

# REGISTRATION PROCEDURES

## Current eSP Version 3.1

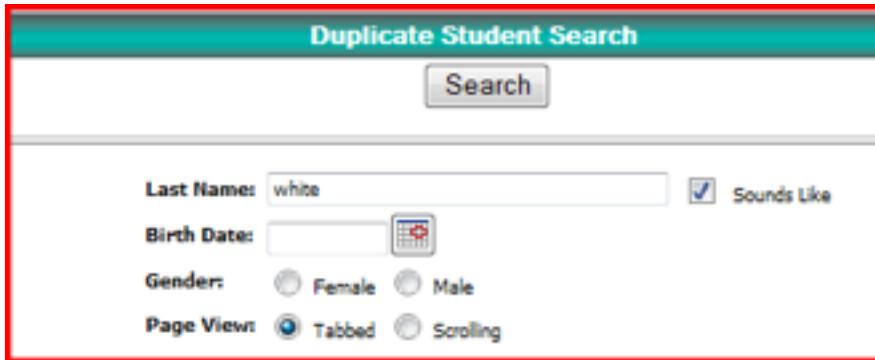
### August 5, 2016

#### 1. NEW STUDENT ENTRY

We suggest that you use more than one method to search for students. Once you select the NEW STUDENT ENTRY on the Menu Tree, **Search** for duplicates prior to adding the student. Use the system search as in the example below:

- Enter the last name only, **check** the Sounds Like box

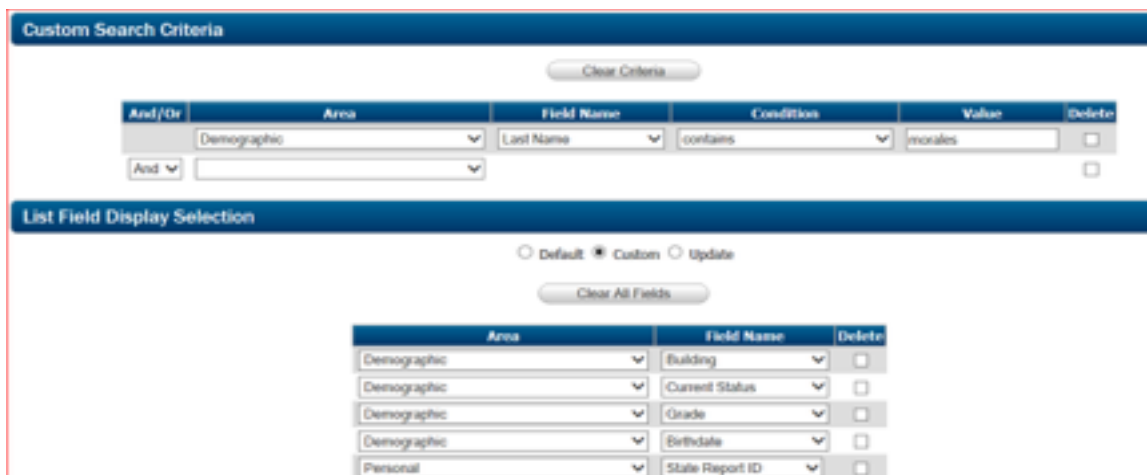
CHECKING FOR DUPLICATE STUDENTS –



Searching with the full last name, plus using the Sounds Like checkbox produces 95 records; whereas just using the last name will give only 45

eSP ADVANCED SEARCH METHOD –

Depending on the age of the student, set your value for grade accordingly, this assists with limiting the possibilities. The most important condition (“contains”) is within the second line which will help pull a last name that is anywhere in the student last name:



And/Or	Area	Field Name	Condition	Value	Delete
And	Demographic	Last Name	contains	inodes	<input type="checkbox"/>
And					<input type="checkbox"/>

Area	Field Name	Delete
Demographic	Building	<input type="checkbox"/>
Demographic	Current Status	<input type="checkbox"/>
Demographic	Grade	<input type="checkbox"/>
Demographic	Birthdate	<input type="checkbox"/>
Personal	State Report ID	<input type="checkbox"/>

After you *hit* search, you would receive a list similar to the following. I have added some other identifiers that most likely will be unique to a student:

[Show Watch List Maintenance](#)  
Number of records found: 38

Student Name	Student ID	Grade	Building	Current Status	Birthdate	State Report id
<a href="#">Chavez-Morales, Gelena</a>	102265	KG	586	A	9/29/2009	
<a href="#">Chavez-Morales, Susana</a>		GR	588	G	8/6/1997	
<a href="#">Luna Morales, Luis Adrian</a>		10	588	I	4/20/1994	
<a href="#">Luna Morales, Marilyn Esmeralda</a>		07	581	I	5/2/2002	
<a href="#">Luna-Morales, Shawn Stephany</a>		10	588	I	1/21/1997	
<a href="#">Marin Morales, Heather</a>		GR	588	G	9/22/1995	
<a href="#">Mendoza-Morales, Alejandro A</a>		12	588	A	8/15/1998	
<a href="#">Mendoza-Morales, Juan Antonio</a>		10	588	A	6/7/2000	

**A. Screens that are required for new student entry process:**

**Use step-by-step process for New Student Entry:**

Page	Include	Page Order
Demographic	<input checked="" type="checkbox"/>	1
Student Addresses	<input checked="" type="checkbox"/>	2
Academic	<input checked="" type="checkbox"/>	3
Emergency	<input checked="" type="checkbox"/>	4
Contacts	<input checked="" type="checkbox"/>	5
Personal	<input checked="" type="checkbox"/>	6
Medical	<input checked="" type="checkbox"/>	7
OR Demographics	<input checked="" type="checkbox"/>	8

**Things to Remember**

- Any section that has a red asterisk \* **means required**. Please make sure you fill in all the areas prior to retrieving the student id.
- Make sure to do a SEARCH PLAN for the student addresses
- Student/Guardian Home Phone is the phone that the guardian designates as “HOME” type. Only use the following phone types: HOME, WORK, MOBILE (if not being considered the HOME phone). The autodialer report looks for “HOME” values.
- Check the appropriate Print Flags for the student

- Parent/Guardian 1 & 2 – ONLY ADD LIVING WITH GUARDIANS HERE
- **SHARED CUSTODY – eSchool Plus System does not support data entry that shows a LIVING WITH guardian with a different address than the student. Only check the guardian that has the same address as the student as LIVING WITH**

## 2. DATA ENTRY BASICS

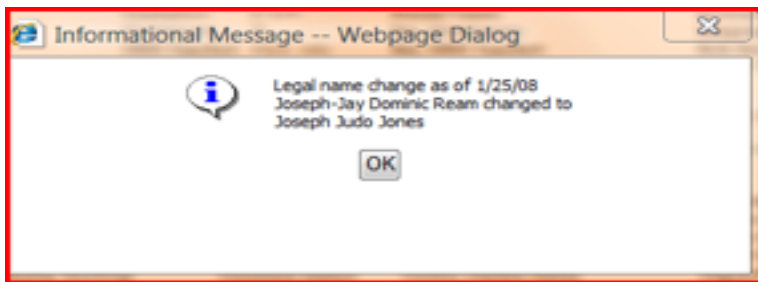
A) **Legal name:** Preferably the name is listed on a legal document such as a birth certificate or passport

State reporting requires school districts to use the legal name of the student; please enter this information in the correct first, middle and last name fields.

Nickname Field: Only use for a preferred name for a student, do not populate this field for all students, only for those who request such a change. Extraneous data in this field produces errors on State Reporting.

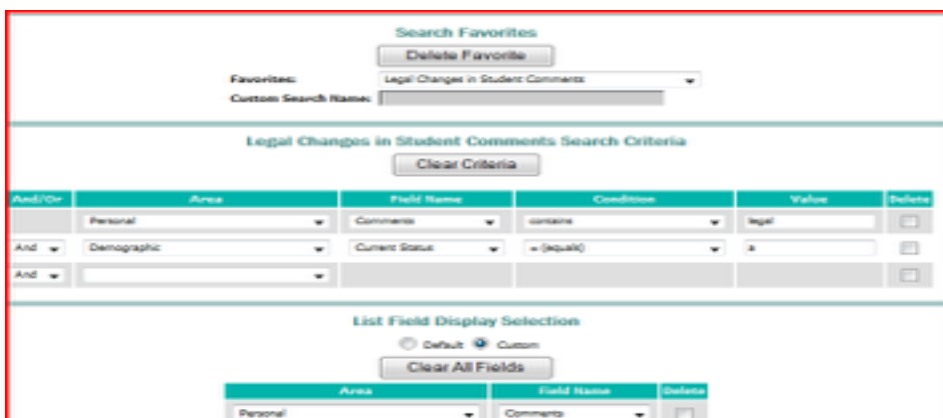
### **Legal Name Change Procedure:**

Go to Student Center > Demographics > Personal > Comments  
 Legal name change as of date: old name changed to new name  
 Be sure to use the method below:



eSP ADVANCED SEARCH FOR LEGAL NAME CHANGES:

Below is an Advanced Search that will help office staff to find students who had their legal name changed:



**B) Transgender Name Change Process: Student Gender Self Identification – Process for Student Registration**

*If you have a transgender student who would like to change his/her first name, it is ok (and required) that we do that for them. If the student is also wanting to change their gender for the school record you can do that also. Again, they do not have to provide any “proof” of this gender change. This process is not a legal name change, but a name change for school use. The school is still maintaining the legal name, but using the preferred name. This process was established hoping to provide support for transgendered students and their families.*

*Students who identify as transgender and want to legally change their name and gender (for a driver license for example), they need to go through the traditional legal process.*

*One caveat to the process below is that the student’s legal name must be on the Transcript as it is an official document. At graduation, the preferred name will be used, but two diplomas will be printed out – one with the legal name and one with the preferred name – this is why it is important to have a saved record of the prior name.*

**I. Prior to Name Change (High School only, K-8 skip to #2)**

**1) Print Transcript with Legal Name**

- a. Run a copy of the Or Custom Transcript from eSchool Plus for the student who wishes to change to a preferred name. SCAN and/or SAVE a copy of the documents onto your computer, place the hardcopy in the cumulative file.
- b. Attach copies of the documents via the electronic student attachment option on the Student Summary page in eSchool Plus – it is the paperclip icon:

Click on  
the



paperclip to open – another window will open:  
Select the



Category called ORSTUACCTG – only certain users will have security to see this document. Browse to the SAVED files, select and Click on the UPLOAD

- c. Once the file is attached, the icon will change to a file icon, like the one below:



- 2) Document that the student wants to change the first name “First Name Change” field for the student: Menu Path: Student Center > Demographic > Program Information

- a. Check the box in the Program Information page called First Name Change (Non Legal)

## II.CHANGE

**First Name Change (Non Legal):**

FIRST NAME (and possibly middle)

- a) Change the first name of the student on the Student Registration First Name field. If the middle name poses an issue of revealing prior gender, change it to the middle initial.

- b) Add a notation in the Personal Comment for the student:

Menu Path: Student Center > Demographic> Personal> Comment

FNC: First Name Changed – 04/12/2015 Lh

**Make sure to select SHOW COMMENT by checking the box**

- c) Teachers will see the correct name via Teacher Access Center in all aspects. They will see that there is a Yellow Personal Alert on the student, they will see that the student had a first name change.

## III. State Reporting SSID: (All buildings)

1. Student Accounting must be aware of name changes to assist in retaining the same SSID.
2. Instruction and Special Services will need to know how to search for first name changes via Cognos or eSchool Plus and work with Student Accounting not to change, merge or delete the SSID for students with first name changes.

## IV. Printing Official Transcripts/Diploma for Graduation (High School)

1. Registrar must do a an Advanced Search to check for First Name Changes

2. Registrar may process the current transcript for the student(s) under the preferred name, print out all certificates etc.
3. Contact Student Accounting (District Office) for legal name of student – confirm SSID and legal name. Student Accounting will update the first and/or middle name back to the legal name and let the Registrar process the official transcript.

Once all processing is completed for the student, after graduation is completed, the registrar will contact Student Accounting to confirm process is finished.

### **C) Geo Code: Residency, Open Enrollment and Supt Transfers**

- 1) **Residency** is based upon student physical address unless the student has an approved superintendent exchange form with the district office.
- 2) **Open Enrollment** - All Approved Open Enrollment Transfers should have a Classification code of OE on the Personal page, plus during the Search Plan, students will be given an OVERRIDE REASON CODE of OE on the registration page – Next Year fields should reflect the same coding.
- 3) **Superintendent Transfers and / or In District Transfers** – If we get transfer requests outside of the Open Enrollment window they would be coded 9 on the personal page and on the registration page – EXCH – Superintendent Exchange. At the end of the year, all Approved Supt Transfers will have their Classification code mass updated to 99 to close out the status for the year.

- **R** For Resident
- **N** For Non Resident

- 4) **Plan Area Search:** For every new student and guardian you must run the **Plan Area Search** function to make sure the student is a legal resident of Bethel.

Do not enroll a student who is out of district without an approved Superintendent transfer on file at the District Office.

Please do not add students without a SEARCH PLAN if possible, contact Linda Hood, ccing Laura Hodges if there are issues with an address.

### **5) IMPORTANT:**

**If student qualifies for McKinney Vento Legislation (Homeless status), please contact Bethel School District Homeless Liaison, Donna Butera prior to adding the REASON as McKinneyVento.**

**Questions:** Contact the Student Accounting office for general residency questions or inquiries about Open Enrollment or other transfers.

**6) Bethel students attending Bethel schools**

Bethel students (residents) attending Bethel schools are enrolled in their appropriate building with their *respective calendar below*:

- Kindergarten = K
- Full time Elementary , K8 and Middle = E
- Full time High school = H
- Seniors at Willamette High – G
- Less than full time Seniors - J
- Seniors at Willamette High who fall to a half time schedule should be placed on the L calendar. The district Student Accounting office should be notified when this happens
- Less than part time (any campus) – L
- Special calendar – S (students on instructional tutoring and or other circumstances)
- Non-membership students – N

**D) Bethel Students Attending Non-Bethel Schools (K-12)**

Bethel students (residents) in alternative placements outside of our buildings are enrolled in the State building of residence (2088 Bethel building), in an “S” calendar, with an alternate building listed in registration.\*

**Questions:** *Contact* the Student Accounting office for all S calendar updates

**E) Special student programs - (Residency is based upon physical address)**

- Lifeskills – students in a Lifeskills class will have a classification in the personal screen of “10” and a regular grade K-12
- Bethel Transition Community Network – located next to WHS in the BTCN class will have a classification in the personal screen of “17” – and a grade of 12.

**F) Enrollment grade**

When enrolling a student in the entry / withdrawal screen, the current grade needs to be entered.

Enrollment grade will reflect the chronological grade in school. Make sure the registration grade on the student summary matches the enrollment grade and the calendars match in both areas (entry/withdrawal and student summary page).

**Note: Only use grade codes of KG -12, these are in accordance with the Oregon Department of Education's state reporting requirements.**

#### G) **Retained students:** Two Part Process HIGH SCHOOL ONLY

##### **Before Year End Rollover**

##### 1) High School Grade 12 Only (non-grads):

- Academic Page
  - Promotion flag = Y
  - Update grad year (example: grad year is 2017 now, change to 2018).
- Registration Page:
  - Next year building equals current building.
  - Next year grade is grade 12 (same as current year).

##### 2) High School Grades 9-11

- Academic Page
  - Promotion flag = Y
  - Update grad year (example: grad year is 2017 now, change to 2018).
- Registration Page:
  - Next year building equals current building.
  - Next year grade moves forward.

##### **After Year End Rollover**

- Retained students will rollover with a RG withdrawal code for the previous year.



- Run the Cognos Grad Year Change Letter to review students that were identified.
- Print out transcripts for the students and forward to counselors

## H) ACADEMIC PAGE: MAINTENANCE FOR NEW STUDENTS

- **Note: Mass Updates can be done at beginning of year, but need to be maintained by users upon new student entry.**

(Add a helpdesk ticket for Mass Update or HOW TO for Registration Assignment Utility)

- 1) Disciplinarian – This is for electronic discipline referrals Federal Graduation Rate Year (Cohort, year student first entered grade 09)
- 2) Graduation Year
- 3) Counselor

- 4) Diploma Type – Most will be R for Regular
- 5) Graduation Requirement Group: This is the graduation plan assigned to the student. Should be MS for most. Kalpuya has a KG grad plan which if completed results in a regular diploma as well
- 6) TAG info maintained by Instruction Dept found in Curriculum Code field.
- 7) Promotion Flag set to Y

### Graduation requirement Groups: (example below)

Group ID	Description	Graduation Year	Delete
ATT	<a href="#">Certificate of Attendance</a>	2015	<input type="checkbox"/>
COM	<a href="#">Certificate of Completion</a>	2015	<input type="checkbox"/>
HD	<a href="#">Honors Diploma</a>	2015	<input type="checkbox"/>
KG	<a href="#">Kalapuya Graduation Plan</a>	2015	<input type="checkbox"/>
MO	<a href="#">Modified Diploma</a>	2015	<input type="checkbox"/>
MS	<a href="#">Regular Graduation Plan</a>	2015	<input type="checkbox"/>

## D) Counselor Field\*

High schools: This field is **required** as it is printed on the official transcripts.

\*Mass Update assistance is available, add a helpdesk ticket.

## J) Homeroom Field and Scheduled Records

**Elementary and Middle:** Primary Homerooms need to be added teacher Inservice week. There are some utilities in eSP that can help you assign homerooms by grade or other criteria. If you do not understand how to use them, please call. The utility will save you a lot of time.

**Elementary Use - Utilities > Generate Programs>Homeroom Assignment**

**Middle Use - Utilities > Generate Programs>Homeroom Assignment by Period**

## K) House Teams

**WHS** – Enter special education case manager or tag-type. If there is more than one, use the comment field for speech or specialist. Users may be able to use the following utility:

**Utilities > House Team Assignment by Course or  
Utilities>Generate Programs>Registration Assignment**

**Prairie Mountain, Meadow View and Shasta** - put grades 06, 07, and 08 into their respective house teams:

Here is an example of possible update criteria for House Team Assignments:

And/Or	Area	Field Name	Condition	Value	Exists
	Demographics	Current Status	= (exact)		<input type="checkbox"/>
And	Demographics	Building	= (exact)	3307	<input type="checkbox"/>
And	Demographics	Grade	is in (comma delimited list)	07,08	<input type="checkbox"/>
And					<input type="checkbox"/>

#### **L) Student Language Code – Registration page**

Enter the language code that is spoken at home. This is used for State Reporting and other key data reports, if the student has a language other than ENGLISH on this field, make sure that a HOME LANGUAGE SURVEY is completed for the ELD teachers.

#### **M) Next Year Tab Information – Keep all data current throughout the year**

Please update the next year tab grade and building information as it needs to be accurate at all times. This means that when you enroll or reactivate a new student, check the next year fields too.

Yearend rollover criteria is being designed to adjust calendar discrepancies for exceptions.

Cognos reports are available, as well as Advanced Searches to help you find inaccurate next year data. You can also mass assign next year tabs in a couple areas:

**Utility>Registration Assignment or Advanced Search/Update option**

#### **N) PRE ENROLLING STUDENTS: MARCH – JUNE**

Beginning last March, we began allowing pre-enrollment of students for all grades. Please look for information on how to do this correctly beginning in February.

#### **KINDERGARTEN ROUNDUP: Here's how to do the pre-registering of KG**

- √ Add students with today's date and E1 entry code.
- √ Check the pre-reg flag to have accurate **PRE-REGISTERED STATUS**.
- √ Add KG for the grade and use their respective calendar.
- √ In the next year tab, update the grade to 01 and building accordingly.

#### **O) PERSONAL SCREEN- THIS SCREEN CONTAINS SENSITIVE DATA**

## 1) Classifications

- a) 504 plan - updated by office or counselors
- b) Iep status and flag - maintained by Special Services
- c) Migrant - maintained by Instruction
- d) Homeless status - maintained by Community Liaison
- e) Alt ed full time (1) - maintained by Student Services
- f) Alt ed part time (1a) - maintained by Student Services
- g) Bethel Community Transitions Network (17) maintained by WHS.
- h) Superintendent exchange (9)-maintained by District Office
- i) Open Enrollment Transfers (OE) – maintained by District Office
- j) Extended kindergarten (18)-maintained by Instruction
- k) Foreign exchange students (7) – maintained by WHS, Registrar or Office Staff
- l) Ged student(ge)-maintained by KHS in building 2088
- m) Home schooled (3)-maintained by Student Services

## 2) Social Security Number – Not required anymore, but will be needed at High School for College Career Planning. We no longer store this data.

Please discontinue asking for social security numbers. The SSN field has been removed from both the New Enrollment and Verification forms.

## 3) Building Transferred From

We have been loading the eighth grade building where the student came from in this field. This was for Special Services, but this may be a place where folks should also add the last school and city, state for transfer students (TBD).

## 4) Comments

These comments are viewable in teacher access center as Personal Alerts. No special needs comments should be located in this field. To show comments as a pop up when the student is viewed in eSP check the box to ‘show comments...’:



The image shows a screenshot of a form with a red border. On the left, the text 'Show Comments:' is visible. To its right is a checkbox that is checked, followed by the text 'Show comments as a pop-up on the summary page'.

**High School:** IEP Accommodations are entered special services case manager – do no edit

## 5) State Reporting ID

**Main front office staff** should be able to view student SSID which is needed by the middle of September for testing and State reporting.

**Contact Student Accounting desk for questions regarding the State Reporting ID**

## P) STUDENT ADDRESSES AND CONTACTS\*

**\*Please do not use a number sign (#) in front of apartment values**

- 1) McKinney Vento students:** mailing and physical address should match enrolled building unless otherwise requested by guardian. This would mean the mailing address could be something different. \*If student qualifies for McKinney Vento Legislation (Homeless status), please contact Bethel School District Homeless Liaison, Donna Butera prior to adding the REASON as McKinney Vento!
- 2) Geo code:** Always use “plan search” on student mailing address if the student is not in district, use the “R-Review” code in current and next year tabs - also complete the “reason” code\*.
- 3) Address Entry and Location:**

**PHYSICAL ADDRESS** needs to reflect a Bethel address or a street address in another district. Only select the SAME AS MAILING ADDRESS if applicable. If the address is in another district, after doing the Plan Search, system will require a reason code reflecting why the student is attending Bethel:

The screenshot shows a web form with the following fields and values:

- Same as mailing address
- Plan Area Number: 35
- Building of Residence Type: 35
- Apartment: [empty]
- Complex: [empty]
- House Number: 100
- Street Prefix: [empty]
- Street Name: Franklin
- Street Type: Ave AVENUE
- Street Suffix: [empty]
- Development: [empty]
- Delivery Point: [empty]
- City: Eugene
- State: OR Oregon
- Zip Code: 97402

**PO BOX ADDRESS** should be entered in the street name field, under the MAILING ADDRESS tab only:

The screenshot shows the 'Mailing Address' tab selected. The 'Street Name' field is highlighted with a red box and contains the text 'PO Box 202'. Other fields like 'House Number' and 'Apartment' are empty.

**Contact Information**

Priority	Name	Type	Address	Phone Number(s)	E-Mail Address
N/A	<a href="#">Taylor Baye Adams</a>	Student Mailing Address	<a href="#">2175 KELSLEY LANE</a> Eugene, OR 97402	<a href="#">Home 1: (541)520-2905</a>	N/A
N/A	<a href="#">Taylor Baye Adams</a>	Student Physical Address	<a href="#">2175 KELSLEY LANE</a> Eugene, OR 97402	<a href="#">Home 1: (541)520-2905</a>	N/A

Language of Correspondence:  Spanish  Use Language For Mailing

2	<a href="#">Amber Mitta</a>	Guardian	<a href="#">2175 KELSLEY LANE</a> Eugene, OR 97402	<a href="#">Mobile: (541)520-2905</a> <a href="#">Work 1: (503)465-1261</a>	<a href="#">ammitta@hotmail.com</a>
---	-----------------------------	----------	---	--	-------------------------------------

Addresses not listed in the Bethel Approved Address List or on Lane Regional Database: [http://www.rlid.org/services/quick\\_look.cfm](http://www.rlid.org/services/quick_look.cfm) should not be entered if the student is not an approved OE or EXCH student. If an address is not listed, please add a helpdesk ticket.

**4) Fields to process SPANISH REPORT card from Cognos:**

If a Spanish Report Card is desired, please note that in the Student's Mailing Address General Tab, *Language of Correspondence* must have ES and the *Use Language for Mailing* box is checked:

**Q) Home Access Center: HAC Reminders**

**STUDENT:** A student and guardian must have the following flags selected to have access to student data via the web.

**Student:** The web access flag needs to be checked for Home Access Center

The screenshot shows the 'Student' profile page with the 'Mailing Address' tab selected. The 'Notes' field is empty. The 'Web Access' section has a checked box for 'This student can access his/her information over the World Wide Web'. The 'Print Flags' section has several checked boxes: 'Registration Labels', 'Attendance Notifications', 'Discipline Letters', 'Schedules', 'IPR Letters', 'Report Cards', 'Medical Letters', and 'Student Fees'.

**GUARDIAN:** The web access flag needs to be checked for Home Access Center (this should be automatic, but double check).

**General Tab**

Login ids and passwords will be automatically generated prior to the opening of school. Guardians are advised to update their password via MY ACCOUNT on Home Access Center. Do not add miscellaneous data into the email address field.

Guardian username convention: First. Last

Typical Password: Youngest Child ID + Youngest Child DOB (54545mmddyyyy) for older accounts. Newer guardians will be given a password generated by the system. You should be able to see (view) the password.

If a Spanish Report Card is desired, please note that in the Student’s Mailing Address General Tab, *Language of Correspondence* must have ES and the *Use Language for Mailing* box is checked:

**R) CONTACTS:** Do a *thorough* search for possible contacts that are already in the database.

REMINDER: Link contacts as required for database integrity. Guardian contacts will automatically link to their other students if added correctly. Call if more information is needed. See underlined note below regarding Guardian contact codes.

**CONTACT CODES:** Guardian, Emergency, Other

**Guardian** - guardians only – check the living with flag for guardians who live with the student. Remember that the system cannot handle shared custody situations yet.

**Emergency** – enter who will be called in case of an emergency, guardians are always called first – do not list as emergency contacts

**Other**- this could be a probation officer, social worker or use in case of restraining order, when home access should be denied. If other is used, add reason in the guardian notes section

#### **S) REMINDERS:**

- ***SEARCHING:*** REMEMBER TO JUST ENTER THE LAST NAME OF THE CONTACT, THIS SHOULD RESULT IN THE LARGEST RESULTS TO SELECT FROM
- ***ADDING:*** THE SYSTEM AUTOMATICALLY DEFAULTS TO “G” FOR GUARDIAN, MAKE SURE TO CHANGE THIS FOR ‘EMERGENCY OR OTHER’ TYPE CONTACTS ENTERED
- **LIVING WITH FLAGS:** THE SYSTEM CANNOT RECOGNIZE A ‘SHARED CUSTODY’ RELATIONSHIP. IF A STUDENT HAS GUARDIANS WHO LIVE AT SEPARATE ADDRESSES, ONLY ONE CAN BE FLAGGED AS “LIVING WITH”. THE STUDENT’S ADDRESS SHOULD MATCH THIS ‘LIVING WITH’ GUARDIAN’S ADDRESS. SAME FORMULA AS BEFORE LIVING WITH GUARDIAN ADDRESS SHOULD MATCH STUDENT PHYSICAL ADDRESS
- ***EMERGENCY CONTACT PHONE:*** DO NOT ENTER MORE THAN 2 PHONE NUMBERS FOR EMERGENCY CONTACTS
- **RELATIONSHIP CODE** - Add the relationship the contact has to the student
- **EMAIL ADDRESSES** – Do not use this field for anything other than an email address



- **PHONES** - If mobile (cell) phone is the primary phone number (home phone or preferred) to contact for the guardian, add as HOME.
  - Auto dialers use the HOME field to send messages home. Please start cleaning up the phone area by re-entering any W1 or W2 entry as a Work Phone.
  - ADD THE PREFIX TO ALL PHONE NUMBERS

**NOTE: ONLY GUARDIAN CONTACTS WILL HAVE ACCESS TO HOME ACCESS CENTER.**

### T) Transportation Screen

Elementary schools and others may use this screen to track how a student gets to and from school, including adding bus routes.

Potential uses could assist emergency planning and grant data

### U) FIRST WEEK OF SCHOOL

*Add a Helpdesk ticket for rollover issues or any other problem encountered. Include brief description and example ids if needed.*

## REGISTRATION PACKETS

New Student Enrollment Forms (Print Shop)

Health Enrollment Forms –Print on yellow paper. (Print Shop)

Cognos Reports

**HAC Guardian Password information letter:** Public Folders > Bethel > eSchoolPLUS+ Reports > Beginning Year > HAC Guardian Letter PDF

**STUDENT REGISTRATION VERIFICATION:** Public Folders > Bethel > eSchoolPLUS+ Reports > Beginning Year>Student Registration Verification

**STUDENT HEALTH VERIFICATION:** Public Folders > Bethel > eSchoolPLUS+ Reports > Beginning Year>Student Health Verification (PRINT ON YELLOW)

### Scheduling Reminders

- Students should be scheduled with the first day of the calendar prior to school beginning
- Students that are scheduled after the first day, make sure to use the correct dates for adding and dropping. The system should automatically pull the current date when scheduling, if you do not see this value after the first day of the calendar, please contact Student Information Systems.

- Maintain adds and drops throughout the year – dates matter!
- State Reporting ADM reports students in classes and with teachers by date, so if you are unsure what date to use, add a helpdesk ticket or contact Student Accounting desk.
- BASICS:

SCHEDULING MATRIX 2017													
Grade	HRM (Assign Registration Homeroom first, then Schedule HR & other courses)	ELA: Reading Fluency	ELA: Writing	ELA: Literacy & Speaking	Health	Learning Behavior	Math	Music	PE	Reading	Science	Social Studies	Spelling
KG	73000	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
01	73001	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
02	73002	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
03	73003	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
04*	73004	99011804	99011	9901104	99002	99021PM	99024	99141	99091	99014	99081	99054	99015
05*	73005	990118	99011	990111	99002	99021PM	99025	99141	99091	99015	99081	99054	99015
Title Read	51068												
SPED	73009												
SPED-Blended**	Add a helpdesk ticket for new course												
Life Skills	72006												

\*Students in grades 4 & 5 should have a total of 15 courses, KG-03 should have a scheduled homeroom

\*\*Two courses are now available: Grade 04 - 730394 and Grade 05 - 730395. Deni will create new if needed.

- Don't use "0" Staff in primary staff id field
- No additional secondary staff listed unless they are HQ in subject area
- New staff or long term substitutes (more than 2 weeks) tracked in the Master Schedule staff date tracked area
- **NO end date for teachers unless a teacher leaves during the year and a new vector line is added for the new teacher**
- If a student receives subject area instruction from 2 staff members they need to be enrolled in 2 math or reading courses
- Check with Deni Basaraba (add helpdesk ticket) if there is a team teaching situation Students moved to district instruction need a schedule, if a student is being withdrawn from the regular program, please send a reminder to Jill Busby regarding scheduling, cc Deni Basaraba.
- **Do not delete or mass move after first day of school**
- **Remember to Preserve schedules after the first day of school**
  - **If student returns, make sure to correct the add dates on the schedule so they match the re-entry date**

## ELEMENTARY SCHEDULE TIPS

### K-5 Grid (If course not appropriate, add helpdesk ticket)

- I. Prepare for Elementary Scheduling
  1. Review the Room Catalog via Registration Center > Rooms  
Update room information  
Add new rooms if needed
  2. Review the Staff Catalog via Registration Center > Staff Catalog  
Deactivate staff by unchecking the ACTIVE box  
Add new staff  
Update primary homerooms  
Update departments for each teacher
- II. See the Run the Registration Assignment Utility: Utilities > Registration Assignment
- III. See Elementary Scheduling Document for Grades 4 & 5

## **ENTRY / WITHDRAWAL TIPS**

### **NO SHOWS (First week only): Entry/Withdrawal Screen**

- Wait to withdraw NO SHOWS until the Thursday of the first week.
- Mark “no shows” – 3E (NS withdrawal code) with the first day of school as the withdrawal date. High schools should preserve schedules prior to dropping students in case they return during the school year.
- If a No Show student returns at any time during the year, please add a new vector.
- Do not alter the original vector.

Contact Student Accounting desk if you have concerns.

## **WITHDRAWING STUDENTS**

- A) TRANSFERS WITHIN DISTRICT: After school starts, appropriate office staff at the receiving school should contact the previous school to assist in having the school successfully withdraw the student with a 1B (W2). If the withdrawn building has awarded a schedule to the student, please drop the schedule prior to withdrawing with a 1B (W2).

B) WITHDRAWAL CODES & DATES: When a student withdraws from school, the withdrawal date should be the one after his/her last day in attendance.

C) WITHDRAWING STUDENTS (After school begins) – PRESERVE SCHEDULE

1. For students who have a schedule, always drop with preserve student schedule.  
IMPORTANT – IF STUDENT RETURNS, MAKE SURE REACTIVATED SCHEDULE DATES MATCH TRIMESTER/SEMESTER DATES
- 2.
3. Any time before the first report card the usual procedure would be to make sure the status of marks to be issued on each course in the mass entry screen in student center > scheduling shows N for no marks.
4. Once a report card has been issued in a building then the status of marks to be issued on each course in the mass entry screen needs to be O for office. This is the only way to retain previous report cards. If you change it to N for no marks all report cards disappear.
5. IMPORTANT: In order for the status to be updated on TAC for teachers when they open RC – schedule synchronization must be run. If not, then the student’s name will appear on the teacher’s report card window. Mark Reporting Center > Calculations > Schedule Synchronization

D) Expelled Student Procedure

Students who have had an expulsion hearing and the result was an expulsion from the current building then the following steps are followed:

1. Building office staff enters the withdrawal code of 5A on the date determined the student could no longer be in attendance via letter from the hearings officer.
2. District office designee goes into the Discipline Center and searches the incident number (referral listed that resulted in a suspension), then update the action code to Expulsion from Suspension Pending Expulsion.
3. District office enters a comment in the personal screen: “Expelled on \_\_\_\_ date. Can re-enter school on \_\_\_\_ date. Also, select the option that this comment must display. This will make it visible to any building where the student attempts to enroll.

1. If the student's expulsion will carry over into the next school year, then on the academic screen uncheck the promote flag. This will cause the student not to roll up. If the student appears to pick up a packet to enroll, the user will have to search on the student and will discover the expelled status and will know not to enroll.
2. Once the student does return to the building, the administrator (or assigned office staff) will remove the comments when deemed appropriate.
3. If student is suspended or expelled, the Attendance Data operator should enter the code to reflect the absence caused by a disciplinary action.

#### **V) END OF YEAR PROCEDURE REMINDERS**

Be sure to run the next year building and grade Cognos 10 report to be sure your students are pointed in the correct grade and building.

High schools need to run the Rank Calculation prior to rollover  
– otherwise the class won't be ranked.

Be sure you let Laura know if you have any changes in your period configuration, bell schedule, etc. prior to doing any scheduling.

#### **PROGRAM TRACKED AREAS**

Remains Open:

IEP Flag, Indian Education, Tag  
504 Plan, OR Demographics, OR LEP

Closed Programs:

Free and Reduced Lunch, Migrant Education  
District Sped Program, Title II, District Sped Program

#### **STATE REPORTING**

Correct data entry processes need to be followed to ensure state reports are accurate. Here is how staff can assist at the building level:

- **Discipline Entry** – Finish the referral entry by Friday afternoon for SWIS to Pentamation uploads (occur every Monday). Kathleen Best is SWIS Coordinator
- **Attendance Entry** – Run the error scans and daily attendance calculations to ensure correct data, run Attendance and Interval Totals prior to State Reports
- **Entry/Withdrawal updates** – update as the year progresses. Update request for records as they come in and try to remove 3E (W8) status.
- **OPTE** (Vocational Education Classes at WHS) – Check with Dawn Delorefice
- **Recent Arrivers** – For all students, make sure to enter a Country of Birth on the Personal page; and a US enrollment date for those born out of the country on the Registration page
- **Transfers** – Please note this will be discussed at August Staff meeting, make notes here if needed.

### **ADVANCED SEARCHES**

Things to remember about advanced searches

- If you edit them, remember to rename them.
- Can generate as an Excel or Adobe report.
- Use page breaks to print out between buildings, homerooms, and staff.
- Delete unwanted favorites during the school year

### **YEAR DATA VERIFICATION – CURRENT FIELDS**

- Run monthly or at least twice a year, prior to beginning of school and end of school.

**This is the end product:**

Search

Report

Search Favorites: Verification - Current Year Fields

Number of records found: 339

Student Name	Student ID	Homeroom Primary	Counselor	Grade	Graduation Year	Promotion	Calendar
<a href="#">Aaroud, Lilian Elaine</a>	20340	55	3355	05	2016	Y	E
<a href="#">Acevedo Mora, Brenda Jessica</a>	20712	52	3904	04	2017	Y	E
<a href="#">Adelman, Austin Lane</a>	20332	55	3355	05	2016	Y	E
<a href="#">Aquirre Alvarez, Jesus Daniel</a>	30909	53	2383	04	2017	Y	E
<a href="#">Aquirre Alvarez, Juan Pablo</a>	93395	1-AM	1136	KA	2021	Y	K

Clear All Fields

Area	Field Name	Display
Demographics	Homeroom Primary	<input type="checkbox"/>
Demographics	Counselor	<input type="checkbox"/>
Demographics	Grade	<input type="checkbox"/>
Academics	Graduation Year	<input type="checkbox"/>
Academics	Promotion	<input type="checkbox"/>
Entry/Withdrawal	Calendar	<input type="checkbox"/>
		<input type="checkbox"/>

Search

**VERIFICATION – NEXT YEAR FIELDS**

- Run monthly or at least twice a year, prior to beginning of school and end of school

**This is the end product:**

Search Favorites: VERIFICATION-NEXT YEAR DATA FIELDS

Number of records found: 339

Student Name	Student ID	Next Year building	Next Year counselor	Next Year grade	Next Year homeroom primary	Homeroom Primary
<a href="#">Acord, Lilian Diana</a>	20340	587	0	06	N/A	55
<a href="#">Acord, Mora, Brenda Jessica</a>	20712	583	0	04	N/A	52
<a href="#">Aberman, Austin Lena</a>	20332	587	0	06	N/A	55

Delete Favorite

Favorites: VERIFICATION-NEXT YEAR DATA FIELDS

Custom Search Name:

---

VERIFICATION-NEXT YEAR DATA FIELDS Search Criteria

Clear Criteria

And/Or	Area	Field Name	Condition	Value	Delete
	Demographic	Building	= (equals)	583	<input type="checkbox"/>
and	Demographic	Current Status	= (equals)	A	<input type="checkbox"/>
and					<input type="checkbox"/>

---

List Field Display Selection

Default  Custom

Clear All Fields

Area	Field Name	Delete
Next Year Demographic	Building	<input type="checkbox"/>
Next Year Demographic	Counselor	<input type="checkbox"/>
Next Year Demographic	Grade	<input type="checkbox"/>
Next Year Demographic	Homeroom Primary	<input type="checkbox"/>
Demographic	Homeroom Primary	<input type="checkbox"/>
		<input type="checkbox"/>

Search

## ESCHOOL DASHBOARD: 3.1

Here is a screen shot of how your eschool dashboard should appear if you have set up appropriate content. This is not required but can be helpful – Click on the SETTINGS icon to start setting the page up

The dashboard is titled "July 22, 2014" and includes a "Settings" icon in the top right corner. It is organized into several sections:

- Tasks: Current:** A message states "You do not have any tasks running currently."
- Reports:** A list of report logs with timestamps:
  - Master Schedule Mass Update Statistics Log (7/23/2014 1:28:47 PM)
  - Security changes have been processed (7/23/2014 10:53:17 AM)
  - Print Report Cards Log (7/23/2014 2:43:39 PM)
  - REPORTCARDTEMPLATEREPOK.MPX** (7/23/2014 2:43:39 PM)
  - Generate MI Data Warehouse Log (7/23/2014 2:43:31 PM)
- Tasks: Scheduled:** A message states "You do not have any tasks scheduled."
- Calendar:** A section for the calendar, currently showing "Wednesday, July 23, 2014".
- Attendance Membership: By Building:** A circular gauge chart showing 100.00% attendance. A legend indicates 100% attendance.
- Enrollment: By Building:** A bar chart showing enrollment numbers for four buildings: 1577, 788, 713, and 649. A legend identifies the buildings by color: 1577 (green), 788 (orange), 713 (blue), and 649 (yellow).



