Use **Hide Sort Courses** and **Show Sort Courses** to toggle between showing and hiding the course sorting options.

[ Hide Sort Courses ]

<p><b>Course Sorting Options</b></p> <ul style="list-style-type: none"> <li>Subject Area</li> <li>Area Of Study</li> <li>EMIS Subject Code</li> <li>EMIS Subject Area For Credit</li> </ul>	⇌ ⇌	<p><b>Selected Course Sorting Options</b></p> <ul style="list-style-type: none"> <li>Course Code</li> <li>Course Name</li> </ul>
---	--------	--

Select All      **CORE Subject Area:**

**Sort Courses Area on Bulk Update Course Core Subject Area Screen**

**Course Sorting Options** (optional) – This dual select control allows the user to select the sort order of the courses in the Course Preview list among the fields shown in the list. The **Sort Courses** button will resort the Course List with the chosen sort options.

**Select All** (optional) – If checked, this will automatically select all courses in the list.

**CORE Subject Area** (required) – Select the CORE Subject Area that will be assigned to the selected courses.

**Update Selected Courses** – Perform the Bulk Update of the selected CORE Subject Area to all selected courses in all selected school years and the context year. Do not click this button until you are sure you have the proper courses selected in the Course Preview list below.

**Course Preview**

Use **Hide Course Preview** and **Show Course Preview** to toggle between showing and hiding the Course Preview list.

[ Hide Course Preview ]

All courses will be returned if the 'Show Only Courses with no CORE Subject Area' box is unchecked, allowing you to change pre-existing CORE Subject Area values with the bulk update.

**Course Preview Area on Bulk Update Course Core Subject Area Screen**

The Course Preview list is populated when you choose specific filters and click **Preview Courses**.

[ Hide Course Preview ]

	Course Code	Course Name	Hours Of Instruction	Department	Subject Area	Area Of Study	EMIS Subject Code	EMIS Subject Area For Credit	CORE Subject Area
1	<input checked="" type="checkbox"/>	0900	PERSONAL FINANCE	60	BUS	BUS	031500	BUS	BUS
2	<input checked="" type="checkbox"/>	0911	BUSINESS LAW	60	BUS		030900	BUS	BUS
3	<input type="checkbox"/>	0912	ECONOMICS	60	BUS		031800	BUS	BUS

Show Only Courses with no CORE Subject Area

All courses will be returned if the 'Show Only Courses with no CORE Subject Area' box is unchecked, allowing you to change pre-existing CORE Subject Area values with the bulk update.

**Course Preview Area with Courses Selected**

Select the Courses that you wish to have bulk updated with the Core Subject Area selected in a previous area.

**Show Only Courses with no CORE Subject Area** (optional) – If checked, only courses in the list that do not yet have a CORE Subject Area will display. If unchecked, all courses will be returned. This allows the user to change pre-existing CORE Subject Area values with the bulk update.

## Bulk Update Manual Course Core Subject Area

### Navigation: Management – Ad-Hoc Updates – Bulk Update Manual Course Core Subj Area

This screen allows you to bulk update the CORE Subject Area for manually entered courses. All manual course history records that are marked as “Is High School Credit” need a CORE Subject Area value. All courses in which high school credit is earned need to have the CORE Subject Area updated for the current year, the future year (if School Year Initialization is already complete), and prior years – regardless of where the course was taken (JVS, post-secondary institution, another district, or middle school).

### Choose School Years Tab

#### Choose School Years Tab on Bulk Update Manual Course Core Subject Area Screen

This tab allows you to choose the school years you want to view and update manually entered courses.

**Manually Entered Course School Years** – The school years for which the school in context has manually entered courses will be displayed.

**Chosen** – Select the school years you want to filter and view manually entered courses.

**Next>** – Process the Choose schools years tab and proceed to the Choose originating schools tab.

**Summary>>** – Proceed directly to the View summary tab.

## Choose Originating Schools Tab

Home » Management » Ad-Hoc Updates » Bulk Update Manual Course Core Subj Area

### Bulk Update Manual Course Core Subject Area

From this screen you can bulk update the Core Subject Area on Manually Entered Courses

Choose school years | **Choose originating schools** | Choose filters | View courses and update records | View summary

< Prev | Next > | Summary >>

Choose whether to view and update manually entered courses included in High School Credit only.

High School Credit Manually Entered Courses Only

**Choose the originating schools to update.**  
 If no originating schools are chosen, records for all originating schools will be updated.  
 The list contains the originating schools on the manually entered courses for the school years chosen.

Manually Entered Course Originating Schools	Chosen
AJVS	
ALABAMA	
ALLEN EAST HIGH SCHOOL	
ALT SCH	
APOLLO	
APOLLO CAREER CENTER JVSD	
BATH HIGH SCHOOL	
BC	
BILOXI	
CALIFORNIA	
CANADA	
CLYDE HS	
DELPHOS	
DJHS	
EASTLAND	

### Choose Originating Schools Tab on Bulk Update Manual Course Core Subject Area Screen

This tab allows the you to choose the originating schools for which you want to view manually entered courses.

**High School Credit Manually Entered Courses Only**– When checked, only manually entered courses that are marked as “Is High School Credit” will be returned. This will default to checked and normally, you will want to leave it as checked since these courses require a CORE Subject Area.

**Manually Entered Course Originating Schools** – This side of the dual select box lists the originating schools of the manually entered courses at the school for all of the selected school years.

**Chosen** – Select the originating schools for which you want to filter and view manually entered courses. StudentInformation State Support recommends running the update process for one originating school at a time.

**Next>** – Process the Choose originating schools tab and proceed to the Choose filters tab.

**<Prev** – Return to the Choose school years tab.

**Summary>>** – Proceed directly to the View summary tab.

## Choose Filters Tab

Home » Management » Ad-Hoc Updates » Bulk Update Manual Course Core Subj Area Advanced

### Bulk Update Manual Course Core Subject Area

From this screen you can bulk update the Core Subject Area on Manually Entered Courses

Choose school years | Choose originating schools | **Choose filters** | View courses and update records | View summary

< Prev | Next > Summary >>

**Choose filters to limit the manually entered courses to view and update.**  
The filters contain a distinct list of values from the manually entered courses in the school years and originating schools chosen in previous tabs. To view all courses, do not select any filters. If a filter is chosen, only records matching the filter(s) will be returned.

Filter Category	Available Values	Chosen	Or like
<b>Subject Areas</b>	A/T - FINE ART/BUS TECHNOLOGY APO - APO APO - VOCATIONAL COURSE BUS - BUSINESS EDUC BUS - BUSINESS TECHNOLOGY		<input type="text"/>
<b>Areas Of Study</b>	AGR - AGR AGR - AGRICULTURE BUS - BUS BUS - BUSINESS CAP - COMPUTER APPLICATONS		<input type="text"/>
<b>Course Codes</b>	000 021 032 0410 050		<input type="text"/>
<b>Course Short Names</b>	1stYearExp 1stYearExper 1stYearExper. 1stYr.Exper. 1stYrExper		<input type="text"/>
<b>Course Names</b>	1stYearExperience 1STYREXP RNCE 2-DARTS 3DART AbnormalPsychology		<input type="text"/>

### Choose Filters Tab on Bulk Update Manual Course Core Subject Area Screen

This tab allows you to choose additional filters to limit the manually entered courses to view and update.

#### Subject Areas, Areas of Study, Course Codes, Course Short Names and Course Names

– The filters contain a distinct list of values from the manually entered courses in the school years and originating school years chosen in previous tabs.

**Chosen** – Select one or more values on which to filter the select manual courses. To view all courses for the selected school years and originating school years chosen in previous tabs, do not select any filters. If filters are chosen, only records matching the filters will be returned.

**Or Like** – Instead of choosing specific values for each filter, the “Or like” filter can be used. Enter a character string that will be used to filter based on the beginning of the value. For example, entering “alg” for the Subject Area “Or like” filter will return manual courses with Subject Areas of ALG, ALG2, ALGEBRA I, and ALGEBRA II, etc.

**Next>** – Process the Choose filters tab and proceed to the View courses and update records tab.

**<Prev** – Return to the Choose originating schools tab.

**Summary>>** – Proceed directly to the View summary tab.

## View Courses and Update Records Tab

Home » Management » Ad-Hoc Updates » Bulk Update Manual Course Core Subj Area

### Bulk Update Manual Course Core Subject Area

From this screen you can bulk update the Core Subject Area on Manually Entered Courses

Choose school years | Choose originating schools | Choose filters | **View courses and update records** | View summary

< Prev | Next > | Summary >>

Select the manually entered courses to update. Choose a CORE subject area value and click the 'Update Selected Records' button. Only records matching the school years and originating schools selected in the previous tab will be updated.

CORE Subject Area: [Clear CORE Subject Area]

Select All | Update Selected Records

	Code ^	Short Name	Name	Is HS Credit	CORE Subject Area	Records
<input type="checkbox"/>	COMP	COMPUTER	COMPUTERPOWERPOINT	<input checked="" type="checkbox"/>	BUS	1
<input type="checkbox"/>	COMP	COMPUTERLIT	COMPUTERLITERACY	<input checked="" type="checkbox"/>	TEC	1
<input type="checkbox"/>	MICRO	MICROSOFTTOOL	MICROSOFTTOOLBOX	<input checked="" type="checkbox"/>	BUS	1
<input type="checkbox"/>	MICRO	MICROTOOLBOX	MICROSOFTTOOLBOX	<input checked="" type="checkbox"/>	TEC	1
<input type="checkbox"/>	TWC	T/WILDCATCO	THEWILDCATCOMPANY	<input checked="" type="checkbox"/>	BUS	1

Show Manually Entered Courses Missing CORE Subject Area Only

**Total Manual Course Records**  
5

### View Courses and Update Records Tab on Bulk Update Manual Course Core Subject Area Screen

This tab allows you to view and update the manually entered courses based on the school years, originating schools and filters chosen. All manual course history records that match the selected school years, originating schools, and filters are listed.

The manual course history list can be sorted by Code in ascending or descending order. The Core Subject Area column shows the existing CORE Subject Area (if any) assigned that specific manual course history record. The Records column shows how many manual course history records will be affected if the update is completed.

**Core Subject Area column** – From the drop-down list, choose to [Clear CORE Subject Area] or choose the CORE Subject Area for which to update all of the selected manual courses. Choosing [Clear CORE Subject Area] will blank out the CORE Subject Area for the selected manually entered courses.

**Select All** – Selecting this box will select all of the courses listed.

Select the **check box** next to the course to select specific manual course history records. Place a check in the box next to the courses that you want to be updated with the CORE Subject Area chosen.

**Show Manually Entered Courses Missing CORE Subject Area Only** – Selecting this box will show only manually entered courses that currently have a blank (or missing) CORE Subject Area.

**Update Selected Records** – Clicking this button will process the bulk update of the CORE Subject Area for the manual course history records that have been selected. Only manual course history records that are selected will be updated. After the update, the same list of courses will be displayed with the updated CORE Subject Area now displayed.

**Next>** – Proceed to the View summary tab.

<Prev – Return to the Choose filters tab.

Summary>> – Proceed directly to the View summary tab.

## View summary Tab

The screenshot shows the 'Bulk Update Manual Course Core Subject Area' screen. The 'View summary' tab is selected. The summary text states: 'The summary shows counts by originating school and high school credit. Counts are for the manually entered courses that match the school years, originating school and high school credit options chosen on the previous tabs. Use the summary to view the number of records for which the CORE Subject Area is set.'

Originating School	Is HS Credit	CORE Missing	CORE Set	Total
AJVS	<input checked="" type="checkbox"/>	1	0	1

Total Missing	Total Set	Total Records
1	0	1

### View Summary Tab on Bulk Update Manual Course Core Subject Area Screen

This summary tab shows counts by originating school and high school credit in addition to total counts. Counts are for the manually entered courses that match the school years, originating school, and high school credit options chosen on the previous tabs. The summary can be used to view the number of manual course records with the CORE Subject Area still missing and the CORE Subject Area set by the update just processed.

<Prev – Return to the View courses and update records tab.

<<Start Over – Start over and return to the Choose school years tab.

## Bulk Update Fall Initialization Blocks

### Navigation: Management – Ad-Hoc Updates – Bulk Update Fall Initialization Blocks

This screen allows the user to perform a bulk update to set/unset the “Exclude from Fall Initialization” flags on the Student Profile – FS, FD and FN tabs.

**Bulk Update Fall Initialization Blocks Screen**

**Ad-Hoc Membership** (optional) – You may select an Ad-Hoc Membership to use when updating the “Exclude Fall Initialization Flags” on the Student Profile. If an Ad-Hoc Membership is selected, only the students included in the Ad-Hoc Membership will have their “Exclude Fall Initialization Flags” updated as specified. Click to add a new Ad-Hoc Membership.

**Public And Private** – If checked, both public and private Ad-Hoc Memberships will be included in the Ad-Hoc Membership drop-down menu.

**Update Check Box**

**Update** – Check the Update check box next to the specific Setting that is to be updated. The appropriate Student Profile flag will be updated as follows:

**Settings That Can Be Updated**

Setting	Action
Process FS Records	The “Exclude FS Records from Fall Initialization Updates” flag on the Student Profile-FS tab will be updated
Process FD Records	The “Exclude FD Records from Fall Initialization Updates” flag on the Student Profile-FD tab will be updated
Process FN Records	The “Exclude FN Records from Fall Initialization Updates” flag on the Student Profile-FN tab will be updated

## New Value

If the Exclude Student option is selected, the Exclude Records from Fall Initialization Updates option will be selected on the appropriate Student Profile tab as specified by the Setting.

If the Include Student option is selected, the Exclude Records from Fall Initialization Updates option will be unchecked on the appropriate Student Profile tab as specified by the Setting.

**Submit** – Execute the Bulk Update Fall Initialization Blocks with the selected Settings and Values. The user will receive a message that indicates how many students were updated.

1 Students were successfully updated

**Cancel** – Do not execute the Bulk Update Fall Initialization Blocks.

## Student Membership Copy

### Navigation: Management – Ad-Hoc Updates – Student Membership Copy

This screen allows you to copy selected student membership assignments from the previous school year to the current year in context. Refer to *ProgressBook StudentInformation Student and Registration Guide* for more information.

**Note:** The 215XXX codes are not available for you to copy in this process. These codes are now stored on the **Services** tab of the **Special Education** screen.

The memberships that have been copied for the selected student display on the Student Memberships screen.

Home » SIS » Student » Student Memberships

### Student Memberships

From this screen, you can view the memberships associated with a student.

Special Education Services (215xxx) for FY13 and beyond now report to EMIS from the Special Education Services page.

Membership Code	Membership Name	School Year ^	Start Date	Stop Date	EMIS Program Code
48	No FERPA Form	2009	Dec 10, 2009		
405003	Drama Club/Theatians	2010	Sep 03, 2010		405003
405007	Music Activities (not associated with course which credit ea	2010	Sep 06, 2010		405007
405004	Foreign Language Clubs	2011	Sep 05, 2011		405004

Current Assignments Only
  All Assignments This Year
  All Assignments All Years

[Back to Student Profile](#)

### Student Memberships Screen

After the Memberships (MEMBEMIS) update process has been run, Student Program Records (GQ) are created for memberships that have an EMIS Program Code. See [“Memberships \(MEMBEMIS\)”](#) for further details.

Home » EMIS » Maintenance » Student Program Record

### Student Program Record

From this screen, you can display, add, change and delete data pertaining to student program records.

Reporting Period: K ▾

Add Program Record

	<u>Program Code</u> ^	<u>Start Date</u>	<u>Stop Date</u>	<u>Employee Id</u>	<u>Prog Prov IRN</u>
 	205075	Sep 01, 2011	Dec 19, 2011	797546350	*****

Student Program Record Screen

# Reports

## Period G Student Core Summary Report

The Period G Student Core Summary report lists the students graduating in period G and the credits they received for each core area by district and school.

The Period G Student Core Summary Report is a Report Builder report and is located in the following path: Home > Local > Report Builder Links > Report Builder Reports.

Home » Local » Report Builder Advanced Search | Feedback

### Report Builder

From this screen, you can manage Regular and User Reports created in ProgressBook Report Builder

[ Hide Regular Reports ]

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.
	<b>Period G Student Core Summary Report</b>	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	Period K NonGraduate Core Summary Report	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	Course Fee Analysis	
	Payments Posted by User Report	
	Discipline Report	

[ Hide User Reports ]

View Report	Name	Description
	Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.
	My Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.

### Period G Student Core Summary Report on the Report Builder Reports Screen

1. With the school or district for which you want to run the report in context, on the Report Builder screen, click the **run icon** in the View Report column for the Period G Student Core Summary report.

The report displays on the StudentInformation Report Viewer screen.

District	Building Name	Student Number	Last Name	First Name	Middle Name	CORE Area Code	Area Count	Total Area Count	
Ashland City Schools	ASHLAND HIGH SCHOOL	129001	RAMDS	TERRY		BUS	0.50		
						CTA	7.50		
						ELE	0.50		
						ENG	4.00		
						FLR	2.00		
						MTA	1.00		
						MTD	3.00		
						PHE	1.00		
						SCP	2.00		
						SOG	0.50		
						SDH	1.00		
						SOD	2.00		
							<b>Total:</b>	<b>25.000</b>	
								129002	REYES
CTA	3.00								
ENG	4.00								
FAR	4.00								
FLR	2.00								
MTA	2.50								
MTD	3.00								
PHE	1.00								
SCA	2.00								

**Period G Student Core Summary Report**

2. If you would like to apply an additional filter to the report results, click **Show Setup**, and then in the **Set Optional Filters** area:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the **Field Name** drop-down list. For more information about filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.
  - c. In the **Value** field, enter or select the appropriate value, if applicable.

**Note:** The available options and acceptable values vary depending on the option you selected in the Field Name drop-down list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name drop-down list. If you selected an option in the Field Name drop-down list that requires a date, a calendar becomes available in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation drop-down list, then the Value field is unavailable.

- d. To add an additional filter, repeat [step 2\(a\)](#) through [step 2\(c\)](#) in the line below the previous filter.

- e. Click **View Report** to apply the filter(s) to the report.

The report displays a second time with the filters you defined applied. The following figure shows the report filtered by the Core Area Code of BUS.

Period G Student Core Summary Report								
District	Building Name	Student Number	Last Name	First Name	Middle Name	CORE Area Code	Area Count	Total Area Count
Ashland City Schools	ASHLAND HIGH SCHOOL	129001	RAMOS	TERRY		BUS	0.50	
							Total:	0.500
		129002	REYES	GERALD		BUS	0.50	
							Total:	0.500
		129004	SHAW	VIVIAN		BUS	0.50	
							Total:	0.500
		129005	HOLMES	ROBERTA		BUS	2.00	
							Total:	2.000
		129006	RICE	HOLLY		BUS	0.50	
							Total:	0.500
		129007	ROBERTSON	BRITTANY		BUS	0.50	
							Total:	0.500
		129008	HUNT	WILLIE		BUS	0.50	
							Total:	0.500
129010	ROMERO	MELINDA		BUS	0.50			
					Total:	0.500		
129011	LARSON	ARLENE		BUS	0.50			
					Total:	0.500		
129013	MENDOZA	ALLISON		BUS	0.50			
					Total:	0.500		
129014	MCDANIEL	TERRY		BUS	0.50			
					Total:	0.500		

**Period G Student Core Summary Report Filtered by BUS Core Area Code**

3. To save the report with your selected parameters and filters, perform the following steps:
  - a. Click **Save Setup As**.
  - b. In the **New report name** field, enter a unique report name.
  - c. In the **New description** field, enter a description of the report.
  - d. Click **Save**.

The following message displays at the bottom of the screen: "Report setup saved successfully."

The report is saved. You can now run it directly from the User Reports area on the Report Builder Reports screen.

4. Click the close button to close the StudentInformation Report Viewer screen and return to the Report Builder screen.

## Period K Non-Graduate Core Summary Report

The Period K Non-Graduate Core Summary report lists the students and the credits received for each core area in period K by district and school.

The Period K Non-Graduate Core Summary Report is a Report Builder report and is located in the following path: Home > Local > Report Builder Links > Report Builder Reports.

**Run Icon** →

View Report	Name	Description
	Class Master Schedule with Disabilities R407	Class Master Schedule with Disabilities (R407)
	Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.
	Period G Student Core Summary Report	Provide a listing of period G Core Summary records by student for verification of core records for graduating students.
	<b>Period K NonGraduate Core Summary Report</b>	Providing a listing of period K Core Summary records by student for verification of core records for non-graduating students.
	Course Fee Analysis	
	Payments Posted by User Report	
	Discipline Report	

View Report	Name	Description
	✗ Class Master Schedule for Geometry	This report lists the Class Master Schedule for all geometry classes.
	✗ My Outstanding Fee Balances by Account Code	Provides a list of outstanding student fees and groups them by account code.

### Period K Non-Graduate Core Summary Report on the Report Builder Reports Screen

1. With the school or district for which you want to run the report in context, on the Report Builder screen, click the run icon in the **View Report** column for the Period K Non-Graduate Core Summary report.

The report displays on the StudentInformation Report Viewer screen.

District	Building Name	Student Number	Last Name	First Name	Middle Name	Grade Level	CORE Area Code	Area Count	Total Area Count
Ashland City Schools	ASHLAND HIGH SCHOOL	129001	RAMOS	TERRY		12	BUS	0.500	18.500
							CTA	3.500	
							ELE	0.500	
							ENG	3.500	
							FLR	2.000	
							MTA	1.000	
							MTO	2.000	
							PHE	1.000	
							SCP	2.000	
							SDH	1.000	
							SDD	1.500	
	Total:								
		129002	REYES	GERALD		12	BUS	0.500	
							CTA	3.000	
							ENG	3.000	
							FAR	1.000	
							FLR	2.000	
							MTA	1.500	
							MTO	3.000	
							PHE	1.000	

**Period K Non-Graduate Core Summary Report**

2. If you would like to apply an additional filter to the report results, click **Show Setup**, and then in the **Set Optional Filters** area:
  - a. In the **Field Name** drop-down list, select the field on which you want to filter the report.
  - b. In the **Operation** drop-down list, select the operation you want to apply to the filter. The available options may vary depending on the field you selected in the Field Name list. For more information about the filter operations, refer to *ProgressBook StudentInformation Report Builder User Guide*.
  - c. In the **Value** field, enter or select the appropriate value, if applicable.

**Note:** The available options and acceptable values vary depending on the option you selected in the Field Name drop-down list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name drop-down list. If you selected an option in the Field Name drop-down list that requires a date, a calendar becomes available in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation drop-down list, then the Value field is unavailable.

- d. To add an additional filter, repeat [step 2\(a\)](#) through [step 2\(c\)](#) in the line below the previous filter.

- e. Click **View Report** to apply the filter(s) to the report.

The report displays a second time with the filters you defined applied. The following figure shows an example of the report filtered by the Core Area Code of BUS.

District	Building Name	Student Number	Last Name	First Name	Middle Name	Grade Level	CORE Area Code	Area Count	Total Area Count
Ashland City Schools	ASHLAND HIGH SCHOOL	129001	RAMOS	TERRY		12	BUS	0.500	
								Total:	0.500
		129002	REYES	GERALD		12	BUS	0.500	
								Total:	0.500
		129004	SHAW	VIVIAN		12	BUS	0.500	
								Total:	0.500
		129005	HOLMES	ROBERTA		12	BUS	0.500	
								Total:	0.500
		129006	RICE	HOLLY		12	BUS	0.500	
								Total:	0.500
		129007	ROBERTSON	BRITTANY		12	BUS	0.500	
								Total:	0.500
		129008	HUNT	WILLIE		12	BUS	0.500	
						Total:	0.500		
129010	ROMERO	MELINDA		12	BUS	0.500			
						Total:	0.500		
129011	LARSON	ARLENE		12	BUS	0.500			
						Total:	0.500		
129013	MENDOZA	ALLISON		12	BUS	0.500			
						Total:	0.500		

**Period K Non-Graduate Core Summary Report Filtered by BUS Core Area Code**

3. To save the report with your selected parameters and filters, perform the following steps:
  - a. Click **Save Setup As**.
  - b. In the **New report name** field, enter a unique report name.
  - c. In the **New description** field, enter a description of the report.
  - d. Click **Save**.

The following message displays at the bottom of the screen: "Report setup saved successfully."

The report is saved. You can now run it directly from the User Reports area on the Report Builder Reports screen.

4. Click the close button to close the StudentInformation Report Viewer screen and return to the Report Builder screen.

# Appendix A – Student Registration and Withdrawal Scenarios

Please refer to the 12/13 Withdrawal Scenarios document, which is located on the Web documentation page (Procedural Checklists - EMIS section).

This page intentionally left blank.

# Appendix B – StudentInformation Crosswalk

The following table lists all EMIS elements based on the state EMIS Manual Chapter 5 and where they reside in StudentInformation.

## Student Demographic Record (GI)

EMIS Element	Location in StudentInformation
	These elements are located on various Student Profile tab(s) as listed below.
Building IRN	Additional – Primary Building AND FS-Standing – Attending Building IRN
EMIS Student ID Number	FS-Standing
Date of Birth	General – Birthdate
Gender	General – Gender
Racial/Ethnic Group	General - Summative Race
Native Language	General – Native Language
First Name	General – First Name and/or Private – Legal First Name
Middle Name	General – Middle Name and/or Private – Legal Middle Name
Last Name	General – Last Name and/or Private – Legal Last Name
Student Birth Place City	General – Birthplace City
Student Home Language	General - Home Language
Hispanic/Latino	General - Hispanic/Latino

## Student Demographic - Race Detail Record (GJ)

EMIS Element	Location in StudentInformation
EMIS Student ID Number	FS Standing
Racial Group	General - Racial Groups (1 record created for each group checked)

**Student Standing Record (FS)**

EMIS Element	Location in StudentInformation
	These elements are located on various Student Profile tab(s) as listed below.
Effective Start Date	FS-Standing – Effective Start Date
Admission Date	FS-Standing – District Admission Date
Student Admission Reason	FS-Standing – Admission Reason
Admitted From IRN	FS-Standing – Admitted From IRN
Effective End Date	FS-Standing – Effective End Date
Withdrawal Reason	FS-Standing – Withdraw Reason
Withdrawn To IRN	FS-Standing – Withdrawn To IRN
State Student ID (SSID)	FS-Standing – State Student ID (SSID)
Student Percent of Time	FS-Standing – Percent of Time
Tuition Type	FS-Standing – Tuition Type
District Relationship	FS-Standing – District Relationship
Legal District of Residence	FS-Standing – District of Residence
Attending Building IRN	FS-Standing – Attending Building IRN
Assigned Building Area IRN	FS-Standing – Assigned Building IRN
How Received	FS-Standing – How Received
How Received IRN	FS-Standing – How Received IRN
Sent Reason 1	FS-Standing – Sent To Reason 1
Sent To IRN 1	FS-Standing – Sent to IRN 1
Sent To Percent of Time 1	FS-Standing – Percent of Time 1
Sent Reason 2	FS-Standing – Sent To Reason 2
Sent To IRN 2	FS-Standing – Sent To IRN 2
Sent To Percent of Time 2	FS-Standing – Sent To Percent of Time 2
County of Residence	FS-Standing – County of Residence
October Count Week Attendance Days	FS-Attendance – October CW: Attendance Days
October Count Week Excused Absence Days	FS-Attendance – October CW: Excused Absence Days
October Count Week Unexcused Absence Days	FS-Attendance – October CW: Unexcused Absence Days
School Year Attendance Days	FS-Attendance – School Year: Attendance Days
School Year Excused Absence Days	FS-Attendance – School Year: Excused Absence Days
School Year Unexcused Absence Days	FS-Attendance – School Year: Unexcused Absence Days

**Student Attributes – Effective Date Record (FD)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	These elements are located on various Student Profile tab(s) as listed below.
Effective Start Date	FD-Attributes – Effective Start Date
Effective End Date	FD-Attributes
Grade Level	FD-Attributes – EMIS Grade Level
State Equivalent Grade Level	FD-Attributes – State Equivalent Grade
Attendance Pattern	FD-Attributes – Attendance Pattern
Disadvantagement	FD-Attributes – Disadvantagement
Preschool Poverty Level	FD-Attributes – Preschool Poverty Level
Disability Condition	FD-Attributes – Disability Condition
Student being served by 504 Plan	FD-Attributes – Section 504 Plan
Homeless Status	FD-Attributes – Homeless Status
Homeless Unaccompanied Youth	FD-Attributes – Homeless Unaccompanied Youth
Limited English Proficiency	FD-Attributes – Limited English Proficiency
Migrant Status	FD-Attributes – Migrant Status
Foreign Exchange Student Graduation Plan	FD-Attributes – Foreign Exchange Graduation Plan
Immigrant Status	FD-Attributes – Immigrant Status

**Student Attributes – No Date Record (FN)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	These elements are located on various Student Profile tab(s) as listed below.
Non-Attending Reason	FS-Attendance – October CW: Non-Attending Reason
Retained Status	FN-Attributes – Retained Status
Fiscal year student began 9th grade	FN-Attributes – Fiscal Year Began 9th
Accountability IRN	FN-Attributes – Accountability IRN
Attending Building IRN Next Year	FN-Attributes – Attending Building IRN Next Year
Third Grade Reading Guarantee	FN-Attributes – Third Grade Reading Guarantee
Limited English Proficient Reclassification Date	FD-Attributes – LEP Reclass Date
Majority of Attendance IRN	FN-Attributes – Majority of Attendance IRN
CORE Economics and Financial Literacy Requirement Met	FN-Graduate – Economics and Financial Literacy Requirement Met
CORE Fine Arts Requirement Met	FN-Graduate – Fine Arts Requirement Met
CORE Graduation Requirement Exemption Code	FN-Graduate – CORE Graduation Requirement Exemption
Exempted from Physical Education Graduation Requirement	FN-Graduate – Exempted from Physical Education Graduation Requirement

**Student Attributes – No Date Record (FN)**

EMIS Element	Location in Student Information
Diploma Date	FN-Graduate– Graduation Date
Diploma Type	FN-Graduate – Diploma Type
OGT Graduation Alternative	FN-Graduate – OGT Graduation Alternative
Military Compact Graduation Alternative Count	FN-Graduate – Military Compact Graduation Alternative
Updated Dec 1 IEP Outcome	FN-Attributes – Updated Dec 1 IEP Outcome
Tech Prep Completer	FN-Attributes – Tech Prep Completer
CTE Program of Concentration	FN-Attributes – CTE Program of Concentration

**Student Acceleration Record (FB)**

EMIS Element	Location in Student Information
	These elements are located on the Student Acceleration (FB) page.
Subject Area Code	Student Acceleration (FB) – Assessment Area Code
Accelerated Level Count	Student Acceleration (FB) – Accelerated Level Count
Accelerated Assessment Flag	Student Acceleration (FB) – Accelerated Assessment Flag
Accelerated Assessment Accountability IRN	Student Acceleration (FB) – Accelerated Assessment Accountability IRN

**Student Graduation - Core Summary Record (GC) - Period K**

EMIS Element	Location in Student Information
District IRN	District IRN
EMIS Student ID Number	FS Standing – EMIS
CORE Area Code	EMIS Maintenance – Student Non-Graduate Core Summary – CORE Area Code
CORE Area Count	EMIS Maintenance – Student Non-Graduate Core Summary – CORE Count

**Student Graduation - Core Summary Record (GC) - Period G**

EMIS Element	Location in Student Information
District IRN	District IRN
EMIS Student ID Number	FS Standing – EMIS ID
CORE Area Code	Graduate Reporting Period (G) – Student Graduate Core Summary Maintenance – Student Non-Graduate Core Summary – CORE Area Code
CORE Area Count	Graduate Reporting Period (G) – Student Graduate Core Summary Maintenance – Student Non-Graduate Core Summary – CORE Count

**Student Special Education Graduation Requirement Record (FE)**

EMIS Element	Location in StudentInformation
District IRN	District IRN
EMIS Student ID Number	FS – EMIS ID
IEP Date Type	Special Education – Grad Requirement – Date Type
IEP Date	Special Education – Grad Requirement – IEP Date
Assessment Type Code	Always “STR”.
Assessment Area Code	Special Education – Grad Requirement – Assessment – Assessment Area
Exemption Flag	Special Education – Grad Requirement – Assessment – Exemption Flag

**Student Course Record (GN)**

EMIS Element	Location in StudentInformation
Local Classroom Code	Constructed by CTRMEMIS using School Code + Course ID + Section
High School Credit Earned	Student Subject Record – High School Credit Earned
Partial/Override Credit	Student Subject Record – High School Credit Amount
Course Enrollment Start Date	Student Subject Record – Course Start Date
Course Enrollment End Date	Student Subject Record – Course Stop Date

**Student Program Record (GQ)**

EMIS Element	Location in StudentInformation
Program Code	Student Memberships – EMIS Program Code Note(s): The 215xxx codes that are reported as part of the GQ record are also located on the Services tab on the Special Education screen.
Employee ID	The ID comes from the Staff record in Security based on the Student Memberships – Staff Member.
Program Provider IRN	Student Memberships – Program Provider IRN
Program Enrollment Start Date	Student Memberships – Start Date
Program Enrollment End Date	Student Memberships – Stop Date

**Graduation-Only Test Record (GP)**

EMIS Element	Location in StudentInformation
	This record is not currently stored in StudentInformation.

**Student Achievement Test Record (GA)**

EMIS Element	Location in StudentInformation
	All elements are on the Student Achievement page.
Test Grade Level	Test
Subject Type	Part
Test Date	Test date

**Student Achievement Test Record (GA)**

EMIS Element	Location in StudentInformation
Required Test Type	Test
Grade Level of Student at time of Test	Grade at time of test
Type of Accommodation	Accommodations
Scaled Score	Scaled score
Score Not Reported	Reason Test Not Taken
Raw Score	Raw score
Building IRN - Spring Test Administration	Spring administration IRN

**Student Ohio Graduation Test (OGT) Record (GX)**

EMIS Element	Location in StudentInformation
	All elements are on the Ohio Graduation Test page.
Subject	Part
Test Date	Test Date
Required Test Type	Test Type
Grade Level of Student at time of test	Grade at Time of Test
Type of Accommodation	Accommodations
Scaled Score	Scaled Score
Score Not Reported	Score Not Reported
Raw Score	Raw Score
Test Required for Graduation	Required for Graduation
Building IRN – Spring Test Administration	March Administration Building IRN

**CTE Student Assessment Record (GY)**

EMIS Element	Location in StudentInformation
	This record is not currently stored in StudentInformation.

**Student Kindergarten Readiness Assessment – Literacy Record (GO)**

EMIS Element	Location in StudentInformation
	All elements are on the Kindergarten Readiness Assessment – Literacy (KRA-L) Record page.
Test Date	Test Date
Type of Accommodation	Accommodations
Score Not Reported	Reason Test Not Taken
Total Score	Total Score

**Student Preschool Assessment Record (GB)**

EMIS Element	Location in StudentInformation
	All elements are on the Preschool Assessment Record page.
Test Date	Test Date
Type of Accommodations to Standard Test Type	Accommodations
Score Not Reported	Reason Test Not Taken
Picture Naming Score	Picture Naming Score
Rhyming Score	Rhyming Score
Alliteration Score	Alliteration Score

**Student Preschool ASQ/SE Assessment Record (GS)**

EMIS Element	Location in StudentInformation
	All elements are on the Preschool ASQ/SE Assessment Record page.
Test Level	Test Level
Test Date	Test Date
Score Not Reported	Reason Test Not Taken
Score	Score

**Student Preschool ECO Assessment Record (GM)**

EMIS Element	Location in StudentInformation
	All elements are on the Preschool ECO Assessment Record page.
Assessment Area	Test Part
Test Date	Test Date
Score Not Reported	Reason Test Not Taken
Score	Score
Progress	Progress

**Ohio Test of English Language Acquisition Record (GF)**

EMIS Element	Location in StudentInformation
	All elements are on the Ohio Test of English Language Acquisition (OTELA) page.
Test Date	Test Date
Grade Level of Student at Time of Test	Grade Level at Time of Test
Type of Accommodations	Accommodations
Score Not Reported	Reason Test Not Taken
Reading Domain Score	Reading Scaled Score
Writing Domain Score	Writing Scaled Score
Listening Domain Score	Listening Scaled Score
Speaking Domain Score	Speaking Scaled Score

**Ohio Test of English Language Acquisition Record (GF)**

EMIS Element	Location in Student Information
Comprehension Domain Score	Comprehension Scaled Score
Composite Performance Level	Comprehension Performance Level

**Student Gifted Education Record (GG)**

EMIS Element	Location in Student Information
	All elements are on the Student Gifted Record page.
Gifted Screening – Superior Cognitive ability	Screening: Superior Cognitive Ability
Gifted Screening – (SAA) - Mathematics	Screening: Specific Academic Ability – Math
Gifted Screening – (SAA) - Science	Screening: Specific Academic Ability – Science
Gifted Screening – (SAA) - Reading/Writing	Screening: Specific Academic Ability – Reading/Writing
Gifted Screening – (SAA) - Social Studies	Screening: Specific Academic Ability – Social Studies
Gifted Screening – Creative Thinking Ability	Screening: Creative Thinking Ability
Gifted Screening – Visual/Performing Arts	Screening: Visual/Performing Arts
Gifted Assessment – Superior Cognitive Ability	Assessment: Superior Cognitive Ability
Gifted Assessment – (SAA) – Mathematics	Assessment: Specific Academic Ability – Math
Gifted Assessment – (SAA) – Science	Assessment: Specific Academic Ability – Science
Gifted Assessment – (SAA) – Reading, Writing	Assessment: Specific Academic Ability – Reading/Writing
Gifted Assessment – (SAA) - Social Studies	Assessment: Specific Academic Ability – Social Studies
Gifted Assessment – Creative Thinking Ability	Assessment: Creative Thinking Ability
Gifted Assessment – Visual/Performing Arts	Assessment: Visual/Performing Arts
Gifted Identification – Superior Cognitive Ability	Identified: Superior Cognitive Ability
Gifted Identification – (SAA) – Mathematics	Identified: Specific Academic Ability – Math
Gifted Identification – (SAA) – Science	Identified: Specific Academic Ability – Science
Gifted Identification – (SAA) – Reading/Writing	Identified: Specific Academic Ability – Reading/Writing
Gifted Identification v (SAA) – Social Studies	Identified: Specific Academic Ability – Social Studies
Gifted Identification – Creative Thinking Ability	Identified: Creative Thinking Ability
Gifted Identification – Visual/Performing Arts	Identified: Visual/Performing Arts
Gifted Identification Date – Superior Cognitive Ability	Identified Date: Superior Cognitive Ability
Gifted Identification Date – (SAA) – Mathematics	Identified Date: Specific Academic Ability – Math

**Student Gifted Education Record (GG)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
Gifted Identification Date – (SAA) - Science	Identified Date: Specific Academic Ability – Science
Gifted Identification Date – (SAA) – Reading/Writing	Identified Date: Specific Academic Ability – Reading/Writing
Gifted Identification Date – (SAA) – Social Studies	Identified Date: Specific Academic Ability – Social Studies
Gifted Identification Date – Creative Thinking Ability	Identified Date: Creative Thinking Ability
Gifted Identification Date – Visual / Performing Arts	Identified Date: Visual/Performing Arts
Gifted Served - Superior Cognitive Ability	Gifted Served: Superior Cognitive Ability
Gifted Served – (SAA) – Mathematics	Gifted Served: Specific Academic Ability – Math
Gifted Served – (SAA) – Science	Gifted Served: Specific Academic Ability – Science
Gifted Served – (SAA) – Reading/Writing	Gifted Served: Specific Academic Ability – Reading/Writing
Gifted Served – (SAA) – Social Studies	Gifted Served: Specific Academic Ability – Social Studies
Gifted Served – Creative Thinking Ability	Gifted Served: Creative Thinking Ability
Gifted Served – Visual/Performing Arts	Gifted Served: Visual/Performing Arts

**Student Special Education Record (GE)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	All elements are on the Student – Special Education page
Date Type	Date Type
Date	Event Date
Outcome ID	Outcome Id
Non-compliance ID	Non-Compliance Id
Outcome Beginning Date	Outcome Begin Date
Outcome End Date	Outcome End Date
IEP Test Type	IEP Test Type
Secondary Planning	Secondary Planning

**Student Discipline Record (GD)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
Date of Discipline	Discipline Incidents – Action record – Action Start Date
Type of Discipline	Discipline Incidents – Action Incident – Action Type
Discipline Reason	Discipline Incidents – Infraction Record – Infraction Type. Up to 5 reasons may be reported. If more than 5 exist on the infraction record, the first 5 will be reported.
Discipline Sequence number	Calculated based on multiple actions with the same date and action type.
Total Discipline Days	Discipline Incidents – Student Incident – Action record – Number of Days

**Student Discipline Record (GD)**

EMIS Element	Location in StudentInformation
Discipline Modified	Discipline Incidents – Student Incident – Action record – Modified
Referred for Alternate Educational Services	Discipline Incidents – Student Incident – Action record – Alternative Program
Building IRN where discipline incident took place	Discipline Incidents – Building IRN where Discipline Incident took place

**CTE Workforce Development Follow-up Record (GV)**

EMIS Element	Location in StudentInformation
	This record is not currently stored in StudentInformation

**Course Master Record (CN)**

EMIS Element	Location in StudentInformation
	Course Master Records are made up of elements from Courses, Course Sections, Security Staff, and Highly Qualified Teacher data.
District IRN	District IRN
Subject Code	Courses – EMIS tab – EMIS Subject Code
Local Classroom Code	Constructed by CTRMEMIS – School code + Course ID + Section (from course sections)
Course Level	Courses – EMIS tab – EMIS Course Level
Semester Code	Course Section - Course Term
Length of Scheduled Instruction	Courses - EMIS tab
Location IRN number	Courses – EMIS tab – EMIS Location IRN
High School Credit	Student Subject Record – High School Credit Amount
Subject Area for Credit	Courses – EMIS tab – EMIS Subject Area for Credit
Language used in Teaching course	Courses – EMIS tab – EMIS Language Used
Course Start Date	Course Terms – Start Date for term assigned to course section
Course End Date	Course Terms – Stop Date for term assigned to course section
CTE College Credit	Courses - EMIS tab – CTE College Credit
Curriculum	Courses - EMIS tab – Curriculum
Delivery Method	Courses - EMIS tab – Delivery Method
Educational Option	Courses - EMIS tab – Educational Option
Student Population	Courses - EMIS tab – Student Population
Credit Flexibility	Courses - EMIS tab – Credit Flex

**Career-Technical Education Correlated Class Record (CV)**

EMIS Element	Location in StudentInformation
	All elements are on the Vocational Correlated Records page
Anchor/Lab/Co-op Local Classroom Code	Anchor Classroom

**Career-Technical Education Correlated Class Record (CV)**

EMIS Element	Location in StudentInformation
First Correlated Academic or Technical Related Local Classroom Code	First Correlated Classroom
Second Correlated Academic or Technical Related Local Classroom Code	Second Correlated Classroom

**Mapped Local Classroom Code Record (CM)**

EMIS Element	Location in StudentInformation
	All elements are on the Mapped Local Classroom Codes page
Mapped From Local Classroom Code	Mapped From Classroom Code
Mapped To Local Classroom Code	Mapped To Classroom Code

**Staff Course Record (CU)**

EMIS Element	Location in StudentInformation
	Staff Course Records are made up of elements from Courses, Course Sections, Security, and Highly Qualified Teacher data.
District IRN	District IRN
Employee ID	Security – Staff – State Staff ID associated with the staff member assigned on Course Sections
Local Classroom Code	Constructed by CTRMEMIS - School code + Course ID + Section (from course sections)
Staff Course Start Date	Course Sections – Teacher History – Start Date
Staff Course End Date	Course Sections – Teacher History – Stop Date
Staff Role Code	Course Sections – Teacher History – Role
HQT Definition	Highly Qualified Teacher Update Maintenance – HQ Definition
Highly Qualified Teacher IRN	Courses – EMIS tab – Highly Qualified Teacher IRN
Staff Provider IRN	Courses – EMIS tab – EMIS Staff Provider IRN

**Student Achievement Test Record (FA)**

EMIS Element	Location in StudentInformation
	All elements are stored on the Assessment – Student Achievement screen.
Assessment Type Code	Always “GA”.
Test Grade Level	Test Grade
Assessment Area Code	Part
Test Date	Test Date
Required Test Type	Reqd Test Type
Grade Level of Student at Time of Test	Grade at time of test
Type of Accommodations	Accomm
Score Not Reported	Score Not Reported
Score	Scaled Score for (STE), Raw Score for (ALT)

**Student Ohio Graduation Test (OGT) Record (FA)**

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Student Assessment – OGT Assessment screen.
Assessment Type Code	Always “GX”.
Test Grade Level	Always “10”.
Assessment Area Code	Part
Test Date	Test Date
Required Test Type	Test Type
Grade Level of Student at Time of Test	Grade at Test Time
Type of Accommodations	Accomm
Score Not Reported	Score Not Reported
Score	Scaled Score (for STR Test Type), Raw Score (for ALT Test Type)

**CTE Student Assessment Record (FA)**

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Student Assessment – CTE Student Assessment Record screen.
Assessment Type Code	Always “GY”.
Test Grade Level	Always “***”.
Assessment Area Code	CTE Student Assessment Code from CTE Student Assessment screen.
Test Date	Always Jan 1.
Required Test Type	Always “STR”.
Grade Level of Student at Time of Test	Always “***”.
Type of Accommodations	Always “***”.
Score Not Reported	Always “**”.
Score	CTE Technical Score If Assessment Area code = “14TP” then CTE Teaching Professions Portfolio Score

**Student Kindergarten Readiness Assessment Record (FA)**

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Student Assessment – K-RAL Assessment screen.
Assessment Type Code	Always “GO”.
Test Grade Level	Always “KG”.
Assessment Area Code	Always “R” for Reading.

**Student Kindergarten Readiness Assessment Record (FA)**

EMIS Element	Location in Student Information
Test Date	Test Date
Required Test Type	Always "STR".
Grade Level of Student at Time of Test	Always "KG".
Type of Accommodations	Accommodations
Score Not Reported	Score Not Reported
Score	Test Score

**Student Preschool Assessment Record (FA)**

EMIS Element	Location in Student Information
	All elements located on the Assessment – Preschool GGG page.
Assessment Type Code	Always "GB".
Test Grade Level	Always "PS".
Assessment Area Code	Assessment – Preschool GGG – Picture Naming, Rhyming, Alliteration
Test Date	Test Date
Required Test Type	Always "STR".
Grade Level of Student at Time of Test	Always "PS".
Type of Accommodations	Accommodations
Score Not Reported	Score Not Reported
Score	Picture Naming Score (PCNM) Rhyming Score (RHYM) Alliteration Score (ALLT)

**Student Preschool ASQ/SE Assessment Record (FA)**

EMIS Element	Location in Student Information
	All elements located on the Assessment – Preschool ASQ/SE screen.
Assessment Type Code	Always "GS".
Test Grade Level	Always "PS"
Assessment Area Code	Test Level (03, 04, 05, 30)
Test Date	TEst Date
Required Test Type	Always "STR".
Grade Level of Student at Time of Test	Always "PS".
Type of Accommodations	Always "***".
Score Not Reported	Score Not Reported
Score	Score

**Student Preschool ECO Assessment Record (FA)**

EMIS Element	Location in StudentInformation
	All elements located on the Assessment – Preschool ECO screen.
Assessment Type Code	Always “GM”.
Test Grade Level	Always “PS”
Assessment Area Code	E - Social Emotional Skills (EPRG) K - Acquiring and Using Knowledge & Skills (KPRG) T - Taking Appropriate Action to Meet Needs (TPRG) EPRG - Social Emotional Skills Progress KPRG - Acquiring and Using Knowledge * Skills TRPG - Taking Appropriate Action to Meet Needs
Test Date	Test Date
Required Test Type	Always “STR”.
Grade Level of Student at Time of Test	Always “PS”.
Type of Accommodations	Always “***”.
Score Not Reported	Score Not Reported
Score	Score (where Assessment Area Code = E, K or T) Progress (where Assessment Area Code = EPRT, KPRG, TPRG)

**Ohio Test of English Language Acquisition Assessment Record (GF)**

EMIS Element	Location in StudentInformation
	All Elements on the Assessment – OTELA Assessment screen.
Assessment Type Code	Always “GF”.
Test Grade Level	Always “***”
Assessment Area Code	Reading (R) Writing (W) Listening (LIST) Speaking (SPKG)
Test Date	Test Date
Required Test Type	Always “STR”.
Grade Level of Student at Time of Test	Grade Level at Time of Test
Type of Accommodations	Accommodations
Score Not Reported	Score Not Reported
Score	Reading Scaled Score (R) Writing Scaled Score (W) Listening Scaled Score (LIST) Speaking Scaled Score (SPKG)

**Student CTE Industry Assessment Record (FA)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	All elements located on the Assessment – CTE Industry Assessment screen.
Assessment Type Code	Always “GU”.
Test Grade Level	Always “***”.
Assessment Area Code	CTE Student Assessment Code
Test Date	Always Jan 1.
Required Test Type	Always “STR”.
Grade Level of Student at Time of Test	Always “***”.
Type of Accommodations	Always “***”.
Score Not Reported	Always “***”.
Score	CTE Industry Assessment Result

**Grade Schedule Record (DL)**

<b>EMIS Element</b>	<b>Location in Student Information</b>
	All elements are on the District and Building Information page – Building Grade Schedule (DL) tab
Building IRN	Building IRN
Grade Code	State Grade Code
Attendance Pattern	Attendance Pattern Code
First day of school	First Day of School
Last day of school	Last Day of School
Hours Per Day	Hours Per Day
Annual Days in Session	Annual Days in Session
Annual Hours in Session	Annual Hours in Session
Date of Spring Administration – Math Test	Date of Spring Administration Math Test

**District Testing – Yearend Record (DT) for Reporting Period N**

EMIS Element	Location in Student Information
	All elements are on the District and Building Information page – District Testing - Year End (DT) tab
Grade Level Assessed	Grade Level Assessed
Local Assessment Number	Local Assessment Number
Number Of Students Taking Assessment	Number Of Students Taking Assessment
Assessed Students With Disabilities Head Count	Assessed Students With Disabilities Head Count
Administered with Accommodations/Modifications	Administered with Accommodations/Modifications
Accommodations/Modifications Head Count	Accommodations/Modifications Head Count
Alternate Assessments Provided	Alternate Assessments Provided
Alternate Assessment Head Count	Alternate Assessment Head Count

**Organization General Information Record (DN) for Reporting Period K**

Attribute	EMIS Element	Location in Student Information
		All elements are on the District and Building Information page – District Organization Info (DN) tab
INFOTECIRN	Attribute Name	Reporting ITC IRN
STUKGBRDAY	Attribute Name	Date student is required to be five years old to be admitted into kindergarten
STUHOMESCL	Attribute Name	Count of home schooled resident students
STUELGEXAC	Attribute Name	Amount of time a student is required to attend district to be eligible for extracurricular activities
STUNPNTSRV	Attribute Name	Count of resident and non-resident nonpublic students within district boundaries eligible for Special Education services but not being served by the district
CWDAYSOPEN	Attribute Text	Count Week Days Open
FEEDERSCHL	Attribute Text	Feeder School
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings FTE
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference FTE
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings hours (community schools only)
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference hours (community schools only)

**Organization General Information Record (DN) for Reporting Period N**

<b>Attribute</b>	<b>EMIS Element</b>	<b>Location in Student Information</b>
INFOTECIRN	Attribute Name	Reporting ITC IRN
STUNPNTELG	Attribute Name	Count of resident and non-resident nonpublic students within district boundaries evaluated and determined ineligible for Special Education services
STUPSTCBTR	Attribute Name	Count of preschool transition conferences held by 3rd birthday, no disability suspected, no additional evaluation
STUPSTCATR	Attribute Name	Count of preschool transition conferences held after 3rd birthday, no disability suspected, no additional evaluation
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings FTE
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference FTE
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings hours
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference hours
CLMTYTAKEN	Attribute Number	Calamity days taken
SHORTENWEA	Attribute Number	Shortened days due to weather
CLMTYMDEUP	Attribute Number	Calamity days made up
SHORTENOTH	Attribute Number	Shortened days, non-weather

**Organization General Information Record (DN) for Reporting Period K**

<b>Attribute</b>	<b>EMIS Element</b>	<b>Location in Student Information</b>
		All elements are on the District and Building Information page – Building Organization Info (DN) tab
CWDAYSOPEN	Attribute Text	Count Week Days Open
FEEDERSCHL	Attribute Text	Feeder School
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings FTE
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference FTE
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings hours (community schools only)
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference hours (community schools only)
SIGEXTNDYR	Attribute Number	Increased learning time by extending the school year
SIGEXTNDDY	Attribute Number	Increased learning time by extending the school day
SIGBEFNAFT	Attribute Number	Increased learning time in before and after school settings
SIGWEEKEND	Attribute Number	Increased learning time on the week end

**Organization General Information Record (DN) for Reporting Period K**

Attribute	EMIS Element	Location in Student Information
SIGSUMRSCH	Attribute Number	Increased learning time in summer school
SIGOTHERM	Attribute Number	Increased learning time in some other time frame not listed above

**Organization General Information Record (DN) for Reporting Period N**

Attribute	EMIS Element	Location in Student Information
FEEDERSCHL	Attribute Text	Feeder School
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings FTE
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference FTE
PRFSNLMEET	Attribute Text Attribute Number	Professional Teacher Meetings hours
PTCONFERN	Attribute Text Attribute Number	Parent/Teacher conference hours
CLMTYTAKEN	Attribute Number	Calamity days taken
SHORTENWEA	Attribute Number	Shortened days due to weather
CLMTYMDEUP	Attribute Number	Calamity days made up
SHORTENOTH	Attribute Number	Shortened days, non-weather
FRSTNEXTYR	Attribute Name	First Day Next Year
SIGEXTNDYR	Attribute Number	Increased learning time by extending the school year
SIGEXTNDDY	Attribute Number	Increased learning time by extending the school day
SIGBEFNAFT	Attribute Number	Increased learning time in before and after school settings
SIGWEEKEND	Attribute Number	Increased learning time on the week end
SIGSUMRSCH	Attribute Number	Increased learning time in summer school
SIGOTHERM	Attribute Number	Increased learning time in some other time frame not listed above

# Appendix C – EMIS Situation History (prior to FY09)

Navigation: Home - SIS - Student - EMIS Situation History

**THIS SCREEN IS NOT AVAILABLE IN FY09 (08-09) AND LATER**

The EMIS Situation History screen is used to track a student’s EMIS Situation in each EMIS Reporting Period, and make any necessary changes. Records are automatically added each time changes are made to the EMIS situation, FTE and District of Residence on student profile.

Date	Reporting Period	EMIS Situation	Status	FTE	District of Residence	Attending / Home IRN	Attending / Home IRN Indicator	Active
Nov 27, 2006	K	Resident attending full time	0	100	043877		0	
Nov 27, 2006	M	Non-Preschool student attending ESC full time	0	100	043877		0	

**EMIS Situation History Screen**

This page has standard add record, edit record and delete record controls. Refer to *ProgressBook StudentInformation General Use Guide* for more information on these controls.

**Note:** Records on this page are not deleted, but are inactivated instead. Refer to *ProgressBook StudentInformation General Use Guide* for more information on active/inactive records and re-activation.

**Sorting** – You may sort by any column (Date, Reporting Period, EMIS Situation, Status, FTE, District of Residence, Attending/Home IRN, Attending/Home IRN Indicator, Active) in ascending or descending order by clicking on the column header.

**From Date** (optional) – Enter a start date from which to filter EMIS Situations.

**To** (optional) – Enter an end date to filter EMIS Situations.

**Go** – Refresh the data grid, showing only EMIS Situations within the specified date range.



– Active EMIS Situation History entry.



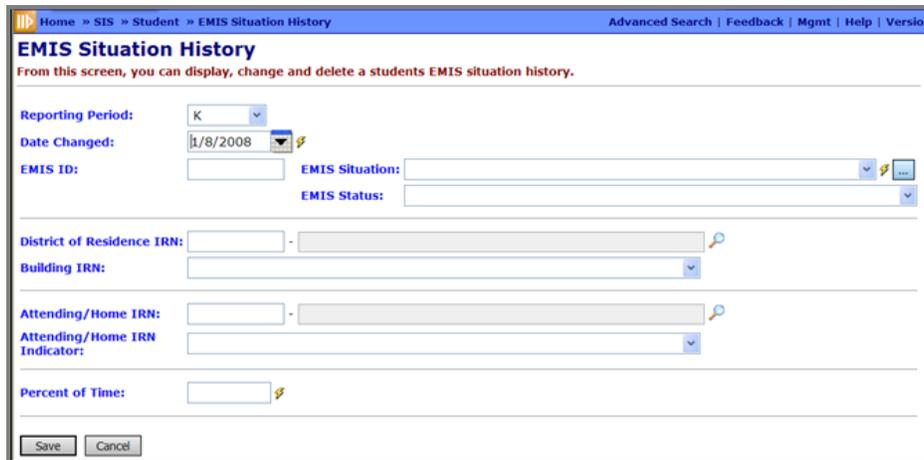
– Inactive EMIS Situation History entry.

**Show Current Year Only** – If checked, only EMIS Situation History entries from the current year will be displayed.

**Show Active Events Only** – If checked, will show only active EMIS Situation History events; if not checked, will show both active and inactive EMIS Situation History events.

**Add** – Add a new EMIS Situation History entry.

## Add/Edit EMIS Situation History Record



Home » SIS » Student » EMIS Situation History

Advanced Search | Feedback | Mgmt | Help | Version

### EMIS Situation History

From this screen, you can display, change and delete a students EMIS situation history.

Reporting Period: K

Date Changed: 11/8/2008

EMIS ID: [ ] EMIS Situation: [ ] EMIS Status: [ ]

District of Residence IRN: [ ] - [ ]

Building IRN: [ ]

Attending/Home IRN: [ ] - [ ]

Attending/Home IRN Indicator: [ ]

Percent of Time: [ ]

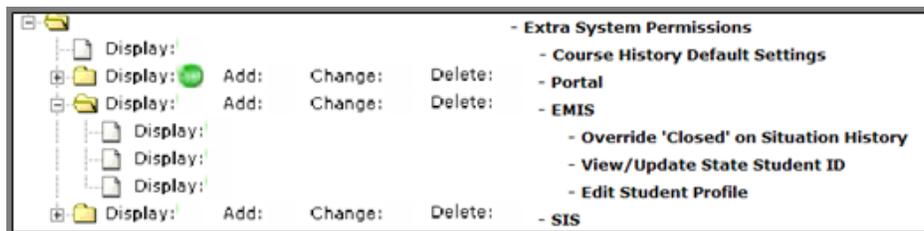
Save Cancel

**Add EMIS Situation History Screen**

**Submit** – Save EMIS Situation History. This banner message will display:



**Special Security Note:** By default EMIS Situation History cannot be updated (edited or deleted) if the specified EMIS Reporting Period is closed. This can be overridden by using the Extra System Permissions in Security. Opening the “Override ‘Closed’ on Situation History” setting in the Sitemap Access allows the Role and User/Groups assigned this Role to update EMIS Situation History in closed EMIS Reporting Periods.



**Extra System Permissions**

# Student Information to Data Collector Element Crosswalk

## Change Log

Date	Section Number/Name	Change Description
6/10/2013	FY13 Updates	Added DL attributes, Added FS and FN elements, FC record, Updated GQ for Services
4/25/2012	Inserted new record types	Added FE, FB, CU records
4/25/2012	Assessment Tables	Updated to reference FA file format
4/23/2012	Entire document	FY12 Updates
1/13/2012	Entire document	FY12 Updates
11/29/10	Student Course Record (GN)	Remove GN130 CTE Concentrator
1/20/10	District General Information - Yearend (DT)	Corrected Alternate Assessment Provided (DT110)
11/5/09	Entire document	Reformatted document and removed obsolete field explanations
9/3/09	Document Created	

# Contents

<b>STAFF &amp; COURSE RELATED RECORDS .....</b>	<b>4</b>
MAPPED LOCAL CLASSROOM CODE RECORD (CM).....	4
COURSE MASTER RECORD (CN).....	4
STAFF COURSE RECORD (CU).....	5
CAREER-TECHNICAL EDUCATION CORRELATED CLASS RECORD (CV).....	6
<b>DISTRICT &amp; BUILDING RECORDS.....</b>	<b>7</b>
ORGANIZATION GENERAL INFORMATION – OCTOBER & YEAREND (DN).....	7
GRADE SCHEDULE RECORD – OCTOBER & YEAREND (DL).....	10
DISTRICT GENERAL INFORMATION – YEAREND (DT).....	11
<b>STUDENT DEMOGRAPHICS/STANDING/ATTRIBUTES/RACE .....</b>	<b>12</b>
STUDENT DEMOGRAPHIC RECORD (GI).....	12
STUDENT RACE DETAIL RECORD (GJ).....	12
STUDENT ATTRIBUTES – EFFECTIVE DATE RECORD (FD).....	12
STUDENT ATTRIBUTES – NO DATE RECORD (FN).....	13
STUDENT STANDING RECORD (FS).....	14
<b>ASSESSMENT RECORDS.....</b>	<b>15</b>
STUDENT ACHIEVEMENT TEST RECORD (TEST TYPE CODE GA).....	15
STUDENT PRESCHOOL ASSESSMENT RECORD (ASSESSMENT TYPE GB).....	15
OHIO TEST OF ENGLISH LANGUAGE ACQUISITION RECORD (ASSESSMENT TYPE GF).....	16
STUDENT PRESCHOOL ECO ASSESSMENT RECORD (RECORD TYPE GM).....	16
STUDENT KINDERGARTEN READINESS ASSESSMENT – LITERACY RECORD (RECORD TYPE GO).....	17
STUDENT PRESCHOOL ASQ/SE ASSESSMENT RECORD (RECORD TYPE GS).....	17
STUDENT CTE INDUSTRY ASSESSMENT RECORD (RECORD TYPE GU).....	18
STUDENT OHIO GRADUATION TEST (OGT) RECORD (RECORD TYPE GX).....	18
CTE STUDENT ASSESSMENT RECORD (RECORD TYPE GY).....	18
GRADUATION-ONLY TEST RECORD (GP) (NOT IN STUDENTINFORMATION, MUST USE FF EDITOR).....	19
STUDENT ACCELERATION RECORD (FB).....	19
<b>STUDENT SPECIAL EDUCATION RECORDS.....</b>	<b>20</b>
STUDENT SPECIAL EDUCATION RECORD (GE).....	20

STUDENT SPECIAL EDUCATION GRADUATION RECORD (FE) .....	21
STUDENT GIFTED EDUCATION RECORD (GG) .....	21
<b>OTHER STUDENT RECORDS .....</b>	<b>22</b>
STUDENT GRADUATION – CORE SUMMARY RECORD (GC) .....	22
STUDENT COURSE RECORD (GN) .....	23
STUDENT PROGRAM RECORD (GQ) .....	23
STUDENT DISCIPLINE RECORD (GD) .....	23
STUDENT MISSING OVERRIDE RECORD (FC) .....	24

All tables in this document following the same general outline. Tables are grouped together based on data content.

Field Number	Description in Chapter 5	Location in DASL / DASL Field Name
--------------	--------------------------	------------------------------------

## Staff & Course Related Records

### *Mapped Local Classroom Code Record (CM)*

<a href="#">Home</a> » <a href="#">EMIS</a> » <a href="#">Maintenance</a> » <a href="#">Mapped Local Classroom Codes</a>		
<b>CM050</b>	Mapped From Local Classroom Code	Mapped From Classroom Code
<b>CM060</b>	Mapped to Local Classroom Code	Mapped To Classroom Code

### *Course Master Record (CN)*

<a href="#">Home</a> » <a href="#">Management</a> » <a href="#">School Administration</a> » <a href="#">Scheduling Administration</a> » <a href="#">Course Maintenance</a> » Or use the EMIS override values for some fields on the <a href="#">Course Sections Maintenance Page &gt; EMIS tab</a>		
<b>CN050</b>	Subject Code	<a href="#">Courses/EMIS Tab/EMIS Subject Code</a> OR <a href="#">Course Sections / EMIS Tab</a>
<b>CN060</b>	Local Classroom Code	<a href="#">Course Sections / General Tab / Course and Section Number</a> {pulls school code of reporting building}
<b>CN080</b>	Course Level	<a href="#">Courses/EMIS Tab/EMIS Course Level</a>
<b>CN090</b>	Semester Code	<a href="#">Course Sections / General Tab /Course Term</a>
<b>CN100</b>	Length of Scheduled Instruction	<a href="#">Courses / General Tab / Hours of Instruction</a>
<b>CN110</b>	Location IRN	<a href="#">Courses /EMIS Tab / EMIS Location IRN</a>
<b>CN200</b>	High School Credit	<a href="#">Courses /General Tab/Is High School Credit</a>
<b>CN210</b>	Subject Area for Credit	<a href="#">Courses /EMIS Tab/EMIS Subject Area for Credit</a>

<b>CN220</b>	Language Used in Teaching Course	<a href="#">Courses/</a> EMIS Tab/EMIS Language Used
<b>CN280</b>	Course Start Date CCYYMMDD	<a href="#">Home</a> » <a href="#">Management</a> » <a href="#">School Administration</a> » <a href="#">Scheduling Administration</a> » <a href="#">Initialization</a> » <a href="#">Course Terms</a> /Start Date
<b>CN290</b>	Course End Date CCYYMMDD	<a href="#">Home</a> » <a href="#">Management</a> » <a href="#">School Administration</a> » <a href="#">Scheduling Administration</a> » <a href="#">Initialization</a> » <a href="#">Course Terms</a> /End Date
<b>CN300</b>	CTE College Credit	<a href="#">Courses</a> /EMIS Tab/CTE College Credit
<b>CN310</b>	Curriculum	<a href="#">Courses</a> /EMIS Tab/Curriculum OR Course Sections / EMIS Tab
<b>CN320</b>	Delivery Method	<a href="#">Courses/</a> EMIS Tab/Delivery Method OR Course Sections / EMIS Tab
<b>CN330</b>	Educational Option	<a href="#">Courses/</a> EMIS Tab/Educational Option
<b>CN340</b>	Student Population	<a href="#">Courses</a> /EMIS Tab/Student Population OR Course Sections / EMIS Tab
<b>CN350</b>	Credit Flexibility Code	<a href="#">Courses/</a> EMIS Tab/Credit Flex

### ***Staff Course Record (CU)***

		<a href="#">Home</a> » <a href="#">Management</a> » <a href="#">School Administration</a> » <a href="#">Scheduling Administration</a> » <a href="#">Course Maintenance</a> » Or use the EMIS override values for some fields on the <a href="#">Course Sections Maintenance Page</a> > EMIS tab
<b>CU050</b>	Employee ID	<a href="#">Home</a> » <a href="#">Management</a> » <a href="#">Security</a> » <a href="#">View Staff Members</a> » <a href="#">Add/Edit Staff Member</a> / State Staff ID
<b>CU060</b>	Local Classroom Code	<a href="#">Course Sections</a> / General Tab / Course and Section Number {pulls school code of reporting building}
<b>CU070</b>	Staff Course Start Date CCYYMMDD	<a href="#">Course Sections</a> / Teacher History Tab /Start Date
<b>CU080</b>	Staff Course End Date CCYYMMDD	<a href="#">Course Sections</a> / Teacher History Tab /Stop Date
<b>CU090</b>	Staff Role Code	<a href="#">Course Sections</a> – Teacher History Tab/Role
<b>CU100</b>	Highly Qualified Teacher	<a href="#">Home</a> » <a href="#">Management</a> » <a href="#">School Administration</a> » <a href="#">Scheduling Administration</a> » <a href="#">Highly Qualified Teacher Update</a> / How the teacher meets highly qualified definition
<b>CU110</b>	Highly Qualified Teacher IRN	<a href="#">Courses</a> /EMIS Tab/Highly Qualified Teacher IRN OR Course Sections / EMIS Tab
<b>CU120</b>	Staff Provider IRN	<a href="#">Courses</a> /EMIS Tab/EMIS Program Provider IRN OR Course Sections / EMIS Tab

## ***Career-Technical Education Correlated Class Record (CV)***

[Home](#) » [EMIS](#) » [Maintenance](#) » [Vocational Correlated Records](#)

<b>CV060</b>	Anchor/Lab/Co-op Local Classroom Code	Anchor/Lab/Co-op LCC
<b>CV070</b>	First Correlated Academic or Technical Related Local Classroom Code	1 <sup>st</sup> Correlated Academic or tech related LCC
<b>CV080</b>	Second Correlated Academic or Technical Related Local Classroom Code	2 <sup>nd</sup> Correlated Academic or tech related LCC

## District & Building Records

### *Organization General Information – October & Yearend (DN)*

**DN records are formatted differently than other records. Attributes are used rather than a fixed file. Only attributes for which a building or district has a response are included as individual records in the table. The following table indicates where the value for each attribute is in Maintenance.**

	Element	Attribute Name	<a href="#">Home</a> » <a href="#">EMIS</a> » <a href="#">Maintenance</a> » <a href="#">District Organization Info (DN) &amp; Building Organization Info (DN)</a>
<b>DN050</b>	Organization IRN		<b>Building DN Tab:</b> School
<b>DN060</b>	<b>Information Technology Center Group:</b> ITC IRN	INFOTECIRN (Periods K & N)	<b>District DN Tab:</b> Reporting ITC IRN
<b>DN060</b>	<b>Student Group:</b> Count of resident and non-resident nonpublic students within district boundaries evaluated and determined ineligible for special education services	STUNPNTLGN (Period N)	<b>District DN Tab:</b> Count of resident and non-resident students within district boundaries evaluated and determined eligible for special education services
<b>DN060</b>	<b>Student Group:</b> Student Group Count of Preschool transition conferences held by 3 <sup>rd</sup> birthday, no disability suspected, no additional evaluation.	STUPSTCBTR (Period N)	<b>District DN Tab:</b> Count of preschool transition conferences held by 3 <sup>rd</sup> birthday, no disability suspected, no additional evaluation.
<b>DN060</b>	<b>Student Group:</b> Count of Preschool transition conferences held after 3 <sup>rd</sup> birthday, no disability suspected, no additional evaluation	STUPSTCATR (Period N)	<b>District DN Tab:</b> Count of Preschool transition conferences held after 3 <sup>rd</sup> birthday, no disability suspected, no additional evaluation.
<b>DN060</b>	<b>Student Group:</b> Date student is required to be five years old to be admitted to Kindergarten	STUKGBRDAY (Period K)	<b>District DN Tab:</b> Date student is required to be five years old to be admitted into kindergarten
<b>DN060</b>	<b>Student Group:</b> Count of home schooled resident students	STUHOMESCL (Period K)	<b>District DN Tab:</b> Count of home schooled resident students.
<b>DN060</b>	<b>Student Group:</b> Amount of time a student is required to attend the district to be eligible for extracurricular activities	STUELGEXAC (Period K)	<b>District DN Tab:</b> Amount of time a student is required to attend district to be eligible for extracurricular activities.
<b>DN060</b>	<b>Student Group:</b> Count of resident and non-resident nonpublic students within district boundaries eligible for special education services but not being served by the district	STUNPNTSRV (Period K & N)	<b>District DN Tab:</b> Count of resident and non-resident nonpublic students within district boundaries eligible for special education services but not being served by the district

<b>DN0060</b>	<b>Local Wellness Policy Group:</b> Indicates whether or not the district has ad		
<b>DN060</b>	<b>Count Week Days Group:</b> Count Week Days Open	CWDAYSOPEN (Period K)	<b>Building Organization Info Tab:</b> Count Week Days Open
<b>DN060</b>	<b>Feeder School Group:</b> Feeder School	FEEDERSCHL (Period K & N)	<b>Building Organization Info Tab:</b> Feeder School
<b>DN060</b>	<b>Teacher Group:</b> Professional Teacher Meeting FTE	PRFSNLMEET + FTE (Period K & N)	<b>Building Organization Info Tab:</b> Professional Teacher meetings FTE
<b>DN060</b>	<b>Teacher Group:</b> Parent/Teacher Conference FTE	PTCONFERNC + FTE (Period K & N)	<b>Building Organization Info Tab:</b> Parent/Teacher Conference FTE
<b>DN060</b>	<b>Teacher Group:</b> Professional Teacher Meetings Hours (Community Schools)	PRFSNLMEET + HOURS (Period K & N)	<b>Building Organization Info Tab:</b> Professional Teacher meetings hours
<b>DN060</b>	<b>Teacher Group:</b> Parent/Teacher Conference Hours (Community Schools)	PTCONFERNC + HOURS (Period K & N)	<b>Building Organization Info Tab:</b> Parent/Teacher Conference hours
<b>DN060</b>	<b>SIG Time Extended Group:</b> Increased learning time by extending school year	SIGEXTNDYR (Period K & N)	<b>Building Organization Info Tab:</b> Increased learning time by extending the school year
<b>DN060</b>	<b>SIG Time Extended Group:</b> Increased learning time by extending the school day	SIGEXTNDDY (Period K & N)	<b>Building Organization Info Tab:</b> Increased learning time by extending the school day
<b>DN060</b>	<b>SIG Time Extended Group:</b> Increased learning time in before and after school settings	SIGBEFNAFT (Period K & N)	<b>Building Organization Info Tab:</b> Increased learning time in before and after school settings
<b>DN060</b>	<b>SIG Time Extended Group:</b> Increased learning time on the week end	SIGWEEKEND (Period K & N)	<b>Building Organization Info Tab:</b> Increased learning time on the weekend
<b>DN060</b>	<b>SIG Time Extended Group:</b> Increased learning time in summer school	SIGSUMRSCH (Period K & N)	<b>Building Organization Info Tab:</b> Increased learning time in summer school
<b>DN060</b>	<b>SIG Time Extended Group:</b> Increased learning time in some other time frame not listed above.	SIGOTHERTM (Period K & N)	<b>Building Organization Info Tab:</b> Increased learning time in some other time frame not listed above.
<b>DN060</b>	<b>Calamity Group:</b> Calamity days taken	CLMTYTAKEN (Period N)	<b>Building Organization Info Tab:</b> Calamity days taken
<b>DN060</b>	<b>Calamity Group:</b> Calamity days made up	CLMTYMDEUP (Period N)	<b>Building Organization Info Tab:</b> Calamity days made up
<b>DN060</b>	<b>Calamity Group:</b> Shortened days due to weather	SHORTENWEA (Period N)	<b>Building Organization Info Tab:</b> Shortened days due to weather
<b>DN060</b>	<b>Calamity Group:</b> Shortened days, non-weather	SHORTENOTH (Period N)	<b>Building Organization Info Tab:</b> Shortened days, non-weather
<b>DN060</b>	<b>First Day Next Year Group:</b> First Day Next Year	FRSTNEXTYR (Period N)	<b>Building Organization Info Tab:</b> First Day Next Year

<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band KG-02 Limited Progress	PHYSEDLMKG	<b>Building Organization Info Tab:</b> KG-01 Total Students scoring Limited
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band KG-02 Proficient Progress	PHYSEDPFKG	<b>Building Organization Info Tab:</b> KG-01 Total Students scoring Proficient
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band KG-02 Advanced Progress	PHYSEDADKG	<b>Building Organization Info Tab:</b> KG-01 Total Students scoring Advanced
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band KG-02 Not evaluated	PHYSEDNEKG	<b>Building Organization Info Tab:</b> KG-01 Total Students not evaluated
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band KG-02 evaluation not conducted at this grade band for the building	PHYSED**KG	<b>Building Organization Info Tab:</b> KG-01 Total Students not applicable
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 03-05 Limited Progress	PHYSEDLM03	<b>Building Organization Info Tab:</b> 03-05 Total Students scoring Limited
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 03-05 Proficient Progress	PHYSEDPF03	<b>Building Organization Info Tab:</b> 03-05 Total Students scoring Proficient
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 03-05 Advanced Progress	PHYSEDAD03	<b>Building Organization Info Tab:</b> 03-05 Total Students scoring Advanced
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 03-05 Not evaluated	PHYSEDNE03	<b>Building Organization Info Tab:</b> 03-05 Total Students not evaluated
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 03-05 evaluation not conducted at this grade band for the building	PHYSED**03	<b>Building Organization Info Tab:</b> 03-05 Total Students not applicable
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 06-08 Limited Progress	PHYSEDLM06	<b>Building Organization Info Tab:</b> 06-08 Total Students scoring Limited
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 06-08 Proficient Progress	PHYSEDPF06	<b>Building Organization Info Tab:</b> 06-08 Total Students scoring Proficient
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 06-08 Advanced Progress	PHYSEDAD06	<b>Building Organization Info Tab:</b> 06-08 Total Students scoring Advanced
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 06-08 Not evaluated	PHYSEDNE06	<b>Building Organization Info Tab:</b> 06-08 Total Students not evaluated

<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 06-08 evaluation not conducted at this grade band for the building	PHYSED**06	<b>Building Organization Info Tab:</b> 09-12 Total Students not applicable
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 09-12 Limited Progress	PHYSEDLM09	<b>Building Organization Info Tab:</b> 09-12 Total Students scoring Limited
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 09-12 Proficient Progress	PHYSEDPF09	<b>Building Organization Info Tab:</b> 09-12 Total Students scoring Proficient
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 09-12 Advanced Progress	PHYSEDAD09	<b>Building Organization Info Tab:</b> 09-12 Total Students scoring Advanced
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 09-12 Not evaluated	PHYSEDNE09	<b>Building Organization Info Tab:</b> 09-12 Total Students not evaluated
<b>DN060</b>	<b>PhysED Evaluation Group:</b> PE Evaluation – Band 09-12 evaluation not conducted at this grade band for the building	PHYSED**09	<b>Building Organization Info Tab:</b> 09-12 Total Students not applicable

***Grade Schedule Record – October & Yearend (DL)***

		<b>Home » EMIS » Maintenance » District and Building Information/Building Grade Schedule/ Period K &amp; N (DL) tab</b>
<b>DL050</b>	Building IRN	Building IRN
<b>DL060</b>	Grade Code	Grade Code
<b>DL070</b>	Attendance Pattern Code	Attendance Pattern
<b>DL080</b>	First day of school	First Day of school
<b>DL090</b>	Last day of school	Last day of School
<b>DL100</b>	Hours Per Day	Hours Per Day
<b>DL110</b>	Annual Hours in Session	Annual Hours in Session
<b>DL120</b>	Annual Days in Session	Annual Days in Session
<b>DL130</b>	Date of Spring Administration – Math Test	Date of Spring Administration Math Test

***District General Information – Yearend (DT)***

		<a href="#">Home</a> » <a href="#">EMIS</a> » <a href="#">Maintenance</a> » <a href="#">District and Building Information/Period N (DR/DT)</a> <b>tab</b>
<b>DT050</b>	Grade Level Assessed	Grade Level Assessed
<b>DT060</b>	Local Assessment Number	Local Assessment Number
<b>DT070</b>	Number of Students Taking Assessment	Number of Students Taking Assessment
<b>DT080</b>	Assessed Students with Disabilities Headcount	Assessed Students with Disabilities Headcount
<b>DT090</b>	Administered with Accommodations/Modifications	Administered with Accommodations/Modifications
<b>DT100</b>	Accommodations/Modifications Headcount	Accommodations/Modifications Headcount
<b>DT110</b>	Alternate Assessments Provided	Alternate Assessments Provided
<b>DT120</b>	Alternate Assessment Headcount	Alternate Assessment Headcount

## Student Demographics/Standing/Attributes/Race

### *Student Demographic Record (GI)*

<b>Home » SIS » Student » Edit Profile FY09</b>		
<b>GI040</b>	Building IRN	FS Standing Tab/Primary Building IRN
<b>GI050</b>	EMIS Student ID Number	FS Standing Tab/ EMIS ID
<b>GI070</b>	Date of Birth (CCYYMMDD)	General Tab/Birth date
<b>GI080</b>	Gender	General Tab/Gender
<b>GI090</b>	Summative Racial/Ethnic Group	General Tab/Summative Race
<b>GI270</b>	Native Language	General Tab/Native Language
<b>GI330</b>	First Name (Optional)	General Tab/First Name
<b>GI340</b>	Middle Name (Optional)	General Tab/Middle Name
<b>GI350</b>	Last Name (Optional)	General Tab/Last Name
<b>GI360</b>	Student Birth Place City (Optional)	General Tab/Birthplace City
<b>GI570</b>	Student Home Language	General Tab/Home Language
<b>GI580</b>	Hispanic/Latino	General Tab/Hispanic/Latino

### *Student Race Detail Record (GJ)*

<b>Home » SIS » Student » Edit Profile FY09</b>		
<b>GJ050</b>	EMIS Student ID Number	FS Standing Tab/ EMIS ID
<b>GJ060</b>	Racial Group	General Tab/Racial Group(s) (1 record created for each box checked)

### *Student Attributes – Effective Date Record (FD)*

<b>Home » SIS » Student » Edit Profile FY09 / FD Attributes Tab</b>		
<b>FD060</b>	Effective Start Date	Effective Start Date
<b>FD070</b>	Effective End Date	District Withdraw Date
<b>FD090</b>	State Equivalent Grade Level	State Equivalent Grade
<b>FD100</b>	Attendance Pattern	Attendance Pattern
<b>FD110</b>	Disadvantagement	Disadvantagement
<b>FD120</b>	Preschool Poverty Level	Preschool Poverty Level
<b>FD130</b>	Disability Condition	Disability Condition

<b>FD140</b>	Student being served by 504 Plan	Section 504 Plan
<b>FD150</b>	Homeless Status	Homeless Status
<b>FD160</b>	Homeless Unaccompanied Youth	Homeless Unaccompanied Youth
<b>FD170</b>	Limited English Proficiency	Limited English Proficiency
<b>FD180</b>	Migrant Status	Migrant Status
<b>FD190</b>	Foreign Exchange Student Graduation Plan	Foreign Exchange Graduation Plan
<b>FD200</b>	Immigrant Status	Immigrant Status

***Student Attributes – No Date Record (FN)***

		<b>Home » SIS » Student » Edit Profile FY09</b>
<b>FN030</b>	Reporting Period	FN/Attributes Tab/ Reporting Period
<b>FN060</b>	Non-Attending Reason	FS Attendance Tab/Non-Attending Reason
<b>FN070</b>	Retained Status	FN Attributes Tab/Retained Status
<b>FN080</b>	Grade Level, Next Year	FN Attributes Tab/EMIS Grade Next Year
<b>FN090</b>	Diploma Date	FN Graduate Tab/Graduation Date
<b>FN100</b>	Diploma Type	FN Graduate Tab/Diploma Type
<b>FN110</b>	Fiscal Year student began 9 <sup>th</sup> grade	FN Attributes Tab/Fiscal Year Began 9 <sup>th</sup>
<b>FN120</b>	OGT Graduation Alternative	FN Graduate Tab/OGT Graduation Alternative
<b>FN140</b>	Accountability IRN	FN Attributes Tab/Accountability IRN
<b>FN210</b>	Limited English Proficient Reclassification Date	FD Attributes Tab/LEP Reclass Date
<b>FN220</b>	Majority of Attendance IRN	FN Attributes Tab/Majority of Attendance IRN
<b>FN230</b>	Yearend Reported State Student ID	FS Student Standing – SSID on latest record
<b>FN240</b>	CORE Economics and Financial Literacy Requirement Met	FN Graduate Tab/ CORE Economics and Financial Literacy Requirement Met
<b>FN250</b>	CORE Fine Arts Requirement Met	FN Graduate Tab/ CORE Fine Arts Requirement Met
<b>FN260</b>	Exempted from Physical Education Graduation Requirement	FN Graduate Tab/ Exempted from Physical Education Graduation Requirement
<b>FN270</b>	Updated December 1 IEP Outcome	FN Attributes Tab/Updated December 1 IEP Outcome
<b>FN280</b>	Tech Prep Completer	FN Attributes Tab/Tech Prep Completer
<b>FN290</b>	CTE Program of Concentration	FN Attributes Tab/CTE Program of concentration (must choose CTE program Area first)
<b>FN300</b>	Core Graduation Requirement Exemption Code	FN Graduate Tab/Core Graduation Requirement Exemption
<b>FN310</b>	Military Compact Graduation Alternative Count	FN Graduate Tab/Military Compact Graduation Alternative
<b>FN360</b>	Math Diagnostic Result Code	FN Attributes Tab/Math Diagnostic Result Code
<b>FN370</b>	Reading Diagnostic Result Code	FN Attributes Tab/Reading Diagnostic Result Code
<b>FN380</b>	Writing Diagnostic Result Code	FN Attributes Tab/Writing Diagnostic Result Code
<b>FN390</b>	Attending Building IRN Next Year	FN Attributes Tab/Attending Building IRN Next Year

## ***Student Standing Record (FS)***

		<b><u>Home</u> » <u>SIS</u> » <u>Student</u> » <u>Edit Profile FY09</u></b>
<b>FS050</b>	EMIS Student ID Number	FS Standing Tab/EMIS ID
<b>FS060</b>	Effective Start Date	FS Standing Tab/Effective Start Date
<b>FS070</b>	Admission Date DDYYMMDD	FS Standing Tab/District Admission Date
<b>FS080</b>	Student Admission Reason	FS Standing Tab/Admission Reason
<b>FS090</b>	Effective End Date	FS Standing Tab/District Withdraw Date
<b>FS100</b>	Withdrawal Reason	FS Standing Tab/Withdraw Reason
<b>FS110</b>	State Student ID (SSID)	FS Standing Tab/State Student ID (SSID)
<b>FS120</b>	Student Percent of Time	FS Standing Tab/Percent of Time
<b>FS130</b>	Tuition Type	FS Standing Tab/Tuition Type
<b>FS140</b>	District Relationship	FS Standing Tab/District Relationship
<b>FS150</b>	Legal District of Residence	FS Standing Tab/District of Residence
<b>FS160</b>	Attending Building IRN	FS Standing Tab/Attending Building IRN
<b>FS170</b>	Assigned Building Area IRN	FS Standing Tab/Assigned Building IRN
<b>FS180</b>	How Received	FS Standing Tab/How Received
<b>FS190</b>	How Received IRN	FS Standing Tab/How Received IRN
<b>FS200</b>	Sent Reason 1	FS Standing Tab/Sent To 1: Reason
<b>FS210</b>	Sent to IRN 1	FS Standing Tab/Sent To 1: IRN
<b>FS220</b>	Sent to Percent of Time 1	FS Standing Tab/Sent To 1: Percent of Time
<b>FS230</b>	Sent To Reason 2	FS Standing Tab/Sent To 2: Reason
<b>FS240</b>	Sent To IRN 2	FS Standing Tab/Sent To 2: IRN
<b>FS250</b>	Sent To Percent of Time 2	FS Standing Tab/Sent To 2: Percent of Time
<b>FS260</b>	October Count Week Attendance Days	FS Attendance Tab/October CW: Attendance Days
<b>FS270</b>	October Count Week Excused Absence Days	FS Attendance Tab October CW: Excused Absence Days
<b>FS280</b>	October Count Week Unexcused Absence Days	FS Attendance Tab October CW: Unexcused Absence Days
<b>FS320</b>	School Year Attendance Days	FS Attendance Tab School Year: Attendance Days
<b>FS330</b>	School Year Excused Absence Days	FS Attendance Tab School Year: Excused Absence Days
<b>FS340</b>	School Year Unexcused Absence Days	FS Attendance Tab School Year: Unexcused Absence Days
<b>FS350</b>	Admitted From IRN	FS Standing Tab/Admitted from IRN
<b>FS360</b>	Withdrawn To IRN	FS Standing Tab/Withdrawn to IRN
<b>FS370</b>	County of Residence	FS Standing Tab/County of Residence

## Assessment Records

**Note: Beginning in Period N, all Assessments will be reported under the FA Record type Rules. Each individual assessment record is still maintained on a separate assessment maintenance page in StudentInformation. Individual assessment records will be reported for each student/test according to the number of test parts for each test.**

### *Student Achievement Test Record (Test Type Code GA)*

<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Assessment</a> » <a href="#">Student Achievement</a>		
<b>FA060</b>	Assessment Type Code	GA used for Achievement Tests
<b>FA200</b>	Test Grade Level	Test Grade
<b>FA205</b>	Assessment Area Code C – Social Studies M – Mathematics R – Reading S – Science W – Writing	Part
<b>FA210</b>	Test Date (CCYYMM)	Test date
<b>FA215</b>	Required Test Type	Reqd Test Type
<b>FA220</b>	Grade Level of Student at time of Test	Grade at time of test
<b>FA225</b>	Type of Accommodations	Accomm
<b>FA235</b>	Score Not Reported	Score Not Reported
<b>FA240</b>	Score	Scaled Score for (STR), (ALT)

### *Student Preschool Assessment Record (Assessment Type GB)*

<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Assessment</a> » <a href="#">Preschool GGG</a>		
<b>FA060</b>	Assessment Type Code	GB used for Preschool Assessment Records
<b>FA200</b>	Test Grade Level	Always 'PS'
<b>FA205</b>	Assessment Area Code	Picture Naming (PCNM) Rhyming (RHYM) Alliteration (ALLT)
<b>FA210</b>	Test Date (CCYYMM)	Test Date
<b>FA215</b>	Required Test Type	Always 'STR'
<b>FA220</b>	Grade Level of Student at time of Test	Always 'PS'
<b>FA225</b>	Type of Accommodations	Accommodations
<b>FA235</b>	Score Not Reported	Score Not Reported
<b>FA240</b>	Score	Picture Naming Score (PCNM) Rhyming Score (RHYM)

		<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Assessment</a> » <a href="#">Preschool GGG</a>
		Alliteration Score (ALLT)

### ***Ohio Test of English Language Acquisition Record (Assessment Type GF)***

<b>GF</b>		<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Assessment</a> » <a href="#">OTELA</a>
<b>FA060</b>	Assessment Type Code	GF used for OTELA Assessment Records
<b>FA200</b>	Test Grade Level	Always '**'
<b>FA205</b>	Assessment Area Code	Reading (R) Writing (W) Listening (LIST) Speaking (SPKG)
<b>FA210</b>	Test Date	Test Date
<b>FA215</b>	Required Test Type	Always 'STR'
<b>FA220</b>	Grade Level of Student at time of Test	Grade Level at Time of Test
<b>FA225</b>	Type of Accommodations	Accommodations
<b>FA235</b>	Score Not Reported	Score Not Reported
<b>FA240</b>	Score	Reading Scaled Score (R) Writing Scaled Score (W) Listening Scaled Score (LIST) Speaking Scaled Score (SPKG)

### ***Student Preschool ECO Assessment Record (Record Type GM)***

		<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Assessment</a> » <a href="#">Preschool ECO</a>
<b>FA060</b>	Assessment Type Code	GM used for ECO Assessment Records
<b>FA200</b>	Test Grade Level	Always 'PS'
<b>FA205</b>	Assessment Area Code	E – Social Emotional Skills (EPRG) K – Acquiring and Using Knowledge & Skills (KPRG) T – Taking Appropriate Action to meet needs (TPRG) EPRG – Social Emotional Skills Progress KPRG – Acquiring and Using Knowledge * Skills TRPG – Taking Appropriate Action to meet needs
<b>FA210</b>	Test Date	Test Date
<b>FA215</b>	Required Test Type	Always 'STR'
<b>FA220</b>	Grade Level of Student at time of Test	Always 'PS'
<b>FA225</b>	Type of Accommodations	Always '**'
<b>FA235</b>	Score Not Reported	Score Not Reported

<b><u>Home » SIS » Student » Assessment » Preschool ECO</u></b>		
<b>FA240</b>	Score	Score (where Assessment Area Code = E,K or T) Progress (where Assessment Area Code = EPRG, KPRG, TPRG)

***Student Kindergarten Readiness Assessment – Literacy Record (Record Type GO)***

<b><u>Home » SIS » Student » Assessment » KRA-L</u></b>		
<b>FA060</b>	Assessment Type Code	GO used for KRAL Assessment Records
<b>FA200</b>	Test Grade Level	Always 'KG'
<b>FA205</b>	Assessment Area Code	Reading (R)
<b>FA210</b>	Test Date	Test Date
<b>FA215</b>	Required Test Type	Always 'STR'
<b>FA220</b>	Grade Level of Student at time of Test	Always 'KG'
<b>FA225</b>	Type of Accommodations	Accommodations
<b>FA235</b>	Score Not Reported	Score Not Reported
<b>FA240</b>	Score	Total Score

***Student Preschool ASQ/SE Assessment Record (Record Type GS)***

<b><u>Home » SIS » Student » Assessment » Preschool ASQ/SE</u></b>		
<b>FA060</b>	Assessment Type Code	GS used for PS ASQ/SE Assessment Records
<b>FA200</b>	Test Grade Level	Always 'PS'
<b>FA205</b>	Assessment Area Code	Test Level (03, 04, 05, 30)
<b>FA210</b>	Test Date	Test Date
<b>FA215</b>	Required Test Type	Always 'STR'
<b>FA220</b>	Grade Level of Student at time of Test	Always 'PS'
<b>FA225</b>	Type of Accommodations	Always '**'
<b>FA235</b>	Score Not Reported	Score Not Reported
<b>FA240</b>	Score	Score

### ***Student CTE Industry Assessment Record (Record Type GU)***

		TBD
<b>FA060</b>	Assessment Type Code	GU used for CTE Industry Assessment Records
<b>FA200</b>	Test Grade Level	Always `***`
<b>FA205</b>	Assessment Area Code	CTE Industry Assessment Code
<b>FA210</b>	Test Date	Always Jan 1
<b>FA215</b>	Required Test Type	Always `STR`
<b>FA220</b>	Grade Level of Student at time of Test	Always `***`
<b>FA225</b>	Type of Accommodations	Always `***`
<b>FA235</b>	Score Not Reported	Always `***`
<b>FA240</b>	Score	CTE Industry Assessment Result

### ***Student Ohio Graduation Test (OGT) Record (Record Type GX)***

		<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Assessment</a> » <a href="#">OGT</a>
<b>FA060</b>	Assessment Type Code	GX used for OGT Assessment Records
<b>FA200</b>	Test Grade Level	Always `10`
<b>FA205</b>	Assessment Area Code C – Social Studies M – Mathematics R – Reading S – Science W – Writing	Part
<b>FA210</b>	Test Date	Test Date
<b>FA215</b>	Required Test Type	Test Type
<b>FA220</b>	Grade Level of Student at time of Test	Grade at Test Time
<b>FA225</b>	Type of Accommodations	Accomm
<b>FA235</b>	Score Not Reported	Score Not Reported
<b>FA240</b>	Score	Scaled Score (for STR & Alt Test Type for Assessments taking in FY13) Raw Score (for ALT Test Type if test date prior to FY13)

### ***CTE Student Assessment Record (Record Type GY)***

		CTE OCTCA maintenance now has two tabs, one for CTE Technical Score and a second for CTE Portfolio Score (used only for the CTE Teaching Professionals)
<b>FA060</b>	Assessment Type Code	GY used for CTE Student Technical Assessment Records
<b>FA200</b>	Test Grade Level	Always `***`

<b>FA205</b>	Assessment Area Code	CTE Student Assessment Code
<b>FA210</b>	Test Date	Always Jan 1
<b>FA215</b>	Required Test Type	Always 'STR'
<b>FA220</b>	Grade Level of Student at time of Test	Always '**'
<b>FA225</b>	Type of Accommodations	Always '**'
<b>FA235</b>	Score Not Reported	Always '*'
<b>FA240</b>	Score	CTE Technical Score If Assessment Area code = 'CPTP' then CTE Teaching Professions Portfolio Score

***Graduation-Only Test Record (GP) (Not in StudentInformation, must use FF Editor)***

<b>GP040</b>	IRN of Building giving test	Use FF Editor
<b>GP050</b>	EMIS Student ID Number	Use FF Editor
<b>GP060</b>	Student Name	Use FF Editor
<b>GP070</b>	Gender	Use FF Editor
<b>GP080</b>	Racial/Ethnic Group	Use FF Editor
<b>GP090</b>	Courses Completed Date (CCYMM)	Use FF Editor
<b>GP100</b>	Courses Completed IRN (Where student completed course requirements)	Use FF Editor
<b>GP110</b>	Reading Test Score	Use FF Editor
<b>GP120</b>	Writing Test Score	Use FF Editor
<b>GP130</b>	Mathematics Test Score	Use FF Editor
<b>GP140</b>	Social Studies/Citizenship Text Score	Use FF Editor
<b>GP150</b>	Science Test Score	Use FF Editor
<b>GP160</b>	Diploma Date (CCYMMDD)	Use FF Editor
<b>GP170</b>	Reading Scaled Score	Use FF Editor
<b>GP180</b>	Writing Scaled Score	Use FF Editor
<b>GP190</b>	Mathematics	Use FF Editor
<b>GP200</b>	Social Studies/Citizenship Scaled Score	Use FF Editor
<b>GP210</b>	Science Score	Use FF Editor
<b>GP220</b>	State Student ID (SSID)	Use FF Editor

***Student Acceleration Record (FB)***

		<b><u><a href="#">Home</a></u> » <u><a href="#">SIS</a></u> » <u><a href="#">Student</a></u> » <u><a href="#">Assessment</a></u> » <u><a href="#">Student Acceleration (FB)</a></u></b>
<b>FB040</b>	District ID	IRN from District in Context
<b>FB050</b>	EMIS Student ID Number	EMIS ID of student in Context from FS record

<b>FB060</b>	Subject Area Code	Assessment Area
<b>FB070</b>	Accelerated Level Count	Accelerated Level Count
<b>FB080</b>	Accelerated Assessment Flag	Accelerated Assessment Flag
<b>FB090</b>	Accelerated Assessment Accountability IRN	Accelerated Assessment Accountability IRN

## Student Special Education Records

### *Student Special Education Record (GE)*

<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Special Education</a>		
<b>GE100</b>	Date Type	Date Type
<b>GE110</b>	Date (CCYYMMDD)	Event Date

<b>GE120</b>	Outcome ID	Outcome ID
<b>GE130</b>	Non-compliance ID	Non-Compliance Id
<b>GE140</b>	Outcome Beginning Date Element (CCYYMMDD)	Outcome Begin Date
<b>GE150</b>	Outcome End Date Element (CCYYMMDD)	Outcome End Date
<b>GE160</b>	IEP Test Type Element	IEP Test Type
<b>GE170</b>	Secondary Planning Element	Secondary Planning

### ***Student Special Education Graduation Record (FE)***

<b>Home » SIS » Student » Special Education » Grad Requirement</b>		
<b>FE040</b>	District IRN	IRN of the district in context
<b>FE050</b>	EMIS Student ID Number	EMIS ID from FS record
<b>FE060</b>	IEP Date Type	Date Type
<b>FE070</b>	IEP Date	IEP Date
<b>FE080</b>	Assessment Type Code	Defaults to 'GX' in the output file
<b>FE090</b>	Assessment Area Code	Assessment Area
<b>FE100</b>	Exemption Flag	Exemption Flag

### ***Student Gifted Education Record (GG)***

<b>Home » SIS » Student » Gifted » Student Gifted Record</b>		
<b>GG060</b>	Gifted Screening – Superior Cognitive Ability	Screening-Superior Cognitive Ability/Screening checkbox
<b>GG070</b>	Gifted Screening – Mathematics	Screening-Specific Academic Ability-Math/Screening checkbox
<b>GG080</b>	Gifted Screening – Science	Screening-Specific Academic Ability-Science/Screening checkbox
<b>GG090</b>	Gifted Screening – Reading/Writing	Screening-Specific Academic Ability-Reading/Writing/Screening checkbox
<b>GG100</b>	Gifted Screening – Social Studies	Screening-Specific Academic Ability-Social Studies/Screening checkbox
<b>GG110</b>	Gifted Screening – Creative Thinking Ability	Screening-Creative Thinking Ability/Screening checkbox
<b>GG120</b>	Gifted Screening – Visual/Performing Arts	Screening-Visual/Performing Arts/Screening checkbox
<b>GG130</b>	Gifted Assessment – Superior Cognitive Ability	Assessment-Superior Cognitive Ability/Assessment checkbox
<b>GG140</b>	Gifted Assessment – Mathematics	Assessment-Specific Academic Ability-Math/Assessment checkbox
<b>GG150</b>	Gifted Assessment – Science	Assessment Specific Academic Ability-Science/Assessment checkbox
<b>GG160</b>	Gifted Assessment – Reading, Writing	Assessment-Specific Academic Ability-Reading/Writing/Assessment checkbox
<b>GG170</b>	Gifted Assessment – Social Studies	Assessment-Specific Academic Ability-Social Studies/Assessment checkbox
<b>GG180</b>	Gifted Assessment – Creative Thinking Ability	Assessment-Creative Thinking Ability/Assessment checkbox
<b>GG190</b>	Gifted Assessment – Visual/Performing Arts	Assessment-Visual/Performing Arts/Assessment checkbox
<b>GG200</b>	Gifted Identification – Superior Cognitive Ability	Identified-Superior cognitive Ability/Identified checkbox
<b>GG210</b>	Gifted Identification – Mathematics	Identified-Specific Academic Ability-Math/Identified checkbox
<b>GG220</b>	Gifted Identification – Science	Specific Academic Ability-Science/Identified checkbox
<b>GG230</b>	Gifted Identification – Reading/Writing	Identified-Specific Academic Ability-Reading/Writing/Identified checkbox

<b>GG240</b>	Gifted Identification – Social Studies	Identified-Specific Academic Ability-Social Studies/Identified checkbox
<b>GG250</b>	Gifted Identification – Creative Thinking Ability	Identified-Creative Thinking Ability/Identified checkbox
<b>GG260</b>	Gifted Identification – Visual/Performing Arts	Identified-Visual/Performing Arts/Identified checkbox
<b>GG430</b>	Gifted Identification Date– Superior Cognitive Ability	Identified Date-Superior cognitive Ability/Identified Date field
<b>GG440</b>	Gifted Identification Date– Mathematics	Identified Date-Specific Academic Ability-Math/Identified Date field
<b>GG450</b>	Gifted Identification Date– Science	Identified Date-Specific Academic Ability-Science/Identified Date field
<b>GG460</b>	Gifted Identification Date– Reading/Writing	Identified Date-Specific Academic Ability-Reading/Writing/Identified Date field
<b>GG470</b>	Gifted Identification Date– Social Studies	Identified Date-Specific Academic Ability-Social Studies/Identified Date field
<b>GG480</b>	Gifted Identification Date– Creative Thinking Ability	Identified Date-Creative Thinking Ability/Identified Date field
<b>GG490</b>	Gifted Identification Date– Visual/Performing Arts	Identified Date-Visual/Performing Arts/Identified Date field
<b>GG510</b>	Gifted Served – Superior Cognitive Ability	Served-Superior cognitive Ability/Served checkbox
<b>GG520</b>	Gifted Served – Mathematics	Served-Specific Academic Ability-Math/Served checkbox
<b>GG530</b>	Gifted Served – Science	Served-Specific Academic Ability-Science/Served checkbox
<b>GG540</b>	Gifted Served – Reading, Writing	Served-Specific Academic Ability-Reading/Writing/Served checkbox
<b>GG550</b>	Gifted Served – Social Studies	Served-Specific Academic Ability-Social Studies/Served checkbox
<b>GG560</b>	Gifted Served – Creative Thinking Ability	Served-Creative Thinking Ability/Served checkbox/Served checkbox
<b>GG570</b>	Gifted Served – Visual/Performing Arts	Served-Visual/Performing Arts/Served checkbox

## Other Student Records

### *Student Graduation – Core Summary Record (GC)*

		<a href="#">Home</a> » <a href="#">EMIS</a> » <a href="#">Maintenance</a> » <a href="#">Student CORE Summary Record</a>
<b>GC060</b>	CORE Area Code	CORE Subject Area
<b>GC070</b>	CORE Area Count	Total Credits/Units Earned

## Student Course Record (GN)

<b>GN080</b>	Local Classroom Code	<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Scheduling</a> » <a href="#">Course Section Assignments</a> / Course/Section
<b>GN150</b>	High School Credit Earned	Calculated based on credit earned for course
<b>GN152</b>	Partial/Override Credit	Calculated based on credit earned for course
<b>GN160</b>	Course Enrollment Start Date (CCYYMMDD)	<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Scheduling</a> » <a href="#">Course Section Assignments</a> / Assignment Start Date
<b>GN170</b>	Course Enrollment End Date (CCYYMMDD)	<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Scheduling</a> » <a href="#">Course Section Assignments</a> / Assignment Stop Date

## Student Program Record (GQ)

		<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Edit Memberships and</a> <a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Special Education</a> » <a href="#">Services Tab (215XXX Programs Only)</a>
<b>GQ060</b>	Program Code (See Appendix E)	Membership Group & Membership
<b>GQ070</b>	Employee ID	Staff Member
<b>GQ090</b>	Program Provider IRN	Program Provider IRN
<b>GQ100</b>	Program Enrollment Start Date CCYYMMDD	Start Date
<b>GQ110</b>	Program Enrollment End Date CCYYMMDD	Stop Date

## Student Discipline Record (GD)

		<a href="#">Home</a> » <a href="#">SIS</a> » <a href="#">Student</a> » <a href="#">Discipline</a>
<b>GD060</b>	Date of Discipline (CCYYMMDD)	Incident/ Date
<b>GD070</b>	Type of Discipline	Incident record/ Action /Action Type
<b>GD080</b>	Discipline Reason (Can have multiple reasons)	Incident record/ Infraction/Infraction Type
<b>GD085</b>	Discipline Sequence	Calculated by DISCEMIS based on multiple incidents on the same date with same Action
<b>GD090</b>	Total Discipline Days	Incident record/ Action/Number of Days
<b>GD100</b>	Discipline Modified	Incident record/Action/Modified
<b>GD110</b>	Referred for Alternate Educational Services	Incident record/ Action/Alternate Program
<b>GD120</b>	Building IRN where Discipline Incident Took Place	incident/ Building IRN where Discipline Incident Took Place

## ***Student Missing Override Record (FC)***

<b><u>Home</u> » <u>EMIS</u> » <u>Maintenance</u> » <u>Student Missing Override Record</u></b>		
<b>FC050</b>	State Student ID (SSID) previous Reporting period	SSID
<b>FC060</b>	Withdrawal Date (CCYYMMDD)	Withdrawal Date
<b>FC070</b>	Withdrawal Reason	Withdrawal Reason

---

# SIFWorks® VRF™ Data Collector

## User's Guide

Version 1.3

June 30, 2011

The Pearson logo consists of a dark blue rectangular box with the word "PEARSON" written in white, uppercase, sans-serif font in the center.

PEARSON

Pearson  
Data Solutions  
9815 S. Monroe St.,  
Ste. 400  
Sandy, UT 84070  
1.877.790.1261

[www.pearsondatasolutions.com](http://www.pearsondatasolutions.com)

---

Copyright © 2011 Pearson Education, Inc., or its affiliate(s).  
All rights reserved.

SIF is a registered trademark, and Schools Interoperability Framework is a trademark of the Schools Interoperability Framework Association. Data Solutions, SIFWorks, and Vertical Reporting Framework are registered trademarks of Data Solutions. SIFWorks VRF is a trademark of Data Solutions. All other marks mentioned herein are trademarks or registered trademarks of their respective owners.

# Contents

- 1. DOCUMENT REVISION HISTORY .....5**
- 2. INTRODUCTION.....9**
  - Intended Audience .....9
  - Definitions of Terms .....9
  - Introduction to SIFWorks Vertical Reporting Framework™ (VRF) .....9
  - Vertical Reporting Framework Structure .....10
- 3. VRF APPLICATIONS .....11**
  - Data Collector .....11
  - Report Collector .....11
- 4. ORGANIZATION OF THE DATA COLLECTOR USER INTERFACE .....12**
  - How It Looks .....12
  - A. Login / Logout .....13**
  - B. Data Collector Tabs .....13**
    - Tabs on the Left (Collection and Submission) .....13
    - Tabs on the Right (Primarily Administrative) .....14
  - D. Data Collector Tabs.....15**
  - E. Data Collector Conventions .....18**
  - F. Data Collector Sidebar.....21**
- 5. DATA COLLECTION .....22**
  - Data Flow .....22
  - Logging In .....24
  - Responding to a Collection Request.....25
    - Before You Begin.....25
    - Data Collector Roles .....26
  - Starting a Data Collection .....27**
    - Stopping vs. Canceling a Data Collection .....29
    - Collecting from SIF and EMIS Files Data Sources.....30
  - Monitoring Data Collection.....31**
    - Before You Begin.....31
    - Collections by Collection Request .....32
  - Add New Scheduled Collection.....34**
  - Managing Scheduled Collections.....41**
    - Viewing the List of Scheduled Collections.....41
    - Editing or Updating a Scheduled Collection .....43
    - Deleting a Scheduled Collection .....45
  - Managing SIF Zones .....47**
    - Managing SIF Zone Properties .....47
    - Checking SIF Zone Status .....47
  - Managing EMIS Formatted Files (Other Data Sources) .....49**
    - Viewing EMIS Files Data Sources.....49
    - Uploading EMIS Files (Other Data Sources).....51
    - Deleting EMIS Files (Other Data Sources).....55
    - Cancel .....56
  - When a Collection Completes .....56**
  - Preparing and Validating Collections .....59**
    - Special Cases.....62
  - Validation Exceptions .....64**
    - Level 1 Validation and Exceptions Report .....64
  - Previewing Data Collections .....66**

---

Invalid Records .....	70
Finding the Cause of the Directly Invalid Records .....	71
Downloading a .Zip File with the Generated Previews .....	72
<b>Certifying and Submitting a Collection .....</b>	<b>75</b>
Submission Status .....	77
Submissions Page Columns .....	79
Submissions Page Refresh Links .....	79
Submission Details .....	80
<b>Receiving Submission Status from the Report Collector.....</b>	<b>82</b>
Tracking Submission Status from the Report Collector .....	83
Level 2 Validation Exception Report.....	85
Submission Archives .....	87
Viewing and Managing Archived Submissions .....	88
<b>6. TROUBLESHOOTING AND MONITORING.....</b>	<b>95</b>
<b>Common Errors .....</b>	<b>95</b>
<b>Database Connection Error.....</b>	<b>96</b>
<b>Monitoring Data Collection through the Collection Status Tab .....</b>	<b>97</b>
Collection Status Screen.....	97
<b>Errors and Warnings .....</b>	<b>98</b>
<b>INDEX .....</b>	<b>101</b>

# 1. Document Revision History

Document Revision History			
Version	Date	Page Numbers	Descriptions
1.2	01/05/10	5, 7, 9, 10, 20, 64	Compiled a single revision history table and deleted the separate tables in each chapter.
1.2	11/04/10	1-2	Updated branding and copyright information.
"Introduction" Revision History			
Version	Date	Page Numbers	Descriptions
1.2	01/04/10	7	Added revision history table
1.2	01/05/10	7	Deleted revision history table from "Introduction" chapter and added it to this table.
"VRF Applications" Revision History			
Version	Date	Page Numbers	Descriptions
1.2	01/04/10	9	Added revision history table
1.2	01/05/10	9	Deleted revision history table from "VRF Applications" chapter and added it to this table.
"Organization of the Data Collector User Interface" Revision History			
Version	Date	Page Numbers	Descriptions
1.2	01/04/10	10	Added revision history table
1.2	01/05/10	10	Deleted revision history table from "Organization of the Data Collector User Interface" chapter and added it to this table.
"Data Collection" Revision History			
Version	Date	Page Numbers	Descriptions
1.2	01/04/10	20	Added revision history table
1.2	01/05/10	20	Deleted revision history table from "Data Collection" chapter and added it to this table.
1.2	01/04/10	26	Information added for new action, <i>None at the moment</i> , under Starting a Data Collection.
1.2	1/04/10	63	Updated screenshot for Level 2 Validation Report.

1.2	1/05/10	20	Revised descriptions for 1/04/10 revision history entries.
1.2	1/05/10	26	Revised information for new action, <i>None at the moment</i> , under Starting a Data Collection.
1.2	1/05/10	45	Deleted the word "Exceptions" from bullet point on Fatal errors and replaced it with "Validation".
1.2	1/05/10	46	Deleted the word "Exceptions" from final paragraph on the page.
1.2	1/05/10	62	Deleted the word "Exceptions" in both places it appeared on the page.
1.2	1/05/10	63	Deleted the word "Exceptions".
1.2	01/29/10	61	New submission status added: <i>Pending acceptance (with errors)</i> .
1.2	01/29/10	61	Updated wording for submission status: <i>Pending acceptance Processed with Errors, and Processed Successfully</i> .
1.2	02/15/10	57	Revised Submission status section with updated screen captures.
1.2	06/11/10	25	Added a section on "Data Collector Roles"
1.2	06/11/10	25	Removed "Updating a Collection Request" (belongs in the Admin Guide only)
1.2	06/11/10	26-28	Minor corrections to the steps in the "Starting a Data Collection" section, including reordering some steps.
1.2	06/11/10	28-29	Added more explanation to "Stopping vs. Canceling a Data Collection"
1.2	06/11/10	29	Added a section on "Collecting from SIF and EMIS Files Data Sources"
1.2	06/11/10	37-45	Changed terminology from "Flat Files data sources to "EMIS Files" data sources (and "Non-SIF" to "Other") to conform with terminology in the UI
1.2	06/11/10	45-47	Added a "When a Collection Completes"
1.2	06/11/10	47-50	Reorganized the "Preparing and Validating Collections" (was called "Preparing and Validating Requests")
1.2	06/11/10	51	Added explanation to check for prepare errors at the beginning of the "Previewing Data Collections"
1.2	06/11/10	52	Preview Options > Views: explained why there are no Summary Views in Ohio

1.2	06/11/10	53-54	Minor revisions to the explanation of Excluded Records and previews
1.2	06/11/10	54-56	Added an explanation of record dependencies and directly invalid vs. dependency invalid records in the "Previewing Data Collections"
1.2	06/11/10	60	Minor edits in the "Certifying and Submitting Collection" section
1.2	06/11/10	62-67	Minor edits in the "Submission Status" section
1.2	06/11/10	67	Corrected the list of possible Submission Statuses (on the Collection Requests page)
1.2	06/11/10	67	Minor edits to the "Receiving Submission Status from the Report Collector" section
1.2	06/11/10	68	Added explanations to the "Level 2 Validation exception Report" section
1.2	06/11/10	69-79	Moved the Submissions Tab out of the Troubleshooting chapter to the end of Data Collection chapter.
1.2	06/11/10	71	Added a "Submission Archives" sub-section and changed the explanation of the archives.
1.2	08/16/10	66	Replaced "Receiving Submission Status from the Report Collector" section with revised section (same title) from Alex (approved by Nancy)
1.2	09/10/10	46-49	Added new information on preparation progress steps and Special Cases subsection.
1.2	09/10/10	48	Added information on the popup that appears when the Data Collector agent may be down.
1.2	09/10/10	70	Added information explaining when the Internal Error status appears.
1.2	09/10/10	71-73	Updated information on accessing Level 2 Validation Exception Reports.
1.3	03/31/11	1, 2	Updated branding, version number, and date.
1.3	03/31/11	33-38	Added Scheduled Collections content.
1.3	03/31/11	ToC, Index	Updated Table of Contents and Index.
1.3	06/24/2011	66-68, 73	Updated the Previewing Data Collection section, for the user interface changes.
1.3	06/28/11	Throughout	Updated screenshots for collection action links, errors & warnings, etc.

<b>“Troubleshooting” Revision History</b>			
<b>Version</b>	<b>Date</b>	<b>Page Numbers</b>	<b>Descriptions</b>
1.2	01/04/10	64	Added revision history table
1.2	01/05/10	64	Deleted revision history table from “Troubleshooting” chapter and added it to this table.
1.2	01/05/10	68	Deleted the word “Exceptions” from note and replaced it with the word “Validation”.
1.2	01/05/10	71	Deleted the word “Exceptions” and replaced it with the word “Validation”.
1.2	02/15/10	67	Revised Submissions Tab section to include new “Manage Archives” screens and features.
1.2	06/11/10	79-89	Moved the Submissions Tab out of the Troubleshooting chapter to the end of Data Collection chapter.
1.2	06/11/10	80	Rename “Troubleshooting” chapter to “Troubleshooting and Monitoring”
1.2	06/11/10	86-89	Added “Appendix A: Record Dependencies and Multiple Record Validations”
1.2	06/14/10	various	Replaced the word “got” with a more descriptive word
1.2	06/14/10	29	Reworded the Collecting from SIF and EMIS Files Data Sources section
1.2	06/14/10	86-89	Removed Appendix A because it references EMIS record type dependencies which can change over the coming years
1.2	07/07/10	25	Corrected the list of collection status messages
1.2	07/07/10	30	Rephrased comments about duplicate records
1.2	07/07/10	33	Rephrased explanation of Collection Status
1.2	07/08/10	Various	Updated screen shots to reflect the latest version of the Data Collector
1.2	07/08/10	65-78	Reorganized the Submission Tab section

---

# 2. Introduction

## Intended Audience

This guide is intended for users of the Data Collector at Local Educational Authorities (LEAs).

This guide provides basic descriptions of the Data Collector User Interface (UI), and simple instructions for creating, certifying, and submitting data collections. This document also references the Report Collector, the other main part of the Vertical Reporting Framework (VRF), which is documented separately.

**Note:** The instructions in this guide assume that the Data Collector is running, and that the user or administrator is logged in with sufficient permissions.

## Definitions of Terms

**Collection Request:** State-issued specifications for requesting data (also known as a Report Manifest in the Schools Interoperability Framework (SIF) standard).

**Data Collection SIF Zones:** These are the SIF Zone(s) to which the Data Collector connects to request SIF objects, in the process of collecting data.

**Report Authority:** An entity that publishes collection requests and subsequently accepts data submissions. The Ohio Department of Education is the Report Authority for EMIS reporting.

**Report Submitter:** The organization (not the person) that submits data collections to the Report Authority—for example, a school district could be a report submitter.

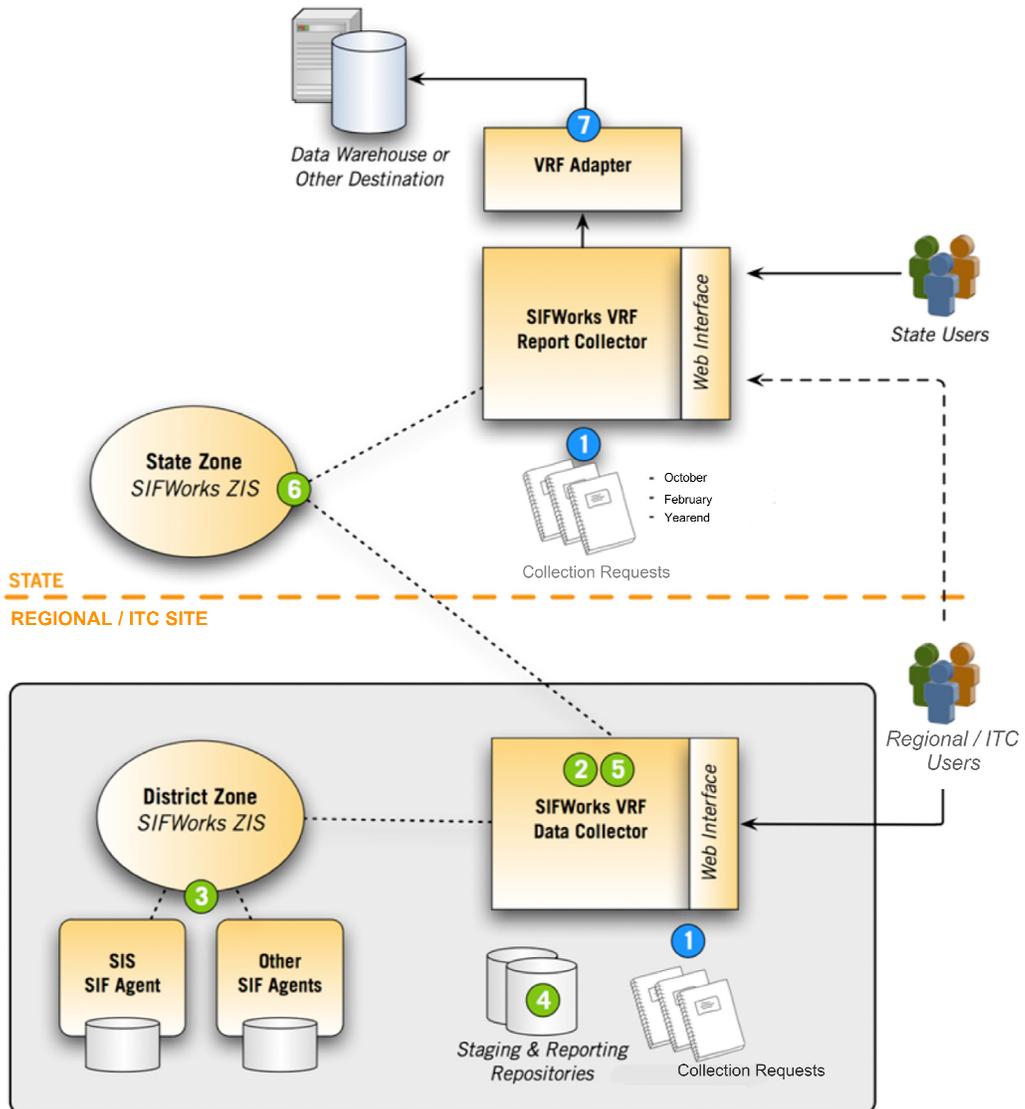
**SIF Zones:** A distributed system that consists of a Zone Integration Server and one or more SIF-enabled software applications (software applications that have a SIF Agent) that share or report one or more SIF objects over a network.

## Introduction to SIFWorks Vertical Reporting Framework™ (VRF)

The governing idea behind the SIFWorks Vertical Reporting Framework® is that the state requires data. The state sends out the specification for these data requirements with their accompanying deadlines, and each Report Submitter fills the data requirements and submits the data. VRF calls the specification for these data requirements a *Collection Request*.

To accomplish these purposes, the SIFWorks VRF™ includes two applications: the Report Collector (RC), which operates centrally at the state level, collecting the data submitted by the Report Submitters, and the Data Collector (DC), distributed to regional sites (Information Technology Centers, or ITCs), which produce data for each Report Submitter and submits these data to the RC. The following diagram illustrates how these two applications and their high-level components fit together.

# Vertical Reporting Framework Structure



---

# 3. VRF Applications

## Data Collector

The Data Collector is an application that can collect data from multiple sources, including SIF-enabled applications, such as DASL and eSIS, and non-SIF-enabled applications, such as CSV files.

The Data Collector's web-based console allows users to:

- Collect data in accordance with the Collection Request requirements.
- Preview the collected data.
- Review validation errors.
- Certify and submit data.
- Receive responses from the Report Collector regarding the status of the submission.

Using the Data Collector, report submitters that participate in the SIFWorks Vertical Reporting Framework deployment receive collection requests and are able to collect data to prepare, preview, and submit data collections.

## Report Collector

The Report Collector is an application that runs at the state level to publish collection requests and receive data from the Data Collectors. As data are received over the secure statewide (or regional) SIF infrastructure, the Report Collector stores the data received in a repository, where it is then further processed and validated. Information is then returned to the Data Collector for school district review.

The Report Collector's web-based console facilitates monitoring data preparation at the Data Collectors, and the submission of the data by each Report Submitter by the State.

# 4. Organization of the Data Collector User Interface

The Data Collector user interface displays login information; the ID of the current submitter; tabs for navigating and operating the Data Collector; menus and operators, conventions, for each tab or screen; and sub-menus or sidebars for each tab or screen.

## How It Looks

The screenshot shows the SIFWorks VRF Data Collector interface. At the top, the header includes the logo and the text 'SIFWorks VRF Data Collector'. On the right side of the header, there is a login status 'Logged in as sifworks (Logout)' and a submitter dropdown menu showing 'Ayersville\_SQL'. Below the header is a navigation bar with tabs: 'Collection Requests' (highlighted), 'Collection Status', 'Submissions', 'Data Sources', 'Agencies', and 'Settings'. The main content area is titled 'Collection Requests Summary' and includes a 'Refresh' link. The primary data section is for the 'Ohio Department of Education' and features a folder icon for 'Graduation (G) FY11 Reporting Period'. Below this, there is a summary box containing submission details: 'Submissions: January 29, 2011 - December 31, 2011', 'Expiration Date: December 31, 2011 (in 274 days)', 'Collection Request: 1', 'Status: Data Collection has been prepared yesterday at 03:30:23 PM and is available for preview or certification.', 'Validation Status: Level 1 Validation', and 'Submission Number: 2 (attempt 1)'. An 'Actions' list includes 'Start/Stop Collection', 'Prepare', 'Preview', 'Certify & Submit', 'Cancel', and 'Add New Scheduled Collection'. On the right side, there is a sidebar titled 'Order Collections By' with radio buttons for 'Expiration Date' and 'A-Z', and a section for 'Built-In Collections' with a checked option 'Don't show built-in collections'. Below that is a 'Manage Scheduled Collections' section with a link to 'Manage scheduled collections'. At the bottom of the sidebar is a 'Questions?' section with contact information for Kevin Dwight at Northern Ohio Educational Computer Association.

- A. Login / Logout
- B. Data Collector Tabs
- C. Data Collector Screens
- D. Data Collector Conventions
- E. Data Collector Sidebar or Sub-menus

## A. Login / Logout



The current user's ID and the logout link are located in the upper right of the Data Collector screen.

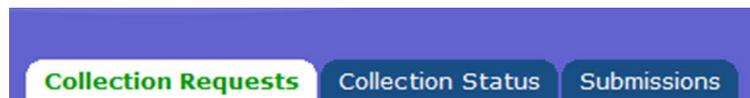
## B. Data Collector Tabs



The screens in the Data Collector web console are organized into six tabs. These tabs are the means by which the Data Collector is operated. Click on each tab to navigate to a corresponding screen.

### Tabs on the Left (Collection and Submission)

The three tabs on the left—Collection Requests, Collection Status, and Submissions—are used to create and submit the data required by the selected Collection Request.



- From the **Collection Requests** tab, you can see what data need to be collected and submitted, and deadlines associated with those data collections. You can also start and stop data collection using this tab.
- The **Collection Status** tab allows you to view progress for the data collections that are currently taking place.
- The **Submissions** tab displays the status of submissions—the date, status, and action, if any, on any individual submission.

---

## Tabs on the Right (Primarily Administrative)



The three tabs on the right of the Data Collector main screen—Data Sources, Agencies, and Settings—are primarily for administrative use, for configuring the Data Collector and the Report Submitter. The availability of these tabs depends upon the access privileges of the user logging into the Data Collector; specifically, the Agencies and Settings tabs are visible only to the ITCs, who use these tabs when setting up member districts in the Vertical Reporting Framework.

### Data Sources tab

---

**Note:** The Data Collector gathers data from SIF Zone(s) as well as from “Other Data Sources” (EMIS formatted files) through the Data Sources tab.

---

The **Data Sources** tab lists the SIF zones and other data sources from which the Data Collector can gather data. SIF zones and other data sources can be added or removed through this tab. ITCs can manage data sources, and districts can upload flat files, through the Data Sources tab. Please note that only ITCs can manage data sources.

### Agencies and Settings tab

---

**Note:** The Agencies and Settings tabs are accessible only by users with administrative privileges. Primarily, these tabs are used by ITCs.

---

The **Agencies** tab lists the Report Authority with which the Data Collector is registered. From this tab, ITCs can register and unregister with the Report Authority, change how the Data Collector connects to the Report Authority, and view collection requests published by the Report Authority.

The **Settings** tab allows ITCs to manage report submitters and their role mappings. Lightweight Directory Access Protocol (LDAP) configuration is performed from this screen. Global settings for the Data Collector can also be viewed and edited from this tab.

## D. Data Collector Tabs

Below are the screens or pages corresponding to the tabs in the Data Collector. (The screens and pages corresponding to the Progress, Agencies and Settings tabs are not shown, since those screens and pages are only for ITC use.)

The screenshot displays the SIFWorks VRF Data Collector interface. At the top, the header shows "SIFWorks VRF Data Collector" and "Logged in as sifworks (Logout) | Submitter: Ayersville\_SQL". Below the header is a navigation bar with tabs: "Collection Requests" (highlighted in green), "Collection Status", "Submissions", "Progress", "Data Sources", "Agencies", and "Settings". The main content area is titled "Collection Requests Summary" and includes a "Refresh" link. The summary is for the "Ohio Department of Education" and focuses on the "Graduation (G) FY11 Reporting Period". A detailed information box contains the following data:

- Submissions:** January 29, 2011 - December 31, 2011
- Expiration Date:** December 31, 2011 (in 186 days)
- Collection Request:** 2
- Status:** Data Collection has been prepared yesterday at 03:01:40 PM and is available for preview or certification.
- Validation Status:** [Level 1 Validation](#)
- Submission Number:** 3 (attempt 1)
- Actions:** [Start/Stop Collection](#), [Prepare](#), [Preview](#), [Certify & Submit](#), [Cancel](#), [Add New Scheduled Collection](#)

On the right side, there are sections for "Order Collections By" (radio buttons for "Expiration Date" and "A-Z"), "Built-In Collections" (checkbox for "Don't show built-in collections"), "Manage Scheduled Collections" (link to "Manage scheduled collections"), and "Questions?" (contact information for Kevin Dwight at Northern Ohio Educational Computer Association).

This screen corresponds with the *Collection Requests* tab, the launching point for data collections.

Collection Requests **Collection Status** Submissions Data Sources

Collections by Collection Request

### Collection Status

Collections by Collection Request

Collection activity by collection request. Choose filter criteria to narrow the scope of the collection requests listed.

Collection Request:  Progress:  [Refresh](#)

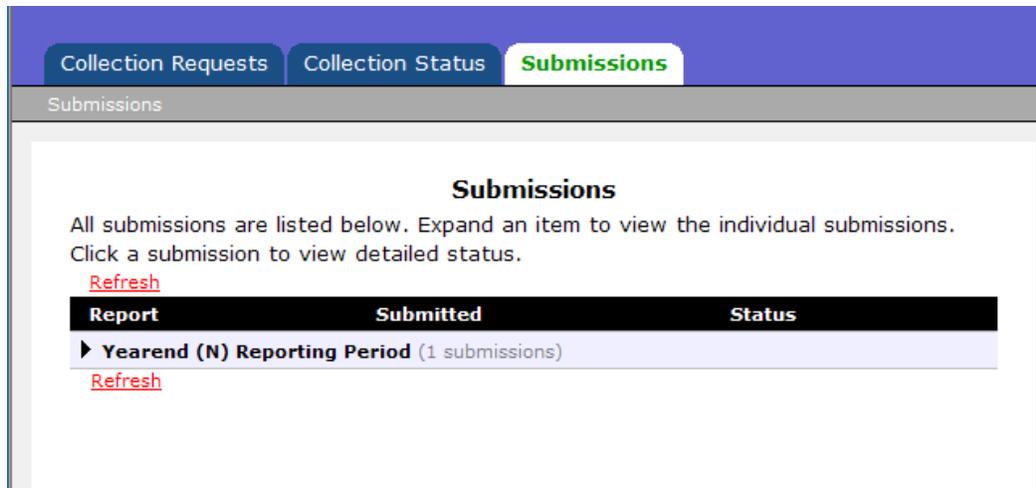
SIF Zones					
Collection / SIF Zone / Request	Records	Packets	Start	Elapsed	Status
▼ Yearend (N) Reporting Period 1.1	9409	53	07/08 01:29 PM	00:31:16	Complete
▼ ✓ Northwestern District	9409	53	07/08 01:29 PM	00:31:16	18 of 18 Complete
✓ Assessment Administration Records	17	<a href="#">1</a>	07/08 01:30 PM	00:30:52	Complete
✓ Assessment Form Records	38	<a href="#">1</a>	07/08 01:30 PM	00:30:46	Complete
✓ Assessment Records	22	<a href="#">1</a>	07/08 01:30 PM	00:30:44	Complete
✓ Assessment Registration Records	80	<a href="#">1</a>	07/08 01:30 PM	00:30:53	Complete
✓ Assessment Subject Records	19	<a href="#">1</a>	07/08 01:30 PM	00:31:01	Complete
✓ Building Records	2	<a href="#">1</a>	07/08 01:30 PM	00:31:12	Complete
✓ Class Information Records	343	<a href="#">2</a>	07/08 01:30 PM	00:18:09	Complete
✓ Course Information Records	275	<a href="#">2</a>	07/08 01:30 PM	00:09:45	Complete
✓ Discipline Records	0	<a href="#">1</a>	07/08 01:30 PM	00:09:46	Complete
✓ District Records	1	<a href="#">1</a>	07/08 01:30 PM	00:31:13	Complete
✓ School Records	1	<a href="#">1</a>	07/08 01:29 PM	00:02:36	Complete
✓ Staff Demographic Records	0	<a href="#">1</a>	07/08 01:30 PM	00:31:12	Complete
✓ Student Attributes Records	1129	<a href="#">6</a>	07/08 01:30 PM	00:17:19	Complete
✓ Student Course Records	5721	<a href="#">11</a>	07/08 01:30 PM	00:30:00	Complete
✓ Student Records	831	<a href="#">10</a>	07/08 01:30 PM	00:09:02	Complete
✓ Student School Records	832	<a href="#">10</a>	07/08 01:30 PM	00:13:52	Complete
✓ Student Test Scores	80	<a href="#">1</a>	07/08 01:30 PM	00:31:03	Complete
✓ Term Information Records	18	<a href="#">1</a>	07/08 01:30 PM	00:09:10	Complete

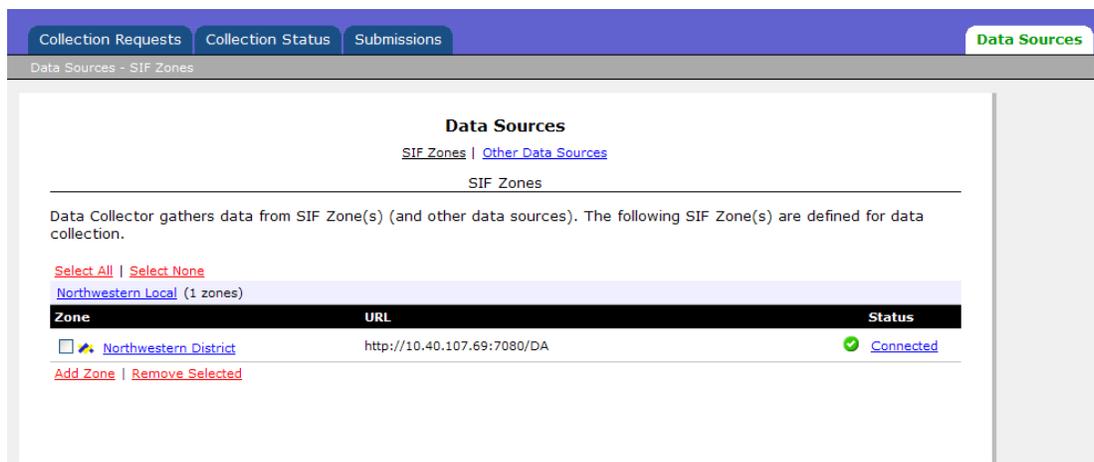
EMIS Formatted Files				
Collection / Data Source	Records	Start	Elapsed	Status
Yearend (N) Reporting Period				Not started

[Refresh](#)

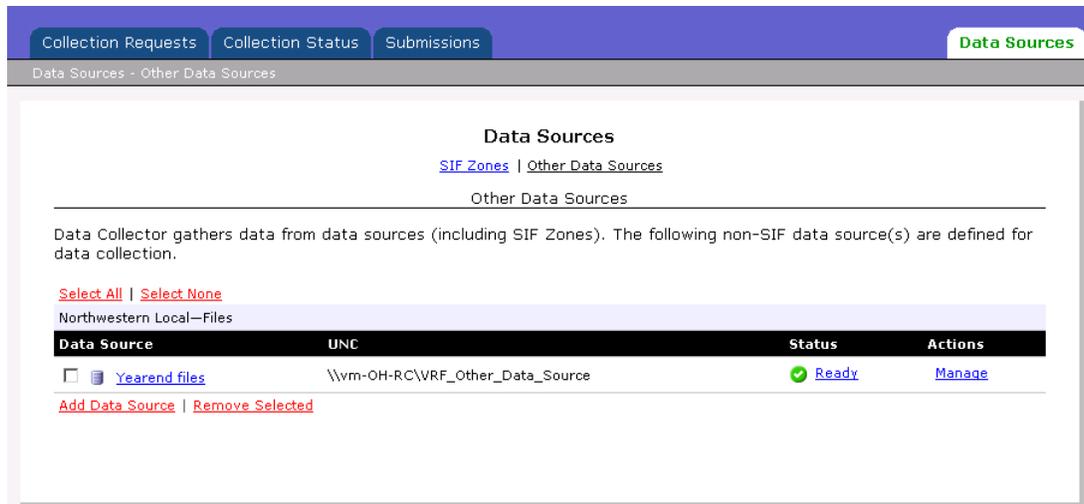
This screen corresponds with the *Collection Status* tab, from which collections can be monitored.



This screen corresponds with the *Submissions* tab, which shows submissions sent to the State (ODE).



This screen corresponds with the *Data Sources* tab. It shows the status of the SIF zone and allows you to select the Other Data Sources link, which redirects to the screen where files can be uploaded.

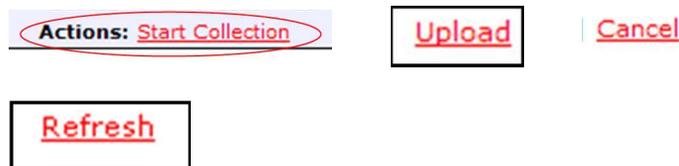


Note that only users with administrative privileges can add or remove SIF zones or other data sources.

## E. Data Collector Conventions

The Data Collector pages and screens are navigated and operated through the use of links, radio buttons, data fields, drop-down lists, check-boxes, and expand/collapse lists. Generally, these operators execute commands specific to the page or sub-menu on which they're found, and behave in the following ways.

- **Links**—Usually underscored in a color that contrasts with the surrounding page or screen; perform named operations and actions; accept or allow options, edits or changes entered through data fields or radio buttons; advance to the next page or to a subsequent step in a process (in which case, the selected link becomes “grayed out” or unavailable). Following are some of the links you will see in the Data Collector screens:



**Note:** The **Refresh link** is displayed on various pages and screens in the Data Collector. The Data Collector pages and screens are static; that is, you must click on the Refresh link to apply options or filters you might have selected, or to update the current page with the latest “behind-the-scenes” information (the status of a collection, for example).

- **Radio buttons**—Allow the selection (or de-selection) of options. (In most cases, the radio button options are not accepted until a “Save” or “Accept” button or link is then selected.)



- **Data fields**—Accommodate the entry of information, such as URLs.

---

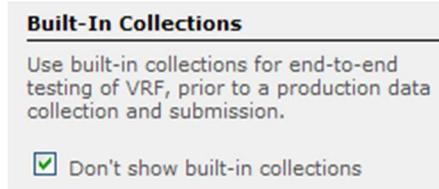
**Address:** 10.40.174.148

- **Drop-down lists**—Provide choices specific to the current page, screen, or sub-menu.

Progress:

- All
- In Progress
- Complete

- **Check-boxes**—Allow the selection of options to filter or manage Data Collector actions



- **Expand/Collapse lists**—Determine the scope of a selected list (to include more or less information, as needed).



- **Status Icons**—Through the Data Collector, these symbols are used to indicate the progress or status of selected actions:

- ✔ Action completed or connection sound.
- ⚠ Warning; indicates a potential for error or a need to repeat a step or action.
- ✖ Unexpected errors were encountered during the current phase of the collection process.

**Note:** The appearance of the “red X” error icon beside the folder icon in the Collection Requests Summary page (Collection Requests tab) indicates that unexpected errors were encountered during the **current phase** of the collection process (Collection, Prepare, or Certify & Submit). Validation errors are **not** attended by this icon.

- 🔄 Action (collection or submission, for example) in progress.

---

## F. Data Collector Sidebar

To the right of most screens in the Data Collector are sidebars—links, check-boxes, or radio buttons—that may be used to set up, filter, or otherwise assist in data collection. Like the tabs in the Data Collector screen tabs, the availability of the sub-menus is contingent upon user permissions.

**Order Collections By**

Expiration Date

A-Z

**Built-In Collections**

Use built-in collections for end-to-end testing of VRF, prior to a production data collection and submission.

Don't show built-in collections

**Questions?**

If you have questions, you may contact:

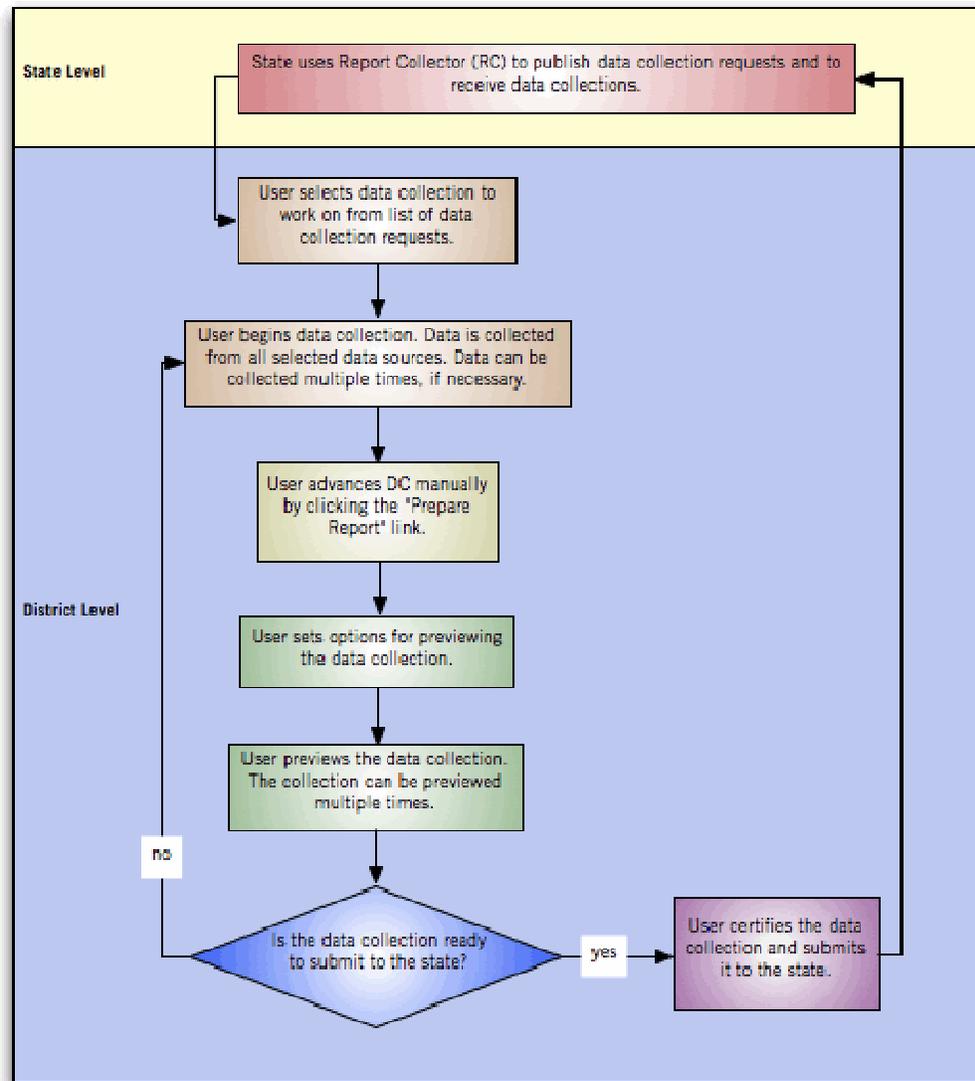
[Kevin Dwight](#)  
Northern Ohio Educational Computer Association  
Email: [kevin@noeca.net](mailto:kevin@noeca.net)  
<http://www.noeca.org/info.htm>

**About Built-in Collections:** In the sidebar menu of the Collection Requests Summary page shown above, the “Don’t show built-in collections” box is unchecked. If you want to use “built-in” collections, that is, “test” collections, leave this box unchecked.

# 5. Data Collection

## Data Flow

The following flowchart illustrates the process for creating a data collection in the SIFWorks Vertical Reporting Framework® Data Collector.



The general design of the SIFWorks VRF places the data collection and submission impetus on Local Education Agency (LEA) users, who control starting the data collection for a collection request, certifying that the data is correct, and submitting data to the state. The process is organized into a structured workflow through which the collection and submission of data is carried out.

---

The Data Collector (DC) guides users through each phase:

1. Collecting the data for the Collection Request
2. Preparing and validating the data
3. Previewing data
4. Certifying and submitting the data
5. Receiving responses from the Report Collector regarding the status of the submission

The first three steps—collecting data; preparing and validating data; and previewing the data—can be repeated multiple times in an effort to correct errors that are identified in the collection process before the data is certified and sent to the state.

---

## Logging In

To access the Data Collector, open your web browser. In the browser window, enter the appropriate URL. The URL will differ for each ITC. The ITC will provide access instructions for the Data Collector.

The following screen will display.



**SIFWorks® VRF® Data Collector**

User Name:

Password:

**Login**

Copyright © 2002-2010 Edustructures. All rights reserved.

The "SIF Certified" Logo is a trademark of the Schools Interoperability Framework Association

The SIFWorks® Vertical Reporting Framework is a Certified Product and meets the conformance requirements for a SIF 2 Enabled Application.



Enter your username and password.

---

## Responding to a Collection Request

The following sections will take you through the phases of Data Collection: Collection; Preparation; Preview; and Submission.

### Before You Begin

Before starting a collection, it's helpful to identify all the types and locations of the data sources you're likely to need for the collection. (For instructions on uploading flat files (non-SIF data sources), see "Uploading Flat Files.")

Fields on the Collection Requests Summary Screen:

**Submissions:** Period during which data for this collection can be submitted.

**Expiration Date:** The last date by which the Report Authority (ODE) will accept the collection.

**Collection Request (Version):** This is the number assigned to the Collection Request by its originator. When the Collection Request author creates the Collection Request document, the author assigns the number '1' as the Collection Request Version. When the Collection Request document needs to be altered or updated the Collection Request Version is incremented. The purpose of the Collection Request version is to track the different versions of the collection request, as it undergoes changes. The version number has no other meaning or purpose.

---

**Note:** The Collection Request version numbers are not necessarily consecutive. This can happen when the Collection Request is changed more than once before your ITC receives the update (or before you see the update). A greater number indicates a more recent collection request than a smaller number (e.g., collection request version 5 was released after collection request version 2). The changes to the Collection Request almost always involve only changes to the "Prepare" step.

---

**Status:** The disposition of the collection. In the following status messages, the text within the angle brackets <> will be replaced by actual values, e.g., July 8, 2010 instead of <date>. The status messages are shown in italics, with explanations next to them in parenthesis:

*This collection has never been submitted.* (this status is displayed for a new collection request for which a collection has not yet been started)

*Data Collection starting.* (displayed while the Data Collector is in the process of starting the Data Collection – usually lasts only a few seconds)

*Data Collection is in progress.* (displayed until collecting data completes)

*Data Collection completed successfully <today> (or on <date>) at <time>.* (for example, Data Collection completed successfully today at 8:15AM)

*Data Collection completed with errors or warnings < today> (or on <date>) at <time>.* (make sure to check the cause of the errors or warnings by clicking on the link next to Errors & Messages)

*Data Collection stopped by <user id>.* You must take action to cancel the collection, or start the collection over. (displayed when someone stops the collection – the <user id> identifies the user who stopped it)

*The collection has been prepared <today> (or on <date>) at <time> and is available for preview or certification.* (displayed after the prepare step completes)

---

*The collection has been prepared on <date> at <time> and is available for preview. You need to re-prepare to make it available for certification. (a “prepare” of the collection is valid only for 24 hours, because validation tables can be automatically updated on a nightly basis; so if you do not certify & submit a collection within 24 hours of preparing it, you need to re-prepare – the only difference between this status and the one above it is that in this case the prepare step completed more than 24 hours ago, and in the previous status the prepare step completed today).*

*Preparation <today> (or on <date>) at <time> resulted in one or more errors. You may correct the errors and recollect the data, prepare the collection again from current data, or cancel the collection. (make sure to check the cause of the errors or warnings by clicking on the link next to Errors & Messages)*

*The collection is currently being sent to Ohio Department of Education. (displayed while the collection is being submitted)*

*The collection was submitted <today> (or on <date>) at <time> by <user id>. (displayed after the Report Collector receives the submission)*

**Submission Number:** Sequential number assigned to submissions; the Submission Number indicates the number of times that a collection is submitted, including the “pending submission” – when you start a collection for a collection request for the first time the submission number starts at 1, not 0.

**Attempts:** In parentheses next to the submission number, another number, followed by the word “attempts”, appears. This number indicates the number of times that data has been prepared, for the current submission. The number of attempts is not visible to the state. It is only for Data Collector users’ reference. Unlike the submission number the attempt number starts at 0 – it shows you how many times you have run the prepare step, during the current submission cycle. The attempt number becomes 1 after the first time you run the prepare step.

**Actions:** The operations that are executable from links in the Actions section of the Collection Requests Summary page include:

*Start Collection*

*Prepare*

*Preview*

*Certify and Submit*

*View Submission Results*

*Review Data*

*Add New Scheduled Collection*

## **Data Collector Roles**

The Data Collector has three different roles, which control what an LEA user of a Data Collector can do. A single user account (login) can have multiple roles. Your ITC controls the roles associated with your account. Contact your ITC if you think you do not have the correct role(s) assigned for your LEA.

Data Collector roles:

- **LEA Collector:** can collect, prepare and preview, but cannot submit the collection. You need the LEA Collector role to see the Data Sources tab and to be able to upload EMIS files to the Data Collector.

- LEA Submitter: can review or preview the collection, and can submit the collection, but cannot start the collection or prepare a collection for preview. Also cannot upload EMIS files for data collection. You need someone with the LEA Collector role to start a data collection for you.
- LEA Reviewer: can only view things – e.g. preview the results of the collection, review a submitted collection, view validation exception reports, etc. Cannot start a collection or submit it.

If you have both the LEA Collector role and the LEA Submitter role then you can do all of data collection, prepare, preview and submit tasks for your LEA – you do not need the LEA Reviewer role.

## Starting a Data Collection

1. Log in to the Data Collector.
2. The **Collection Requests** page is displayed.

The screenshot displays the 'Collection Requests Summary' page. At the top, there is a navigation bar with four tabs: 'Collection Requests' (highlighted in green), 'Collection Status', 'Submissions', and 'Progress'. Below the navigation bar is a header for 'Collection Requests Summary'. A 'Refresh' link is visible on the left. The main content area is titled 'Ohio Department of Education' and features a folder icon next to the heading 'Graduation (G) FY11 Reporting Period'. Below this heading is a descriptive paragraph: 'The FY11 Graduation (G) reporting period captures data related to graduating students. This data will include diploma information and all data necessary to verify that the student has met CORE and testing graduation requirements. Note: File(s) must be uploaded through the Data Collector Data Sources tab.' A light blue box contains the following details: 'Submissions: January 29, 2011 - December 31, 2011', 'Expiration Date: December 31, 2011 (in 186 days)', 'Collection Request: 2', 'Status: This collection has never been submitted.', 'Submission Number: 1 (attempt 0)', and 'Actions: Start Collection' (with a red circle around the link) and 'Add New Scheduled Collection'.

3. Click the **Start Collection** link.

- The **Start Collection** page is displayed. (Note that, in the following screen shot, the district is set up to use both SIF and non-SIF data sources – EMIS Formatted Files. For instructions on using EMIS Formatted Files data sources, see “Uploading a Flat File.” For collections that only use EMIS files, the SIF zone will not appear. Also note that this screen shot shows two SIF zones and multiple EMIS formatted files data sources – in all likelihood you will see at most one SIF zone and only one EMIS Formatted Files data source.)

**Collection Requests** | Collection Status | Submissions | Progress

Collection Requests Summary > Start Collection

### Graduation (G) FY11 Reporting Period

Start Collection — Submission Number 1 (attempt 0)

To start data collection, choose the data sources from which to collect data. You may exclude some of the data sources now and resume data collection later, by clicking the Start/Stop Collection action on the Collection Requests Summary page.

[Start Data Collection for all items checked below](#)

All connected zones in DASL School 1 (1 zones / 1 connected )

SIF Zone	Zone Status	Collection Status
<input type="checkbox"/> DASL1	<a href="#">Connected</a>	Not Started

All EMIS Formatted Files

Data Sources	Availability	Collection Status
<input type="checkbox"/> Graduation	<a href="#">Ready</a>	Not Started

In the **SIF Zones** section of the Start Collection page, note that the available SIF Zone shows a Zone Status of “Connected.” The Collection Status for this Zone is “Not Started.”

In the **EMIS Formatted Files** section, there is a data source(s) listed; the availability of this source is “Ready,” meaning that the EMIS formatted files at the data source are accessible.

- Select the data sources that will be used in this collection.
- Click on the link, **Start Data Collection for all items checked below**.

- Between the time when you click the **Start Collection** link and the time when the actual collection process begins, you will not have any actions available, however the **Status** field will inform you that data collection is starting.

**Submissions:** January 29, 2011 - December 31, 2011  
**Expiration Date:** December 31, 2011 (in 186 days)  
**Collection Request:** 2  
**Status:** Data Collection starting.  
**Submission Number:** 1 (attempt 0)  
**Actions:** None (data collection will start shortly)

- Once the collection has started the Actions section will show Start/Stop and Cancel links; to monitor the progress of the collection, click on the Collection Status tab. (See “Monitoring Data Collection.”)

**Note:** The Data Collector can perform multiple collections simultaneously; simply go back to the Collection Requests Summary page, and click the “Start Collection” link for each required collection request.

### Stopping vs. Canceling a Data Collection

In the Actions section of the Collection Requests Summary page, there are links for executing operations on the current collection request. Depending upon the status of the selected collection request, these links can include Stopping or Canceling a Collection.

**Actions:** [Start/Stop Collection](#)  
[Preview](#)  
[Certify](#)  
[Cancel](#)

#### Stopping a Collection

You stop a collection by data source, e.g., by the SIF zone or the EMIS formatted files data source. Stopping is not synonymous with “pausing” – when you stop a collection in a SIF zone and later restart it, you restart collecting the data from the beginning, not from the point where you stopped it. When you stop a collection, the data collected so far will not be discarded until the collection is restarted. Stopping a collection allows you to stop collecting from one data source without stopping collecting from the other one. For example, you realize that you did not upload the latest set of EMIS formatted files before you started collection from both the SIF zone and from EMIS formatted files. You can stop collecting from the EMIS files, upload the latest EMIS files, and restart data collection from the EMIS files, without disturbing the on-going collection from the SIF zone.

#### Canceling a Collection

Canceling a collection immediately discards all the data collected so far, from all data sources, and eradicates any indication on the collection requests page that the collection had ever started.

**Warning:** You can stop or cancel the collection from the point of view of the Data Collector; however, in a SIF zone, you cannot undo the effect of having started a collection. The application from which data is collected through SIF will continue to send responses (which the Data Collector discards immediately upon receipt). Repeatedly starting and canceling (or stopping) a collection in a SIF zone will stress the resources of your

---

ITC. When you eventually start the collection (without stopping or cancelling it this time) receiving data may be delayed while the Data Collector continues to discard the data received in response to the previous (cancelled) collections.

---

What's the Difference?

**Data management:** Cancel immediately discards data; Stop discards data only when the collection is restarted. When you start data collection after you cancelled the previous one, the collecting of data can start immediately (even though the Data Collector may still be cancelling the previous collection "in the background"). When you restart data collection after stopping the previous one the Data Collector has to finish discarding the data previously collected before it starts the new data collection.

**Scope:** Cancel applies to the entire collection; Stop applies only to a single data source.

---

**Note:** If you are collecting data from more than one source and need to discard an entire collection, then "Cancel" is more efficient than "Stop." If you are collecting from the SIF zone and from EMIS files, and need to stop the SIF collection, then "Cancel" is still more efficient than "Stop" – even though cancelling will discard the data collected from EMIS files as well as data collected from SIF (EMIS files collection is much faster). On the other hand you can "Stop" collecting from the EMIS files and later restart collecting data from them, without affecting a collection from the SIF zone already in progress.

---

## Collecting from SIF and EMIS Files Data Sources

All collection requests support collecting from EMIS files because not all LEAs are currently set up to collect data from a SIF zone. In addition not all data can be collected from the SIF zone. For example, as of this writing, CC and CJ records can only be collected from EMIS files.

You may often be in a position where you will collect data from the SIF zone and from the EMIS Files data source. The collection request defines how to handle the situation when the same data is collected from a SIF zone and an EMIS file. For example, you may have inadvertently left an EMIS file with GI records in the EMIS files data source, while collecting all student data from your SIF-enabled SIS. Or you may have added EMIS files for CI and CK records for employees who are not recorded in your USPS system, only to discover that some of these employees are in your USPS system after all.

In most cases the collection request definition ensures that duplicate records are not inserted into the previews. When duplicate records are collected from multiple data sources, the duplicates result in validation exceptions and the Data Collector will exclude the data for the student or the staff from submission to ODE. In some cases, you may find additional previews which inform you of such duplicate data collected from SIF and EMIS files data sources.

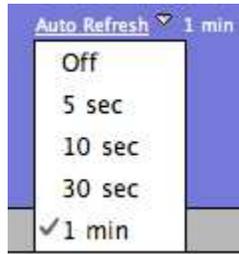
The specification of the handling of such duplicate data can change over time and from one collection request to another.

## Monitoring Data Collection

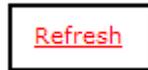
The Collection Status tab allows you to verify the progress of data collection(s) by collection request.

### Before You Begin

**Auto-refresh link**—This drop-down menu is displayed in the banner at the top of the Data Collector screen when the Collection Status tab is open. The Auto-refresh link allows you to set the intervals between automatic refreshes for the Collection Status page. Mouse over the auto-refresh link to bring up the menu. (The default is 30 seconds.)



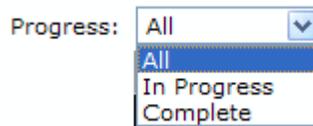
**Refresh link**—Select the Refresh link to update the page according to the options selected in the filter drop-downs and the latest available information on the collection(s).



**Drop-down lists and links**—Filter the Collection Status view by **Collection Request** (selecting **All** Collection Requests or an individual Collection Request from the drop-down list).



Filter the Collection Status view by **Progress** (selecting Collections that are **In Progress** or **Complete**).



## Collections by Collection Request

To view the progress of Collection Requests:

1. Click on the **Collection Status** tab.
2. The **Collection Status** tab opens at **Collections by Collection Request**.

**SIFWorks VRF Data Collector**

Collection Requests | **Collection Status** | Submissions

Collections by Collection Request

### Collection Status

Collections by Collection Request

Collection activity by collection request. Choose filter criteria to narrow the scope of the collection requests listed.

Collection Request:  Progress:  [Refresh](#)

SIF Zones					
Collection / SIF Zone / Request	Records	Packets	Start	Elapsed	Status
▼ Yearend (N) Reporting Period 2.1	7118	40	07/08 04:04 PM	00:25:21	In Progress
▼ Northwestern District	7118	40	07/08 04:04 PM	00:25:21	8 of 18 Complete
Assessment Administration Records	0	0	07/08 04:04 PM	00:25:20	In Progress
Assessment Form Records	0	0	07/08 04:04 PM	00:25:20	In Progress
Assessment Records	0	0	07/08 04:04 PM	00:25:20	In Progress
Assessment Registration Records	0	0	07/08 04:04 PM	00:25:20	In Progress
Assessment Subject Records	0	0	07/08 04:04 PM	00:25:19	In Progress
Building Records	0	0	07/08 04:04 PM	00:25:19	In Progress
Class Information Records	343	2	07/08 04:04 PM	00:17:39	Complete
Course Information Records	275	2	07/08 04:04 PM	00:07:31	Complete
Discipline Records	0	1	07/08 04:04 PM	00:07:32	Complete
District Records	0	0	07/08 04:04 PM	00:25:19	In Progress
School Records	1	1	07/08 04:04 PM	00:00:05	Complete
Staff Demographic Records	0	0	07/08 04:04 PM	00:25:19	In Progress
Student Attributes Records	1129	6	07/08 04:04 PM	00:16:53	Complete
Student Course Records	3689	7	07/08 04:04 PM	00:25:20	In Progress
Student Records	831	10	07/08 04:04 PM	00:06:48	Complete
Student School Records	832	10	07/08 04:04 PM	00:11:32	Complete
Student Test Scores	0	0	07/08 04:04 PM	00:25:19	In Progress
Term Information Records	18	1	07/08 04:04 PM	00:06:56	Complete

EMIS Formatted Files				
Collection / Data Source	Records	Start	Elapsed	Status
▼ Yearend (N) Reporting Period	381	07/08 04:06 PM	00:00:59	Complete

The **Collection Status > Collections by Collection Request** screen looks and behaves in the following ways:

The first column in the SIF Zones section of the **Collection Status > Collections by Collection Request** page includes:

- Collection:** Current Collection Request
- SIF Zone:** Name of the zone(s) participating in the collection.
- Request:** An indication of the SIF object requested (some SIF objects correspond closely to EMIS record types, others do not)

The subsequent columns in the SIF Zones section include:

**Records:** Number of SIF objects (records) collected.  
**Packets:** Number of packets collected; a packet is how the SIF bundles records as they are sent across the network.  
**Start:** Timestamp of when the Data Collector sent a SIF request for the record.  
**Elapsed:** Number of minutes/seconds that have passed since the SIF record was requested.  
**Status:** Disposition of the current collection,  
 For individual records:  
     *In progress*  
     *Complete*  
 For entire SIF Zone:  
     *x of y complete (e.g. 12 of 18 complete indicates that 12 types of records, out of 18 types requested, completed collection)*

**Columns in the EMIS Formatted Files section of the Collection Status > Collections by Collection Request page include:**

**Collection:** Current collection(s).  
**Data Source:** Name of the non-SIF data source(s). The detailed list under the data source shows the EMIS record type collected, and the name of the file from which these records were collected.  
**Records:** Number of records collected from this source – rows read from the file  
**Start:** Timestamp when the Data Collector started reading the EMIS file.  
**Elapsed:** Number of minutes / seconds that have passed since the Data Collector started reading the EMIS file.  
**Status:** Disposition of the current collection, including:  
     *In Progress*  
     *Complete*

**Collection Status**  
Collections by Collection Request

---

Collection activity by collection request. Choose filter criteria to narrow the scope of the collection requests listed.

Collection Request:  Progress:  [Refresh](#)

SIF Zones						
Collection / SIF Zone / Request	Records	Packets	Start	Elapsed	Status	
▼ Yearend (N) Reporting Period 2.1	9409	53	07/08 04:04 PM	00:30:12	Complete	
▶ <a href="#">Northwestern District</a>	9409	53	07/08 04:04 PM	00:30:12	18 of 18 Complete	

EMIS Formatted Files					
Collection / Data Source	Records	Start	Elapsed	Status	
▼ Yearend (N) Reporting Period	381	07/08 04:06 PM	00:00:59	Complete	
▼  Yearend files	381	07/08 04:06 PM	00:00:59	Complete	
CI / YearendCICK.txt	132	07/08 04:07 PM	00:00:06	Complete	
CK / YearendCICK.txt	249	07/08 04:07 PM	00:00:13	Complete	

You click on the arrows to expand and collapse additional detail.

**Collection Status**  
Collections by Collection Request

---

Collection activity by collection request. Choose filter criteria to narrow the scope of the collection requests listed.

Collection Request:  Progress:  [Refresh](#)

SIF Zones					
Collection / SIF Zone / Request	Records	Packets	Start	Elapsed	Status
▼ Yearend (N) Reporting Period 2.1	9409	53	07/08 04:04 PM	00:30:12	Complete
▶ ✓ Northwestern District	9409	53	07/08 04:04 PM	00:30:12	18 of 18 Complete

EMIS Formatted Files				
Collection / Data Source	Records	Start	Elapsed	Status
▼ Yearend (N) Reporting Period	381	07/08 04:06 PM	00:00:59	Complete
▶ ✓ Yearend files	381	07/08 04:06 PM	00:00:59	Complete

[Refresh](#)

When the data collection is complete, the progress animation disappears and the collection status changes to Complete.

## Add New Scheduled Collection

Data collections can be scheduled to occur automatically at selected intervals, or just once – making it possible to collect data overnight, regularly on a weekday, or over a weekend, for example. Scheduled collections save time and resources because they can run unattended.

The following section explains how to schedule a collection.

Collection Requests
Collection Status
Submissions
Progress

---

Collection Requests Summary

[Refresh](#)

Ohio Department of Education



**Graduation (G) FY11 Reporting Period**

The FY11 Graduation (G) reporting period captures data related to graduating students. This data will include diploma information and all data necessary to verify that the student has met CORE and testing graduation requirements. Note: File(s) must be uploaded through the Data Collector Data Sources tab.

**Submissions:** January 29, 2011 - December 31, 2011

**Expiration Date:** December 31, 2011 (in 186 days)

**Collection Request:** 2

**Status:** Data Collection completed successfully today at 11:41:13 AM.

**Submission Number:** 1 (attempt 0)

**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

---

In the Actions section of the Collection Requests page, there are links for executing operations on the current Collection. The **Add New Scheduled Collection** link opens the Add Scheduled Collection page, where you can choose the starting date for a scheduled collection, the intervals at which you want data collection to recur, and the data sources to include in the scheduled collection.

To add a new scheduled collection, take the following steps:

1. Click on the Collection Requests tab, and navigate to the one for which you would like to schedule a collection.



**October (K) FY11 SIF and Flat File**

Note: This Collection Request supports SIF for USPS users, as well as those files uploaded through the Data Collector Data Sources tab. Student, staff, program, and course data are the primary data elements collected during this reporting period. One of the main purposes of the October (K) 2011 reporting period is to capture school district enrollment during the first full week of October.

<b>Submissions:</b> December 03, 2010 - December 31, 2011
<b>Expiration Date:</b> December 31, 2011 (in 292 days)
<b>Collection Request:</b> 3
<b>Status:</b> The collection was submitted February 23, 2011 at 03:28:56 PM by VRF Administrator.
<b>Validation Status:</b> <a href="#">Level 1 Validation</a>
<b>Submission Status:</b> Pending Processing (February 23, 2011 at 03:28:58 PM)
<b>Submission Number:</b> 1 (attempt 1)
<b>Actions:</b> <a href="#">Review</a> <a href="#">View Submission Results</a> <a href="#">Start Collection</a> <a href="#">Add New Scheduled Collection</a>

2. In the Actions section of the Collection Request, click on the **Add New Scheduled Collection** link.
3. The **Add Scheduled Collection** page is displayed.

**Add Scheduled Collection**  
October (K) FY11 SIF and Flat File

To schedule an unattended data collection choose from the options below and select the appropriate zones and data sources for the collection.

**Collection Request / Submitter**

**Collection Request:** October (K) FY11 SIF and Flat File  
**Submitter:** Ayersville\_SQL

**Schedule**

**Start Date:**  (mm/dd/yyyy)    **Start Time:**  (hh:mm AM)

**Scheduled Action:**  ▼

Skip scheduled collection when a prior collection is in progress but not yet submitted

All zones in Ayersville\_SQL

SIF Zone	Zone Status
<input type="checkbox"/> eSIS	<input checked="" type="checkbox"/> <a href="#">Connected</a>

All EMIS Formatted Files

Data Sources	Availability
<input type="checkbox"/> Graduation	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> October_2010	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> December	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> Ayersville	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> March	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> YearEnd	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> July	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> 5Year_2010	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> October 2011	<input checked="" type="checkbox"/> <a href="#">Ready</a>

[Schedule Collection](#) | [Cancel](#)

- In the **Schedule** section of the Add Scheduled Collection page, enter the **Start Date**, and **Start Time**. (Be sure to follow the “MM/DD/YYYY” and “HH:MM AM” formats; otherwise, you cannot proceed with scheduling the collection.)
- From the drop-down list in the Scheduled Action field, choose the action you want to schedule.

**Schedule**

**Start Date:**  (mm/dd/yyyy)    **Start Time:**  (hh:mm AM)

**Scheduled Action:**  ▼

Skip scheduled collection when a prior collection is in progress but not yet submitted

- Collect Only
- Collect and Prepare
- Collect, Prepare and Submit
- Collect, Prepare and Submit if no errors

The actions you can schedule include:

- **Collect Only**—The collection will occur at the selected time and interval, but subsequent processes (Preparing, Previewing, Submitting, etc.) will have to be manually initiated.
- **Collect and Prepare**—The collection will occur at the selected time and interval, and the “Prepare” process will occur; subsequent submission of the collected data will have to be manually initiated.
- **Collect, Prepare and Submit**—For collection requests that allow automatic submission, this action allows the scheduled collection to run from collection through submission; note that if this option is selected, the collection will be

submitted regardless of whether any validation exceptions were found, or any system errors took place.

- **Collect, Prepare and Submit if no errors**—This action applies only to collection requests that allow automatic submissions. Select this action if you want the collection to be submitted only if it is error-free.

**Note:** Most collection requests do not allow automatic submissions; if you select “Collect, Prepare, and Submit” or “Collect, Prepare, and Submit if no errors” for a collection requests that does not allow automatic submissions, a reminder is displayed just below the Scheduled Action drop-down list, as shown in the following screen capture.

**Schedule**

**Start Date:**  (mm/dd/yyyy)      **Start Time:**  (hh:mm AM)

**Scheduled Action:**  \*

\* This collection request doesn't allow automatic submission as a scheduled action.

Skip scheduled collection when a prior collection is in progress but not yet submitted

6. In most cases you will check the box to “Skip scheduled collection when a prior collection is in progress but not yet submitted.” If this box is left blank, the scheduled collection will start, regardless of whether there is a prior collection in progress, cancelling the prior collection. This check box allows you to schedule a collection, e.g. for off-shift hours, on the assumption that you will submit (or cancel) the current collection before you leave for the night. If the current collection has not been submitted, the scheduled collection will not start, as long as this box is checked (if the box is not checked the scheduled collection will cancel the current collection, and start a new collection as per the schedule).
7. Select the Data Sources from which to collect the data – SIF Zones and/or EMIS Formatted Files.

- Go to the sidebar menu of the Add Scheduled Collection page, where you will find the **Recurring Collection** interval options.

### Add Scheduled Collection

October (K) FY11 SIF and Flat File

---

To schedule an unattended data collection choose from the options below and select the appropriate zones and data sources for the collection.

**Collection Request / Submitter**

**Collection Request:** October (K) FY11 SIF and Flat File  
**Submitter:** Ayersville\_SQL

**Schedule**

**Start Date:**  (mm/dd/yyyy)    **Start Time:**  (hh:mm AM)

**Scheduled Action:**  ▼

Skip scheduled collection when a prior collection is in progress but not yet submitted

All zones in Ayersville\_SQL

SIF Zone	Zone Status
<input checked="" type="checkbox"/> eSIS	<input checked="" type="checkbox"/> <a href="#">Connected</a>

All EMIS Formatted Files

Data Sources	Availability
<input type="checkbox"/> Graduation	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> October_2010	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> December	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> Ayersville	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> March	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> YearEnd	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> July	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> 5Year_2010	<input checked="" type="checkbox"/> <a href="#">Ready</a>
<input type="checkbox"/> October 2011	<input checked="" type="checkbox"/> <a href="#">Ready</a>

Schedule Collection | Cancel

#### Recurring Collection

Choose the appropriate interval for repeating this collection.

Repeat:

One Time Only

Daily

Weekly

Monthly

Every  Days

Include Weekdays

Include Weekends

9. Choose the interval at which you would like the selected action to repeat.

**Recurring Collection**

Choose the appropriate interval for repeating this collection.

Repeat:

- One Time Only
- Daily
- Weekly
- Monthly
- Every  Days
- Include Weekdays
- Include Weekends

- **One Time Only**—The collection will occur only once.
  - **Daily**—The collection will occur every day (including weekdays and weekends, if that option is selected) at the appointed time.
  - **Weekly**—The collection will occur once a week at the appointed time.
  - **Monthly**—The collection will occur once a month at the appointed time.
  - **Include Weekdays**—The collection interval will include weekdays (Monday through Friday, if the schedule falls on a weekday).
  - **Include Weekends**—The collection interval will include weekends (Saturday and Sunday).
10. Click on the **Schedule Collection** link at the bottom of the **Add Scheduled** page.
11. The Collection Request page returns.



12. Note that this icon, (the folder with the alarm clock), is displayed beside the collection request for which you scheduled a collection. This icon indicates that you have a scheduled collection associated with this collection request, regardless of whether the scheduled collection was set up to run periodically or to run only once. When a collection was scheduled to run once the alarm icon continues to appear even after the collection had run – it serves as a reminder that you have a scheduled collection associated with this collection request. You can edit a scheduled collection (as described in the next section), instead of creating a new one. To eliminate the icon you can delete the scheduled collection.



#### **October (K) FY11 SIF and Flat File**

Note: This Collection Request supports SIF for USPS users, as well as those files uploaded through the Data Collector Data Sources tab. Student, staff, program, and course data are the primary data elements collected during this reporting period. One of the main purposes of the October (K) 2011 reporting period is to capture school district enrollment during the first full week of October.

<b>Submissions:</b>	December 03, 2010 - December 31, 2011
<b>Expiration Date:</b>	December 31, 2011 (in 292 days)
<b>Collection Request:</b>	3
<b>Status:</b>	The collection was submitted February 23, 2011 at 03:28:56 PM by VRF Administrator.
<b>Validation Status:</b>	<a href="#">Level 1 Validation</a>
<b>Submission Status:</b>	Pending Processing (February 23, 2011 at 03:28:58 PM)
<b>Submission Number:</b>	1 (attempt 1)
<b>Actions:</b>	<a href="#">Review</a> <a href="#">View Submission Results</a> <a href="#">Start Collection</a> <a href="#">Add New Scheduled Collection</a>

## Managing Scheduled Collections

View and manage scheduled collections through the **Manage scheduled collections** link in the sidebar menu on the Collection Requests tab.

The screenshot shows the 'Collection Requests Summary' page. At the top, there are navigation tabs: 'Collection Requests' (active), 'Collection Status', 'Submissions', and 'Progress'. On the right, there are additional tabs: 'Data Sources', 'Agencies', and 'Settings'. The main content area is titled 'Collection Requests Summary' and includes a 'Refresh' link. Below this, it identifies the 'Ohio Department of Education' and a specific collection: 'Graduation (G) FY11 Reporting Period'. A description explains that this data includes diploma information and is used for testing graduation requirements. A summary box provides details: Submissions from January 29, 2011, to December 31, 2011; Expiration Date of December 31, 2011 (186 days); Collection Request 2; Status: Data Collection completed successfully today at 11:41:13 AM; Submission Number 1 (attempt 0); and Actions: Start/Stop Collection, Prepare, Cancel, and Add New Scheduled Collection. On the right sidebar, under 'Order Collections By', 'A-Z' is selected. Under 'Built-In Collections', 'Don't show built-in collections' is checked. The 'Manage Scheduled Collections' section contains a link 'Manage scheduled collections' which is circled in red. The 'Questions?' section provides contact information for Kevin Dwight at Northern Ohio Educational Computer Association.

## Viewing the List of Scheduled Collections

To view the list of collections scheduled for the current submitter:

1. Open the Collection Requests tab; navigate to the sidebar menu.

This close-up shows the sidebar menu with the following sections: 'Order Collections By' (radio buttons for 'Expiration Date' and selected 'A-Z'); 'Built-In Collections' (checkbox for 'Don't show built-in collections' which is checked); 'Manage Scheduled Collections' (text: 'Click the option below to manage the current list of scheduled collections for the current submitter.' followed by a blue link 'Manage scheduled collections' circled in red); and 'Questions?' (text: 'If you have questions, you may contact:' followed by contact info for Kevin Dwight).

2. Click on the **Manage Scheduled Collections** link.

3. The **Manage Scheduled Collections** page is displayed.

**Manage Scheduled Collections**

The following is a list of all scheduled collections for the current submitter organized by collection request. Use the delete link to remove a selected item, or click on an item to edit the scheduled collection.

[Select All](#) | [Select None](#)

Start Date & Time	Recurrence	Scheduled Action	If in Progress	Last Started
▼ <b>October (K) FY11 SIF and Flat File</b>				
<input type="checkbox"/> <a href="#">03/14/2011 03:16 PM</a>	One Time w/Weekdays ends	Collect Only	Skip Scheduled	03/14/2011
<b>October (K) FY11 for verifying VRF-1449</b>				
<a href="#">Delete Selected</a>				

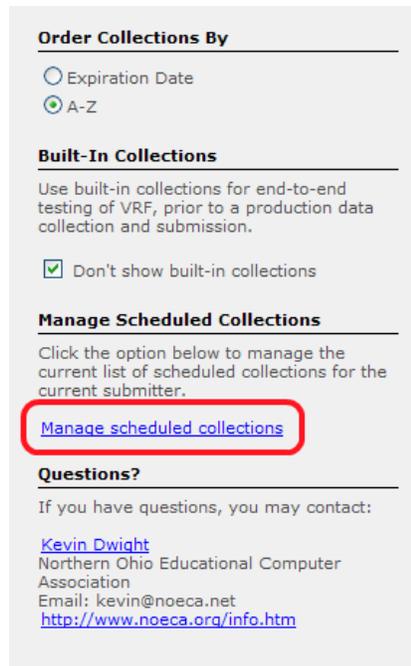
4. The Manage Scheduled Collections page provides information about the scheduled collections for the current submitter:
  - Links to each scheduled collection are found in the **Start Date & Time** column of the table.
  - The frequency or intervals at which scheduled collections will occur is found in the **Recurrence** column.
  - The **Scheduled Action** column displays the selected collection action(s): Collect Only; Collect and Prepare; Collect, Prepare & Submit; Collect, Prepare & Submit with no errors. The Collect, Prepare & Submit action indicates that the collection will be submitted, even if there were collect or prepare errors. Note that the collection request has to authorize the ability to submit a scheduled collection automatically after the prepare step, without a manual certification of the collection. Most collection requests require someone to preview and certify the results of the collection, so automatic submission does not apply to these collection requests.
  - Information in the **If in Progress** column is drawn from the “Skip scheduled...” box when a collection is scheduled. If the “Skip a scheduled collection...” box is selected, the scheduled collection will be skipped in deference to a prior collection already in progress (but not yet submitted). If the “Skip a scheduled collection...” box was *not* selected, then the scheduled collection will cancel any prior collection – even if the prior collection was ready for submission to ODE.
  - The date in the **Last Started** column reports the date that the scheduled collection was last launched. (“N/A” in this column means that the scheduled collection has not yet started.)

## Editing or Updating a Scheduled Collection

You can modify a scheduled collection by selecting it from the **Manage Scheduled Collections** page.

To edit a scheduled collection:

1. Open the Collection Requests tab; navigate to the sidebar menu.
2. Click on the **Manage Scheduled Collections** link



**Order Collections By**

Expiration Date

A-Z

**Built-In Collections**

Use built-in collections for end-to-end testing of VRF, prior to a production data collection and submission.

Don't show built-in collections

**Manage Scheduled Collections**

Click the option below to manage the current list of scheduled collections for the current submitter.

[Manage scheduled collections](#)

**Questions?**

If you have questions, you may contact:

[Kevin Dwight](#)  
Northern Ohio Educational Computer Association  
Email: [kevin@noeca.net](mailto:kevin@noeca.net)  
<http://www.noeca.org/info.htm>

The **Manage Scheduled Collections** page is displayed.

### Manage Scheduled Collections

The following is a list of all scheduled collections for the current submitter organized by collection request. Use the delete link to remove a selected item, or click on an item to edit the scheduled collection.

[Select All](#) | [Select None](#)

Start Date & Time	Recurrence	Scheduled Action	If in Progress	Last Started
<b>▼ October (K) FY11 SIF and Flat File</b>				
<input type="checkbox"/> <a href="#">03/14/2011 03:16 PM</a>	One Time w/Weekdays ends	Collect Only	Skip Scheduled	03/14/2011
<b>October (K) FY11 for verifying VRF-1449</b>				
<a href="#">Delete Selected</a>				

3. Click on the link for the scheduled collection you want to edit.
4. The **Edit Scheduled Collection** page displays details for the selected scheduled collection. From this page, you can change the schedule details, interval, and the data sources to include in the scheduled collection.

### Edit Scheduled Collection

October (K) FY11 SIF and Flat File

To update this scheduled collection, modify the options below, update the appropriate zones and data sources for the collection and click Update Collection.

**Collection Request / Submitter**

**Collection Request:** October (K) FY11 SIF and Flat File  
**Submitter:** Ayersville\_SQL  
**Last Started:** 03/14/2011 03:17 PM

**Schedule**

**Start Date:**  (mm/dd/yyyy)    **Start Time:**  (hh:mm AM)  
**Scheduled Action:**    
 Skip scheduled collection when a prior collection is in progress but not yet submitted

All zones in Ayersville\_SQL

SIF Zone	Zone Status
<input checked="" type="checkbox"/> eSIS	<span style="color: green;">✔</span> <a href="#">Connected</a>

All EMIS Formatted Files

Data Sources	Availability
<input type="checkbox"/> Graduation	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input checked="" type="checkbox"/> October_2010	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input type="checkbox"/> December	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input type="checkbox"/> Ayersville	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input type="checkbox"/> March	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input type="checkbox"/> YearEnd	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input type="checkbox"/> July	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input type="checkbox"/> 5Year_2010	<span style="color: green;">✔</span> <a href="#">Ready</a>
<input type="checkbox"/> October 2011	<span style="color: green;">✔</span> <a href="#">Ready</a>

[Update Collection](#) | [Cancel](#)

**Recurring Collection**

Choose the appropriate interval for repeating this collection.

Repeat:

One Time Only  
 Daily  
 Weekly  
 Monthly  
 Every  Days  
 Include Weekdays  
 Include Weekends

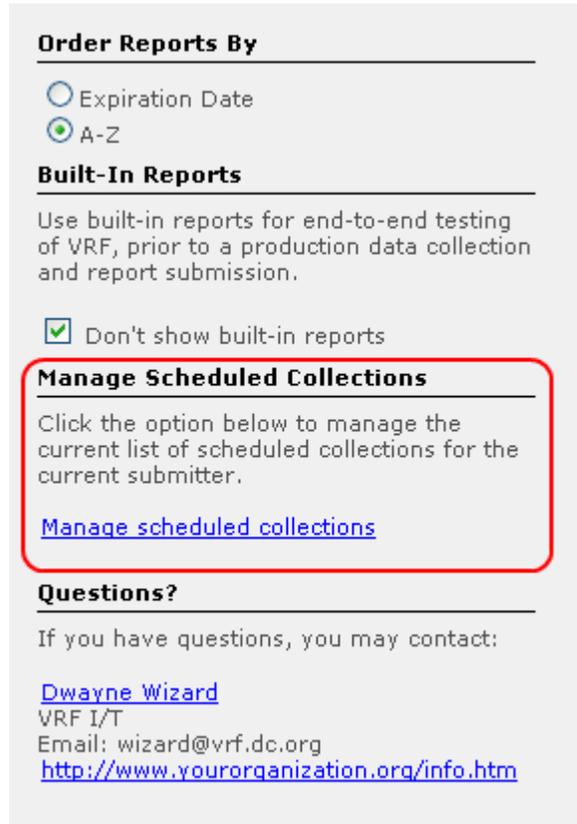
5. Make any necessary changes to the scheduled collection.
6. Click the **Update Collection** link.
7. The **Manage Scheduled Collections** page is returned, showing the updated information for the selected scheduled collection.

## Deleting a Scheduled Collection

You can delete any scheduled collection by accessing the same **Edit Scheduled Collection** page you use for editing or updating a scheduled collection.

To delete a scheduled collection:

1. Open the Collection Requests tab; navigate to the sidebar menu.



**Order Reports By**

Expiration Date  
 A-Z

**Built-In Reports**

Use built-in reports for end-to-end testing of VRF, prior to a production data collection and report submission.

Don't show built-in reports

**Manage Scheduled Collections**

Click the option below to manage the current list of scheduled collections for the current submitter.

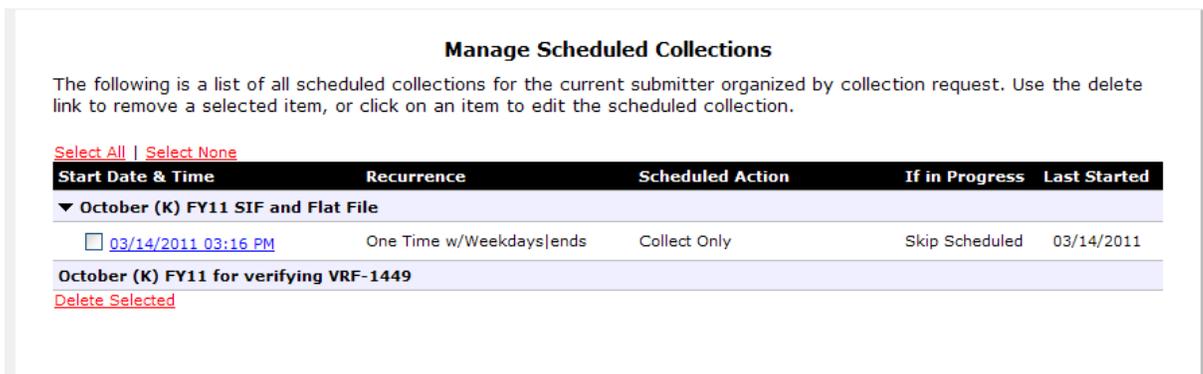
[Manage scheduled collections](#)

**Questions?**

If you have questions, you may contact:

[Dwayne Wizard](#)  
VRF I/T  
Email: wizard@vrf.dc.org  
<http://www.yourorganization.org/info.htm>

2. Click on the **Manage scheduled collections** link.
3. The Manage Scheduled Collections page opens.



**Manage Scheduled Collections**

The following is a list of all scheduled collections for the current submitter organized by collection request. Use the delete link to remove a selected item, or click on an item to edit the scheduled collection.

[Select All](#) | [Select None](#)

Start Date & Time	Recurrence	Scheduled Action	If in Progress	Last Started
▼ October (K) FY11 SIF and Flat File				
<input type="checkbox"/> <a href="#">03/14/2011 03:16 PM</a>	One Time w/Weekdays ends	Collect Only	Skip Scheduled	03/14/2011
October (K) FY11 for verifying VRF-1449				
<a href="#">Delete Selected</a>				

4. Select the scheduled collection(s) you want to delete.
5. Select the scheduled collection(s) you want to delete.
6. Click on the **Delete Selected** link.
7. A confirmation dialog is displayed.



8. Click **OK** to confirm the deletion.
9. The **Manage Scheduled Collections** page is refreshed, and the list is updated.
10. After you delete all scheduled collections for a collection request, the "alarm clock" icon will disappear (from its place beside the folder icon) on the collection request.

## Managing SIF Zones

ITCs can manage the messaging mode, SIF version, and maximum buffer size of a selected SIF Zone. Administrative users at ITCs can configure a SIF Zone's ID, URL, and connection properties.

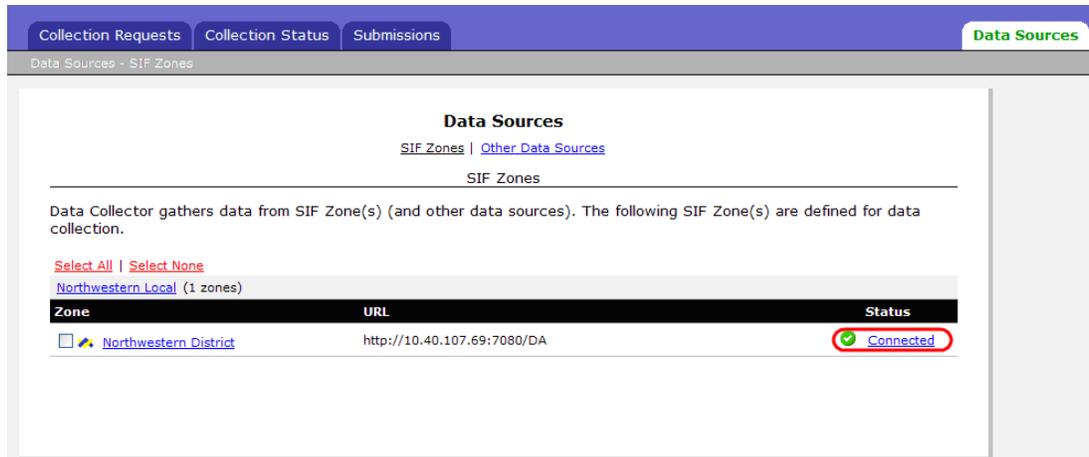
LEA users can test whether or not a SIF Zone is connected, and if you have LEA Collector authorization you can try to re-establish the connection if an existing zone has become disconnected. LEA users do not have access privileges to complete tasks specified for ITCs. Many of the tasks described in this section are for ITC reference and **do not apply** to LEA users.

### Managing SIF Zone Properties

See the VRF Data Collector Administrator's Guide for further information about managing SIF Zones.

### Checking SIF Zone Status

1. Log in to the Data Collector.
2. Click on the **Data Sources** tab.



The screenshot displays the 'Data Sources' page in the VRF Data Collector interface. The page has a navigation bar with tabs for 'Collection Requests', 'Collection Status', 'Submissions', and 'Data Sources'. Below the navigation bar, the page title is 'Data Sources' with sub-links for 'SIF Zones' and 'Other Data Sources'. The main content area is titled 'SIF Zones' and contains a description: 'Data Collector gathers data from SIF Zone(s) (and other data sources). The following SIF Zone(s) are defined for data collection.' Below this description are links for 'Select All' and 'Select None', and a link for 'Northwestern Local (1 zones)'. A table lists the SIF Zones with columns for 'Zone', 'URL', and 'Status'. The table contains one row: 'Northwestern District' with URL 'http://10.40.107.69:7080/DA' and status 'Connected' (indicated by a green checkmark icon).

Zone	URL	Status
<input type="checkbox"/> <a href="#">Northwestern District</a>	http://10.40.107.69:7080/DA	<input checked="" type="checkbox"/> Connected

3. You can click on the "Connected" link to re-direct to the Zone Status page, to check that the zone responds to a "Ping." If the connectivity status is "Disconnected," notify your ITC.

4. The **Zone Status** screen is displayed.

Collection Requests | Collection Status | Submissions

Data Sources - SIF Zones > Zone Status

### Zone Status

eSIS

Use this page to view zone status or to perform diagnostic actions such as connecting, disconnecting or registering with the zone.

Zone	
Zone ID:	eSIS
Zone URL:	http://localhost:7080/eSIS

Zone Status	
Connection Status:	✔ Connected
Command Issued:	Ping
Command Results:	The zone responded to the ping

[Ping](#)

5. Click the **Ping** link to send a request to the Zone, to verify that the Data Collector and the Zone are connected and communicating.

## Managing EMIS Formatted Files (Other Data Sources)

In Ohio non-SIF, or “other” data sources are synonymous with EMIS formatted files. These are the files formatted according to Chapter 5 of the ODE EMIS Manual. You need the LEA Collector role to see or use the Data Sources tab.

### Viewing EMIS Files Data Sources

1. Go to the **Data Sources** tab and click on **Other Data Sources**.
2. The **Other Data Sources** page is displayed.

**Data Sources**

[SIF Zones](#) | [Other Data Sources](#)

**Other Data Sources**

Data Collector gathers data from data sources (including SIF Zones). The following non-SIF data source(s) are defined for data collection.

[Select All](#) | [Select None](#)

Northwestern Local—Files

Data Source	UNC	Status	Actions
<input type="checkbox"/> <a href="#">Yearend files</a>	\\VRF_Other_Data_Source	<span>✓ Ready</span>	<a href="#">Manage</a>

[Add Data Source](#) | [Remove Selected](#)

3. Click on the **Manage** link.

4. The **Manage Files** page is displayed.

**Manage Files**  
Other Data Sources — Yearend files

Use the options below to manage files for this data source.

[Select All](#) | [Select None](#)

Currently Uploaded File(s)		
File Name	Upload Date	Size
<input type="checkbox"/> YearendCICK.txt	July 08, 2010 12:44:46 PM	(115666 bytes)
<input type="checkbox"/> CJContractorStaffEmployment.txt	March 17, 2009 10:26:47 AM	(288 bytes)
<input type="checkbox"/> CCStaffContractOnly.txt	March 17, 2009 10:26:41 AM	(791 bytes)
<input type="checkbox"/> CMMappedClassroomCode.txt	March 17, 2009 10:22:58 AM	(313 bytes)
<input type="checkbox"/> DHBuilding.txt	March 17, 2009 09:52:26 AM	(70 bytes)
<input type="checkbox"/> DQDistrict.txt	January 15, 2009 04:39:33 AM	(62 bytes)

[Upload File](#) | [Delete Selected](#) | [Cancel](#)

5. From links on this page, you can edit, delete, or upload EMIS formatted files. (Detailed instructions on these operations are available in subsequent sections of this guide.)

Note: Clicking on the Select All link will check **all** files in the list; conversely, the Select None link will unselect **all** files in the list.

## Uploading EMIS Files (Other Data Sources)

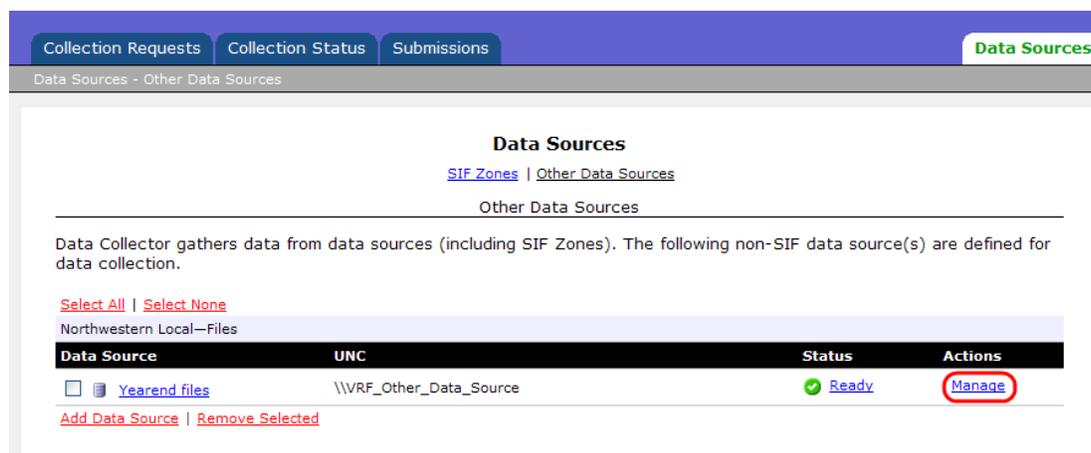
Your ITC sets up the “other data source” for you – a location on the Data Collector server where you can upload the EMIS formatted files.

The following instructions include steps for simultaneously uploading *multiple* flat files—which requires the use of Google Gears™. In addition to the necessary administrative permissions within Data Collector, your local system or network may require permissions for downloading or updating software. Verify with your system administrator that you have the necessary administrative permissions for downloading and installing Google Gears™ on your machine.

To upload flat files (non-SIF data sources):

**Note:** At the district level, the only role that can upload flat files is the LEA Collector.

1. Click on the **Other Data Sources** link.



The screenshot shows the 'Data Sources' page in the Data Collector application. The page has a blue header with navigation tabs: 'Collection Requests', 'Collection Status', 'Submissions', and 'Data Sources'. Below the header, there is a section titled 'Data Sources' with a sub-section 'Other Data Sources'. The page contains a table of data sources. The table has columns for 'Data Source', 'UNC', 'Status', and 'Actions'. One data source is listed: 'Yearend files' with UNC path '\\VRF\_Other\_Data\_Source', status 'Ready', and a 'Manage' link circled in red. There are also links for 'Select All', 'Select None', 'Add Data Source', and 'Remove Selected'.

Data Source	UNC	Status	Actions
<input type="checkbox"/> <a href="#">Yearend files</a>	\\VRF_Other_Data_Source	<span style="color: green;">✓</span> Ready	<a href="#">Manage</a>

2. Click on the **Manage** link (in the Actions column) to select and manage a non-SIF data source.

- The **Manage Files** screen is displayed. On this screen, the following columns are displayed: File Name, Upload Date, and Size. The File Name column lists the names of the files. The Upload Date column lists the month, day, year, and time that the file was uploaded. The Size column shows the size of each file in bytes. Also, please note that if this screen lists a file or files that you no longer need, you can click the checkbox, then click the “Delete Selected” link to remove the unneeded file or files.

Collection Requests | Collection Status | Submissions | **Data Sources**

Data Sources - Other Data Sources > Manage Files

### Manage Files

Other Data Sources — Yearend files

Use the options below to manage files for this data source.

[Select All](#) | [Select None](#)

Currently Uploaded File(s)		
File Name	Upload Date	Size
<input type="checkbox"/> YearendCICK.txt	July 08, 2010 12:44:46 PM	(115666 bytes)
<input type="checkbox"/> CJContractorStaffEmployment.txt	March 17, 2009 10:26:47 AM	(288 bytes)
<input type="checkbox"/> CCStaffContractOnly.txt	March 17, 2009 10:26:41 AM	(791 bytes)
<input type="checkbox"/> CMMappedClassroomCode.txt	March 17, 2009 10:22:58 AM	(313 bytes)
<input type="checkbox"/> DHBuilding.txt	March 17, 2009 09:52:26 AM	(70 bytes)
<input type="checkbox"/> DQDistrict.txt	January 15, 2009 04:39:33 AM	(62 bytes)

[Upload File](#) | [Delete Selected](#) | [Cancel](#)

- To upload a file, click on **Upload File**.
- The **File Upload** screen is displayed.

Collection Requests | Collection Status | Submissions | **Data Sources**

Data Sources - Other Data Sources > Manage Files > Upload File

### File Upload

Other Data Sources — Yearend files

Use the form below to upload files to the data source.

**Upload**

**Data Source Name:** Yearend files

**Target UNC Location:** \\VRF\_Other\_Data\_Source

**File To Upload:**

[Upload](#) | [Cancel](#)

**Multiple File Upload Support**

Uploading more than one file at a time is possible with the installation of Google Gears™. Google Gears™ is not currently detected in your browser at this time. Click on the link below to install Google Gears™ and enable this feature.

[Install Google Gears™](#)

- Choose a file to upload. Enter a file path, or click on Browse to locate a file. (The appearance of this screen may vary, depending on the browser you are using.)
- Click the **Upload** link.

8. The uploaded file appears with the **Other Data Sources**, under the data source listed in the target UNC Location.

The default setting allows you to upload one file at a time. This is in keeping with most browsers' security protocols. Please keep in mind that, depending on which software and extract process you are using, you might only have one file to upload (for example, with DASL). Alternatively, you might have multiple files to upload, as with eSIS, which generates multiple files, by record type. For circumstances in which multiple files must be uploaded, there is an option for uploading multiple files at a time. Those who wish to upload more than one file at a time may do so through the use of Google Gears™.

---

**Note:** Simultaneously uploading *multiple* flat files requires the use of Google Gears™. Your local system or network may require permissions for downloading or updating software. Verify with your system administrator that you have the necessary administrative permissions for downloading and installing Google Gears™ on your machine.

---

Installing Google Gears™ is *not* required. Google Gears™ is a freeware beta product. Network policies that do not allow freeware or beta software cannot use Google Gears™. Those who are able to use Google Gears™ and wish to do so can download and install that software as per its instructions. If Google Gears™ is not installed on your system, a prompt with a link to download it will be visible from the file upload page.

Collection Requests | Collection Status | Submissions | **Data Sources**

Data Sources - Other Data Sources > Manage Files > Upload File

### File Upload

Other Data Sources — Yearend files

Use the form below to upload files to the data source.

**Upload**

**Data Source Name:** Yearend files

**Target UNC Location:** \\VRF\_Other\_Data\_Source

**File To Upload:**

[Upload](#) | [Cancel](#)

#### Multiple File Upload Support

Uploading more than one file at a time is possible with the installation of Google Gears™. Google Gears™ is not currently detected in your browser at this time. Click on the link below to install Google Gears™ and enable this feature.

[Install Google Gears™](#)

When Google Gears™ is installed, the File Upload screen appearance changes – the “Upload File” link is instead named “Select Upload Files”, since you will be able to upload multiple files at once. When you click on the Upload Files link in the Manage Files dialog:

Collection Requests | Collection Status | Submissions | **Data Sources**

Data Sources - Other Data Sources > Manage Files

### Manage Files

Other Data Sources — Yearend files

Use the options below to manage files for this data source.

[Select All](#) | [Select None](#)

Currently Uploaded File(s)		
File Name	Upload Date	Size
<input type="checkbox"/> YearendCICK.txt	July 08, 2010 12:44:46 PM	(115666 bytes)
<input type="checkbox"/> CJContractorStaffEmployment.txt	March 17, 2009 10:26:47 AM	(288 bytes)
<input type="checkbox"/> CCStaffContractOnly.txt	March 17, 2009 10:26:41 AM	(791 bytes)
<input type="checkbox"/> CMMappedClassroomCode.txt	March 17, 2009 10:22:58 AM	(313 bytes)
<input type="checkbox"/> DHBuilding.txt	March 17, 2009 09:52:26 AM	(70 bytes)
<input type="checkbox"/> DQDistrict.txt	January 15, 2009 04:39:33 AM	(62 bytes)

[Upload File](#) | [Delete Selected](#) | [Cancel](#)

and you have Google Gears installed, the File Upload dialog will look like this:

SIFWorks VRF Data Collector | Logged in as sifworks

Collection Requests | Collection Status | Submissions | **Data**

Data Sources - Other Data Sources > Manage Files

### Manage Files

Other Data Sources — Graduation

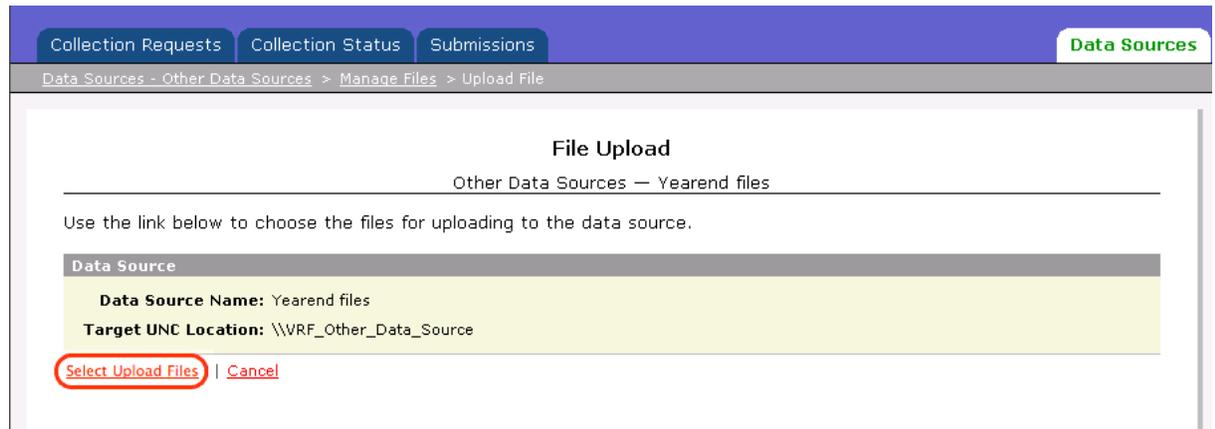
Use the options below to manage files for this data source.

[Select All](#) | [Select None](#)

Currently Uploaded File(s)		
File Name	Upload Date	Size
<input type="checkbox"/> EMIS-046706-FN-2009G.txt	December 08, 2009 10:45:59 AM	(22650 bytes)
<input type="checkbox"/> EMIS-046706-GC-2009G.txt	December 08, 2009 10:45:59 AM	(122310 bytes)
<input type="checkbox"/> EMIS-046706-GI-2009G.txt	December 08, 2009 10:45:59 AM	(22650 bytes)
<input type="checkbox"/> EMIS-046706-GP-2009G.txt	December 08, 2009 10:45:59 AM	(604 bytes)
<input type="checkbox"/> EMIS-046706-GX-2009G.txt	December 08, 2009 10:45:59 AM	(116270 bytes)
<input type="checkbox"/> Grad_Maumee_044362.zip	December 07, 2009 05:36:33 PM	(62553 bytes)

[Upload Files](#) | [Delete Selected](#) | [Cancel](#)

This brings up the File Upload screen.

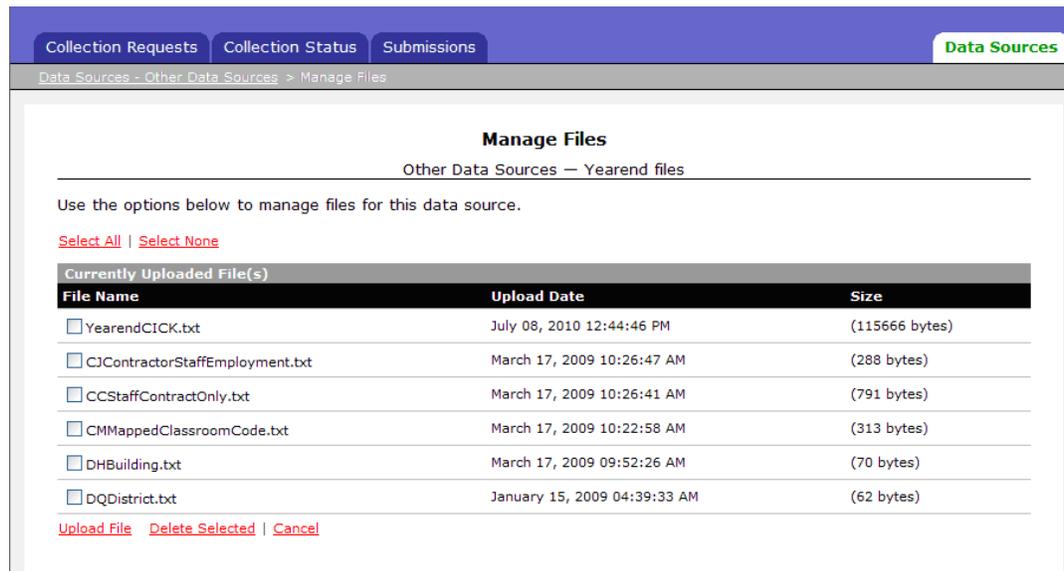


Click on the “Select Upload Files” link (circled in the screenshot above) to bring up a browse window. Select the files you wish to upload, then click “Open.”

When you have finished uploading files, click on the “Done” link to finish and return to the Manage Files page.

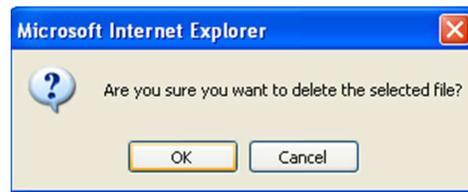
## Deleting EMIS Files (Other Data Sources)

1. Click on the Data Sources tab; then select Other Data Sources > Manage Files.
2. The **Manage Files** screen is displayed.



3. Select the file from the list (by checking the box next to the file path / name).

- Click the **Delete Selected** link. A confirmation dialog is displayed.



- Click **OK** to continue the deletion of selected file(s), or **Cancel** to stop the operation.

### Cancel

Clicking Cancel (at the bottom of the page) **before** either the upload or delete link has been selected will cancel the operation and return to the previous screen. The option to cancel is also provided in confirmation dialogs displayed **after** the selection of either the file upload or delete link; clicking Cancel here will terminate the operation and restore the current page.

## When a Collection Completes

You can tell that the data collection has completed because the Actions offer a Prepare link, and the Status informs you when the data collection has completed. If your ITC has signed you up for email notification, you may also receive an email from the Data Collector informing you that the data collection has completed.



#### Yearend (N) FY11 Reporting Period

Yearend (N) reporting is a data collection reflecting the district's entire school year, with the exception of the CTE record reported in reporting period D. Yearend is designed to capture what has occurred in each district throughout the school year.

<p><b>Submissions:</b> February 04, 2010 – December 31, 2011 <b>Expiration Date:</b> December 31, 2011 (in 275 days) <b>Collection Request:</b> 4 <b>Status:</b> Data Collection completed successfully today at 03:31:14 PM. <b>Submission Number:</b> 2 (attempt 0) <b>Actions:</b> <a href="#">Start/Stop Collection</a> <a href="#">Prepare</a> <a href="#">Cancel</a> <a href="#">Add New Scheduled Collection</a></p>
---

The Status section also indicates whether there were any errors or warnings during the data collection. Note that errors or warnings differ from Level 1 validation exceptions (sometimes also called Level 1 validation errors). Validation exceptions indicate data issues and require you to correct the data. The link next to the "Errors & Messages" indicates a processing problem, such as a configuration error.

The background color of the collection request section turns orange if you have either errors and warnings, or Level 1 validation exceptions. The orange color serves as a visual cue that there is something to check, and possibly correct, before moving to the next step of collection processing.

If there are any errors or warnings, the background of the collection request turns orange and there is an Errors & Messages link:

**Submissions:** October 15, 2010 - December 31, 2011  
**Expiration Date:** December 31, 2011 (in 186 days)  
**Collection Request:** 6  
**Status:** Data Collection completed with errors (or warnings) today at 11:03:33 AM.  
**Errors & Messages:** [0 errors, 13 warnings, 0 messages](#)  
**Submission Number:** 5 (attempt 1)  
**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

Clicking on the link next to the Errors & Warnings redirects you to the Errors & Warnings page (see the “Errors and Warnings” chapter).

The Data Collector displays the count of errors, warnings and informational messages (or simply “messages”) relevant to the phase of collection processing just completed. That is, after the collection completes the Errors & Messages section displays the number of errors, warnings, and messages the Data Collector encountered during the data collection. After a “Prepare” the Errors & Messages section displays the number of errors, warnings, and messages the Data Collector encountered during the preparation of the collection for preview.

---

**Important:** Always check whether you have received any errors or warnings at the end of a processing step before you move on to the next step. For example, when you see the Errors & Warnings link after the collection completes check the errors and warnings you received, before moving on to the Prepare step – some collection errors can result with no data to preview after the prepare step completes.

---

If you ignore the above recommendation, and move to the next step of collection’s processing, despite having received errors or warnings in the previous step, you will still have a chance to view the errors or warnings from the previous phase. The Errors & Warnings section will display the Other Errors link – this means that there were no errors or warnings in this phase of the collection’s processing, but there are some errors or warnings from the prior phase(s).

For example, clicking the Prepare link in the above dialog resulted in the following state at the end of the Prepare step:

**Submissions:** October 15, 2010 - December 31, 2011  
**Expiration Date:** December 31, 2011 (in 186 days)  
**Collection Request:** 6  
**Status:** Data Collection has been prepared today at 11:15:57 AM and is available for preview or certification.  
**Validation Status:** [Level 1 Validation](#)  
**Errors & Messages:** [Other Errors](#)  
**Submission Number:** 5 (attempt 2)  
**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Preview](#)  
[Certify & Submit](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

Clicking on the Other Errors link still takes you to the Errors and Warnings page:

**Errors & Warnings**

October (K) FY11 SIF and Flat File DASL Agent Testing 5.1

Category:  Display:   Extended description for all [Export to a file](#)

**Data Collection** 1-10 of 13 Pages: 1 2 Prev | Next

Timestamp	Code	Description
today at 11:03:31 AM	110	More than one file matches the EMIS collection handler for record type CN. The newer file will be used.
Extended Description: File EMIS-046706-CN-2011K.txt will be ignored.		
today at 11:03:31 AM	110	More than one file matches the EMIS collection handler for record type DF. The newer file will be used.
Extended Description: File EMIS-046706-DF-2011K.txt will be ignored.		
today at 11:03:31 AM	110	More than one file matches the EMIS collection handler for record type DQ. The newer file will be used.
Extended Description: File EMIS-046706-DQ-2011K.txt will be ignored.		
today at 11:03:31 AM	110	More than one file matches the EMIS collection handler for record type FD. The newer file will be used.

These warnings indicate that the Data Collector found more than one file with QF and QN record types in the EMIS files data source. Checking the “Extended description for all” shows the additional information (extended description) with each warning – in this case which of the two files was ignored when collecting data from the EMIS files data source.

## Preparing and Validating Collections

After data collection completed for a collection request, options appear on the Collection Requests screen, under that request, to prepare or cancel the data collection.

To prepare and validate a data collection:

1. Click on the **Collection Requests** tab.
2. On the Collection Requests Summary page, scroll to the Collection Request you wish to prepare.



### Yearend (N) FY11 Reporting Period

Yearend (N) reporting is a data collection reflecting the district's entire school year, with the exception of the CTE record reported in reporting period D. Yearend is designed to capture what has occurred in each district throughout the school year.

Submissions: February 04, 2010 – December 31, 2011  
Expiration Date: December 31, 2011 (in 275 days)  
Collection Request: 4  
Status: Data Collection completed successfully today at 03:31:14 PM.  
Submission Number: 2 (attempt 0)  
Actions: [Start/Stop Collection](#)  
[Prepare](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

3. Click on the **Prepare** link (circled in the screenshot above) in the Status field.
4. The screen that appears will show a series of messages that show your preparation's progress.
  - The first step executes the prepare request, preparing the collected data for validation.

### Preparation

Step 1 of 3: Executing the prepare request — 65 of 255 done

Please Wait (Elapsed Time: 00:00:06)



- 
- The second step runs validation checks on the prepared records

**Preparation**

Step 2 of 3: Executing validations — 133 of 579 done

Please Wait (Elapsed Time: 00:00:34)



- The third step runs record dependency checks

**Preparation**

Step 3 of 3: Validating record dependencies — 91 of 138 done

Please Wait (Elapsed Time: 00:01:42)



- 
- Depending on the collection request, there may be a fourth step. When the fourth step appears, it states: “Step 4 of 4: Creating post validation reports/summaries – x of y done”. The collection request controls whether or not this fourth step is present. If you are preparing a collection that allows four steps, this will be reflected in the other three steps also; they will say Step 1 of 4, Step 2 of 4, and so on.

### Preparation

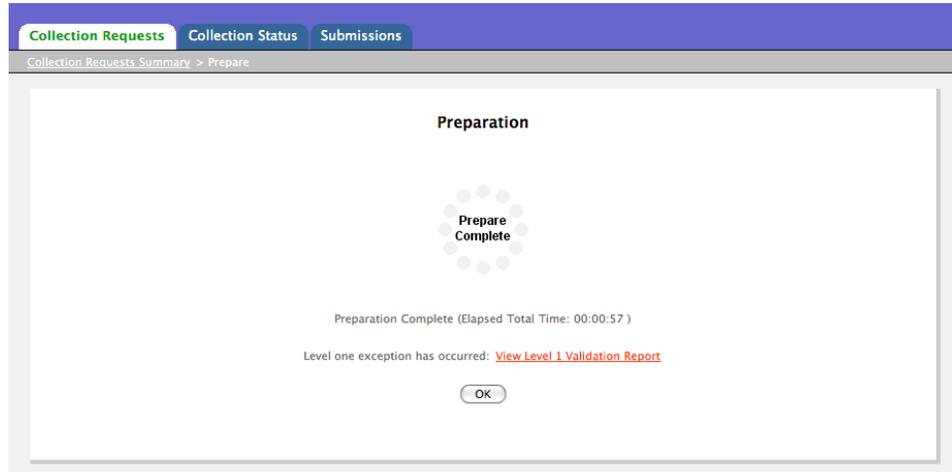
Step 4 of 4: Creating post validation reports/summaries –  
42 of 148 done

Please Wait (Elapsed Time: 00:02:15)



5. When preparation is complete, and **no** validation exceptions (data errors) are found, click **OK** and return to the Collection Requests Summary page; proceed with the Previewing and Submitting steps. Otherwise, continue to the next step.

- When preparation is complete, and validation exceptions are found during the preparation and validation process, a link to a validation report is displayed.



- Click on the **View Level 1 Validation Report** link to view the Validation Exceptions now, or click on the OK button to return to the Collection Requests page – you will still be able to view the Validation Exceptions from the Collection Requests page.
- Whether you viewed the **Level 1 Validation** exceptions first, or went directly to the Collection Requests page, make sure you check whether or not the Prepare processing created any errors or warning. If you do see a link next to the Errors & Warnings, check what errors or warnings you have from the Prepare processing.

## Special Cases

There are two special cases that you might see in the course of a preparation.

If the Data Collector is busy and cannot start the prepare processing right away, you will see the message shown below.

### Preparation

The prepare request is in the queue, waiting for resources

Please Wait (Elapsed Time: 00:00:07)



---

If the Data Collector service is terminated while the Prepare processing is running, a popup screen appears.



If this popup screen appears, click OK, then click on the Collection Requests tab. If your browser can no longer connect to the Data Collector, the Data Collector service is no longer running.

## Validation Exceptions

After a collection has been prepared, the Collection Requests Summary includes a **Validation Status** field, providing a link to the Validation Exceptions report. Validation exceptions are part of normal Data Collection operation – they indicate errors in the collected data. Even though they are a normal part of collection processing (and are not errors) they do merit a look – the background color turns orange to remind you that there is something to check before certifying and submitting the collection.

Click on the Validation Status link to view the **Validation Exceptions** report.



### Graduation (G) FY11 Reporting Period

The FY11 Graduation (G) reporting period captures data related to graduating students. This data will include diploma information and all data necessary to verify that the student has met CORE and testing graduation requirements. Note: File(s) must be uploaded through the Data Collector Data Sources tab.

**Submissions:** January 29, 2011 – December 31, 2011

**Expiration Date:** December 31, 2011 (in 275 days)

**Collection Request:** 1

**Status:** Data Collection has been prepared today at 03:30:23 PM and is available for preview or certification.

**Validation Status:** [Level 1 Validation](#)

**Submission Number:** 2 (attempt 1)

**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Preview](#)  
[Certify & Submit](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

## Level 1 Validation and Exceptions Report

Level 1 Validation is an evaluation of data that has not yet been submitted. Level 1 Validation prevents submitting invalid records in the collection to the ODE. Each collection request includes a set of validation rules, which are executed at the end of the Prepare step of collection processing – when you click on the Prepare link you both prepare and validate the records in the collection.

A sample Level 1 Validation exceptions screen shot, with an explanation of each column:

Error Number	Error Level	Message	Description	Record Identifying Fields
GI.0001	Fatal	Invalid option	The field contains an invalid option: 'X' value in Gender (GI080)	Record: Building IRN= '046722', EMIS Student ID Number= , First Name= , Last Name=
FN.0007	Fatal	Element value can not be blank	The field is required, yet has no value: empty value in Non-Attending Reason (FN060)	Record: First Name= , Last Name= , Building IRN= '046722', EMIS Student ID Number=
FN.0007	Fatal	Element value can not be blank	The field is required, yet has no value: empty value in Non-Attending Reason (FN060)	Record: First Name= , Last Name= , Building IRN= '046722', EMIS Student ID Number=

**Error Number:** The unique identifier of the validation check which found the validation exception

---

**Error Level:** Each validation exception has been classified by ODE as having one of four error severities:

- **Fatal:** This is the only error level highlighted in red when it appears in the Validation report. The red color indicates that the record will not be submitted if you submit the collection as it is right now. You need to fix all the data errors which cause the fatal validation errors, before all the collected records will be submitted to ODE. Most of the validations checks defined by ODE check for fatal errors. All other validation error levels (see below) do not prevent the record with the error from being sent to ODE when you submit the collection.
- **Critical:** Data error should be corrected, but the record will be included in the submission.
- **Warning:** An error probably occurred, and should be investigated.
- **Informational:** The least significant of all validation error levels; may or may not be an error (but was worth mentioning).

**Message:** A short summary of the error.

**Description:** Details about the cause of the error

**Record Identifying Fields:** This shows the actual data in the record which contains an error. Use the values in these fields to identify which records were flagged by the validations as incorrect. At this point you need to determine whether to submit the data (excluding records which have been identified with fatal errors) or to correct the data at the source and restart the data collection process.

## Previewing Data Collections

After the data is prepared and validated, and *before* it is certified and submitted to the Report Authority, it is strongly recommended that you preview the data before you approve it for submission to ODE.

**Important:** After the prepare step (just as when the collection completes) check whether you have received any prepare errors or warnings. See the “Errors and Warnings” section.

Prepare errors, if any, result from errors in the collection request the ITC received from ODE. If you do find any prepare errors, notify the ITC. Prepare errors can have severe repercussions, such as the preview missing all the data for some record types.

**Note:** Whenever you take a screen shot of the Errors & Warnings page always show the Extended Description (by clicking on the clipboard icon on the right, or selecting the “Extended description for all” checkbox. Click on the link next to the Errors & Messages, on the Collection Requests tab, to redirect to the Errors & Warnings page.

To preview the results of the prepare processing:

1. Open the Collection Requests Tab, and scroll to the Collection Request you want to preview. In the selected Collection Request, the **Actions** section displays the following links:

**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Preview](#)  
[Certify & Submit](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

2. Click on the **Preview** link.
3. The **Generate Preview** page is displayed for the selected Collection Request.

Submission Number 5 (attempt 3)

Select the options and click on the Generate Preview link to create the preview.

**Last Prepared:** Today at 12:00:58 PM

### Preview Types

Detail

### Output Options

**Zip File:**  Download file as a compressed .zip (for faster downloads)

**File Format:**  CSV  
 HTML

[Generate Preview](#)

- 
4. Select the options for generating the preview.

### Preview Types

**Views:** Initially (as of this writing) you will only see a Details checkbox, which will be pre-selected. The “Details” preview shows you the detailed EMIS records, as they will be submitted to ODE. Eventually ODE will offer additional types of previews, with a longer explanation of each preview type. Once there are multiple preview types you can select the ones you want to view.

### Output Options

**Zip File:** Selecting the “Download file as a compressed .zip” option saves multiple files into one compressed file for faster downloading. For more information on downloading a compressed .zip file, please see the section, “Extracting a .Zip File to Preview a Report”.

---

**Note:** The Windows Extraction Wizard (for compressed or “zipped” files) cannot open the .zip file generated by the VRF. A third-party utility, such as WinZip or 7-Zip, is required for extracting compressed reports. Verify that such a utility has been installed on the machine or server where the file will be downloaded and extracted.

---

**File Format:** select to preview in CSV or HTML format:

- **CSV:** (recommended for analysis purposes) Comma Separated Values format; this type of file can be sorted or manipulated in an external spreadsheet program, such as EXCEL.
- **HTML:** (recommended for viewing purposes only) Hypertext Markup Language format; recommended for viewing in a web browser.

5. Click on the **Generate Preview** link at the bottom of the page.

- The page now displays a list of the views, one per record type (or view type), in the file format selected in the Download Report sections.

Submission Number 5 (attempt 3)

Select the options and click on the Generate Preview link to create the preview.

**Last Prepared:** Today at 12:00:58 PM

**Preview Types**

Detail

---

**Output Options**

**Zip File:**  Download file as a compressed .zip (for faster downloads)

**File Format:**  CSV  
 HTML

[Generate Preview](#)

File	Valid	Invalid	Total
<a href="#">Building General Info Fall (DF).csv</a>	0	3	3
<a href="#">Career-Technical Education Correlated Class (CV).csv</a>	0	2	2
<a href="#">Contract Only Staff (CC).csv</a>	0	0	0
<a href="#">Contractor Staff Employment (CJ).csv</a>	0	0	0
<a href="#">District General Info Fall (DO).csv</a>	0	1	1
<a href="#">Excluded Records.csv</a>			50
<a href="#">Mapped Classroom Code (CM).csv</a>	0	7	7
<a href="#">Race Detail Record (GJ).csv</a>	0	33	33
<a href="#">Special Education (GE).csv</a>	0	13	13
<a href="#">Staff Course Master (CN).csv</a>	0	384	384
<a href="#">Staff Demographic (CI).csv</a>	0	97	97
<a href="#">Staff Employment Record (CK).csv</a>	0	128	128
<a href="#">Staff Summer Employment Separation (CL).csv</a>	0	6	6
<a href="#">Student Attributes Effective Date (FD).csv</a>	0	593	593
<a href="#">Student Attributes No Date (FN).csv</a>	0	588	588
<a href="#">Student Course (GN).csv</a>	0	5562	5562
<a href="#">Student Demographic (GI).csv</a>	0	590	590
<a href="#">Student Graduation - Core Summary (GC).csv</a>	0	1293	1293
<a href="#">Student Kindergarten Readiness Assessment - Literacy (GO).csv</a>	0	35	35
<a href="#">Student Preschool ASQ SE Assessment (GS).csv</a>	0	0	0
<a href="#">Student Preschool ECO Assessment (GM).csv</a>	0	0	0
<a href="#">Student Preschool GGG Assessment (GB).csv</a>	0	0	0
<a href="#">Student Program (GQ).csv</a>	0	60	60
<a href="#">Student Standing (FS).csv</a>	0	593	593
<b>Total counts:</b>	0	9988	10038

For collections from EMIS Files the Excluded Records view lists individual records that were collected from EMIS files but excluded from the preview. The collection request from ODE includes rules defining which records to exclude from EMIS files collections and why. Records that are excluded appear in the Excluded Records document, with columns listing the Record Type, the record's ID, the Building IRN, and a description of the reason it was excluded. In the example shown below, an FN record (Student Attribute No Date) with ID 123456789 from Building IRN 0000 was excluded from a preview because no GI (Student Demographic) record was found for this student (ID 123456789).

The collection request's validity checks specify that a record must exist in both Student Attributes and Student Demographic, and because this example record did not, it was excluded from the preview.

A	B	C	D	E
Record Type	ID	Building IRN	Description	
FN	123456789	0	no GI record found for this student	

Other documents (CSV files or HTML views) list the records for the record type(s) that are stated in the file name. For example, the Student Attributes No Date (FN).csv file contains the collected and prepared FN records. (Personal data has been removed from this screenshot for security purposes.)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q		
Fiscal Year	Reporting Pe	District IRN	First Name	Last Name	Building IRN	EMIS Student	Diploma Date	Diploma Type	Fiscal Year	ST	OGT	Graduat	Yearend Rep	CORE Econom	CORE Fine Ar	Exempted fr	State Studen	Record Is Valid
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 2	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 2	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 2	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 2	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes
2009	G	046706					5/24/09 1	2006	0				N	N	N			Yes

- Click on the file(s) you wish to view or save.
- Examine the records in the previews to determine which records have errors, and whether all records were collected. Keep in mind that fatal Level 1 Validation exceptions will cause records to be suppressed from the submission to ODE. You will need to correct the errors in the source – the application which produced the EMIS files or supplied the data to the SIF collection, and go through another iteration of collect/prepare/preview. Of course you decide whether to submit the data to ODE as is, e.g. when enough records pass validation and are displayed in the previews.

**Note:** In previews (both HTML and CSV) numbers appear without the leading zeroes. This differs from what you are used to in the EMIS formatted files, where each field is padded on the left with zeroes. For example, a numeric value which accepts numbers in the range 0000 to 9999 (according to the EMIS specification) may display in preview simply as 0. 0, as a number, is equivalent to 0000.

## Invalid Records

When you generate the previews, the page which lists the previews also shows you the number of valid and invalid records (the last line shows the totals for all selected preview types):

File	Valid	Invalid	Total
<a href="#">Building General Info Fall (DF).csv</a>	0	3	3
<a href="#">Career-Technical Education Correlated Class (CV).csv</a>	0	2	2
<a href="#">Contract Only Staff (CC).csv</a>	0	0	0
<a href="#">Contractor Staff Employment (CJ).csv</a>	0	0	0
<a href="#">District General Info Fall (DQ).csv</a>	0	1	1
<a href="#">Excluded Records.csv</a>			50
<a href="#">Mapped Classroom Code (CM).csv</a>	0	7	7
<a href="#">Race Detail Record (GJ).csv</a>	0	33	33
<a href="#">Special Education (GE).csv</a>	0	13	13
<a href="#">Staff Course Master (CN).csv</a>	0	384	384
<a href="#">Staff Demographic (CI).csv</a>	0	97	97
<a href="#">Staff Employment Record (CK).csv</a>	0	128	128
<a href="#">Staff Summer Employment Separation (CL).csv</a>	0	6	6
<a href="#">Student Attributes Effective Date (FD).csv</a>	0	593	593
<a href="#">Student Attributes No Date (FN).csv</a>	0	588	588
<a href="#">Student Course (GN).csv</a>	0	5562	5562
<a href="#">Student Demographic (GI).csv</a>	0	590	590
<a href="#">Student Graduation - Core Summary (GC).csv</a>	0	1293	1293
<a href="#">Student Kindergarten Readiness Assessment - Literacy (GO).csv</a>	0	35	35
<a href="#">Student Preschool ASQ SE Assessment (GS).csv</a>	0	0	0
<a href="#">Student Preschool ECO Assessment (GM).csv</a>	0	0	0
<a href="#">Student Preschool GGG Assessment (GB).csv</a>	0	0	0
<a href="#">Student Program (GQ).csv</a>	0	60	60
<a href="#">Student Standing (FS).csv</a>	0	593	593
<b>Total counts:</b>	0	9988	10038

Every invalid record, accounted for in the Invalid column in the screen shot above, is invalid because the record received a fatal error during Level 1 Validations (is directly invalid), or because the record has a dependency on an invalid record. The Invalid column shows the count of all the records considered invalid. Invalid records are filtered out of the submission to ODE.

Some records may be considered invalid, not because they received a fatal error during Level 1 Validation, but because they depend upon an invalid record. For example, when a Student Demographic (GI) record is invalid for a student, no records at all are sent to ODE for this student. In such a case, we say that the GI record is *directly invalid*, while the other records for the student are invalid because of a *dependency* (they might be invalid directly also, but the dependency invalidation is enough to suppress them from the submission to ODE). All directly invalid records have a fatal error (at least one) in the Level 1 Validation Exception Report.

The previews distinguish between these two types of invalid records – directly invalid records and records invalid because of a dependency. This is crucial because when you correct the data, turning a (directly) invalid record into a valid record, you also make valid the records which were invalid because of the dependency on this

invalid record. By correcting all the data errors which caused the fatal errors in the Level 1 Validation exception report you make all the records in the collection valid. A record which is simultaneously directly invalid, and invalid because of a dependency, displays as a directly invalid record.

In HTML previews, the directly invalid records are shaded red (the same color as in the Error Level in the Level 1 Validation report). Records that are invalid because of a dependency are shaded in peach color. (Personal data has been removed from this screenshot for security purposes.)

Fiscal Year	Reporting Period	District IRN	Building IRN	EMIS Student ID Number	Last Name	First Name	State Student ID	Non-Attending Reason	Retained Status	Diploma Date	Fiscal Year Student Began 9th Grade	CORE Economics Literacy Met	CORE Fine Arts Met	Exempted from Physical Education
2010	K							*	*		2008	Y	Y	N
2010	K							*	*		0000	Y	Y	N
2010	K							*	*		0000	Y	Watermelon shaded	N
2010	K							*	*		0000	Y	Invalid Record	N
2010	K							*	*		2010	Y	Y	N
2010	K							*	*		0000	Y	Y	N
2010	K							*	*		0000	Y	Peach shaded Invalid Record	N

In CSV previews the directly invalid records have “No” as the value in the *Record Is Valid* column. Records that are invalid because of a dependency have “Dep” in this same column. (Personal data has been removed from this screenshot for security purposes.)

Fiscal Year	Reporting Period	District IRN	Building IRN	EMIS Student ID Number	Last Name	First Name	State Student ID	Non-Attending Reason	Retain	Diploma Date	Fiscal Year Student Began 9th Grade	CORE Economics Literacy Met	CORE Fine Arts Met	Exempted from Physical Education	Record Is Valid
634	2010	K						*	*		0000	Y	Y	N	No
635	2010	K						*	*		Invalid Record	N	N	N	Yes
636	2010	K						*	*			N	N	N	Yes
637	2010	K						*	*			N	N	N	Yes
638	2010	K						*	*		Invalid w/ Dependency	N	N	N	Yes
639	2010	K						*	*			N	N	N	Dep
640	2010	K						*	*		2007	Y	Y	N	Yes

### Finding the Cause of the Directly Invalid Records

Every directly invalid record failed some Level 1 Validation check and is marked “fatal” in the Level 1 Validation exception report. For example, if you are looking at the HTML preview for the Special Education (GE) record type, and see 10 red-colored records, and 15 peach colored records (or if you are viewing the CSV report, and see 10 “No” entries and 15 “Dep” entries in the *Record Is Valid* column), you can expect to find the 10 fatal errors in the Level 1 Validation exception report which caused the 10 GE records to “turn red”. These validation errors can usually be found in the validation exception report by searching for error codes that start with “GE.” However, this is not always the case, because Multiple Record validations also directly invalidate some records.

The Multiple Record validations use data from more than one record type to perform the validation. Their error codes start with the string “MR.” They still invalidate an individual record – for example MR.0007 invalidates a GE record. Hence you may

---

need to check the MR error codes in the Level 1 Validation exception report to find all the fatal errors that turned some rows red in the html preview.

Note that direct invalidation takes precedence over dependency invalidation. For example when one of the FD records for a student and the GI record for the student both receive a Level 1 Validation exception, both will show up in the Level 1 Validation exception report, and both will have red shaded rows in the preview – if the other FD records for the student pass validation on their own they will have the peach shaded rows, because of the dependency invalidation.

## Downloading a .Zip File with the Generated Previews

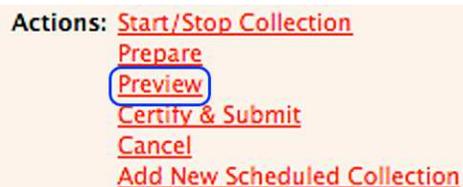
---

**Note:** The Windows Extraction Wizard (for compressed or “zipped” files) cannot open the .zip file generated by the VRF. A third-party utility, such as WinZip or 7-Zip, is required for extracting compressed reports. Verify that such a utility has been installed on the machine or server where the file will be downloaded and extracted.

---

In addition to previewing records in HTML format in a web browser, or CSV files, you can create a .zip file with all the previews and download the .zip file to your computer.

1. Click on the **Collection Requests** tab. The **Collection Request Summary** page is displayed.



2. Click on the **Preview** link.
3. The **Preview** page is displayed.

- Select the options for generating the preview. For more information on these options, please refer to the previous section. Make sure to select the checkbox "Download file as a compressed .zip", as shown below.

Submission Number 5 (attempt 3)

---

Select the options and click on the Generate Preview link to create the preview.

**Last Prepared:** Today at 12:00:58 PM

**Preview Types**

Detail

**Output Options**

**Zip File:**  Download file as a compressed .zip (for faster downloads)

**File Format:**  CSV  
 HTML

[Generate Preview](#)

- Click on the **Generate Preview** link at the bottom of the page.
- The Report Output section of the Preview page displays a link to the compressed file. The name of this file will be unique each time you generate the preview .zip file, so you do not need to rename it after downloading, The name consists of, separated with underscores: LEA IRN, collection request code, collection request version, submission number, attempt number, day of year (CCYYMMDD), time of day (HHMMSS).zip

Submission Number 5 (attempt 3)

---

Select the options and click on the Generate Preview link to create the preview.

**Last Prepared:** Today at 12:00:58 PM

**Preview Types**

Detail

**Output Options**

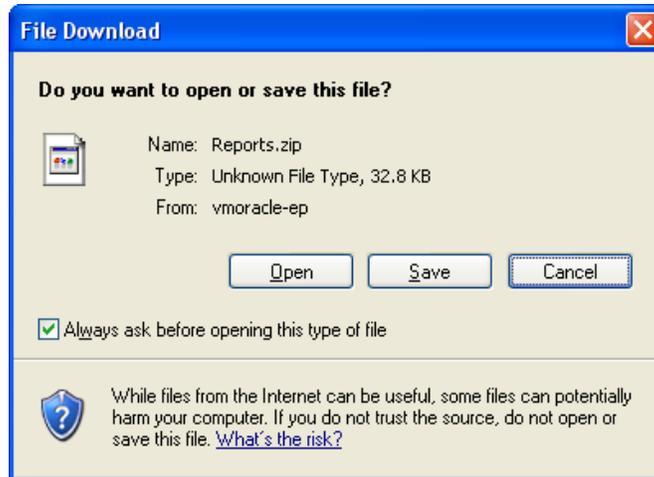
**Zip File:**  Download file as a compressed .zip (for faster downloads)

**File Format:**  CSV  
 HTML

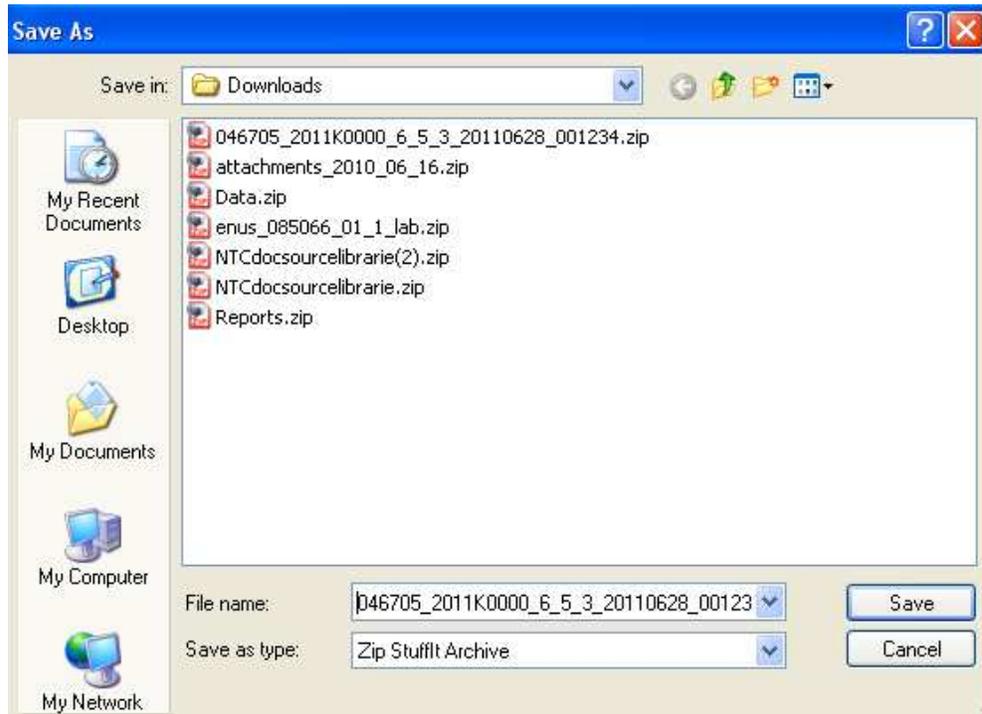
[Generate Preview](#)

File	Valid	Invalid	Total
<a href="#">046705_2011K0000_6_5_3_20110628_001234.zip</a>			

- Click on this link to start the download.
- A File Download dialog is displayed.



9. Click **Save**.
10. A **Save As** window is displayed.



11. Choose the location where the file will be stored, and click **Save**.
12. The file is saved in the selected folder, and the **Collection Requests > Preview** page is returned.
13. Navigate to the .zip file location for viewing.

## Certifying and Submitting a Collection

Once you are satisfied with the data in previews, take the following steps to certify and submit the collection to ODE.

1. Click on the **Certify & Submit** link, available in either of the following locations:
  - In the sidebar, to the right of the **Preview** screen.

**October (K) FY11**  
Submission Number 5 (attempt 3)

---

Select the options and click on the Generate Preview link to create the preview.

**Last Prepared:** Today at 12:00:58 PM

**Preview Types**

Detail

**Output Options**

**Zip File:**  Download file as a compressed .zip (for faster downloads)

**File Format:**  CSV  
 HTML

[Generate Preview](#)

File	Valid	Invalid	Total
 <a href="#">Building General Info Fall (DF).csv</a>	0	3	3

### Need to make changes?

If you are not satisfied with this data, return to the Collection Requests page and use the Start/Stop Collection command to re-request information from data sources. You can then Prepare the collection again.

[Start/Stop Collection...](#)

### Certification / Submission

Once you have previewed the collection and are satisfied with its contents, click the link below to certify it and submit it to the Department of Education.

[Certify & Submit...](#)

-or-

- In the **Collection Requests Summary** of the selected Collection Request (the Collection Requests tab).

**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Preview](#)  
[Certify & Submit](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

2. The **Certify and Submit** page is displayed.

**Yearend (N) Reporting Period**  
Submission Number 2 (attempt 1) - Certification

---

Select the check box and click the link, to submit.

**Submission Details**

**Collection Requests:** Yearend (N) Reporting Period

**Date & Time:** July 08, 2010 10:30:34 PM

**Statement of Certification**

By certifying this collection, you are stating that you have previewed the data and approve its contents. The collection will be submitted to the report authority and will include your name and contact information.

I certify this collection

Certified By: Jane Smith

**Comments (FOR YOUR USE ONLY)**

[Certify & Submit](#) | [Cancel](#)

3. The **Submission Details** section displays the Collection name, date and time of submission, and submission number.

The **Statement of Certification** section is where you confirm that you have previewed the data and approve its contents. Check the “I certify this Collection” box.

The **Comments** section will accommodate notes you may want to keep about the submission. The notes are for your use only and will not be included in the submission to the State (ODE).

4. Click on the **Certify & Submit** link at the bottom of the page. The Submissions screen (in the Submissions tab) is displayed, and shows the progress of the submission.
5. The Submissions tab will display the Submissions screen, which lists submission(s), and the status of submission(s) for each collection request. You can click on the “Refresh” link to update the status displayed on the screen, as the screen will not automatically refresh itself.

## Submission Status

The following screen shots show submissions with some of the more common status messages you are likely to see at this point in the process.

The screen below shows a Submission in “**Preparing...**” status. This status means that the Data Collector is preparing the submission to ODE. The time it takes to prepare the submission depends on the number of records submitted and the speed of the Data Collector server. Typical times can range from seconds to several minutes.

**Submissions**

All submissions are listed below. Expand an item to view the individual submissions. Click a submission to view detailed status.

[Refresh](#)

Report	Submitted	Status
▶ <b>Financial (H) 2009 Reporting Period</b> (1 submissions)		
▶ <b>October (K) FY10 Reporting Period</b> (5 submissions)		
▼ <b>Yearend (N) Reporting Period</b> (1 submissions)		
📄 <a href="#">Submission 1</a>	07/08/2010	Preparing submission (certified by Jane Smith)

[Refresh](#)

The screen below shows a Submission “**Waiting for report authority...**” This could indicate a break in the connection to the report authority (ODE), in which case you should consult your ITC. It could also indicate that the Report Collector at ODE is backed up with many districts submitting collections around the same time, and your notification that the submission is ready is queued at the Report Collector. Or it could indicate that the Data Collector is waiting for information over a slow internet connection. If the “Waiting...” message persists for an unreasonable length of time, contact your ITC.

The length of time needed to submit a report varies depending on the size of the report, so there is no one-size-fits-all length of time that you should wait before contacting your ITC. After you have submitted a report once or twice, you will know about how long it should take.

Collection Requests
Collection Status
**Submissions**

Submissions

### Submissions

All submissions are listed below. Expand an item to view the individual submissions. Click a submission to view detailed status.

[Refresh](#)

Report	Submitted	Status
▶ <b>Financial (H) 2009 Reporting Period</b> (1 submissions)		
▶ <b>October (K) FY10 Reporting Period</b> (5 submissions)		
▼ <b>Yearend (N) Reporting Period</b> (1 submissions)		
<span style="color: #4a69bd;">▼</span> <a href="#">Submission 1</a>	07/09/2010	Waiting for report authority to issue request (certified by Jane Smith)

[Refresh](#)

The following screen shows a Submission status of “**Transmission completed...**” This status message indicates that the submission has been received by the Report Collector. The submitted data may not yet have been processed by ODE. (Use the View Submission Results link, from the Collection Requests tab, to check whether the submitted data has been processed).

**Submissions**

All submissions are listed below. Expand an item to view the individual submissions. Click a submission to view detailed status.

[Refresh](#)

Report	Submitted	Status
▶ <b>Financial (H) 2009 Reporting Period</b> (1 submissions)		
▶ <b>October (K) FY10 Reporting Period</b> (5 submissions)		
▼ <b>Yearend (N) Reporting Period</b> (1 submissions)		
✔ <a href="#">Submission_1</a>	07/09/2010	Transmission completed on July 09, 2010 (certified by Jane Smith)

[Refresh](#)

### Submissions Page Columns

The Submissions page is divided into three columns: Report (meaning submission), Submitted, and Status.

#### Report

The Report column displays the name of the collection request. “Yearend (N) Reporting Period” in the screen shots above.

#### Submitted

The Submitted column shows the date of the submission. For example “07/09/2010”.

#### Status

The progress of a submission is displayed in the Status column, as shown in the previous screen shots.

### Submissions Page Refresh Links

The **Refresh** links are found at the top and bottom of the Submissions screen. When the **Refresh** link is selected, the Submissions screens will refresh and provide updated status (if any).

## Submission Details

As you make repeated submissions to ODE all submissions will appear on the Submissions screen. To view details of a specific submission, click on the submission link.

**Submissions**

All submissions are listed below. Expand an item to view the individual submissions. Click a submission to view detailed status.

[Refresh](#)

Report	Submitted	Status
▶ <b>Financial (H) 2009 Reporting Period</b> (1 submissions)		
▶ <b>October (K) FY10 Reporting Period</b> (5 submissions)		
▼ <b>Yearend (N) Reporting Period</b> (1 submissions)		
✔ <a href="#">Submission 1</a>	07/09/2010	Transmission completed on July 09, 2010 (certified by Jane Smith)

[Refresh](#)

Clicking on a submission link brings up the Submission Report Info screen.

**Submit Report Info**  
Yearend (N) Reporting Period

Certification and submission details.

**Certification Summary**

Prepare Date: July 09, 2010 12:35:06 AM  
Certify Date: July 09, 2010 12:35:43 AM  
Certified By: Jane Smith

**Submission Summary**

Submission: 1  
Collection Request Version: 19  
Submission Reason: Initial Submission  
Report Submitter: Northwestern Local  
Report Destination: Secretary of Education  
Comment:

**Record Count**

Click on the link below to download a file of record counts for this submission.

[Download Record Count File](#)

On this screen, you can view details regarding the submission. You can also click on the Download Record Count File link, on the right side of the screen, to download a document showing the count of records submitted, by record type. This count should match exactly the number of Valid records you saw in the Preview, when you previewed this collection prior to submission.

---

### Record Count

Click on the link below to download a file of record counts for this submission.

[Download Record Count File](#)

The document, when opened, will show each record type and the number of records included in the submission, as shown below. The number of records for each record type matches the number of valid records displayed in preview.

A	B
GB_STU_PRE_ASSESS	21
GS_STU_ASQSE_ASSESS	16
GM_STU_ECO_ASSESS	36
GX_STU_OGT	324
GA_OAT	750
GY_CTE	0
GF_ELA	0
GU_CTEIndAssess	0
CI_STAFF_DEMO	113
CK_STAFF_EMPLOYMENT	186
CN_COURSE_MASTER	508
CV_CTE_CRRLTD_CLS	0
CJ_CSTAFF_EMP	0
CM_MAP_CLASS_CODE	0
CC_CNTRCT_ONLY_STF	0
GI_StudentDemographic	834
FS_StudentStanding	920
FD_StudentEffectDate	920
GQ_StudentProgram	1057
GE_Special_Ed	229
FN_StudentAttrNoDate	834
GN_StudentCourse	7683
GD_Discipline	0
GG_Gifted	0
DB_BuildGen	2
DR_DistGen	1
DT_DistrictTesting	0

## Receiving Submission Status from the Report Collector

When the Report Collector processes your submission (at ODE) it sends a status message to tell the Data Collector the results of this processing. The processing at ODE includes cross-district and cross-year validations. These validations are called Level 2 validations – they can only be done at ODE because of their cross-district and cross-year nature (the Level 1 validations, done at the end of the prepare step, validate the data collected from the single LEA).

You can tell that the Data Collector received the response to the submission, because a “Submission Status” is displayed above the “Submission Number” in the main Collection Requests tab.



### October (K) FY10 Reporting Period

Note: This Collection Request supports SIF for DASL, eSIS and USPS users, as well as those files uploaded through the Data Collector Data Sources tab. Student, staff, program, and course data are the primary data elements collected during this reporting period. One of the main purposes of the October (K) 2010 reporting period is to capture school district enrollment during the first full week of October.

<b>Submissions:</b> August 08, 2009 - September 30, 2010
<b>Expiration Date:</b> September 30, 2010 (in 83 days)
<b>Collection Request:</b> 47
<b>Status:</b> The collection was submitted yesterday at 02:36:26 PM by VRF Administrator.
<b>Validation Status:</b> <a href="#">Level 1 Validation</a>
<b>Submission Status:</b> Pending Acceptance
<b>Submission Number:</b> 6 (attempt 1)
<b>Actions:</b> <a href="#">Start/Stop Collection</a> <a href="#">Prepare</a> <a href="#">Preview</a> <a href="#">Certify &amp; Submit</a> <a href="#">Cancel</a> <a href="#">Add New Scheduled Collection</a>

The submission status shows what happened when the submission was processed at ODE, and includes the following:

*Not Started*—this status appears before the Report Collector starts processing the received submission.

*Pending Processing*—this status indicates that the Report Collector successfully received all of the submitted data and completed the first processing step. The Level 2 validations are done at the end of the second processing step at ODE.

*Processing Completed*—this status indicates that ODE finished processing the second (and final) phase of processing the submission. If there were any Level 2 validation errors identified you will see a Level 2 Validation link under the “Validation Status”.

*Pending Processing (with errors)*—this status indicates that the Report Collector encountered processing errors, and not all the data in the submission was able to reach the database at ODE. Notify the ITC if you ever see this status – the errors need to be investigated by ODE.

*Accepted*—this status only applies to submissions for the Diagnostic collection requests. If you are not submitting for a Diagnostic collection request, you will not see this message.

---

You can have your ITC set up email notification for you so the Data Collector will send you an email when it receives the notification that the Report Collector finished processing the submission (with or without Level 2 validation errors).

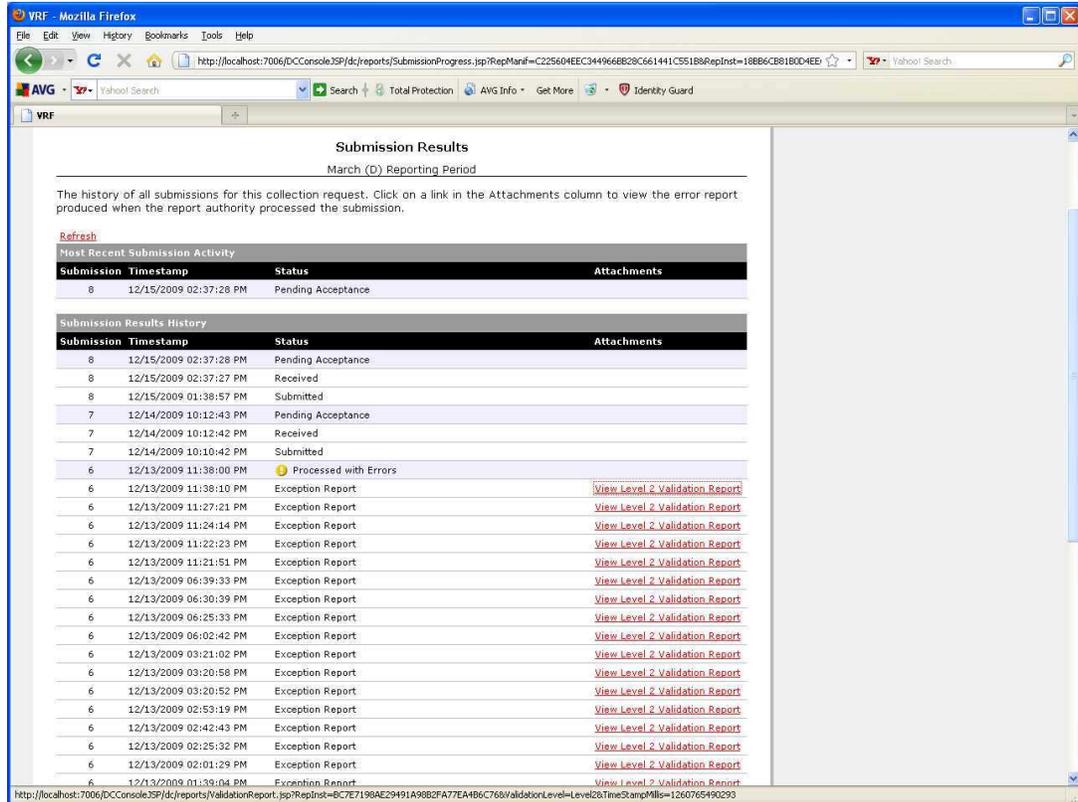
In addition to the statuses listed above, very rarely, you may see a status called *Internal Error*. This indicates that your submission was not processed because of an error at ODE. Please notify your ITC and have the ITC notify ODE, so that ODE can correct the problem.

### **Tracking Submission Status from the Report Collector**

During the submission process, you can view the communication status between the Data Collector and the Report Collector from the **Submission** tab, as described in the previous section. Once your submission has been received and processed by the Report Collector you can view, in the **Collection Requests** tab, the results of the processing of the submission.

After the submission has been processed at ODE, the **Actions** field displays links to **View Submission Results**, or **Start Collection** (which will start a new collection for this Collection Request.) Click on the **View Submission Results** link to see detailed information about submission processing, including the final status for each of the submissions (in case you submitted more than once).

The **Submission Results** page is displayed. Each line displays the submission number, the status of the submission, and when the Data Collector was notified of the submission results by the Report Collector. When there is a Level 2 Validation Exception report you will see a link, in the attachments column. Click on the link to view the level 2 exceptions.



## Level 2 Validation Exception Report

**Level 2 Validation** is an evaluation of data that have been processed by ODE. Level 2 Validation compares data across LEAs and across multiple years. To view this report, click on the **View Level 2 Validation Report** link in the Attachments column of the Submission Results page.

You can also view the most recent Level 2 Validation Report from the main Collection Requests page.



### October (K) FY10 Reporting Period

Note: This Collection Request supports SIF for DASL, eSIS and USPS users, as well as those files uploaded through the Data Collector Data Sources tab. Student, staff, program, and course data are the primary data elements collected during this reporting period. One of the main purposes of the October (K) 2010 reporting period is to capture school district enrollment during the first full week of October.

**Submissions:** August 08, 2009 – September 30, 2010  
**Expiration Date:** September 30, 2010 (in 21 days)  
**Collection Request:** 53  
**Status:** The collection was submitted today at 11:01:16 AM by VRF Administrator.  
**Validation Status:** [Level 1 Validation](#)  
**Validation Status:** [Level 2 Validation](#)  
**Submission Status:** Processing Completed  
**Submission Number:** 6 (attempt 3)  
**Actions:** [Review](#)  
[View Submission Results](#)  
[Start Collection](#)  
[Add New Scheduled Collection](#)

To view older validation reports, click on the **View Submission Results** link.



### October (K) FY10 Reporting Period

Note: This Collection Request supports SIF for DASL, eSIS and USPS users, as well as those files uploaded through the Data Collector Data Sources tab. Student, staff, program, and course data are the primary data elements collected during this reporting period. One of the main purposes of the October (K) 2010 reporting period is to capture school district enrollment during the first full week of October.

**Submissions:** August 08, 2009 – September 30, 2010  
**Expiration Date:** September 30, 2010 (in 21 days)  
**Collection Request:** 53  
**Status:** The collection was submitted today at 11:01:16 AM by VRF Administrator.  
**Validation Status:** [Level 1 Validation](#)  
**Validation Status:** [Level 2 Validation](#)  
**Submission Status:** Processing Completed  
**Submission Number:** 6 (attempt 3)  
**Actions:** [Review](#)  
[View Submission Results](#)  
[Start Collection](#)  
[Add New Scheduled Collection](#)

Clicking on the **View Submission Results** link takes you to a screen from which you can select any of the received Level 2 Validation Exception Reports .

### Submission Results

October (K) FY10 Reporting Period

The history of all submissions for this collection request. Click on a link in the Attachments column to view the error report produced when the report authority processed the submission.

[Refresh](#)

Most Recent Submission Activity			
Submission	Timestamp	Status	Attachments
6	09/09/2010 11:06:46 AM	Processing Completed	

Submission Results History			
Submission	Timestamp	Status	Attachments
6	09/09/2010 11:06:46 AM	Processing Completed	
6	09/09/2010 11:06:55 AM	Exception Report	<a href="#">View Level 2 Validation Report</a>
6	09/09/2010 11:06:54 AM	Exception Report	<a href="#">View Level 2 Validation Report</a>
6	09/09/2010 11:06:52 AM	Exception Report	<a href="#">View Level 2 Validation Report</a>
6	09/09/2010 11:06:52 AM	Exception Report	<a href="#">View Level 2 Validation Report</a>
6	09/09/2010 11:01:17 AM	Received	
6	09/09/2010 11:01:14 AM	Submitted	
5	08/20/2010 10:34:43 AM	Processing Completed	
5	08/20/2010 10:34:44 AM	Exception Report	<a href="#">View Level 2 Validation Report</a>
5	08/19/2010 02:17:15 PM	Exception Report	<a href="#">View Level 2 Validation Report</a>
5	08/19/2010 02:17:14 PM	Exception Report	<a href="#">View Level 2 Validation Report</a>
5	08/19/2010 01:52:16 PM	Exception Report	<a href="#">View Level 2 Validation Report</a>
5	08/19/2010 01:52:14 PM	Exception Report	<a href="#">View Level 2 Validation Report</a>
5	08/19/2010 01:47:11 PM	Exception Report	<a href="#">View Level 2 Validation Report</a>
5	08/19/2010 01:40:17 PM	Received	
5	08/19/2010 01:40:15 PM	Submitted	
4	08/19/2010 10:43:39 AM	Internal Error	
4	08/19/2010 10:43:38 AM	Received	
4	08/19/2010 10:43:35 AM	Submitted	
3	08/16/2010 01:55:57 PM	Pending Processing	
3	08/16/2010 01:55:56 PM	Received	
3	08/16/2010 01:55:51 PM	Submitted	
2	08/16/2010 01:15:57 PM	Processing Completed	
2	08/16/2010 01:16:02 PM	Exception Report	<a href="#">View Level 2 Validation Report</a>
2	08/16/2010 01:08:24 PM	Received	
2	08/16/2010 01:08:12 PM	Submitted	
1	08/11/2010 11:38:41 AM	Pending Processing (with errors)	
1	08/11/2010 11:38:38 AM	Received	
1	08/11/2010 11:38:23 AM	Submitted	

[Refresh](#)

Sometimes you may receive multiple Level 2 Validation Reports for one submission. The link in the Collection Requests will show you only the latest report. Use the Submission Results page to view all the Level 2 Validation Reports for the submission.

The Level 2 Validation Exception report has the same format as the Level 1 Validation Exception report. Here is an example of how a Level 2 Validation Exception report appears. Personal information has been grayed out for security.

Error Number	Error Level	Message	Description	Record Identifying Fields
4.3	Critical	IEP will expire before report date.	IEP for this SSID will expire before reporting date. An IEP record reported but event date prior to required reporting date.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, 'E13' = Outcome Id, '10' = Disability Condition, '06/01/2010' = Outcome End Date, 'RIEP' = Date Type, = Building Name
4.3	Critical	IEP will expire before report date.	IEP for this SSID will expire before reporting date. An IEP record reported but event date prior to required reporting date.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, 'E13' = Outcome Id, '05' = Disability Condition, 'RIEP' = Date Type, = Building Name
4.3	Critical	IEP will expire before report date.	IEP for this SSID will expire before reporting date. An IEP record reported but event date prior to required reporting date.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, 'E13' = Outcome Id, '05' = Disability Condition, '05/28/2009' = Outcome End Date, 'IEP' = Date Type, = Building Name
4.3	Critical	IEP will expire before report date.	IEP for this SSID will expire before reporting date. An IEP record reported but event date prior to required reporting date.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, 'E13' = Outcome Id, '05' = Disability Condition, 'IEP' = Date Type, = Building Name
4.3	Critical	IEP will expire before report date.	IEP for this SSID will expire before reporting date. An IEP record reported but event date prior to required reporting date.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, 'E16' = Outcome Id, '08' = Disability Condition, '06/01/2010' = Outcome End Date, 'RIEP' = Date Type, = Building Name
4.1	Critical	SSID reported with disability but no Special Education Record.	This SSID has been reported with a Disability Condition Code but no Special Education Event record has been reported.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, '10' = Disability Condition, = Building Name
4.1	Critical	SSID reported with disability but no Special Education Record.	This SSID has been reported with a Disability Condition Code but no Special Education Event record has been reported.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, '05' = Disability Condition, = Building Name
4.1	Critical	SSID reported with disability but no Special Education Record.	This SSID has been reported with a Disability Condition Code but no Special Education Event record has been reported.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, '15' = Disability Condition, = Building Name
4.1	Critical	SSID reported with disability but no Special Education Record.	This SSID has been reported with a Disability Condition Code but no Special Education Event record has been reported.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, '10' = Disability Condition, = Building Name
4.1	Critical	SSID reported with disability but no Special Education Record.	This SSID has been reported with a Disability Condition Code but no Special Education Event record has been reported.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, '10' = Disability Condition, = Building Name
4.1	Critical	SSID reported with disability but no Special Education Record.	This SSID has been reported with a Disability Condition Code but no Special Education Event record has been reported.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, '05' = Disability Condition, = Building Name
4.1	Critical	SSID reported with disability but no Special Education Record.	This SSID has been reported with a Disability Condition Code but no Special Education Event record has been reported.	= Building IRN, = EMIS Student ID, = State Student ID, = Reporting District IRN, '05' = Disability Condition, = Building Name

You can access the latest Level 2 validation report for the submission from the Collection Requests tab. In the Submission Results tab you will see the links for all the Level 2 validation reports. Since Level 2 validation errors come from cross-LEA checks, your LEA can continue to receive new Level 2 reports for the last submission, even when you make no additional submissions. As other LEAs submit, the processing of their submissions can create Level 2 reports for your LEA. Similarly, a new submission by another LEA can cause some of the Level 2 errors to disappear from the Level 2 report for your LEA.

### Submission Archives

Whenever you submit a collection to ODE the Data Collector automatically archives the submission. The Data Collector creates two .zip files for each submission – one .zip file contains the CSV previews of the submission. The other file contains the data exactly as submitted to ODE. The content of the two sets of files is the same, except that:

- The files submitted to ODE do not include any invalid records. The “preview” files do include invalid records – with a “No” or “Dep” in the Is Record Valid column
- While the content of the valid records is the same the preview files have more columns – for example all student records include the EMIS ID and the name of the student and these are not sent to ODE.

Submissions Tab > Archived Submissions



Users can view or manage archive files by clicking on the “Manage Archives” link, found in the “Archived Submissions” section of the Submissions tab sidebar. While the Data Collector automatically creates an archive of each submission, these are kept for a short time (otherwise the Data Collector server may run out of disk space). You can always retrieve the archive of the latest submission, and the previous submission, for each collection request. You can download these to your computer, in case you want to preserve the archive.

## Viewing and Managing Archived Submissions

To view and save archived submissions:

1. Log into the Data Collector.
2. Click on Submissions tab.
3. In the sidebar menu, click on the “Manage Archives” link.
4. The Manage Archives page is displayed.



- In the “Filter Options” section of the page, select a collection request from the Collection Request drop-down list.



- In the “Filter Options” section of the page, select an Archive Type from the drop-down list. Options include Submissions Only, Previews Only, or Submissions & Previews.

### Archive Types

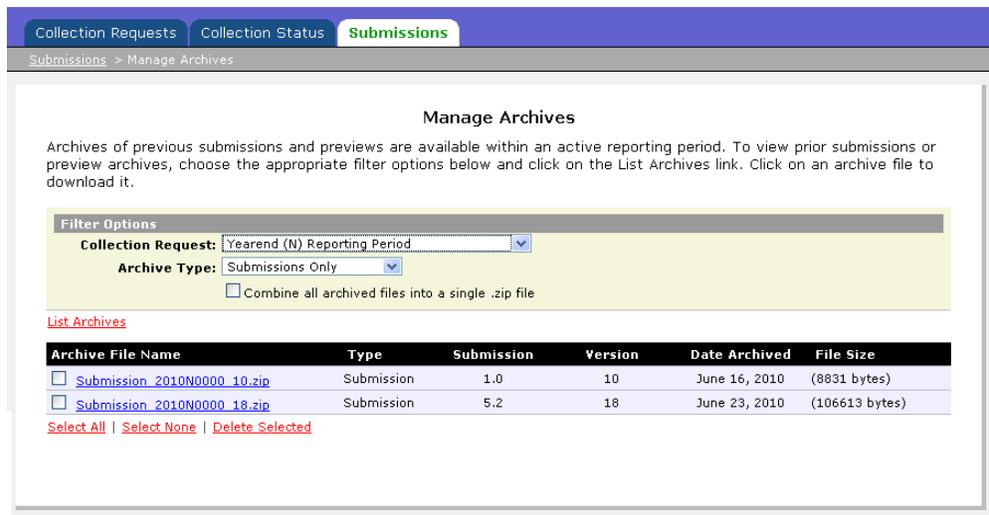
- Submissions**—Contain **exactly** what the LEA sent to the state
- Previews**—Contain what the LEA user saw when they certified the collection. Previews may have additional columns to aid readability (e.g., student’s name), and previews contain any records that failed validation and were therefore not submitted.



- After Collection Request and Archive Type filters have been selected, note the checkbox, “Combine all archived files into a single .zip file.” If you wish to combine all files into a single zip file, check this box; otherwise, leave it unchecked so that archived files are listed individually.
- Click on the **List Archives** link.



9. The **Manage Archives** page displays an archived file(s) section.



10. The columns in the Archive Files section include:

- **Archive File Name**—the archived file name
- **Type**—the archive type selected (Submissions Only; Previews Only; or Submissions & Previews)
- **Submission**—the submission number and attempt number.
- **Version**—the collection request version with which this submission was prepared.
- **Date Archived**—the date that the Data Collector stored this archive file.
- **File Size**—the size of the file (in bytes)

11. Select a file to view or manage by clicking on the file link.

---

12. A file download confirmation dialog is displayed.

13. Cancel the download, Open or Save the file.

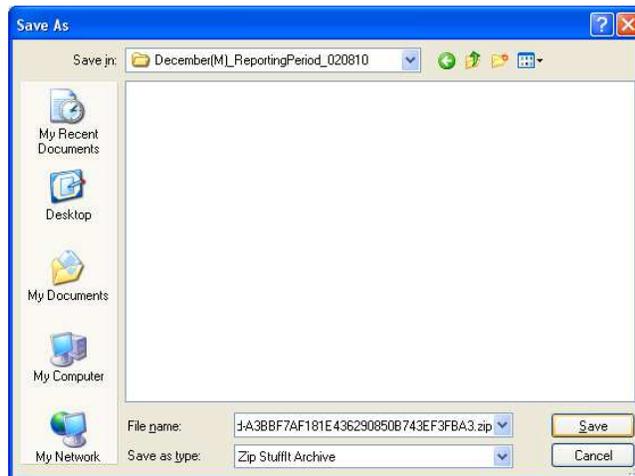
- a. To terminate the operation and return to the Manage Archives page, click Cancel.

or

- b. To open and view the file, click Open; a zip extraction utility displays a list of files to be opened or extracted; select from this list the file you wish to view; the file is displayed in spreadsheet format.

or

- c. To save the file, click Save. The Save As, or other file management dialog, is displayed.



- d. Navigate to the destination folder, and click Save.

To delete archived submissions:

1. Log into the Data Collector.
2. Click on Submissions tab.
3. In the sidebar menu, click on the “Manage Archives” link.

4. The Manage Archives page is displayed.



5. In the "Filter Options" section of the page, select a collection request from the Collection Request drop-down list.



6. In the "Filter Options" section of the page, select an Archive Type from the drop-down list. Options include Submissions Only, Previews Only, or Submissions & Previews.

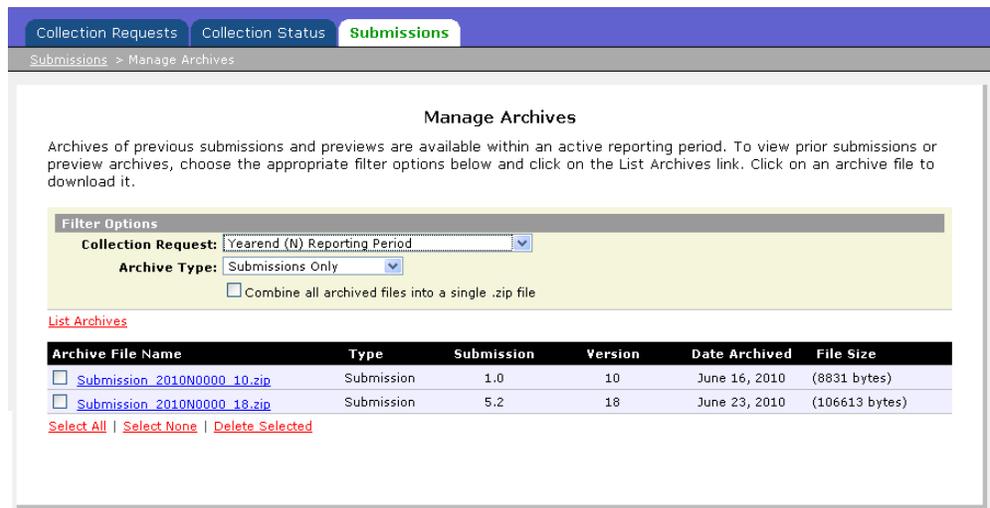


## Archive Types

- **Submissions**—Contain **exactly** what the LEA sent to the state
  - **Previews**—Contain what the LEA user saw when they certified the collection. Previews may have additional columns to aid readability (e.g., student’s name), and previews contain any records that failed validation and were therefore not submitted.
7. After Collection Request and Archive Type filters have been selected, note the checkbox, “Combine all archived files into a single .zip file.” If you wish to combine all files into a single zip file, check this box; otherwise, leave it unchecked so that archived files are listed individually.
  8. Click on the **List Archives** link.



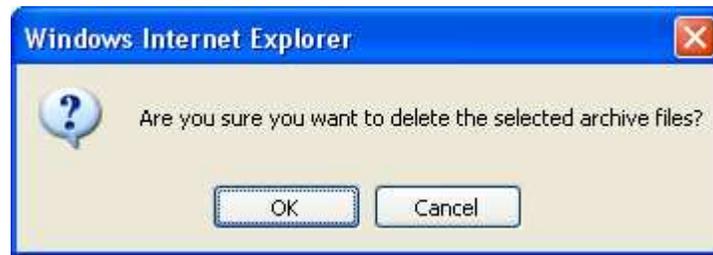
9. The **Manage Archives** page displays an archived file(s) section.



**Note:** The Delete option is not available when the “Combine all archived files...” option is selected, because the zipped output is an aggregation of archives.

10. To delete an archive file, check the box beside the file name or, to delete all displayed archive files, click the **Select All** link.

- 
11. Click the **Delete Selected** link.
  12. A confirmation dialog is displayed.



13. The Manage Archives page is returned; the selected archive file has been deleted.

# 6. Troubleshooting and Monitoring

This section describes some of the errors you could encounter in running the Data Collector, and how to remedy those errors. Troubleshooting or diagnosing basic errors in the Data Collector is accomplished through the use of the screens and pages designed to monitor the data collection process.

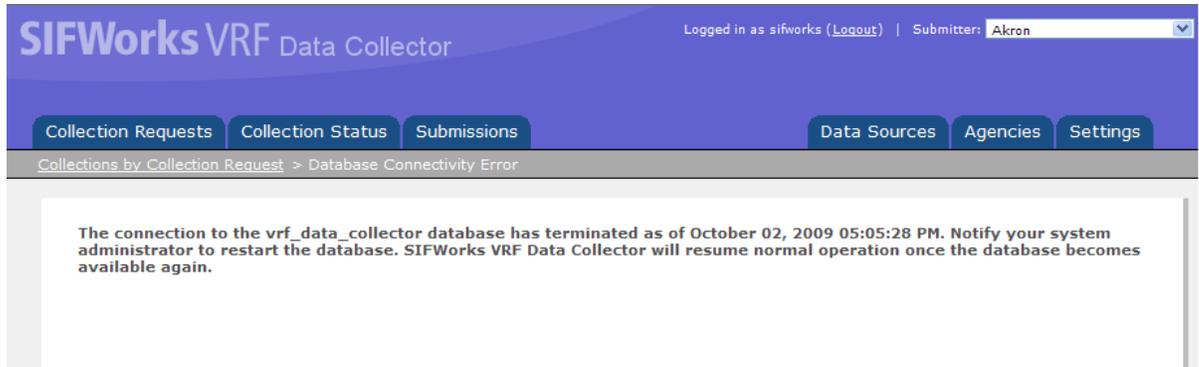
### Common Errors

Some of the most common error messages are generated as a result of connectivity issues-- with the ZIS or a particular Zone or Agent, with the Report Collector, or with the Agency.

If you see this...	It could mean...	To correct the problem...
"SIF query thrown..."	The ZIS is down.	Go to the Data Sources tab, and click on the Connection icon for the zone you're working with; when the Zones page is displayed, click on the "Ping" link. If the Zone is not connected, contact your ITC.
Collection Status Page doesn't update or show progress, after you hit the Refresh link.	The Agency is down; the connection to the ZIS is broken; or connections to other data sources are broken.	Contact your ITC.
"Waiting for report authority..." on Submissions page.	The Report Collector is down.	Contact your ITC.

## Database Connection Error

The following error message is displayed when the connection to the database is terminated; contact your system administrator.



## Monitoring Data Collection through the Collection Status Tab

The Collection Status tab allows you to verify the progress of data collection(s) through screens that organize the view by collection request (the Collections by Collection Request page).

### Collection Status Screen

Detailed information about the way the Collection Status screen looks and behaves is available in a previous section of this guide, "Monitoring Data Collection."

**SIFWorks VRF Data Collector**

Collection Requests | **Collection Status** | Submissions

Collections by Collection Request

### Collection Status

Collections by Collection Request

Collection activity by collection request. Choose filter criteria to narrow the scope of the collection requests listed.

Collection Request:  Progress:  [Refresh](#)

SIF Zones						
Collection / SIF Zone / Request	Records	Packets	Start	Elapsed	Status	
▼ Yearend (N) Reporting Period 2.1	7118	40	07/08 04:04 PM	00:25:21	In Progress	
▼ Northwestern District	7118	40	07/08 04:04 PM	00:25:21	8 of 18 Complete	
Assessment Administration Records	0	0	07/08 04:04 PM	00:25:20	In Progress	
Assessment Form Records	0	0	07/08 04:04 PM	00:25:20	In Progress	
Assessment Records	0	0	07/08 04:04 PM	00:25:20	In Progress	
Assessment Registration Records	0	0	07/08 04:04 PM	00:25:20	In Progress	
Assessment Subject Records	0	0	07/08 04:04 PM	00:25:19	In Progress	
Building Records	0	0	07/08 04:04 PM	00:25:19	In Progress	
Class Information Records	343	2	07/08 04:04 PM	00:17:39	Complete	
Course Information Records	275	2	07/08 04:04 PM	00:07:31	Complete	
Discipline Records	0	1	07/08 04:04 PM	00:07:32	Complete	
District Records	0	0	07/08 04:04 PM	00:25:19	In Progress	
School Records	1	1	07/08 04:04 PM	00:00:05	Complete	
Staff Demographic Records	0	0	07/08 04:04 PM	00:25:19	In Progress	
Student Attributes Records	1129	6	07/08 04:04 PM	00:16:53	Complete	
Student Course Records	3689	7	07/08 04:04 PM	00:25:20	In Progress	
Student Records	831	10	07/08 04:04 PM	00:06:48	Complete	
Student School Records	832	10	07/08 04:04 PM	00:11:32	Complete	
Student Test Scores	0	0	07/08 04:04 PM	00:25:19	In Progress	
Term Information Records	18	1	07/08 04:04 PM	00:06:56	Complete	

EMIS Formatted Files				
Collection / Data Source	Records	Start	Elapsed	Status
▼ Yearend (N) Reporting Period	381	07/08 04:06 PM	00:00:59	Complete

## Errors and Warnings

Another tool for diagnosing and responding to errors and warnings is found on the **Collection Requests Summary** page, through a link to issues or potential problems that the Data Collector has encountered during a collection, prepare, or submission.

**Note:** Errors and warnings differ from the Level 1 Validation Exception Report produced when the report contains validation errors. The Errors & Warnings screen displays errors that took place while processing the report, not those found during data validation.

Normally errors and warnings indicate something beyond your control – such as a system problem, network problem, or an error in the collection request – something which you need to contact your ITC to address. However sometimes data problems may show up as errors or warnings, rather than in the validation exception reports (where they are usually displayed). For example, if you have more than one EMIS file with the same record type for the same collection request, year and reporting period, the Data Collector will choose the most recent file from which to collect these records, and give you a warning for the duplicate file(s) with the same record type.



### October (K) FY11 SIF and Flat File DASL Agent Testing

Note: This Collection Request supports SIF for USPS users, as well as those files uploaded through the Data Collector Data Sources tab. Student, staff, program, and course data are the primary data elements collected during this reporting period. One of the main purposes of the October (K) 2011 reporting period is to capture school district enrollment during the first full week of October.

**Submissions:** October 15, 2010 – December 31, 2011  
**Expiration Date:** December 31, 2011 (in 274 days)  
**Collection Request:** 4  
**Status:** Data Collection has been prepared yesterday at 03:30:56 PM and is available for preview or certification.  
**Validation Status:** [Level 1 Validation](#)  
**Errors & Messages:** [Other Errors](#)  
**Submission Number:** 3 (attempt 1)  
**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Preview](#)  
[Certify & Submit](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)

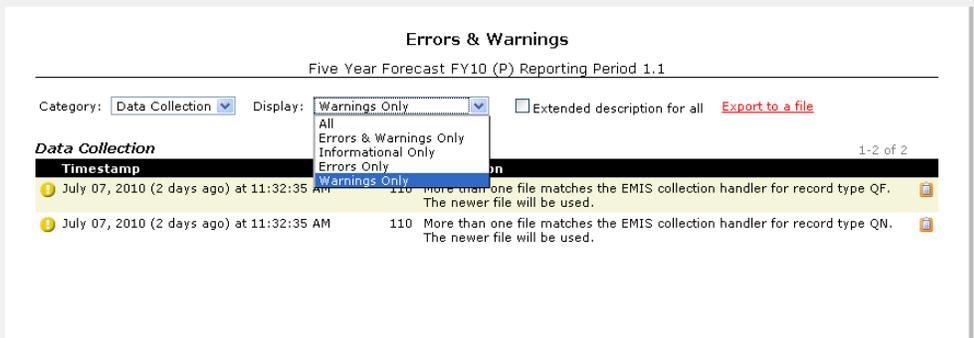
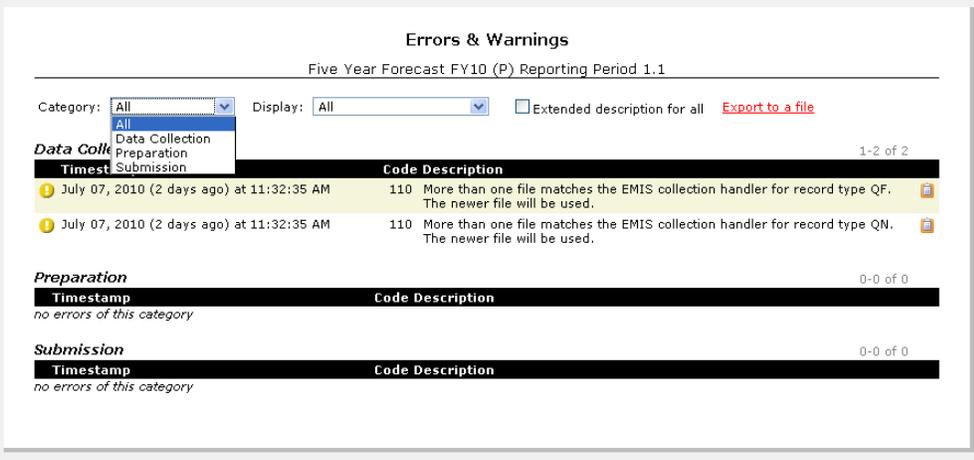
To access the Errors & Warnings screen, click on the **Errors & Messages** link.

The **Errors & Warnings** screen is displayed.

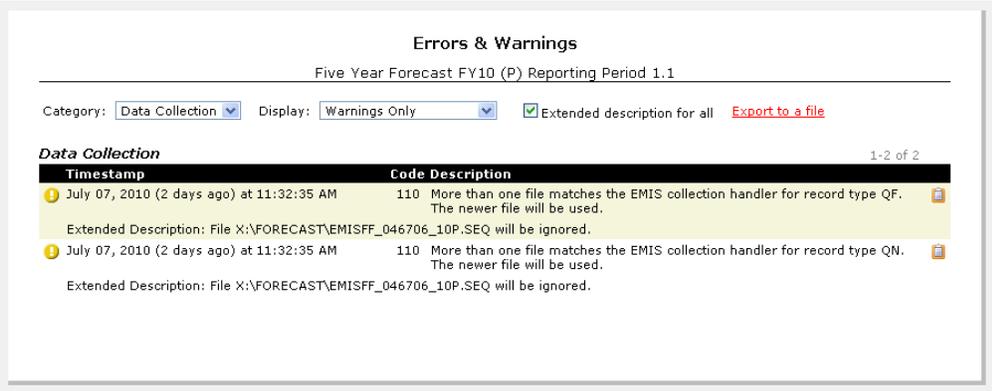
The screenshot shows the 'Errors & Warnings' screen for the 'Five Year Forecast FY10 (P) Reporting Period 1.0'. The interface includes a navigation bar with 'Collection Requests', 'Collection Status', and 'Submissions' tabs. Below the navigation bar, there are filters for 'Category' (Data Collection), 'Display' (All), and a checkbox for 'Extended description for all' (checked). A table lists two data collection errors:

Timestamp	Code	Description
yesterday at 11:32:35 AM	110	More than one file matches the EMIS collection handler for record type QF. The newer file will be used. Extended Description: File X:\FORECAST\EMISFF_046706_10P.SEQ will be ignored.
yesterday at 11:32:35 AM	110	More than one file matches the EMIS collection handler for record type QN. The newer file will be used. Extended Description: File X:\FORECAST\EMISFF_046706_10P.SEQ will be ignored.

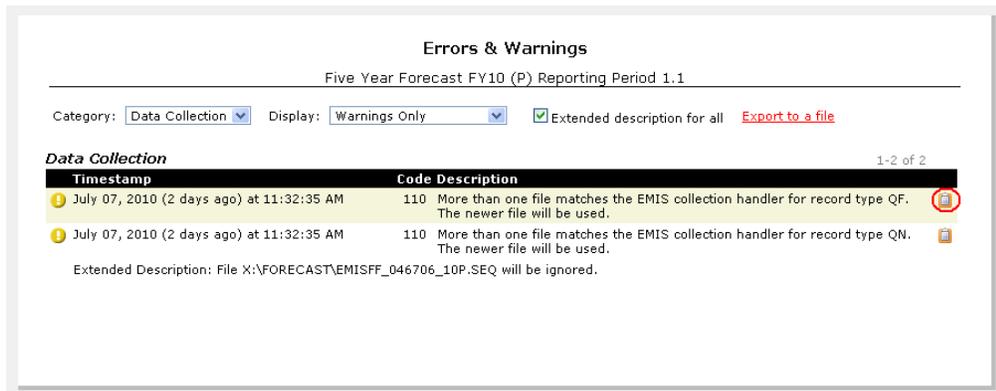
The **Errors & Warnings** screen provides options for filtering by **Category** and **Display**.



Selecting **Extended description for all** (checked in the following screen capture) results in the display of detailed information about the error(s).



Click on the clipboard icon  to extend or collapse the description of a single error.



**Errors & Warnings**  
Five Year Forecast FY10 (P) Reporting Period 1.1

Category:  Display:   Extended description for all [Export to a file](#)

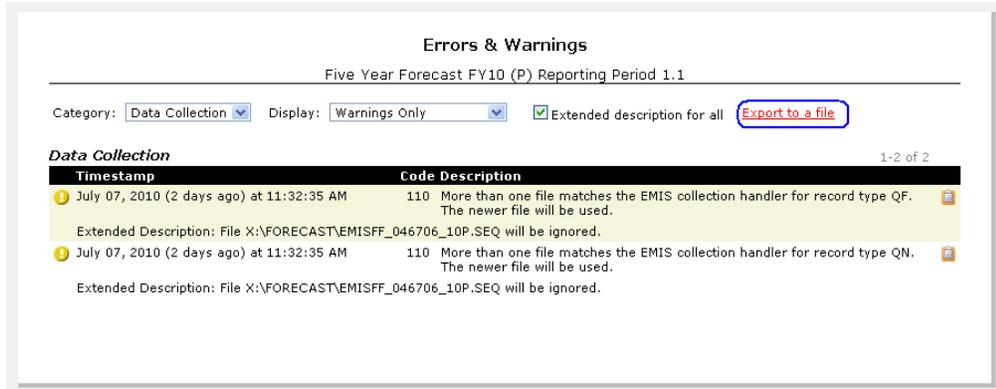
**Data Collection** 1-2 of 2

Timestamp	Code	Description
 July 07, 2010 (2 days ago) at 11:32:35 AM	110	More than one file matches the EMIS collection handler for record type QF. The newer file will be used. 
 July 07, 2010 (2 days ago) at 11:32:35 AM	110	More than one file matches the EMIS collection handler for record type QN. The newer file will be used. 

Extended Description: File X:\FORECAST\EMISFF\_046706\_10P.SEQ will be ignored.

**Note:** Always display the Extended Description of the error(s) or warning(s) when taking screen captures to report to the ITC. The extended description contains crucial technical information, without which the screen captures has a lot less use.

Export the information to a file, by selecting the **Export to file** link.



**Errors & Warnings**  
Five Year Forecast FY10 (P) Reporting Period 1.1

Category:  Display:   Extended description for all [Export to a file](#)

**Data Collection** 1-2 of 2

Timestamp	Code	Description
 July 07, 2010 (2 days ago) at 11:32:35 AM	110	More than one file matches the EMIS collection handler for record type QF. The newer file will be used. 
 July 07, 2010 (2 days ago) at 11:32:35 AM	110	More than one file matches the EMIS collection handler for record type QN. The newer file will be used. 

Extended Description: File X:\FORECAST\EMISFF\_046706\_10P.SEQ will be ignored.

Note that the errors and warnings differ from the Validation Report produced when the request contains validation errors. The Errors & Warnings screen displays errors that took place while processing the request, not those found during data validation.

Read the extended description of an error for more technical information regarding what took place (it may not make much sense to you; it may be more useful to the ITC or support).

Error diagnoses and troubleshooting questions beyond the basic information provided in this guide should be directed to your ITC.

---

# Index

## A

Add New Scheduled Collection, 34  
**Agencies** tab, 14  
Archived Submissions, 88

## C

Cancel, 30, 56  
Certifying and Submitting a Collection Request, 75, 82  
**Check-boxes**, 20  
Checking SIF Zone Status, 47  
**Collection Requests** tab, 13, 59, 72, 75  
**Collection Status** tab, 13, 29, 31, 32, 97  
Collections by Collection Request, 32  
Collections by Collection Status Screen, 97  
Common Errors, 95  
Conventions, 18  
Critical Error, 65

## D

Data Collector, 9, 11, 12, 13, 14, 15, 18, 20, 21, 22, 23,  
24, 29, 48, 95, 98  
Data Collector Screens, 15  
Data Collector Tabs, 13  
**Data fields**, 18  
Data Flow, 22  
**Data Sources** tab, 14, 47, 49, 55, 95  
Database Connection Error", 96  
Definitions of Terms, 9  
delete archived submissions, 91  
Deleting a Scheduled Collection, 45  
Deleting Flat Files (Non-SIF Data Sources), 55  
**Drop-down lists**, 19

## E

Editing or Updating a Scheduled Collection, 43  
Errors, 98, 99, 100  
Errors and Warnings, 98  
**Expand/Collapse lists**, 20

## F

Fatal Error, 65

## I

Informational Error Level, 65  
Introduction, 9  
Invalid Records, 70

## L

Level 1 Validation and Exceptions Report, 64  
Level 2 Validation, 85  
**Links**, 18  
Logging In, 24  
Login / Logout, 13

## M

Managing Scheduled Collections, 41  
Managing SIF Zones, 47  
Monitoring Data Collection, 31  
Monitoring Data Collection through the Collection Status  
Tab, 97

## P

Preparing and Validating Requests, 59, 64  
Previewing Reports, 66

## R

**Radio buttons**, 18  
Receiving Responses from the Report Collector  
Regarding Submission Status, 83  
**Refresh link**, 18, 95  
Report Collector, 9, 11, 23, 83, 95

## S

**Settings** tab, 14  
Sidebar or Sub-Menus, 21  
SIFWorks Vertical Reporting Framework™ (VRF), 9  
Starting a Data Collection, 27  
**Status Icons**, 20  
Stopping vs. Cancelling a Data Collection, 29, 30  
Submission Status, 77  
Submissions Page Columns, 79, 80  
Submissions Page Refresh Link, 79  
**Submissions** tab, 13, 76  
Submissions Tab > Archived Submissions, 88

## T

Tabs on the Left (Collection and Submission), 13  
Tabs on the Right (Primarily Administrative), 14  
Troubleshooting and Monitoring, 95

## U

Uploading a Non-SIF Data Source, 51

---

User Interface, 12

## V

**Validation Exceptions**, 64

Vertical Reporting Framework Structure, 10

view and save archived submissions, 88

Viewing and Managing Archived Submissions, 87, 88

Viewing the List of Scheduled Collections, 41

VRF Applications, 11

Warning, 65

## W

## Z

Zone Status, 28, 48



# DASL PROGRESSBOOK CONVERSION

## Table of Contents

---

DASL ProgressBook Conversion Overview .....	3
1. One-Time Procedures for Preparing ProgressBook to Receive DASL Data.....	4
A. Install ProgressBook.....	4
B. Update WebServices.....	4
C. Set Up the Nightly Integration Job.....	6
2. Create 'Play' ProgressBook Database.....	10
3. Set Up DASL District for ProgressBook.....	18
4. Activate 'Production' ProgressBook Database.....	38
5. ProgressBook Integration Differences .....	43
6. Known Issues .....	45
A. Conversion Failure Recovery .....	46

# DASL ProgressBook Conversion Overview

---

The Progressbook Conversion document covers the following instructions:

- Web services integration steps.
- DASL to Progressbook data integration setup
- Progressbook Play database creation and cutover steps.

## **IMPORTANT:**

These steps cannot take place until after Progressbook version 5.20 has been installed.

If you have any questions regarding any part of this document please contact [dasl\\_help@noacsc.org](mailto:dasl_help@noacsc.org).

# 1. One-Time Procedures for Preparing ProgressBook to Receive DASL Data

## 1A. Install ProgressBook

---

Review and use the installation notes and instructions included with ProgressBook version 5.20.

## 1B. Update WebServices

---

DASL uses WebServices to integrate with ProgressBook. Information about the WebService must be set up in ProgressBook in order for attendance and grading to work. Once the WebServices have been set up (using software and procedures received from the DASL team), the following action is required to inform ProgressBook of the location and required security (credentials) needed to access the WebServices. More information on setting up the DASL GradeBook WebServices interface can be found at the following website:

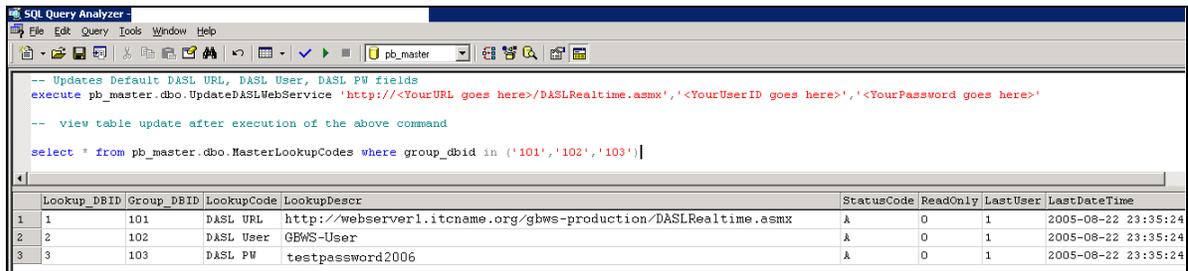
<http://dsldemo.mcoecn.org/dasladmin/>

### **Set Up Default**

ProgressBook needs to know the URL, user id, and password of the default WebService. If you do not know these settings, you should contact your DASL support person.

Go to SQL Query Analyzer, and run the following command using your settings:

```
Execute pb_master.dbo.UpdateDASLWebService '<YourURL>', '<YourUserID>',  
'<YourPassword>'
```



**Set Up Individual District (optional)**

If you would like an individual district to use a different WebService from the default (as would be the case with a “DASL Play” database), go into SQL Query Analyzer and run the following command:

```
Execute pb_master.dbo.UpdateDistrictWebService '<YourURL>',
'<YourUserID>', '<YourPassword>', '<YourDistrictID>'
```

**Remove Individual District Setting (optional)**

If you have previously set up a district to use a different WebService and you would now like it to use the default WebService, you can remove the special settings by running the following command in SQL Query Analyzer:

```
Execute pb_master.dbo.RemoveDistrictWebService '<YourDistrictID>'
```

## 1C. Set Up the Nightly Integration Job

---

This task uses software from the DASL ProgressBook team. A setup program is available to help install the nightly integration job. This only needs to be set up once, and will not need to be repeated when adding additional districts to DASL.

### **Copy Import Software**

Copy the file [PbBackOfficeImport.msi](#) to your SQL server. You can download this file from:

[https://www.progressbook.com/Downloads/Major Releases/ProgressBook/5.2.0 \(1109\) Product Release/Dasl Sites/](https://www.progressbook.com/Downloads/Major Releases/ProgressBook/5.2.0 (1109) Product Release/Dasl Sites/)

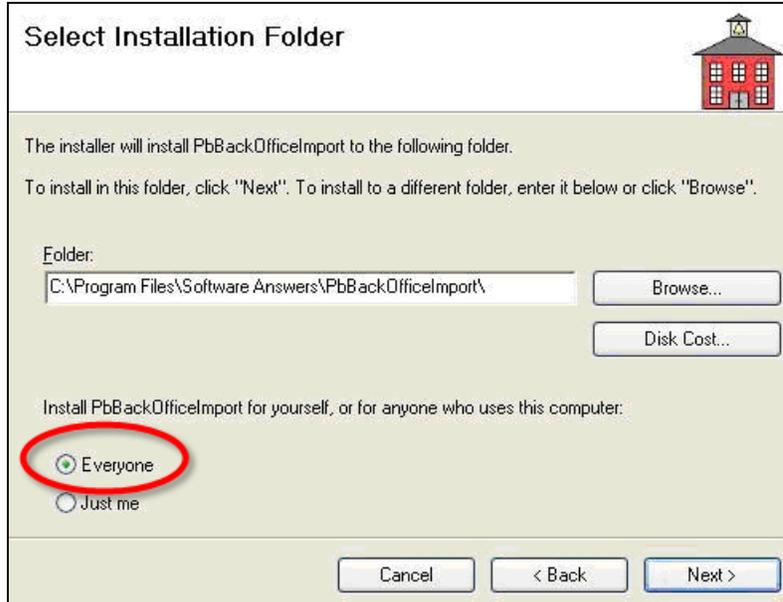
### **Run Import Software**

Double-click on the file [PbBackOfficeImport.msi](#), and answer the prompts.

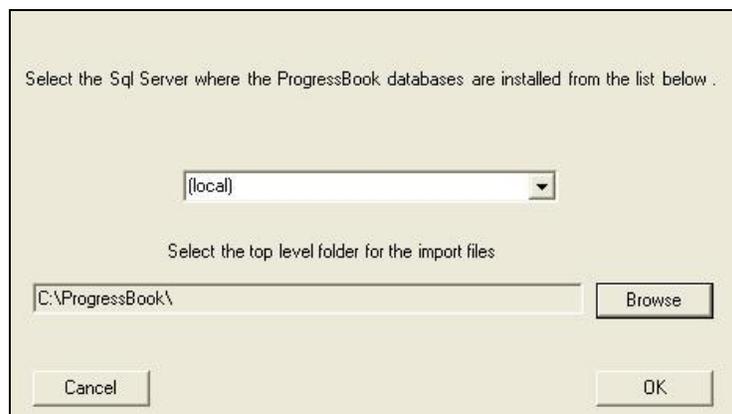
If you receive the following message, be sure to uninstall the existing [PbBackOfficeImport](#) software using Add/Remove Programs in Control Panel. Then simply re-install by double clicking on the new [PbBackOfficeImport.msi](#) file and continue by answering the prompts.



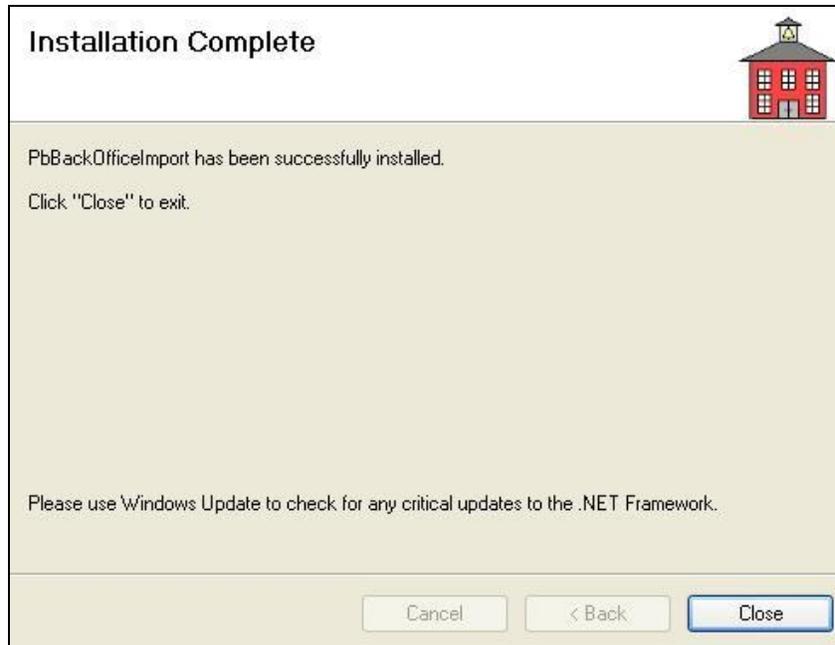
When you get to the “Select Installation Folder” page, be sure to choose the “Everyone” option. It is recommended that you keep the default installation folder.



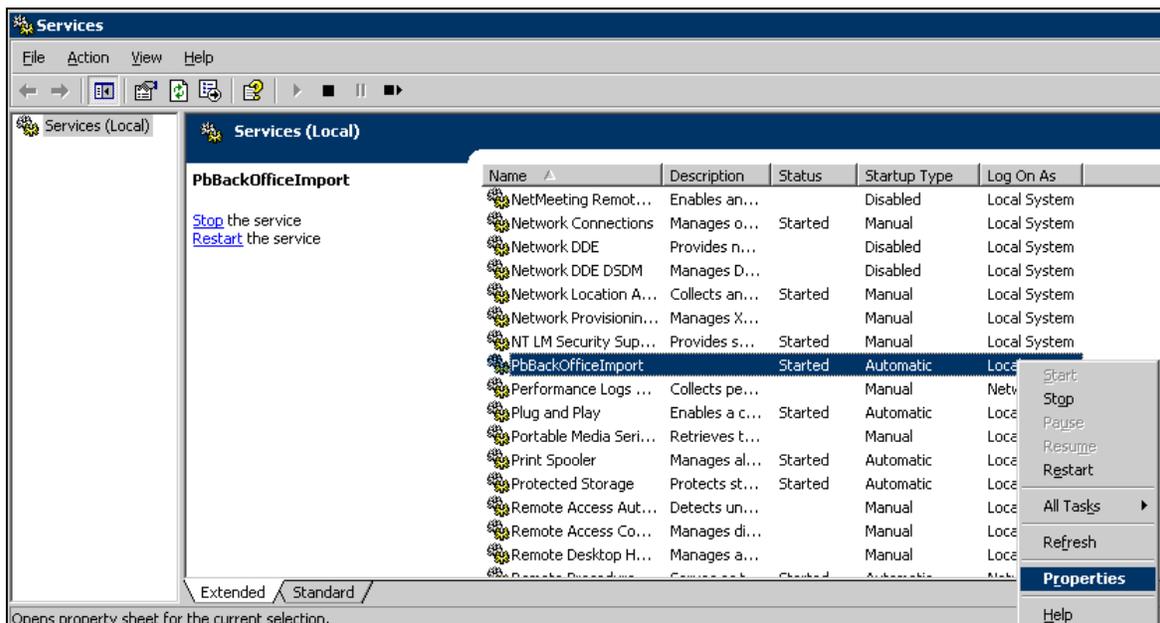
Select your SQL server. In most cases, when installing this package on the SQL server, selecting the (local) SQL server is sufficient (the exception is when installing in a clustered environment). Also choose the top-level folder that DASL uses to store the nightly extract files. (If you are not sure of the location of this folder, contact your DASL support person.)



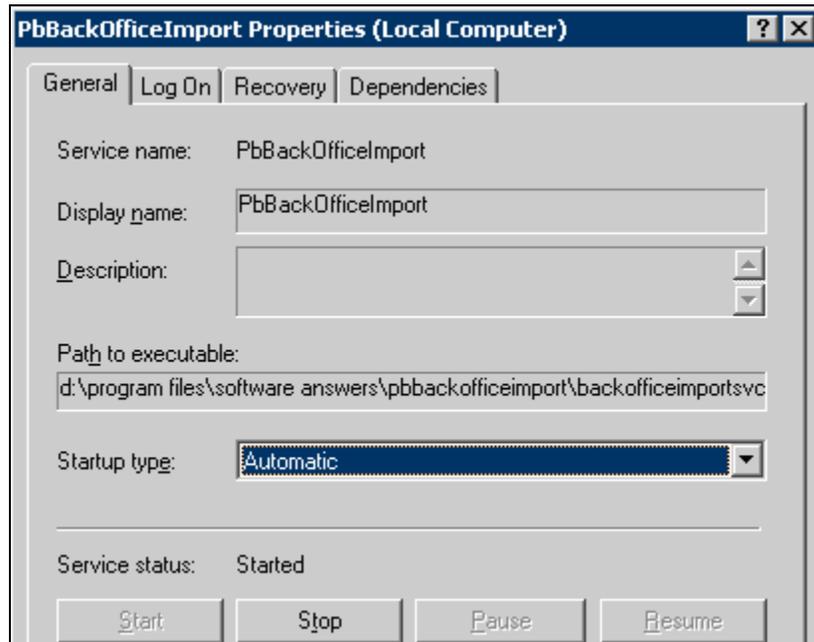
If your installation was successful, you should see the following screen:



Start the `PbBackOfficeImport` service. On the SQLServer, go to Start >> Administrative Tools >> Services. Right-click on the `PbBackOfficeImport` service, and select **Properties** from the menu.



In the **Properties** dialog box, change the Startup Type to **Automatic** by selecting that option from the dropdown list and clicking the **OK** button. Click the **Start** button if the service is stopped.



**Important Note:** Additional documentation on the batch import can be found by viewing the file [pbackofficeimport.chm](#), which is located in the installation folder.

If any errors occur during the execution of the extract and import, first refer to the “Troubleshoot the DASL GBWS Virtual Directory” topic in found in the Installing DASL >> Web Server folder of the administration documentation, at:

<http://dsldemo.mcoecn.org/dasladmin/>

## 2. Create 'Play' ProgressBook Database

---

Software Answers strongly recommends setting up a test environment for any district that will be converted from SIS to DASL with these Conversion procedures. This is called setting up a ProgressBook 'Play' database. (See additional information about setting up a 'play' database at the end of this document).

Conversion of a ProgressBook database from SIS to DASL can be a complicated undertaking. In recognition of this fact, Software Answers strongly advises its customers to set up a test ('Play') database for each district to be converted. If this test database is a copy of the current production ProgressBook database, it can be converted to work with DASL, and the results of the conversion can be verified against the production version.

It is highly recommended that a ProgressBook PLAY and DASL PLAY database is set up and utilized for testing for every district before going live on DASL/PB. This is recommended due to: 1) the many differences in district's Marking Pattern configurations; 2) The number and scheduling of DASL/PB go-lives; and 3) the fact that if the DASL/PB conversion fails, then the district cannot go-live on DASL.

Testing in a ProgressBook PLAY and DASL PLAY environment is imperative to a clean and successful go-live.

## □ **Execute MakePbPlay Script**

Software Answers has provided a script that will automate the steps to set up a play ProgressBook database for use in testing the DASL ProgressBook Conversion process. You can download this script from the ProgressBook site:

<http://www.progressbook.com/>

**Navigate to: Downloads / Major Releases / ProgressBook / 5.2.0 (1109) Product Release / Dasl Sites**

This script performs the following steps:

- Makes a backup copy of the production database using a different name for the database. For example, a Production database named `pb_SA` would be backed up and restored onto the system with the name of `pb_SA_DASL`.
- Makes an entry into the DistrictLogin table in the Pb\_Master database for the play database set up in step 1. Following the example from the previous step, an entry for a district named `SA_DASL` will be inserted into the DistrictLogin table.
- Updates the new entry in the DistrictLogin table with the DistrictIn and Web Service URL information supplied to the script from command line parameters.
- Turns the IntegrationEnabled column in the DistrictLogin table on for the play district. This tells the system that this database should be loaded from DASL.

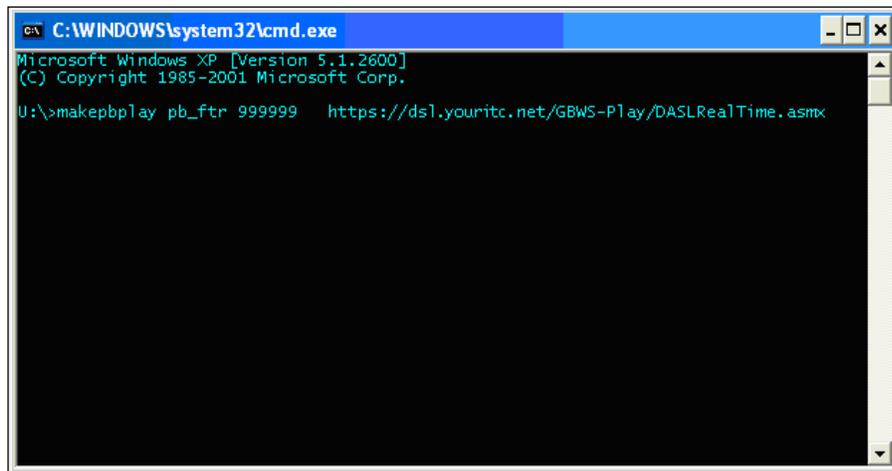
Here is an example of how to run this script:

Start a DOS Command prompt.

Navigate to the folder where the **MakePbPlay.vbs** script file was downloaded. Execute **MakePbPlay**, supplying three command line parameters:

- the **name** of the **production** database to be copied
- the **DistrictIrn** number for the district.
- the **Web Service Url** for the Grade Book Web Services associated with the DASL 'Play' area.

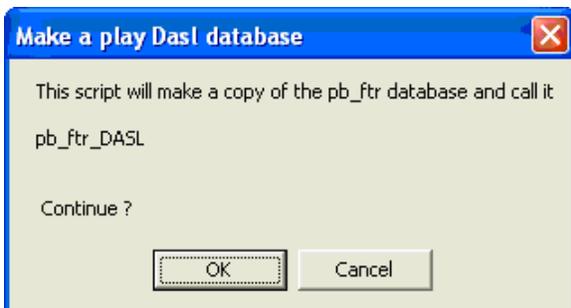
The script prompt at each continue.



will the user step to

Step 1. Click Ok.

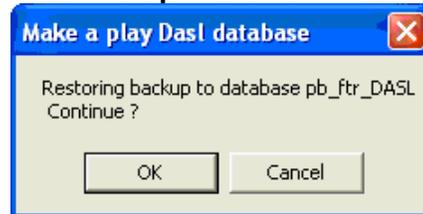
Step 2. Click OK.



**Step 3.** Click OK.



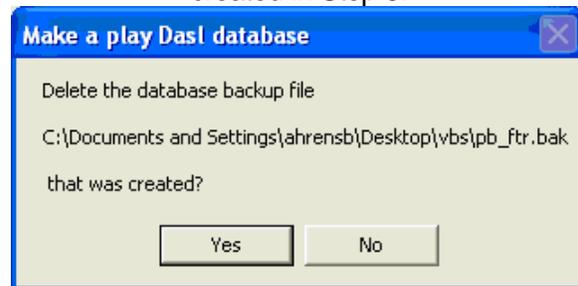
**Step 4.** Click OK.



**Step 5.** Click OK.



**Step 6.** Choose to save or delete the backup file created in Step 3.



**Step 7.** Successful completion. Click OK.



## □ Load the 'Play' Database from DASL

The ProgressBook 'Play' database is now ready for the initial data load from DASL. ***During this initial load, the actual Conversion takes place.*** The initial load is triggered when the DASL XML load files are created by the DASL batch job.

**\*\*\* Very Important: Make sure the initial load is processed as a full extract from DASL instead of a partial extract, and make sure the load completes**

**successfully before continuing on with the instructions for configuring the ProgressBook 'Play' database. \*\*\***

The progress of the load can be tracked by examining the log files for the **ProgressBook Nightly Integration Job**. These log files are located in the **Logs** folder underneath the folder where the software was installed.

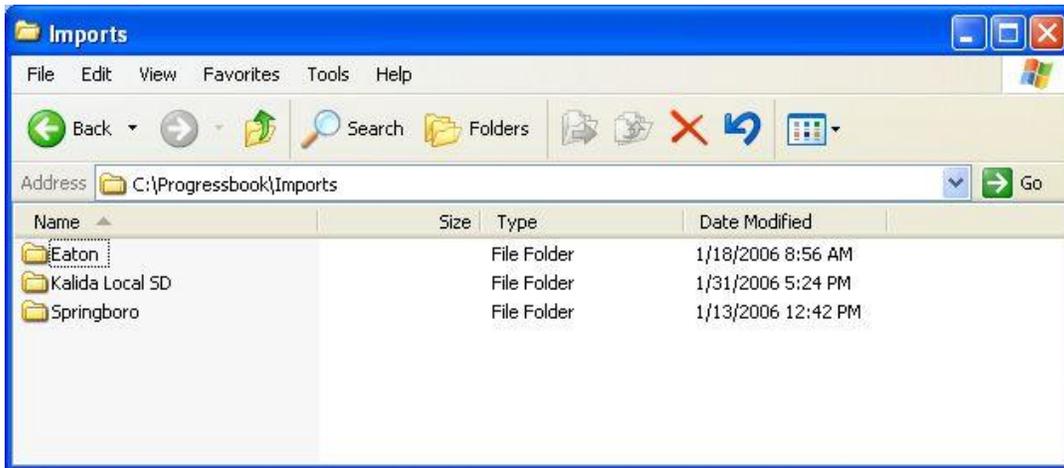
The default location for installation of the software is:

```
C:\Program Files\Software Answers\PbBackOfficeImport\
```

**Important Note:** Make sure that when you set up the batch job to load this database, the XML files are created in a folder below the **top level folder** specified during the installation of the **ProgressBook Nightly Integration Job** (see step 1C in this document for details).

Create a folder for the 'Play' database beneath this top level folder. If you previously configured ProgressBook databases to be integrated with DASL, you will see folders for those databases already there. All the XML files for one district should go in the same folder. The name of the folder is not significant. A sample configuration is shown below. In this case, the top level folder that was specified during the installation of the **ProgressBook Nightly Integration Job** was:

```
C:\ProgressBook\Imports\
```



□ **Change DistrictSchoolID in the School Table**

The School table holds the SIS ‘bunny’ code in a column called DistrictSchoolID. This column was used to link the files from a school in the SIS system to a school in ProgressBook. **\*\*\* Very Important: We need to break that link in the ‘Play’ database. Change these ‘bunny code’ values in the School table.\*\*\*** These can be anything, as long as they are not already-valid bunny codes.

SQL Query Analyzer - [Open Table - SAPBSRVO.pb\_eli.dbo.School]

School_DBID	DistrictSchoolID	SchoolName	SchoolShortName	Address	City	State	ZIP	PhoneNumber	Pri
1	ELEE	Elida Elementary School	ELEE	300 Pioneer Road	Elida	OH	45807	4193317901	Fai
2	ELGO	Gomer Elementary School	ELGO	U S Rt 30 N	Gomer	OH	45809	4196423181	Mar
3	ELHS	Elida Senior High School	ELHS	101 E. North St.	Elida	OH	45807	4193314115	Don
4	ELIN	Elida Intermediate School	ELIN						
5	ELMS	Elida Middle School	ELMS	4500 Sunnydale	Elida	OH	45807	4193312505	Her

SAPBSRVO (8.0) pbadmin (52) pb\_eli 5 rows Ln 1, Col 1  
Connections: 18 NUM

Example: Old ‘Bunny’ codes in DistrictSchoolID table.

SQL Query Analyzer - [Open Table - SAPBSRVO.pb\_eli.dbo.School]

School_DBID	DistrictSchoolID	SchoolName	SchoolShortName	Address	City	State	ZIP	PhoneNumber	Pri
1	TST1	Elida Elementary School	ELEE	300 Pioneer Road	Elida	OH	45807	4193317901	Fai
2	TST2	Gomer Elementary School	ELGO	U S Rt 30 N	Gomer	OH	45809	4196423181	Mar
3	TST3	Elida Senior High School	ELHS	101 E. North St.	Elida	OH	45807	4193314115	Don
4	TST4	Elida Intermediate School	ELIN						
5	TST5	Elida Middle School	ELMS	4500 Sunnydale	Elida	OH	45807	4193312505	Her

SAPBSRVO (8.0) pbadmin (52) pb\_eli 5 rows Ln 5, Col 3  
Connections: 18 CAPS NUM

Example: New ‘Bunny’ codes.

Make a new entry in the ImportLocation table in the pb\_dataintegration database that has the same ‘bunny code’.

SQL Query Analyzer - [Open Table - SAPBSRVO.pb\_dataintegration.dbo.ImportLocation]

ObjectID	ConnString	DistrictId	UpdateDate	Enabled	SchoolDistrict	LoginStyle	LoginAppend	LastRun
24		ELEE		0	045773			
25		ELIN		0	045773			
26		ELMS		0	045773			
27		ELHS		0	045773			
28		ELGO		0	045773			

SAPBSRVO (8.0) pbadmin (73) pb\_dataintegration 55 rows Ln 56, Col 5  
Connections: 19 NUM

Example: ImportLocation rows for production schools in pb\_dataintegration database.

SQL Query Analyzer - [Open Table - SAPBSRV0.pb\_dataintegration.dbo.ImportLocation]

	ConnString	DistrictId	UpdateDate	Enabled	SchoolDistrict	LoginStyle	LoginAppend	LastRunStart
56	\test\	tst1	2006-02-08 13:42:46.740	0	test			
57	\test\	tst2	2006-02-08 13:43:02.537	0	test			
58	\test\	tst3	2006-02-08 13:43:13.507	0	test			
59	\test\	tst4	2006-02-08 13:43:23.740	0	test			
60	\test\	tst5	2006-02-08 13:43:32.990	0	test			

SAPBSRV0 (8.0) pbadmin (58) pb\_dataintegration 60 rows Ln 60, Col 5  
Server Name: SAPBSRV0 (8.0) Connections: 19 NUM

Example: New rows in `ImportLocation` for 'Play' database. Note: these can be reused for all 'play' databases.

### 3. Set Up DASL District for ProgressBook

---

**IMPORTANT:**

- 1) For a District to use ProgressBook, they must first have data entered into DASL.
- 2) You must have selected a Final Schedule Result in DASL before you import data to ProgressBook.

**Verify/Define Mark Types**

Define Mark Types if needed, and make sure all needed Mark Types are displayed. You **must** define a Mark Type if you wish to give that type of Mark during the year. Mark Type Weight is not imported to ProgressBook.

**Navigation: Home – Management – School Administration – Marks Administration Menu – Mark Types**

	Code	Name ^	Description	Default Weight	Active
	Avg	Average mark	Avg	1	
	Exam	Exam	Exam	0	
	Int	Interim		1	
	Qtr	Quarter Mark	Quarter Mark	1	

Show Active Only

□ **Verify/Define Reporting Terms**

Define Reporting Terms as needed, and make sure all needed Reporting Terms are displayed. Marks Cutoff Date is not imported to ProgressBook.

**Navigation: Home – Management – School Administration – Scheduling Administration – Initialization – Reporting Terms Maintenance**

Home » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance Advanced Search | Feedback | Mgmt | Help | Vers

### Reporting Terms Maintenance

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

		Code	Exp Code	Name	Start Date	End Date	Planned Days	Actual Days	Sort Order	Marks Start Date	Marks Cutoff Date	Active
		↓	Qtr1	Quarter 1	Aug 27, 2007	Nov 02, 2007	49.00	49.00	1			
		↑ ↓	Qtr2	Quarter 2	Nov 05, 2007	Jan 18, 2008	44.00	44.00	2			
		↑ ↓	Qtr3	Quarter 3	Jan 22, 2008	Mar 28, 2008	46.00	46.00	3			
		↑	Qtr4	Quarter 4	Mar 31, 2008	May 28, 2008	42.00	42.00	4			

Show Active Only

□ **Verify/Define Marking Patterns and Rules**

Define Marking Patterns and Rules if needed for course term(s), and make sure all needed Marking Patterns are present and correct. Marking patterns define specific mark types that must be created for specific course terms for each reporting period, and must be defined to include all Marks you are collecting in a school year. *This also determines how student marks will be grouped for averaging, and if they are included in GPA. Each course is associated with a marking pattern rule and course marks will be gathered according to the rules defined for the course term. The gold star icon notes which Course Term is set as default for each Marking Pattern.*

**Navigation: Home – Management – School Administration – Marks Administration Menu – Marking Patterns**

Home » Management » School Administration » Marks Administration Menu » Marking Patterns

### Marking Patterns

From this screen, you can display, add, change and delete data pertaining to marking patterns.

-- All Course Terms -- ▾

			<u>Code</u>	<u>Name ^</u>	<u>Description</u>	<u>Course Terms</u>	<u>Active</u>
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem1	1st Semester	1st Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	Sem2	2nd Semester	2nd Semester	
		<a href="#">Marking Pattern Rules</a>	<a href="#">Marking Pattern Courses</a>	pso	post secondary	All Year	

Show Active Only

Significance, Sequence and Credit Percentages are not imported to ProgressBook.

**Navigation: Home – Management – School Administration – Marks Administration Menu – Marking Patterns – Marking Pattern Rules link**

Home » Management » School Administration » Marks Administration Menu » Marking Pattern Rules Maintenance

### Marking Pattern Rules - 1st Semester

From this screen, you can display, add, change and delete data pertaining to marking pattern rules.

Add Pattern Rule Cancel

	Name	Mark Type	Sequence Number	Reporting Term ^	Significance	Credit Percentage	Marks Start Date	Marks Cutoff Date
X	1st Qtr	Quarter Mark	2	Quarter 1	Progress 1	50		
X	1st Interim	Interim	1	1st Interim	Not Used	0		
X	2nd Qtr	Quarter Mark	4	Quarter 2	Progress 1	50		
X	2nd Interim	Interim	3	2nd Interim	Not Used	0		
X	Exam	Exam	5	Exam1	Not Used	0		
X	Sem 1 Avg	Average	6	Sem1 AVG	Progress 2	100		
X	Final	Final	7	Final	Earned	100		

If you use a Marking Pattern that does not have clean percentages (Trimesters), you can set the Marking Pattern to use “Ratio”, and set the Ratio Denominator. You can use Ratio even if your Marking Pattern has clean percentages. The example below uses Trimesters, and a Ratio Denominator of 3.

Home » Management » School Administration » Marks Administration Menu » Marking Patterns

### Marking Patterns

From this screen, you can display, add, change and delete data pertaining to marking patterns.

Code: Tn1

Name: 1st Trimester

Description:

Is Active:

Pattern Type: Percentage

Include	Course Term Name	Set As Default
<input type="checkbox"/>	1st Semester	<input type="checkbox"/>
<input type="checkbox"/>	2nd Semester	<input type="checkbox"/>
<input type="checkbox"/>	All Year	<input type="checkbox"/>

Save Save and New Return to

Home » Management » School Administration » Marks Administration Menu » Marking Patterns

### Marking Patterns

From this screen, you can display, add, change and delete data pertaining to marking patterns.

The marking pattern was successfully saved

Add Marking Pattern -- All Course Terms --

	Code	Name ^	Description	Course Terms	Active
X	Sem1	1st Semester		1st Semester	
X	Tn1	1st Trimester		All Year	
X	Sem2	2nd Semester		2nd Semester	
X	pso	post secondary		All Year	

Show Active Only

□ **Verify/Define Marks**

Define Marks as needed. Marks are also commonly referred to as grades and may be defined by alpha or numeric values. The Average Point Threshold is the midpoint between point values. There should be no gaps between Min Numeric Mark of one Mark and Max Numeric Mark of the next Mark down. You may have to clean up past years' Marks Maintenance screens. "Credit Earned" is used to represent which Marks result in Credit for a course; un-check for Fail, Incomplete, Withdraw and similar Marks. "Is Alt Mark" is used to flag Alpha Marks that can be used by buildings with Numeric Marks set. "Include in GPA" determines which Marks will be included when performing GPA Calculations. "Credit Multiplier" increases the Credit Ratio or Credit Percentage for a specific Mark.

**Navigation: Home – Management – School Administration – Marks Administration Menu – Marks**

Home » Management » School Administration » Marks Administration Menu » Marks													Advanced Search   Feedback   Mgmt   Help   Print
Marks Maintenance													
From this screen, you can display, add, change and delete data pertaining to marks for the current school year.													
Add Mark													
Mark ^	Mark Name	Description	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dg Mark	Active	
X	A	A	4.000000	3.835000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	A-	A-	3.670000	3.500000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	A+	A+	4.000000	4.000000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	B	B	3.000000	2.835000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	B-	B-	2.670000	2.500000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	B+	B+	3.330000	3.165000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	BLK	BLK	BLANK MARK	0			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	C	C	2.000000	1.835000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	C-	C-	1.670000	1.500000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	C+	C+	2.330000	2.165000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	D	D	1.000000	1.000000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	D-	D-	1.000000	0.990000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	D+	D+	1.330000	1.165000			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	F	F	0				1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	F+	F+	0				1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
X	I	I	INCOMPLETE	0			1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	NC	NC	AUDITED CLASS	0			1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	S	S	SATISFACTORY	0			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	S-	S-	SATISFACTORY	0			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	S+	S+	SATISFACTORY	0			1.000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	U	U	UNSATISFACTORY	0			1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	U-	U-	UNSATISFACTORY	0			1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	U+	U+	UNSATISFACTORY	0			1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
X	W	W	WITHDRAWAL	0			1.000000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Marks Maintenance

From this screen, you can display, add, change and delete data pertaining to marks for the current school year.

Mark:	<input type="text" value="B"/>	
Name:	<input type="text" value="B"/>	
Description:	<input type="text" value="ABOVE AVERAGE"/>	
Point Value:	<input type="text" value="3.00000"/>	
Average Point Threshold:	<input type="text" value="2.50000"/>	
Min Numeric Mark:	<input type="text" value="83.00"/>	
Max Numeric Mark:	<input type="text" value="92.00"/>	
Credit Multiplier:	<input type="text" value="1.00000"/>	
Is Alternate Mark:	<input type="checkbox"/>	
Is Credit Earned:	<input checked="" type="checkbox"/>	
Is Included in GPA:	<input checked="" type="checkbox"/>	
Is Disqualified Mark:	<input type="checkbox"/>	
Is Active:	<input checked="" type="checkbox"/>	

□ **Verify Course Sections – Teacher of Record**

Make sure the Teacher of Record box is checked for at least one teacher for each course section. If this box is not checked, the teacher will not be able to see the class in ProgressBook. (Basic Meeting Times only have one teacher, and that teacher is automatically marked as the Teacher of Record. To confirm that a teacher is marked, switch to Intermediate, and edit the sole Meeting Time record. Once you're sure the teacher is marked, hit "Cancel Changes".)

**Home – Management – School Administration – Scheduling Administration – Initialization – Master Schedule – Course Sections link – Meeting Times tab**

**Course Sections - 664 - 10 SCIENCE (1)**  
From this screen you can display or change information regarding course sections

General Meeting Times Memberships Attendance Next: 664 #2 >

Basic  Intermediate  Advanced

**Teacher:** MICHAEL WEBBER

**Location:** 274 - 274

**Periods (All Days):**  1  2  3  3A  4  5  6  7  8  9

**Basic:** course section must have a single teacher and a single location and have the same periods for the entire schedule

**Intermediate:** course section must have the same teachers, locations, and periods for the entire schedule

**Advanced:** course section may have different teacher/location/periods across the schedule

**Home – Management – School Administration – Scheduling Administration – Initialization – Master Schedule – Course Sections link – Meeting Times tab – Add Meeting Times button or Edit icon (After clicking “Advanced”)**

**Course Sections - 640 - ART (1)**  
From this screen you can display or change information regarding course sections

General Meeting Times Memberships Attendance Next: 640 #2 >

Teacher	Location	Start	End	Periods
LAMBERT, WENDY	116 - ART	Aug 27, 2007	May 28, 2008	M: 4; T: 4; W: 4; R: 4; F: 4

**Teacher:** WENDY LAMBERT

**Location:** 116 - ART

**Schedule Term:** 1/19/2008

**Teacher of Record:**

Day	Periods								
M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
T	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
W	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Basic:** course section must have a single teacher and a single location and have the same periods for the entire schedule

**Intermediate:** course section must have the same teachers, locations, and periods for the entire schedule

**Advanced:** course section may have different teacher/location/periods across the schedule

In advanced mode, you must configure the meeting times for each schedule term within the course term. For each schedule term, you should select a teacher, a location and the periods the course section will meet on each rotation day.

Click 'Add Meeting Time' to get started, or you can edit an existing meeting time.

□ **Verify Staff Members**

Make sure all Staff members are associated with a Teacher Code (Staff Code in DASL).

**Navigation: Home – Management – Security – View Staff Members**

Home >> Management >> Security >> View Staff Members

### View Staff Members

Staff Member Name:  Assigned Username:  Show Active Only:

Add Staff Member To:

	Last Name	First Name	Staff Code	District	Domain	Username	Active
	BERRY	DONALD	BERR	DASL Local SD			

**Navigation: Home – Management – Security – View Staff Members – Edit (pencil) icon**

Home >> Management >> Security >> View Staff Members >> Add/Edit Staff Member

### Security - Staff Member: DONALD BERRY

Staff Members **Staff Member Schools**

Staff Code:  ⚡ State Staff ID:

Social Security Number:  ⚡ Name Prefix:

First Name:  ⚡ Middle Name:

Last Name:  ⚡ Last Name Suffix:

Address:  Address 2:

City:  State:

Zip:  Email Address:

Telephone:  Telephone Is Unlisted:

Start Date:  ⚡ Stop Date:  ⚡

Primary School Id:  Is Active:

Comments:

Bypass Address Standardization

□ **Verify Users**

Make sure all Staff members that will be using ProgressBook have a User account.

**Navigation: Home – Management – Security – View Users**

Home » Management » Security » View Users Advanced Search | Feedback | Mgmt | Help | Version | Print

### View Users

Last Name:  First Name:

Email Address:

---

Username:  Domain:

Administrative School:  Default School:

Active:

	Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School	Active
	DASL-Demo	noacsc.chris	Chris	Keller	chris@noacsc.org	All Buildings	DASL HIGH SCHOOL	

□ **Set Up Staff Association**

Make sure all Staff members are associated with a Teacher Code (Staff Code in DASL).

**Navigation: Home – Management – Security – View/Edit Staff Member Associations**

Home » Management » Security » View/Edit Staff Member Associations      [Advanced Search](#) | [Feedback](#) | [Mgmt](#) | [Help](#) | [Version](#) | [Print](#)

### View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

Search for Staff Members    Staff Member Associations

Staff Member Name:     Assigned Username:     Show Active Only:    

Last Name	First Name	Staff Code	District	Domain	Username
BERRY	DONALD	BERR	DASL Local SD		

**Navigation: Home – Management – Security – View/Edit Staff Member Associations – View Details button**

Home » Management » Security » View/Edit Staff Member Associations      [Advanced Search](#) | [Feedback](#) | [Mgmt](#) | [Hel](#)

### View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

Search for Staff Members    Staff Member Associations

**Staff Member Selected:** DONALD BERRY

This staff member is not currently assigned to a user. Please select a user below.

Last Name:     First Name:   
Email Address:

Username:     Domain:   
Administrative School:     Default School:

Make sure each teacher that will be using ProgressBook has their User record linked to their Staff record. Click on the User's magnifying glass icon to assign that User to that Staff member.

**Navigation: Home – Management – Security – View/Edit Staff Member Associations – View Details button – enter criteria – Search button**

Home » Management » Security » View/Edit Staff Member Associations Advanced Search | Feedback | Mgmt | Help | Version | P

### View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

Search for Staff Members Staff Member Associations

**Staff Member Selected:** DONALD BERRY  
 This staff member is not currently assigned to a user. Please select a user below.

[Return to Search for Staff Members](#)

Last Name:  First Name:

Email Address:

Username:  Domain:

Administrative School:  Default School:

Domain	Username	First Name	Last Name ^	Email	Administrative School	Default School
DASL-Demo	noacsc.chris	Chris	Keller	chris@noacsc.org	All Buildings	DASL HIGH SCHOOL

**Navigation: Home – Management – Security – View/Edit Staff Member Associations – View Details button – enter criteria – Search button – click on Magnifying glass icon to assign User**

Home » Management » Security » View/Edit Staff Member Associations Adv

### View/Edit Staff Member Associations

From this screen, you can add a new staff member association or remove an existing one.

Are you sure you want to assign DASL-Demo\noacsc.chris to DONALD BERRY?

□ **Set ProgressBook Data Integration Status**

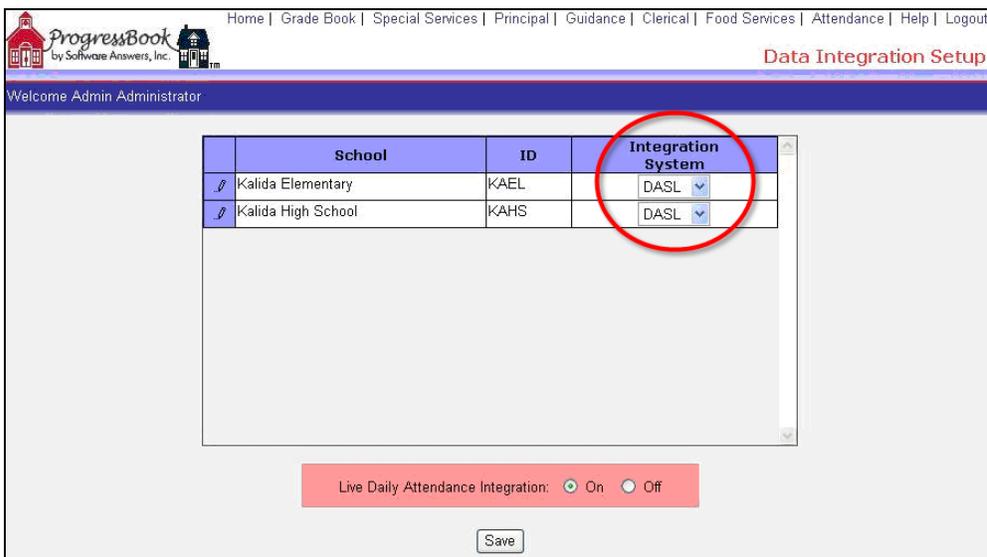
**Important:** Before you continue with the conversion, we highly recommend randomly choosing several classes, and several students, and produce both Student Progress Reports, and Class Progress Reports for the district. After the conversion, you can produce the same exact reports, and perform a side-by-side comparison.

Log into ProgressBook and click on the “**Data Integration Status**” link from the Administrator Home Page

**Important:** Once you have set the ProgressBook Integration System to DASL, the first import of DASL data starts the conversion process.

Change the Integration System to **DASL** for all schools that will be integrated with DASL. The nightly integration job will not load the data from DASL until this has been done.

ProgressBook provides both Live and Batch updates of Daily Attendance information to DASL. Select “**On**” for live update of attendance or “**Off**” for batch update of Attendance.



□ **Update and Map ProgressBook Reporting Periods to DASL Reporting Periods**

**Important:** Since this is a conversion which, by definition, means the district has been using ProgressBook up until now, you will continue to use the existing ProgressBook reporting periods. However, you must update these reporting periods by removing any references to SIS reporting periods, and mapping them to DASL reporting periods.

	Name	Short Name	Gradebook Range?	Gradebook Dates			Entry Dates & Period Xref	Del?
				Term Begin	Interim End	Term End		
⌵	1/01	1/01	<input checked="" type="checkbox"/>	8/25/2004		10/29/2004	Edit	<input type="checkbox"/>
⌵	1/02	1/02	<input checked="" type="checkbox"/>	11/2/2004		1/14/2005	Edit	<input type="checkbox"/>
⌵	1/03	1/03	<input checked="" type="checkbox"/>	1/18/2005		3/28/2005	Edit	<input type="checkbox"/>
⌵	1/04	1/04	<input checked="" type="checkbox"/>	3/29/2005		6/6/2005	Edit	<input type="checkbox"/>
⌵	AVG1	AVG1	<input type="checkbox"/>				Edit	<input type="checkbox"/>
⌵	AVG2	AVG2	<input type="checkbox"/>				Edit	<input type="checkbox"/>
⌵	EX1	EX1	<input type="checkbox"/>				Edit	<input type="checkbox"/>
⌵	EX2	EX2	<input type="checkbox"/>				Edit	<input type="checkbox"/>
⌵	Final	Final	<input type="checkbox"/>				Edit	<input type="checkbox"/>

Click the “**Edit**” link next to a reporting period on the Reporting Period Page or click the “**Cross Reference**” link from the Home Page.

If your schools have been set to use DASL integration, and you have completed at least one data import into ProgressBook, you will see a drop down list in the External Term/Period column. This list contains all of the school’s reporting periods from DASL. Choose the DASL period that corresponds to the ProgressBook period.

**Important:**

- The list of DASL reporting periods will be empty until the nightly integration job has imported DASL data at least once.
- Classes will not have reporting periods in ProgressBook until the reporting periods have been mapped to DASL, and a second nightly integration job has imported DASL data.

- You can update by Reporting Period:

ProgressBook by Software Answers, Inc.

Home | Grade Book | Special Services | Principal | Guidance | Clerical | Food Services | Attendance | Help | Logout

Report Card Entry Dates by School

Reporting Period: Quarter 1

School	Report Card Entry				Interim Entry				Del?
	Entry Begin	Entry End	Term/Period	C	Entry Begin	Entry End	Term/Period	C	
CMES			1QA	<input type="checkbox"/>			1QA	<input type="checkbox"/>	<input type="checkbox"/>
CMHO			1QFnl	<input type="checkbox"/>			1QFnl	<input type="checkbox"/>	<input type="checkbox"/>
CMHS			1QMark	<input type="checkbox"/>			1QMark	<input type="checkbox"/>	<input type="checkbox"/>
CMMS			2QA	<input type="checkbox"/>			2QA	<input type="checkbox"/>	<input type="checkbox"/>
			2QFnl	<input type="checkbox"/>			2QFnl	<input type="checkbox"/>	<input type="checkbox"/>
			2QMark	<input type="checkbox"/>			2QMark	<input type="checkbox"/>	<input type="checkbox"/>
			3QA	<input type="checkbox"/>			3QA	<input type="checkbox"/>	<input type="checkbox"/>
			3QFnl	<input type="checkbox"/>			3QFnl	<input type="checkbox"/>	<input type="checkbox"/>
			3QMark	<input type="checkbox"/>			3QMark	<input type="checkbox"/>	<input type="checkbox"/>
			4QA	<input type="checkbox"/>			4QA	<input type="checkbox"/>	<input type="checkbox"/>
			4QFnl	<input type="checkbox"/>			4QFnl	<input type="checkbox"/>	<input type="checkbox"/>
			4QMark	<input type="checkbox"/>			4QMark	<input type="checkbox"/>	<input type="checkbox"/>

or by School:

ProgressBook by Software Answers, Inc.

Home | Grade Book | Special Services | Principal | Guidance | Clerical | Food Services | Attendance | Help | Logout

Period Cross Reference

Welcome Mr./Mrs. Administrator

School: CMHS

Progress Book Reporting Period	DASL Report Card Term/Period	DASL Interim Term/Period
Quarter 1	1QA	
	1QFnl	
	1QMark	
	2QA	
	2QFnl	
	2QMark	
	3QA	
	3QFnl	
	3QMark	
	4QA	
	4QFnl	
	4QMark	
	Int1	
	Int2	
	Int3	
	Int4	
	Sem 1 Avg	
	Sem 1 Fnl	
	Sem 2 Avg	
	Sem 2 Fnl	

Save

### Update Report Cards (Recommended for Conversion)

#### Important:

- The DASL marking pattern list will be empty until the nightly integration job has run at least once.
- For the conversion, it is recommended that you update the existing report cards rather than create new report cards. This will ensure that marks received earlier in the year will print on the same report card.
- It is not necessary to create separate report cards for 1st semester classes, 2nd semester classes, and year long classes. It is best to build one report card using the year long marking pattern.

Adjustments will be needed to the report card after it has been imported from DASL.

- Click on the report card in the list to edit the setup.
- Go to the General Page of the Report Card Setup. Verify that all of the settings are correct.

**Important:** Report cards that are integrated with DASL must select **“Use Advanced Calculations”**.

ProgressBook  
by Software Answers, Inc.

Home | Grade Book | Principal | Clerical | Food Services | Help | Logout

**Big Walnut H.S. Gradecard For Semester Courses**

List | General | Grade Levels | Periods | Assessments | Requirements | Protected Marks | **Advanced Calc** | System Calc | Template | Mappings | Messages | Check | Preview

- 1) Enter a name for the report card: Big Walnut H.S. Gradecard For Semester Courses
- 2) Choose the type of report that will be produced:  Report Card  Interim Report
- 3) Select a format for the report:  Elementary  Secondary  
(Elementary style report cards have different assessments for each subject area.  
Secondary style report cards use the same assessments for all courses.)
- 4) Select the template for printing: Standard Elementary Report Card (8 1/2 \* 11 portrait)\*
- 5) Which Average Calculation Method would you like to use? **Use Advanced Calculations**
- 6) Is this report card active?  Yes  No
- 7) Choose the data integration method: Batch  
Choose the data integration source: eSIS (For Batch and Live Only)

Save

Go to the **Assessments** tab. Change the External References for all marks and comments to the new DASL references. For all Mark Types that use lists, change the Mark Types to the new DASL Mark Types.

Assessment	Seq#	Mark Type	Default Grading Scale	Value Req?	External Reference	Del?
Mark	10	Percent	District Default	Y	Marking Period Mark	<input type="checkbox"/>
Exam	20	Percent	District Default	Y	Exam Mark	<input type="checkbox"/>
Final	30	Percent	District Default	Y	Final Mark	<input type="checkbox"/>
Comment 1	40	XXHS_General_Comments	N/A	N	Comment 1	<input type="checkbox"/>
Comment 2	50	XXHS_General_Comments	N/A	N	Comment 2	<input type="checkbox"/>

Go to the **Requirements** tab. Verify that the information is still correct and make adjustments if needed. (Most SIS report cards report exams and finals under the mark assessment while many DASL report cards have been set up with separate assessments for exams and finals.)

Assessments	1	1 - Exam	1 - Final	2	2 - Exam	2 - Final	3	3 - Exam	3 - Final
Mark	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exam	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Comment 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comment 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Go to the **Advanced Calcs** tab. This page is only used when the “Average Calculation Method” is set to “Advanced”. Select the method used to populate each mark. The table below describes the methods.

Type of Data	Option to Choose
Marks that are populated from the grade book	Pull from grade book
Attendance totals for a reporting period	Pull Attendance
Marks that are manually entered by the teacher	Manual Entry
Semester Average, Final Average	System Calculation
YTD or Semester Attendance Totals	System Calculation

Assessments	1	1 - Exam	1 - Final	2	2 - Exam
Mark	Pull from Gradebook			Pull from Gradebook	
Exam		Manual Entry			Manual Entry
Final			System Calculation		
Comment 1	Manual Entry			Manual Entry	
Comment 2	Manual Entry			Manual Entry	

Go to the **System Calcs** tab. This tab is similar to the “Average Calcs” tab except that all calculations are set up using a combination of the reporting period and the assessment.

- Choose a calculation to set up. (Notice that the choices in the list are the items that were set to “System Calculation” on the “Advanced Calcs” page.)
- Select the periods/assessments for the calculation and assign a weight.
- Choose a calculation method:
  - “Use Grades (from Report Card)” calculates from the grade recorded on report card.
  - “Use Averages (from Grade book)” calculates from the grade book average.

ProgressBook  
by Software Answers, Inc.

Home | Grade Book | Principal | Clerical | Food Services | Help | Logout

Big Walnut H.S. Gradecard For Semester Courses

List General Grade Levels Periods Assessments Requirements Protected Marks Advanced Calc System Cals Template Mapper Messages Check Preview

Calculation: E12 Semester Average

Select the reporting periods and weights used to calculate the average.

Period & Assessment	Weight	Del?
E11 Grade	2	<input type="checkbox"/>
E12 Grade	2	<input type="checkbox"/>
E12 Exam	1	<input type="checkbox"/>
*		
*		
*		
*		

Select the Calculation Method: Use Letter Grades

Save

Go to the Report Card List tab, and click the Compile icon for your report card. If a severe or critical error is reported, you must correct the problems before the report card can be used.

Compile Results	Actions
No Problems	  
No Problems	  
No Problems	  

□ **Update Batch Attendance (optional)**

If a district has chosen to update attendance in batch mode, an Attendance Export page is available from the Admin Home Page. Select one or more schools to update and enter the dates to process.

Home | Grade Book | Principal | Guidance | Clerical | Food Services | Attendance | Special Services | Help | Logout

ProgressBook  
by Software Answers, Inc.

Attendance Export

Welcome Admin Administrator

Select the Export Options, then Click the "Export" Button

Select one or more schools:

- Kalida Elementary
- Kalida High School

Enter start and end dates:

Start Date: 8/16/2005

End Date: 8/16/2005

Export

## **General Data Verification in ProgressBook**

Check this information in the PLAY testing environment, and in the Production environment immediately after Go-Live, to test the success of the Go-Live and Conversion procedures.

- Verify that ALL reporting periods, for all schools, have been updated in ProgressBook to point the DASL Marking Patterns.
- Verify ALL of your Named Codes in Progress Book (especially your Absence Types and Student Status Codes).
- Verify Staff Data – make sure all staff have Staff ID's (If they do not, check the View Staff Member record in DASL – Staff Code).
- Verify Rooms.
- Verify Homerooms.
- Verify Student Data.
- Verify that the appropriate Features are selected.
- Verify Classes. (Check to see if the teachers' names are next to their classes. If the teacher name is not there make sure the Teacher of Record box is checked on Course Sections in DASL).
- Verify Class Reporting Periods (spot check).
- Verify Mark Types and Grading Scales. (There will be new Mark Types that are building specific imported from DASL. You will see the building code – underscore – Mark Type (SCHS\_General\_Comments, SCHS\_Marks, etc.) The SIS Mark Types (the ones with a \* next to them) will no longer be used.

## **Teacher Data Verification**

- Verify Student Data.
  - a. Run Student Progress Report – reconcile with previously generated reports printed while SIS was integrated with ProgressBook.
  - b. Run Class Progress Report - reconcile with previously generated reports printed while SIS was integrated with ProgressBook.
  - c. View the Gradebook Grid to confirm correct Averages are displaying.

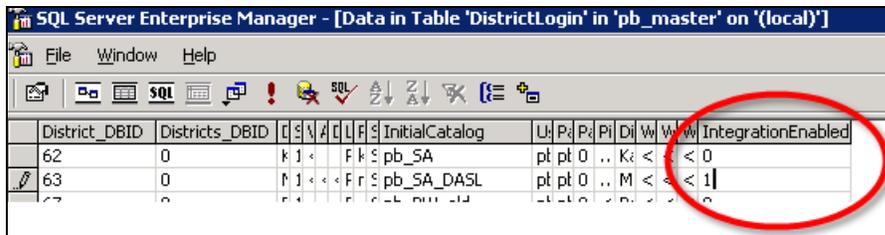
## 4. Activate 'Production' ProgressBook Database

---

Activating a Production database for the conversion involves a few steps originally performed by the MakePbPlay script in section 2, "Create 'Play' ProgressBook Database". Please perform the steps below, in order.

**Turn on Integration for 'Production' Database**

Set the column called `IntegrationEnabled` in the table to '1' for the 'Production' database row. This tells the loading program that this database should be loaded from DASL.



The screenshot shows the SQL Server Enterprise Manager interface. The title bar reads "SQL Server Enterprise Manager - [Data in Table 'DistrictLogin' in 'pb\_master' on '(local)']". The table displayed has the following columns: District\_DBID, Districts\_DBID, InitialCatalog, and IntegrationEnabled. The data rows are:

District_DBID	Districts_DBID	InitialCatalog	IntegrationEnabled
62	0	pb_SA	0
63	0	pb_SA_DASL	1

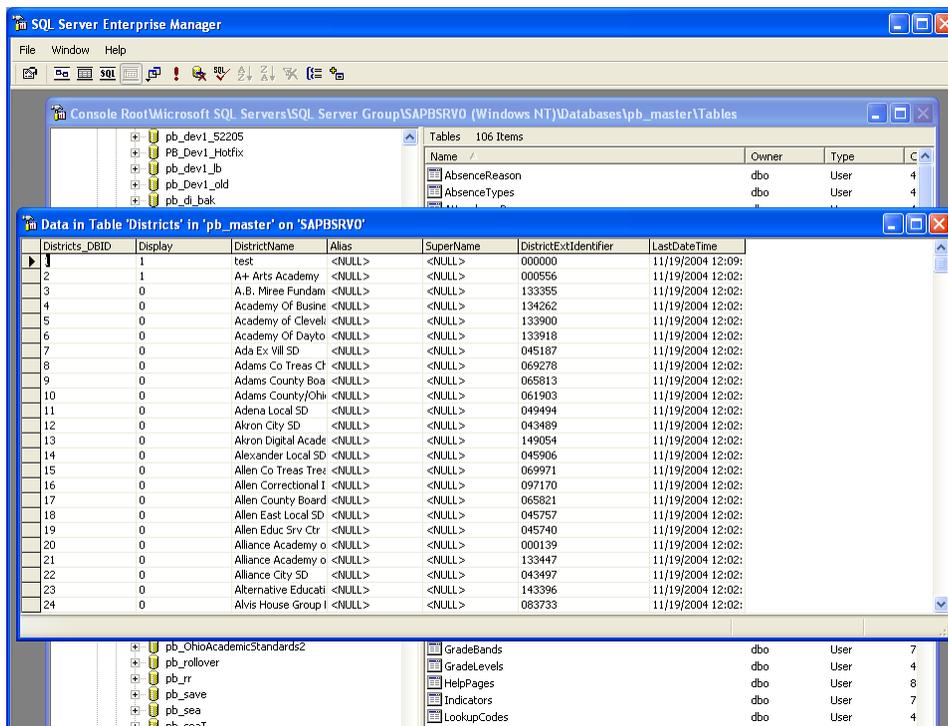
The value '1' in the IntegrationEnabled column for the row where InitialCatalog is 'pb\_SA\_DASL' is circled in red.

## □ Set Up District IRN Linking

Determine the 6 digit State code ([DistrictIRN](#)) for the district to be loaded from DASL.

Using Enterprise Manager on the SQL server, open the [Districts](#) table in the [pb\\_Master](#) database.

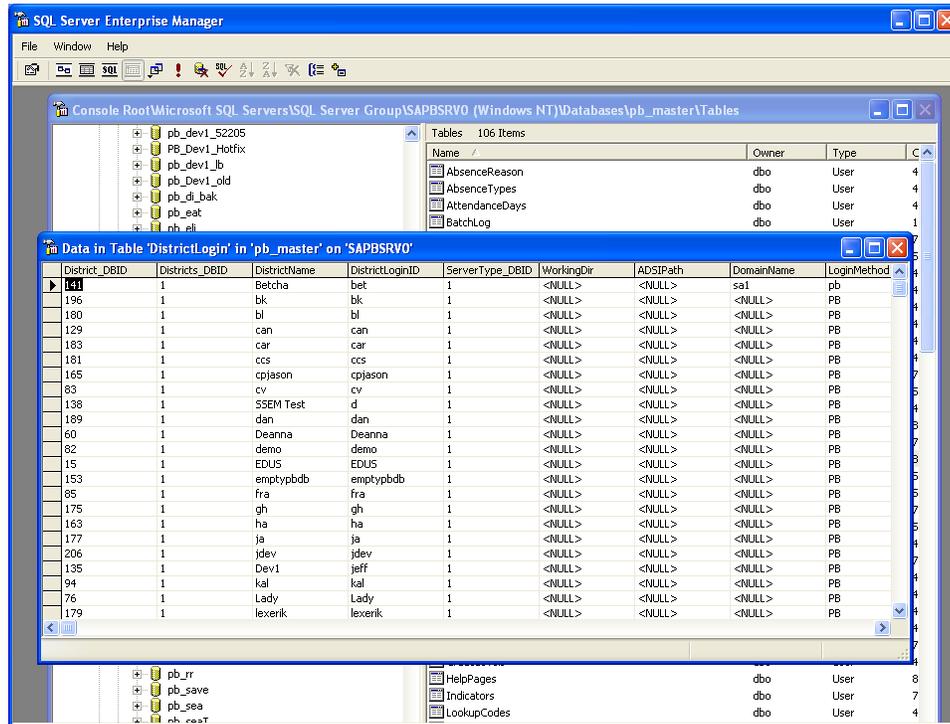
Locate the [DistrictIRN](#) in the [DistrictExtIdentifier](#) field to make sure you have the correct district. Copy the corresponding [Districts\\_DBID](#) field from the same row in the table. Close the [Districts](#) table.



The screenshot shows the SQL Server Enterprise Manager interface. The main window displays the 'Data in Table 'Districts' in 'pb\_master' on 'SAPBSRV0' table. The table has the following columns: Districts\_DBID, Display, DistrictName, Alias, SuperName, DistrictExtIdentifier, and LastDateTime. The data is as follows:

Districts_DBID	Display	DistrictName	Alias	SuperName	DistrictExtIdentifier	LastDateTime
1	test		<NULL>	<NULL>	000000	11/19/2004 12:09:
2	1	A+ Arts Academy	<NULL>	<NULL>	000556	11/19/2004 12:02:
3	0	A.B. Miree Fundam	<NULL>	<NULL>	133355	11/19/2004 12:02:
4	0	Academy Of Busin	<NULL>	<NULL>	134262	11/19/2004 12:02:
5	0	Academy of Clevel	<NULL>	<NULL>	133900	11/19/2004 12:02:
6	0	Academy Of Dayto	<NULL>	<NULL>	133918	11/19/2004 12:02:
7	0	Ada Ex VIII SD	<NULL>	<NULL>	045187	11/19/2004 12:02:
8	0	Adams Co Treas CF	<NULL>	<NULL>	069278	11/19/2004 12:02:
9	0	Adams County Boa	<NULL>	<NULL>	065813	11/19/2004 12:02:
10	0	Adams County/Oh	<NULL>	<NULL>	061903	11/19/2004 12:02:
11	0	Adena Local SD	<NULL>	<NULL>	049494	11/19/2004 12:02:
12	0	Akron City SD	<NULL>	<NULL>	043489	11/19/2004 12:02:
13	0	Akron Digital Acade	<NULL>	<NULL>	149054	11/19/2004 12:02:
14	0	Alexander Local SD	<NULL>	<NULL>	045906	11/19/2004 12:02:
15	0	Allen Co Treas Trez	<NULL>	<NULL>	069971	11/19/2004 12:02:
16	0	Allen Correctional I	<NULL>	<NULL>	097170	11/19/2004 12:02:
17	0	Allen County Board	<NULL>	<NULL>	065821	11/19/2004 12:02:
18	0	Allen East Local SD	<NULL>	<NULL>	045757	11/19/2004 12:02:
19	0	Allen Educ Srv Ctr	<NULL>	<NULL>	045740	11/19/2004 12:02:
20	0	Alliance Academy o	<NULL>	<NULL>	000139	11/19/2004 12:02:
21	0	Alliance Academy o	<NULL>	<NULL>	133447	11/19/2004 12:02:
22	0	Alliance City SD	<NULL>	<NULL>	043497	11/19/2004 12:02:
23	0	Alternative Educati	<NULL>	<NULL>	143396	11/19/2004 12:02:
24	0	Alvis House Group I	<NULL>	<NULL>	083733	11/19/2004 12:02:

Open the [DistrictLogin](#) table in the [pb\\_Master](#) database. Locate the row that has the database that is to be integrated to DASL. Paste the [Districts\\_DBID](#) value from the [Districts](#) table into the [Districts\\_DBID](#) column of that row.



□ **Load the 'Production' Database from DASL**

The ProgressBook 'Production' database is now ready for the initial data load from DASL. *During this initial load, the actual Conversion takes place.* The initial load is triggered when the DASL XML load files are created by the DASL batch job.

**\*\*\* Very Important: Make sure the initial load is processed as a full extract from DASL instead of a partial extract, and make sure the load completes successfully before continuing on with the instructions for configuring the ProgressBook 'Production' database. \*\*\***

The progress of the load can be tracked by examining the log files for the **ProgressBook Nightly Integration Job**. These log files are located in the **Logs** folder underneath the folder where the software was installed. The default location for installation of the software is:

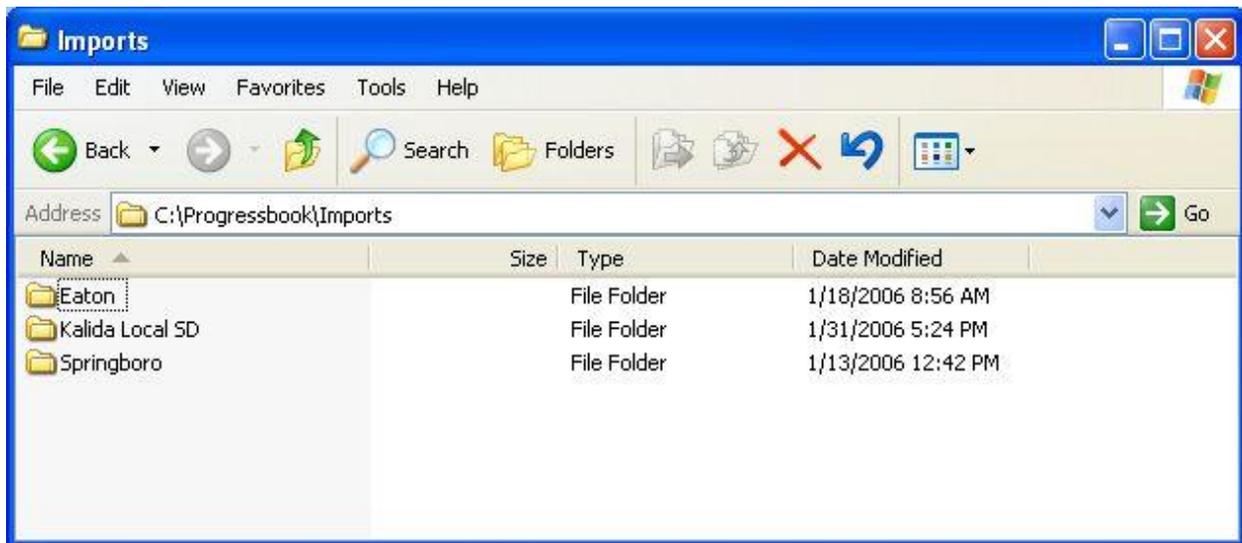
`C:\Program Files\Software Answers\PbBackOfficeImport\`

**Important Note:** Make sure that when you set up the batch job to load this database, the XML files are created in a folder below the **top level folder** specified during the installation of the **ProgressBook Nightly Integration Job** (see step 1C in this document for details).

Create a folder for the 'Production' database beneath this top level folder. If you previously configured ProgressBook databases to be integrated with DASL, you will see folders for those databases already there. All the XML files for one district should go in the same folder. The name of the folder is not significant.

A sample configuration is shown below. In this case, the top level folder that was specified during the installation of the **ProgressBook Nightly Integration Job** was:

`C:\ProgressBook\Imports\`



## 5. ProgressBook Integration Differences

---

Function	Behavior in SIS	Behavior in DASL
Report Card data entry screens.	There is no functional difference between entering grades on report cards. The DASL Web Services support both Inserts and Updates of marks and comments.	There is no functional difference between entering grades on report cards. The DASL Web Services support both Inserts and Updates of marks and comments.
Attendance Totaling	A job attached to the nightly batch import runs after the import to synchronize the absence data in both SIS and ProgressBook. The purpose of this job is to pick up on any absence code changes made on the SIS screens. After this job is run, an Attendance Totaling batch job runs in the early afternoon so that Attendance Totals are accurate each day.	There is no job that synchronizes ProgressBook Attendance with DASL Attendance. Therefore, Attendance Totaling with DASL integrated districts is incorrect. Though this does not affect Secondary Report Cards, Elementary Report Cards printed from ProgressBook may have incorrect totals. The current option is to have teachers collect a student's homeroom attendance totals, and manually enter the data in the report card screen.

<p>Teacher Attendance Screens (Homeroom Attendance Screen, and Seating Chart).</p>	<p>There is no functional difference between systems when using these teacher screens. Homeroom Attendance 'Inserts' are supported by DASL Web Services.</p>	<p>There is no functional difference between systems when using these teacher screens. Homeroom Attendance 'Inserts' are supported by DASL Web Services.</p>
<p>Attendance Clerk Attendance Screens (Absence by Student List, Absence Queue).</p>	<p>These attendance clerk screens, when used to modify attendance, simultaneously update both ProgressBook and SIS. Each day at the conclusion of entering attendance within these screens, SIS and ProgressBook have identical attendance information.</p>	<p>There is no provision with the DASL Web Services to accept 'Updates' to Homeroom Attendance data through the Attendance Clerk screens at this time.</p>

## 6. Known Issues

Issue	Resolution	Resolved
Report Card Setup. Every Comment and Mark List referenced on a Report Card that is integrated with DASL, must have come from DASL. Using older SIS or manually created lists may cause invalid data to be sent to DASL.	Report Card Compiler will identify comments that are set up incorrectly.	Report Card compiler released with Progress Book 5.2.0
Updates made to the Administrative ProgressBook Attendance Screens do not update DASL at this time.	None at this time.	

## 6A. Conversion Failure Recovery

---

Follow these steps to recover from a failed Conversion.

**Restore Database**

Restore the ProgressBook database that was created as a backup prior to the Conversion.

**Restore ProgressBook – SIS Linking**

Restore SIS as the production back office system. Steps to accomplish this include:

1. Set the Data Integration method back to SIS for all schools in the district.
2. Set the IntegrationEnabled flag back to 0 in the DistrictLogin table for the district.

**Re-Enter Data in SIS**

Re-enter any data into SIS that was entered into DASL.

**Re-Enter Data in ProgressBook**

Re-enter any data into ProgressBook that was entered after the backup was created (the backup will only have data entered up to the point the backup was made).

**Document and Communicate**

Thoroughly document the problems you experienced, and communicate these problems with Software Answers and the DASL Team. Supply as much information as possible when documenting any problems. If one district has a problem, it's very likely that other districts will encounter the same problem. Damage assessments should be immediately executed for other districts that have converted to date, to determine if they will need to roll back to SIS as well.