



Scheduling Guide – Request Based Tangipahoa Parish

2223
(2022 – 2023 School Year)

Phase 1: Request Entry

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Overview of New Year Scheduling

Request Entry Phase

1. The district rolled over students from the current school year to next school year. This is done several times over the spring. A final rollover occurs in June.
2. Enter All Student Course Requests.
3. Review the Audit Request Validity Report for accuracy and adjust as needed.
4. Use Audit Master Schedule Seats vs. Requests to determine how many sections of each course you will offer
5. Decide which teachers will teach the sections offered.
6. Think about other items you want reflected in the Master Schedule such as common planning time for teachers, Athletic PE, or any other specific conditions you want reflected in the Master Schedule.
7. Develop the Master Schedule (on paper, Excel file, or any other model) grade by grade beginning with Core singletons, then Core doubletons. Afterwards, work on placing electives.
8. Check the number of sections available for students at each period. Compare against the anticipated count of students coming next year.
 - a. Look for enough places for the students to go to at each period. Example: If there are 300 9th graders, check to see if there are roughly 12 classes for the 9th graders to go at each period.
9. As you complete each grade level transfer it to a document or model that shows the teachers who will be teaching the sections at specific periods.
 - a. This helps you keep straight who is teaching each course at each period so that you will know which periods are available for the teachers as you move down through the grade levels.
10. Update your Master Schedule in the **next year** Master Schedule Editor.

Scheduling Phase

11. Verify student requests are still accurate. Update as necessary.
12. Based on updated requests, you may want to recheck steps 8 – 10 listed above.
13. Optional: Preload manually scheduled classes to students.
14. Run Automatic Scheduler. Some prefer to run it grade by grade, but it can be run for the entire school. It should run at a high percentage if all previous steps were completed as explained.
15. Check your Abandons by clicking on the number. If you are pleased with the run percentage and there appears to be no major issues with the abandons, commit your run by clicking on the Run Number.
16. Adjust student schedules through Student Schedule Maintenance or Pattern Board.
17. Check class count size, verify that all students have a complete schedule.
18. Assign students to homerooms.

Useful Reports about Students for Next Year

Complete Caseload – Special Education Students.

Run this report to obtain special ed information about the new students coming to school.

1. Enter a keyword in the search box at top left or go to **Special Ed > Lists > Complete Caseload**.
2. Configure for next year, grade level to review, and an as of date of first day of school in the new school year.
3. Use the **“Print Legend”** to lookup the values in the report.
4. Column **“IS”** contains the placement information:
 - 1 Regular Class 80% or More of Day (Age 6+)
 - 2 Regular Class 40-79% or More of Day (Age 6+)
 - 3 Regular Class Less than 40% of Day (Age 6+)
 - 5 Hospital/Homebound (Age 6+)
 - 6 Home and receives majority of services at home (Age 3-5)
 - 9 Separate School (Age All)
 - 10 Residential Facility (Age All)
 - 14 Service Provider Location (Age 3-5)
 - 18 ECSE Separate Class (Age 3-5)
 - 19 Correctional Facilities (Age 6+)
 - 20 Parentally Placed in Private Schools (Service Plans Only)
 - 21 In Regular EC Program at least 10 hrs/week and major services in regular class.
 - 22 In Regular EC Program at least 10 hrs/week and major services outside regular class.
 - 23 In Regular EC Program less than 10 hrs/week and major services in regular class.
 - 24 In Regular EC Program less than 10 hrs/week and major services outside regular class.

Setup-11.01.2021 ✕

Year : 2223 ▼

District : 026 ▼

School : 005

As Of Date : Aug ▼ 09 ▼ 2022 ▼ 📅

Grades :

Gender :

Ethnic :

Exceptionality :

Exclude Exceptionality :

Services :

Teacher Selection :

Delivery Option :

Custom Codes :

Column :

Sort By Teacher

Print Exceptionality Initials

Double Space Print

Reports :

English Proficiency List – ESL Students

1. Enter a keyword in the search box at top left or go to **Student Master > Lists > English Proficiency List.**
2. Configure the report for next year.
3. Set the desired grade levels.
4. Set US Entry dates to blank.
5. Set the As of Date to the first day of the new school year.
6. Place a check on the box for “**English Proficient Code is LIMITED**”.

The screenshot shows the configuration interface for the English Proficiency List. The following fields are highlighted with red boxes:

- US Entry Date:** A section containing 'From Date' and 'To Date' fields, both with empty dropdown menus for month, day, and year. A callout bubble labeled 'Set to blank' points to these fields.
- As Of Date:** A date selector set to 'Aug 09 2022'.
- English Proficient Code is LIMITED:** A checkbox in the 'List If' section that is checked.

Other visible fields include Year (2223), District (026), School (005), Grade, Special Codes, Custom Codes, Program, Clubs, Sports, and Team. There are also checkboxes for 'Show Detailed Accommodations' and 'Print Comments', and a 'Column' field listing various data points.

Note: Select either List If: 'There is an Entry Date' or Do Not List If: 'There is no Entry Date' for records that have an Entry Date.

List If:

- There is an Entry Date
- There is a Funding Code
- There is an English Proficient Code
- English Proficient Code is LIMITED
- Include Inactive Students
- Students Coded LEP in Last 2 Years
- First Language Is Not English

Do Not List If:

- Country of Birth is US or Blank
- Country of Origin is US or Blank
- Language Code is English or Blank
- Fully English Proficient
- There is no Entry Date

Test Scores by Roster

1. Enter a keyword in the search box at the top left or go to **Grades > Lists > Test Scores by Roster**
2. **Configure for next year**, with an as of date for first day of school. Select the desired test type.
 - a. If you select **"Show Only Most Recent"**, the test results will give the most recent result on file.
 - b. Use the **"Filters"** button to limit to desired grade level or other grouping of students.

Test Scores By Roster Setup -

Year: 2223

District: 028

School: 058

As Of Date: Aug 9, 2022

Courses:

Section:

Test Name: LEAP 2025 Gr. 3-8

Reports:

Achievement Level Zones

Below: 5 (red)

Above: 5 (green)

Show Zone Students Only

Legend

Filters Advanced

OK

Click to Filter students displayed

Click for more display options

- c. **Tip:** Once results are on screen, for advanced manipulation of data, you may find it easier to export the data to an Excel file.
- i. Click the **“Export”** button at bottom, then choose **“xls”** file type.

Print Document

You are about to create student data information outside of your security umbrella resulting in an unknown disposition and use. Any legal situation is not the responsibility of the software vendor, and your district will be solely responsible for this action.

Print Options

PDF - Non editing

XLS - Spread Sheet

CSV - Comma Separated file

HTML - Markup Text

File Name: testscoresbyroster.xls

Paper Options

Orient: Landscape Portrait

Size: Letter Legal A4

Print Cancel

Where Did My Students Come From? – Student Feeder Trends

1. Go to **Student Master / Lists / Student Feeder Trends**.
2. Set for desired grade level and the **“As of Date”** for start of school or current date.
3. Click Ok to obtain the results. A report of students showing school from last year is displayed.

Setup-03.12.2020

Year: 2223

District: 010

School: 003

Grade: 09

As Of Date: Aug 16, 2022

Show GPA on Report

Show Transferred to School

Sped: All Sped Only Non Sped

Prev Sch: All Has a Previous School Has no Previous School

Previous School:

Order By Previous School

Student Counts and Percentages are found on the Counts Tab

Where Did My Students Roll Over to? Student Next School List

Set the report to the last day of school last year to see what school site the students rolled up to.

1. Go to **Student Master / Lists / Student Next School List**
2. Set the **Year** to current or previous year. Set the desired grade level(s).
3. Set the **“As of Date”** to the last day of the previous school year, then click the **“Ok”** button.
4. Focus on the column **“Next School”**.

Setup-04.12.2019

Year: 2122

District: 010

School: 003

Grades: 09,10,11

Special Codes:

Programs:

Exceptionality:

As Of Date: May 24, 2022

OK

Entering and Verifying Requests

Course Request Fast Loader

This program allows the user to load next year requests by current year course. For example, the user could choose to indicate that all currently scheduled students in English I will get a request for next year in English II.

1. In the left navigation pane, select **Schedule**, then **Loaders**, then **Course Request Fast Loader**.
2. Setup box options:

- **New Year:** Set to "2223".
- **School:** Confirm that school is set correctly.
- **Grades:** Set current year desired grade level of students in each course to assign the selected request to.
 - i. **TIP:** Since many courses in high school have students of multiple grade levels, it may be best to use all grade levels at the school.
 - ii. **Active Only:** Normally set to "checked" status.

- **As of Date:** Normally set to current date.
- **Course Criteria: Grade Levels:** Set to grade levels of the school.
- **Transcript Group:** If desired, click to select a transcript group to limit the courses shown. *Example: Select Math to limit courses to work with as Math only courses.*

- **Limit Courses to Master Schedule:** Normally set to "checked". If there is a need to assign requests to courses that are currently not in the master schedule for next year, uncheck this option.
- **Active Only Courses Prev Year?:** Normally set to "checked". If unchecked, the user will be able to pick from courses marked "obsolete".
- **Active Only Courses New Year?:** Normally set to "checked". If unchecked, the user will be able to pick from courses marked "obsolete".
- Click **Ok** to begin.

3. The user will see there are two basic parts of the screen. On the left, a selection of current year courses is displayed with select boxes. On the right are select boxes of courses for next year.
4. The user picks a course on the left to represent students currently enrolled, such as "English I".
5. Next, the user picks a course on the right to represent the next year requests to be created, such as "English II".

Course Request Fast Loader									Course Request Fast Loader						
	Course 1617	Grade	Credit	Honors	STD	SEM	# PDs	Pf	Sel	Course 1718	Grade	Credit	Honors	STD	SEM
1	<input type="checkbox"/> BUSINESS ENGLISH	11	1			2	1		<input type="checkbox"/>	BUSINESS ENGLISH	11	1			2
2	<input type="checkbox"/> DE ENG IV 101_5P	12	1	EAJ9		1	1		<input type="checkbox"/>	ENGLISH I	9	1	TF	*	2
3	<input type="checkbox"/> DE ENG IV 102_5P	12	1	EAJ9		1	1		<input type="checkbox"/>	ENGLISH II	10	1	TW	*	2
4	<input checked="" type="checkbox"/> ENGLISH I	9	1	TF	*	2	1	9	<input checked="" type="checkbox"/>	ENGLISH III	11	1	TW	*	2
5	<input type="checkbox"/> ENGLISH II	10	1	TW	*	2	1		<input type="checkbox"/>	ENGLISH III HNRS	11	1	HW9		2
6	<input type="checkbox"/> ENGLISH III	11	1	TW	*	2	1		<input type="checkbox"/>	ENGLISH IV	12	1	T		2
7	<input type="checkbox"/> ENGLISH III HNRS	11	1	HW9		2	1		<input type="checkbox"/>	SR APPLICATIONS	11	1			2
8	<input type="checkbox"/> ENGLISH IV	12	1	T		2	1		<input type="checkbox"/>	TECHNICAL WRITIN	9	1			2

- Click the **Load Request** button. A confirmation message will indicate the number of requests created for the next year course.
- Clear the selections and start the next course combination to load. Repeat for each combination desired.

Student Request Fast Loader

The **Student Request Fast Loader** allows the user to load course requests for one or more courses to groups of students at one time in a loader format.

- In JCampus on the left navigation panel, click **Schedule**, then **Loaders**, then **Student Request Fast Loader**.
- At the setup box, set the **Year** to "2223". District and School should be based on your login.
 - Student Grades:** Click to set the desired grade level of students.
 - Gender, Ethnic, Sports, Clubs, Teams, Special Codes, Program Codes:** Click to filter the students by these items if needed.
 - Active Only:** A check will limit the list of students to only students who are enrolled. Default is to have this checked.
 - As of Date:** If "Active Only" is checked, students enrolled as of this date will be displayed on the left side of the screen. Normally this is set to first day of school for 2223.
 - Special Ed, 504, LEP:** Select from the choices to filter students by Special Ed, 504, or LEP.
 - Edit Next School Requests:** If working as a middle school Counselor needing to enter requests at the next school for next year, click here. Note: Needs special user management settings to be able to do this.
 - Select Year to Schedule:** If the user wishes to fast load requests into future years other than next year, click to specify the year being loaded.

Student Request Fast Loader Setup 03.11.19.11 MLM

Year: 2223

District: 010

School: 025

Student Grades: 10

Gender:

Ethnic:

Sports:

Clubs:

Student Teams:

Counselor:

Special Codes:

Custom Codes:

Select Program Codes:

Active Only

As Of Date: Aug 15 2022

Special Ed: All Sped Only Non Sped

504: All 504 Only Non 504

LEP: All LEP Only Non LEP

Adjust grade level(s) as needed for pick list of students.

- **Course Criteria / Grade Levels:** Click to limit the grade level of courses to pick from.
- **Course Criteria / Transcript Group:** Click to limit the transcript group of courses to pick from. *Example:* Transcript group of “English” will limit the pick list of courses to those categorized as “English” such as “English I, Reading I, etc...”

Edit Next School Requests
 Select Year To Schedule : _____
 Course Criteria :
 Course Grades : 09,10,11,12
 Transcript Group : _____
 Limit Courses to Master Schedule?
 Active Courses Only?
 Stu Courses Filter : _____

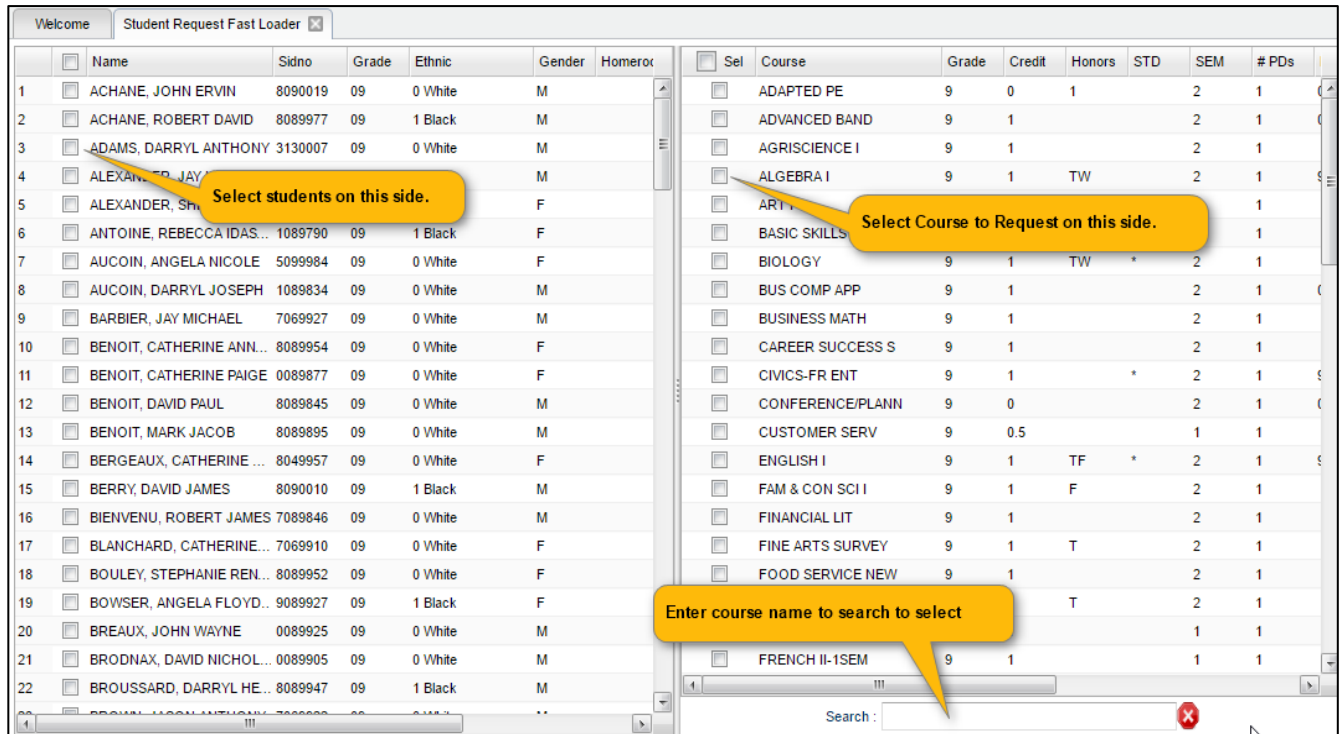
Helpful filter to limit course pick list.

Use if you need to obtain a list of students who have already requested a specific course

- **Limit Courses to Master Schedule?** Normally checked. Check if the user wishes to limit the courses selection to those in the master schedule for the New Year.
- **Active Only Courses:** Normally checked. Check if the user wishes to limit the courses selection to only courses that are not obsolete.
- **Stu Courses Filter:** Click to select a course that will show only students who have requested this course. For example, picking “Algebra III” will cause the loader to only show students that have requested this course.

3. Click the **OK** button to begin the Student Request Fast Loader.

4. On screen, the user will see that there are students with select boxes on the left, and courses with select boxes on the right. Additionally, on the lower right, the user will notice that there are course alpha select buttons, along with a course search text box.



5. **Buttons at the bottom of the screen:**

- **Load Requests:** Click this button to assign selected course requests to selected students.
- **Unload Requests:** Click this button to remove selected course requests from selected students.
- **Setup:** Click to return to the setup box to change settings for the utility.
- **Print:** Click to Print the student listing.

6. **Selecting Students:** Click the select box next to the desired students. To select all students shown, click the box in the upper left next to the column header labeled “SEL”. This will place a check in each student’s box. To clear all selections, click in the same box again.

7. **Selecting Courses:** To locate a desired course either:

- Scroll up or down to the desired course or use the Search box in the lower right under the course listing.
- When the desired course is displayed, click the select box to the left of the course.
- Multiple courses can be selected to load more than one course at a time.

8. **Assign the selected course requests to the selected students:** Click the **Load Request** button. The system will think a moment, then return a message of “Students requests set!”. At this point, requests have been assigned.

9. **Remove the selected course requests from the selected students:** If a mistake was made, or a correction needed, and the requests need to be taken away, first select the desired students, then select the desired course to take away as a request. Click the **Unload Request** button. The system will think a moment, then display a message of “Student requests unset!” At this point, the requests for the selected courses have been removed from the selected students.

10. **TIP: Need to see the requests of the individual student from this screen?**

- Hover the mouse on the name of the student, then click the iGear icon.
- Click Schedule, then either Schedule Maintenance, or Pattern Board.

1. **Schedule Maintenance:** Click the tab labeled **UnScheduled Requests**. From here, the user can add and remove requests for the single student.

2. **Pattern Board:** Requests will show as unscheduled on the screen. From this screen, the user can delete and add requests for the single student.

Load Student Course Requests

This program allows the user to work with requests on an individual student level.

1. In JCampus, in the left navigation panel, click on the "Scheduling" button.
2. Under "Entry", click on "Load Student Course Requests".
3. On the setup box

- **Year:** For this program, the Year should be the upcoming school year
- Set **District** and **School** to default based on security of the user.
- **Stu Grades:** Select the grade level(s) of the students that need course requests.
- **Active Only:** Check the box by "Active Only" to exclude those students who have been dropped.
- The **date field below the "Active Only"** box is to tell the system what date the "Active Only" option should be using to find active students.
- **Show:** Select to include "All" students, special ed students only, or regular ed students only.

Load Requests Setup 06.14.21 MLM

Year: 2223

District: 010

School: 062

Stu Grades: 10

Active Only

Date: Aug 15, 2022

Include Scheduled Requests

Allow Multiyear Requests

Skip Obsolete Courses

Course Grades: 09,10,11,12

Create Courses From Master Schedule

Show Master Schedule Comments

Edit Next School Requests

Current Year Requests Only

Course Long Name Options

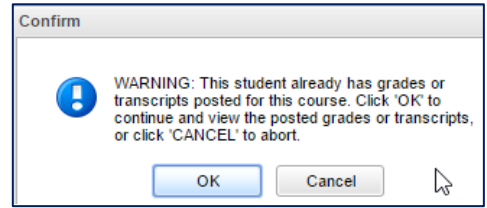
Display Long Course Names en English : Default Language

OK Filters

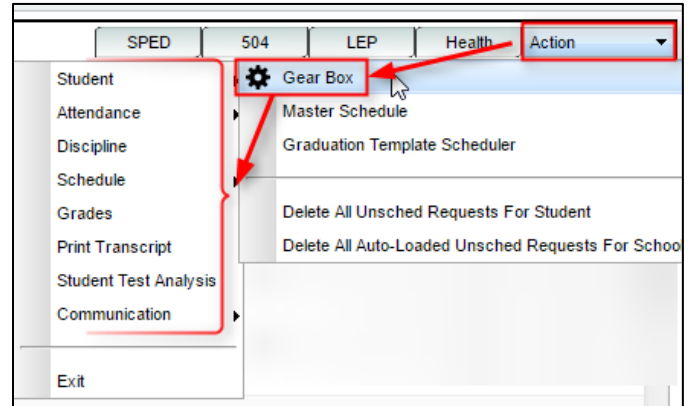
- **Include Scheduled Requests:** Click to show student requests that have already been scheduled. Leave unchecked to only view unscheduled requests.
- **Skip Obsolete Courses:** Check to exclude courses that are obsolete from the course selection list.
- **Course Grades:** Click to limit the course selection list to the grade levels selected.
- **Create Courses From Master Schedule:** Check to limit the course selection list to only those courses in the next year master schedule
- **Filters Button:** Click to choose additional filters when selecting students. After selecting filters, then click OK.

4. Click **Ok** when the setup box is correct.
5. Normally, the first alphabetical student in the grade range will be displayed in the upper left. The user can start with this student or use the **Find** button to locate the desired student.
 - To move to a different student, either click the **Next** or **Prev** (Previous) button or click the **Find** button.
6. The left side of the screen is where the student's requests will appear. On the right is the course selection list.

7. **To add requests:** Click on the desired course from the course selection list on the right, and it will then appear on the left.
8. **If the student has taken the class previously:** The system will present a warning message as shown. To continue adding the course, click **OK**. Click **Cancel** to stop adding the course.

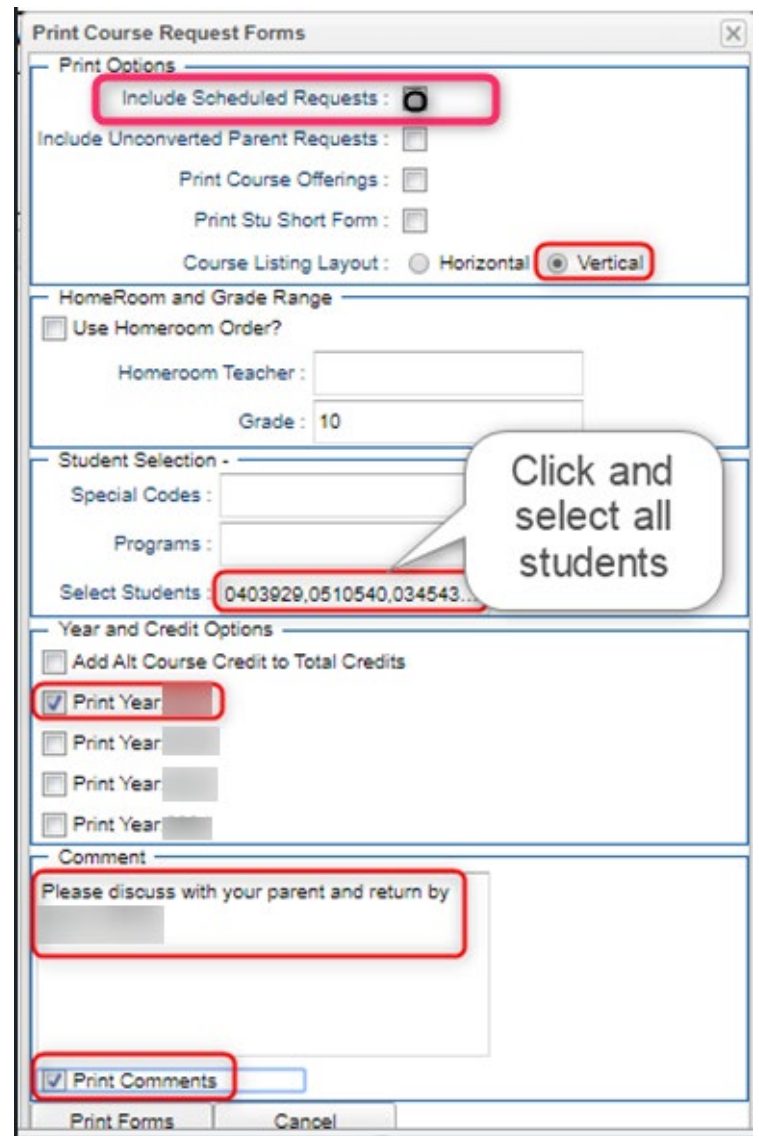


- **TIP:** Need to check the transcript or current year grades as a result of getting the above message? Click the **Action** button in the upper right, then choose **iGear**, then either **Grades** or **Transcript**.



9. **To request part of a course:** Click in the cell under the column header "H". Choose to select "1st Half" of the course, or "2nd Half" of the course.
10. **To delete a request:** Click the red cell to the left of the course.
11. **To Print a Request Sheet:** Click the **PrtStu** button to print a request sheet for this student, or multiple students.

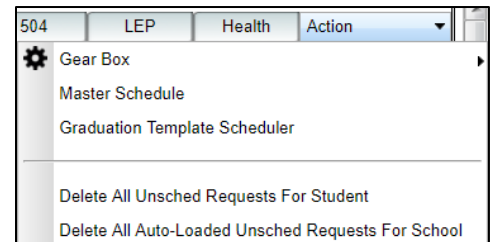
- **Include Scheduled Requests:** Usually checked.
- **Include Unconverted Parent Requests:** Check to show requests entered via the Student Progress Center.
- **Course Listing Layout:** Recommend **Vertical** for easier reading.
- **Use Homeroom Order?** If requests are printed and need to be handed out to students in the current year, then when rollover is done, do not clear the Homeroom Teacher.
- **Homeroom Teacher:** If homerooms from current year have been rolled over to next year, click to select the desired homeroom teacher(s).
- **Grade:** Click to set the desired grade range to print.
- **Special Codes:** Click to filter print out by students with specific special codes in student master.



- **Programs:** Click to filter print out by students with specific program codes in student master.
- **Select Student(s):** By default, the current student's ID will be in this cell. Click in the cell to select all, or some of the students.
- **Print Year:** Select the year (2223) to print requests.
- **Comment:** If the user wishes to place instructions or a message of some kind to the parent / guardian / student, enter them in the Comment cell.
- **Print Comments:** Click to indicate that any text in the Comment section is to be printed on the request page.
- **Print Forms:** Click to print a form for the desired student(s). The user will see the requests listed, with any comments, as well as signature lines at the bottom of the request page.

12. **"Action"** button allows access to other information: Click the **Action** button in the upper right to access other useful programs such as...

- **iGear:** Click the iGear icon to see the student's attendance, grades, discipline, test scores, transcript, and other details.
- **Master Schedule:** Click to see the next year master schedule.
- **Delete All Unshed Requests For Student:** Deletes unscheduled requests for chosen student.
- **Delete All Auto-Loaded Unshed Requests For Student:** DON'T USE THIS FEATURE.



13. **Non-Site Requests** button: If this button contains black letters, not gray, it means that the student has course requests from another school in the district.

- Click the **Non-Site Requests** button to see the requests from the other school site.

The screenshot shows a window titled 'Course Request Viewer'. It contains a table with the following data:

Year	School	School Name	Course Name
1920	001	School	LANG ARTS 8 2P
1920	001	School	MATH 8 2P
1920	001	School	PHYSICAL EDU 8
1920	001	School	SCI 8
1920	001	School	SOC STUD 8

Below the table are buttons for 'Help', 'Close', and 'Print'. A red arrow points to a 'Non Site Requests' button at the bottom of the window, which is highlighted with a red box.

Student Progress Center - SPC

The Student Progress Center can be used by parent/student to enter course requests for the new school year.

District / School Setup Beforehand:

Go to *Communication Configuration > SPC > Requests*

This program will provide the user a way to modify the Student Progress Center's registration and viewing options.

Options to select:

- Allow Alternates for Selected Schools
- Allow Editing of School Entered Requests
- Only Allow Viewing for Selected Schools
- Allow Printing for Selected Schools
- Dates can be set for the entire district or individual schools and grade levels

Procedures to enter course requests – parent/student

1. Login to the Student Progress Center at <https://ebr.edgear.net/progress>
2. Click the Request icon at the top of the page.
3. The student will see course requests if entered by school staff. In the next available field click to enter a request.
4. Select the course group, then click on the subject to be requested.
5. As requests are entered, notice the “Credit Count” increases in the pink bar at top.
6. Add additional requests until the “Credit Count” is equal to the correct number of requests.
7. All requests are automatically saved for the student.
8. The student/parent can print the list of requests by clicking on the printer icon above the requests.

The screenshot shows the Student Progress Center interface for user SHERRI ADDISON in Year:2021. The navigation menu at the top includes Pages, Grade, Calendar, Attendance, Discipline, Transcript, Test, Communication, Documents, and a highlighted Request button. Below the header, the user's name and year are displayed. A printer icon is visible above a pink bar indicating the Credit Count: 3 out of 8 Required. The main area shows a list of entered requests:

Request ID	Course Name	Course Code	Credits	Entered By
1	ALGEBRA III	Math 160375	1 Credit	Entered By School
2	ENGLISH IV	English 120334	1 Credit	Entered By School
3	WORLD HIST	Social Studies 220401	1 Credit	Entered By School
4	<input type="text"/>			Please click field to enter request
5	<input type="text"/>			
6	<input type="text"/>			

Audit Request Validity

Running this report, and editing requests as a result of studying it, is crucial prior to any automatic scheduling.

This report is used to check requests of students to make sure they have a request in an appropriate transcript group, check total credits of requests, and identify any errors.

If errors are found in this report, browse to the **Load Student Course Requests** program to fix any problems.

- In the left navigation pane of JCampus, click on **Scheduling**, then **Lists**, then **Audit Request Validity**.
- On the setup box **(NOTE: Show two setups: 2 semester vs 4x4)**
 - Select the desired **Year**, **District**, and **School**.
 - For **Student Grade**, select the grade level of the students to view. Leave blank if all grade levels are desired
NOTE: The user will find it easier to run this report one grade level at a time.
 - Check the box **Active Only** to only see students who were active as of the date selected.
 - For **Sped**, select if you would like to include all students, special ed students only, or regular ed students only on the report
 - Set Number of Semesters and Number of Class Periods:
 - For 9 weeks schools: Semesters = "2" and Number of Class Periods is the number of periods in a normal day.
 - For 4x4 schools: Semesters = "4" and the Number of Class Periods is the number of periods in a normal day.
- Click **OK**.

The screenshot shows the 'Audit Requests Setup' dialog box with the following fields and callouts:

- Year:** 2223
- District:** 010
- School:** 003
- Master Schedule:** Live
- Student Grade:** 10 (Callout: Run one grade at a time.)
- Special Codes:** (empty)
- Clubs:** (empty)
- Sports:** (empty)
- Counselor:** (empty)
- Active Only**
- As Of Date:** Aug 15 2022 (Callout: If a Nine weeks schedule type, set as shown.)
- Sped:** All Sped Only Non S
- No Semesters:** 2 **No ClsPrd:** 8
- No Semesters:** 4 **No ClsPrd:** 04 (Callout: If a 4x4 schedule type, set as shown.)
- Course Long Name Options:**
 - Audit By Long Course Name** en English : Default Language

4. This program will evaluate the student's requests and provide meaningful results. The user checks to see that students have requests in correct transcript groups, have correct TC (Total Credits) values, and have no counts in the green columns for DU "duplicate", and the MS "master schedule" on the far right (possible errors).

Sel		Student Name	SIDNO	GD	TG1	TG2	TG3	TG4	TG5	TG6	TG7	TG8	TG9	TC	CG	EL	PS	PO	TP	HA	No Code Type	Core	Elective	OB	DU	UN	TR	NC
<input type="checkbox"/>		ACHANE MIKE	6089969	11	1	1							1	5		1	3					5					5	5
<input type="checkbox"/>		AGUILLARD MARK	5088110	11	1		1		1		1		1	5			1	3				5					5	5
<input type="checkbox"/>		ARDOIN MIKE	2009946	11	1		1		1		1		1	5		1	3					5					5	5

5. The following are the fields and their meaning:

- **TG1 - TG9** are the total number of credits requested per transcript group number
 - **TG1** - English
 - **TG2** - Computer
 - **TG3** - Math
 - **TG4** - Social Studies
 - **TG5** - Science
 - **TG6** - Health and P.E.
 - **TG7** - Foreign Language
 - **TG8** - Vocation ED Electives
 - **TG9** - Regular ED Electives
- ***TC** is the total number of credits for all requested courses
- **CG** is the total number of credits for selected core transcript groups. See **Select Core Groups** as explained in setup options earlier.
- **EL** is the total number of credits for elective courses
- ***PS** is the total number of credits short of the normal number of credits for a school day
- ***PO** is the total number of credits over the normal number of credits for a school day
- ***HA** is the total number of half credit courses requested

6. The columns in green on the far right are possible errors. If there is a number in these columns, click on the cell count to view the courses that have an issue.

- **DU** is the total number of duplicate requests.
- **TR** is the total number of requests:
 - **TIP:** Sort on this value to make finding students who are short in counts of requests.
- ***MS** is the total number of requests that do not match any courses in the Master Schedule Editor. Click on the number to view the request
- **GDL** is the total number of requests that have a grade level mismatch between course and student.
 - **Note:** Mainly used for middle level courses.

7. **Convert Requests from Student Progress Center: CONVERT PAR REQ (far right in yellow)**

- ***Needed** only if students are entering requests via the Student Progress Center.
- This column shows a count of requests from the Student Progress Center.
- Click on the number to view the requests entered in the Student Progress Center.
- **(Usual method)** To convert all Student Progress Center requests:
 - Click the **"Select All"** button at bottom to place a check mark by each student.
 - Click **"Convert Parent Requests"** button. Click **"Yes"**.
- **(Single student method)** To convert a single student's Student Progress Center requests:
 - Click on the count of requests from the SPC.

- Click on the requests to convert.
- Click "**Convert Records**".
- When done, you will see the Counts of credits by subject area will be filled in, indicating the requests have been copied from the Student Progress Center to the active requests of the student(s).

Audit Master Schedule Seats vs Requests

***Before running this report, please consider doing the following in the next year Master Schedule Editor:**

1. **Review, and adjust if needed, the MAX count for next year courses.** Easiest way to do this is to "freeze" the **MAX** and **COURSE** columns of the Master Schedule Editor, then sort this listing by **COURSE**.
2. **Delete any unneeded courses for next year.** Clearing out any unnecessary courses in the next year Master Schedule Editor will improve results of the Seats vs Requests report.

Running this report, and editing requests as a result of studying it, is crucial prior to any automatic scheduling.

This report is typically done after requests for New Year scheduling have been entered.

The report will show a count of requests for a course and the number of sections / seats available in the next year master schedule.

From here, the user can plan how many sections of a given course are needed, as well as move requests from one class to another.

1. On the left navigation pane, go to **Scheduling, Lists**, then **Audit Master Schedule Seats vs Requests**.
2. At the setup box, set the **Year** to "2223". **District**, and **School** will automatically populate based on your login.
 - **Select Teams:** If students and classes are assigned to teams, the user can identify a team to run the request counts against.
 - **Show:** Leave as defaulted.
 - **Transcript Groups:** If desired, select a transcript group(s) to limit the report to the selected type of courses. Example: Select "English" to limit the report to just English classes.
3. Click the **OK** button to obtain results. It may take a minute or two to display.
4. The report will show the number of sections for a course currently in the master schedule, as well as the number of requests, also broken down by grade level. Clicking on the count will reveal the students who comprise the count.
5. Columns shown on the screen are described below:
 - **Course:** Name of course

Transcript Group	Group	Description
<input type="checkbox"/>	1	English
<input type="checkbox"/>	2	Computer Education
<input type="checkbox"/>	3	Math
<input type="checkbox"/>	4	Social Studies
<input type="checkbox"/>	5	Science
<input type="checkbox"/>	6	Health & PE
<input type="checkbox"/>	7	Foreign Languages
<input type="checkbox"/>	8	Vocation Ed Electives
<input type="checkbox"/>	9	Regular Ed Electives

- **Gd:** Grade level of the course
- **Sec:** Number of sections in the **next year** master schedule
- **Seats:** Number of seats available in the **next year** master schedule. *(Computed by adding the max seat count for each section of the course.)*
 - **TIP:** If you find the max seat counts are too high, change in the **next year** master schedule by adjusting the “**Max**” of the section.
- **Req:** Number of requests for the class. A user can click on the count to see a listing of students requesting the course.
- **MS:** Course in next year master schedule? It is important that courses being requested are in the master schedule before automatic scheduling occurs.
 - A “Y” indicates that the course is in next year master schedule.
 - A “N” indicates that the course is not in next year master schedule.
- **S Avail:** Seats available for the class based on **next year** master schedule. *(Computed by taking the number of seats (from Seats column) and subtracting the number of requests for the course.)*
- **07, 08, 09, 10, 11, 12:** These are grade level columns which show counts of students requesting the course by grade. The user can click on these counts to see the students being counted.

Dst	Sch	Course	Gd	Sec	Seats	Req	MS	S Avail	07	08	09	10	11	12
027	006	ADAPTED PE	07	1	33	1	Y	+32	1					
027	006	ADAPTED PE	08	1	33	2	Y	+31		2				
027	006	ADAPTED PE	09	1	33	8	Y	+25		1	1			6
027	006	ADULT RESPNS	09	1	26	22	Y	+4					9	13
027	006	ADVANCED BAND	09	1	100	63	Y	+37			19	16	23	5
027	006	ADVANCED MATH I	11	2	50	33	Y	+17					6	27
027	006	AGRISCIENCE ELEC	11	1	25	6	Y	+19						6
027	006	AGRISCIENCE I	09	3	75	53	Y	+22		3	36	1	8	5
027	006	AGRISCIENCE II	10	2	50	34	Y	+16			2	26	4	2
027	006	AGRISCIENCE III	11	1	25	18	Y	+7				2	14	2

6. **Print** button: Click to print the results shown on screen.

Using the information shown on screen: The user goes over the information for several purposes:

1. The count of requests per course helps the user plan on how many sections of each course are needed in planning the **new year** master schedule.
2. Identify requests that may be for classes not offered in the master schedule, and as a result, either need to be added to the master schedule, or the students need to be moved to a different course request.
3. **Move Some or All Students to Request a Different Course:**
 - Click on the count of requests. A list of students will appear as shown below.

Year: 1819 District: 010 Sch: 025 Course: BUSINESS ENG REG (09)															
<input checked="" type="checkbox"/>	Dis	Sch	Student Name	SIDNO	GD	Hmm	Eth	Gen	ECode	EDate	ClsPrd	Room	Sect	GPA	P GPA
<input type="checkbox"/>	0	0			11		0	M	E1	2018-08-14	04	217	025626	1.41	2.48
<input type="checkbox"/>	0	0			09		4	F	E4	2018-10-05	02	217	025267	0.00	0.00
<input type="checkbox"/>	0	0			11		0	F	E1	2018-08-14	04	217	025626	2.50	2.83
<input type="checkbox"/>	0	0			12		1	M	E1	2018-08-14	04	217	025626	2.30	2.88
<input type="checkbox"/>	0	0			09		0	F	E7	2018-08-14	05	217	025643	1.85	0.00
<input type="checkbox"/>	0	0			11		0	M	E1	2018-08-14	01	217	025542	2.75	2.48
<input type="checkbox"/>	0	0			12		0	F	E1	2018-08-14	01	217	025542	3.50	4.21

- Select or deselect the desired students to move to request a different course request.

- Click the **MV STUS** button. A set of directions will appear on screen. After reading over, click the **OK** button.
- A listing of courses will appear.
 - Courses with teachers and periods/sections are associated with the master schedule.
 - If a course has no teacher and period/section associated with the master schedule, you can choose the row with a 700-course site. At the bottom, make sure “**Load Requests**” item is selected.
- Browse the listing to the desired course to move the students to. Click on the desired course row.
- After selecting the desired course, a confirmation dialog will appear. Click “Yes”.
- After the move is complete the program will automatically perform the audit again to refresh the numbers on the main screen.

Request Matrix

Running this report and using it to plan / edit the master schedule classes can be helpful prior to and after automatic scheduling.

The **Request Matrix** is a report that helps the user plan the New Year master schedule. It is commonly reviewed after requests for the New Year are entered and verified. It provides a count of students requesting a course, then lists other courses this same group of students are requesting. For example, the report may show there are 30 students requesting Biology II, and 27 of them are also requesting English IV DE. Therefore, it is important to plan these courses at different times.

- At first, run the report for *Singletons* (classes occurring only once in the master schedule), then run again for *Doubletons* (classes occurring twice in the master schedule), then finally for all classes if needed.

1. In JCampus, on the left navigation panel, click **Scheduling**, then **Count**, then **Request Matrix**.
2. At the setup box, set the **Year** (make sure it is set to the New Year), **District**, and **School**.
3. Other Setup options:
 - **Stu Grades:** Grade level of next year students to count requests against.
 - **As Of Date:** Enrolled date of students to counts requests against. (**Note:** The user can set this to the first day of school for the next year to make sure new students are represented in the count.)
 - **All Courses:** Click to run the report for all requests of all courses, no matter how many times the courses appear in the master schedule.
 - **Singletons:** Click to run the report for requests of courses which occur only once in the master schedule.
 - **Doubletons:** Click to run the report for requests of courses which occur twice in the master schedule.
4. Click the **Ok** button to begin the report.

Setup - 11.25.20 MLM

Year: 2223

District: 010

School: 700

Master Schedule: Live

Stu Grades: 09,10,11,12

As Of Date: Aug 15, 2022

Select Teams:

Conflict Level:

Select Semester(s):

All Courses Singletons Doubletons

Show Unscheduled Course Requests Only

SEL	Group	Description
<input type="checkbox"/>	1	English
<input type="checkbox"/>	2	Computer Education
<input type="checkbox"/>	3	Math
<input type="checkbox"/>	4	Social Studies
<input type="checkbox"/>	5	Science
<input type="checkbox"/>	6	Health & PE
<input type="checkbox"/>	7	Foreign Languages
<input type="checkbox"/>	8	Vocation Ed Electives
<input type="checkbox"/>	9	Regular Ed Electives

5. The main screen will show courses with counts down the left. Across the top are state course code numbers of courses that have the same students requesting a second course.

Course Name	Code	0	3	0	0	1	1	0	0	0	0	0	0	1	1	0	1	0	0	2
ACCOUNTING I	040101	7		2			1	1								1	1			2
AC REFRIG II	310112		1																	
ADVANCED BAND	030302	2		61			3	5		4	1			13	3	9	9	5		6
ADV CAR READ LCB	080410				9		1			1										3
ADV FOOD & NUTR	100301					1			1											
ADVMATH FN DW 1S	160347	1	3	1		14			1				1							
ADV NUT & FD	026001	1		5		1			45		4	1		6		16	4	3		3
AG LEADERSHIP	010364				1		1			1										
AGRISCIENCE I	010301			4				4		63				21	8	6	2	1		
AGRISCIENCE II	010302			1			1			40		2		13		2	5	2		1
AGRISCIENCE III	010303						1				2	13		1		6		1		1
AGRISCIENCE IV	010304												3							2
ALGEBRA I	160321			13				6		21		1		98		2				
ALGEBRA I ADV	026002			3					8				ALGEBRA I/AGRISCIENCE I (21)							
ALGEBRA II	160322	1	9				16		6		2	6		81	11	2			1	10
ALGEBRA II ADV	026003	1	9				4		2											5
ALGEBRA III	160375		5	3			3		1											1
ALG II GFT-LCBA	026004															1	1			1
ALLIED HEALTH I	090101						3												11	1
AP HUMAN GEOG	220310	2		6			5				1	1				10	5	4		1
																				18

There are 98 requests for Algebra 1. 21 of the 98 also want Agriscience 1.

- Clicking on the cell counts will give the user the option to see the sections in the master schedule, or the students who have requested the course.
 - If the option to **Show Students** is chosen, a student listing will be shown. From here, the user can choose to move the students to a different request if needed.

Show Student Roster Or Sections

Show Students - Show a student roster for the selected course(s)

Show Sections - Show all sections teaching the selected course(s)

Course: ALGEBRA I 160321

Conflicting Course: AGRISCIENCE I 010301

6. **Click the Print button to see the results in an easy-to-read manner.** The print will show a count of students requesting a course, and a sub count of other courses the students requested. This can help the user plan courses in the master schedule that will not be conflicting against each other in the scheduling process.

ADVMATH FN DW	160347	14	ACCOUNTING I	040101	1	ADVANCED BAND	030302	3
			AG LEADERSHIP	010364	1	AGRISCIENCE III	010303	1
			CAREER READINESS	080409	3	CHEMISTRY	026008	2
			D MEDICA I 1S	026010	2	ENGLISH III ADV	026015	1
			ENGLISH IV DW	120606	12	ENV SCIENCE DW	150914	1
			FINE ARTS SURVEY	026016	4	HEALTH ED	190500	2
			INTRO TO BCA	040401	1	LAW STUDIES	220506	2
			PE IV BOY ATH-A	026040	3	PE IV GIRL ATH-B	026042	2
			PRE-CALCULUS DW	026044	2	PROB & STAT DW	160356	2
			SOCIOLOGY DW	220601	1	SPANISH II	122502	1
			TRIGONOMETRY DW	160501	14	U.S. HISTORY	220403	1
			WORLD HIST DW	220450	1	WORLD HISTORY	220401	13

Try not to schedule these classes at the same time.

Of the 14 students wanting ADV MATH FN DW, most of them want these other classes too.

Student Counts for the New Year

Often in New Year scheduling, the user needs a count of students for the upcoming year to plan classes for the master schedule. The steps below explain how to get counts for the first day of school by using the **MFP/Ethnic Gender/Lunch** report.

Getting Started

1. On the left navigation panel, go to **Student Master**, then open the **Count** group of programs.
2. Under **Count**, select **MFP/Ethnic-Gender/Lunch**.

How-to

1. At the setup box, set the following:
 - **Year:** Set to the next year.
 - **Grades:** Set to the desired grade levels for next year.
 - **As of Date:** Set to the first day of school.
 - Click the **OK** button.
2. A count by grade level for the school will appear. Some of the column headings are explained below:
 - **?** - The number of students for which the grade level cannot be determined.
 - Usually involves a disagreement between the special ed data and student master data.
 - **MFP** – The number of students counted towards State Funding purposes
 - **Enroll** – The number of students enrolled in the school
 - **Adj** – The number of students adjusted (counted as both Pre K grade 24 and Preschool grade 20.)
 - **22+** - The number of students with an age of 22 or older
 - **NR** – The number of students identified as not reported in SIS to state.
 - **Total** – The number of active students
3. **Note:** If you click on any count cell, the list of students will be displayed. Click the **Print** button to print the list of students.
4. The tabs at the bottom will break down the totals by **Regular Ed, Special Ed, Ethnic and Gender by School, Ethnic and Gender by Grade, Special Codes, and Lunch** codes.
5. Click **Print** to print or save the report.

Print an Easy-to-Read Master Schedule: Teacher Schedule w/ Squares

To create an easy-to-read cross tab report of the master schedule, follow the following steps:

1. In the **Schedule** module, click **Lists**, then **Teacher Schedule w/ Squares**.
2. At the setup box, set the current year, grade level(s), and choose semester 1, or any other desired semester.
 - a. **Master Schedule Course Display:** Typically, *Course Name* is selected.
 - b. **Select Campus Location Taught:**
 - i. *On/Off:* If selected, courses on and off campus are shown.
 - ii. *On Campus:* If selected, only courses on campus are shown.
 - iii. *Off Campus:* If selected, only courses off campus are shown.
 - c. **Select Core Groups:** Click to select each course type, or click to select only desired course types.
 - d. Click the **OK** button.
3. When results are on screen, click the **Print** button to send the report to the printer.
 - Remember the **Print** button can be set to create an Excel (xls) spreadsheet.

Master Schedule Editor

Use the information from the Audit Seats vs Requests and the Request Matrix to go over the master schedule and make changes. Use the data to modify number of sections a course has, the time it is to be offered, the max number of students, the semester to offer, and the staff member teaching the class. Items highlighted in yellow below are commonly used columns in the master schedule.

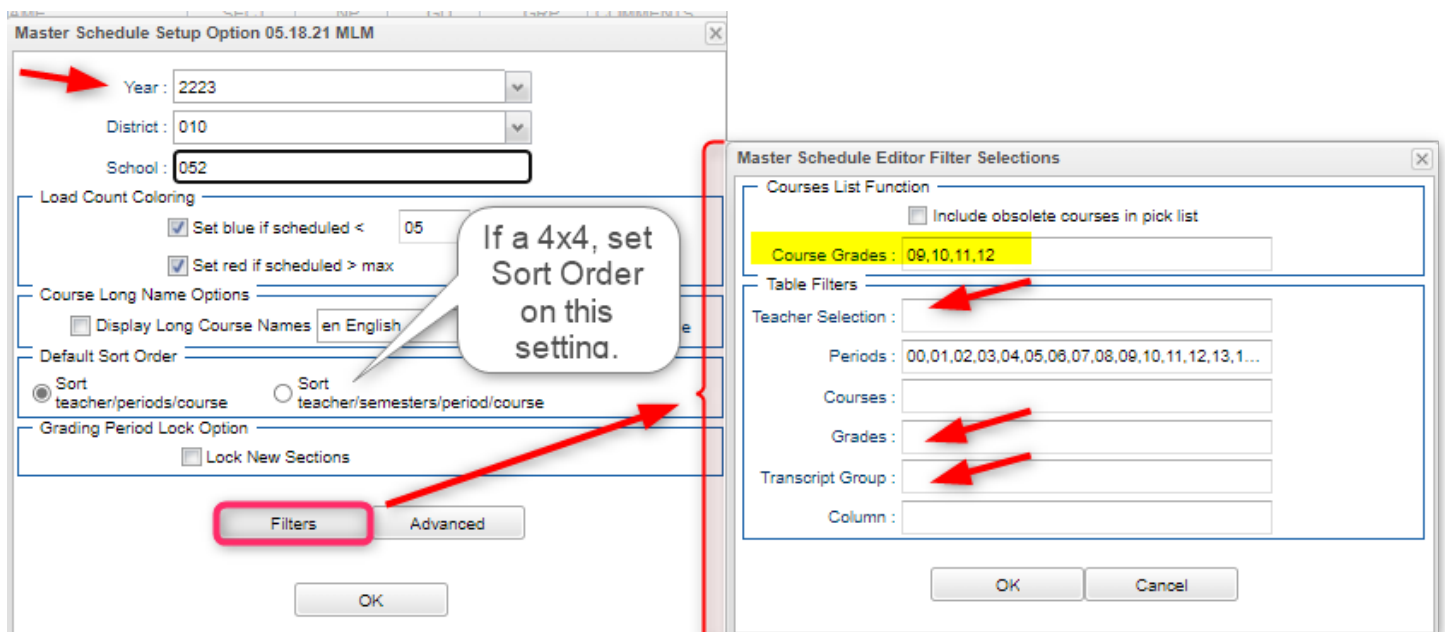
The Master Schedule Editor is a program to insert, edit, and remove classes in a master schedule.

Getting Started

1. On the left, click on **Scheduling**
2. Under **Entry**, select **Master Schedule Editor**.

Setup Options

1. Select the **next "Year"**, then click OK.
2. **Filters** button: Click to filter the master schedule by course, course type, specific teacher, etc...



Master Schedule Columns and Their Meanings

1. **STAFF** – Staff Name
2. **PD** – Class Period
3. **COURSE NAME** – Course Name
4. **GRP** – Transcript group from the courses file
5. **COMMENTS** – Used to Make Comments about the section
6. **SECT** – The section number for the current record. This is a unique number identifying each record in the master schedule.
7. **C1,C2,C3,C4** – Class Counts for Semester 1,2,3,4
8. **ST CODE** – State assigned Code for Courses
9. **HONR** – Identifies the course type. 1 = Sped. 3 = Gifted Talented. 4 = Adv Placement. A = Alternate Grade Scale. D = Dual Enrollment. H = Honors. W = Weighted.

10. **CRED** – Credit given to a course in Course Catalog
11. **S1,S2,S3,S4** – Semester a course is being taught
12. **RM** - Room Number/Name or a combination
13. **NP** – Number of periods a class is taught
14. **GD** – Grade level of a course
15. **DS** – Distance learning flag
16. **Max** – Maximum number of students allowed in a class
17. **LKS** – Allows you to schedule two or more classes together by assigning the same combination of letters or numbers for all
18. **DOW** – Days of the week the class taught
19. **LUNCH** – Lunch break time that occurs during a section
20. **SCH** – Local school number
21. **DIST** – Local district number
22. **RSCH** – School number of the school where class is taught if not the enrolled school
23. **RDIS** - District number of the school where class is taught if not the enrolled school
24. **MREM** – Maximum number of students that can be scheduled to a remote class
25. **REM** – Section is offered to other schools as a [Remote](#) section.
26. **SE SPC** – Special Ed Placement Setting Code – will popup when a sped class is created
27. **TEAM** – Team assignment
28. **C HRS** – College hours for a [Dual Enrollment](#) course.
29. **PSEC SITE** – Post Secondary site for a [Dual Enrollment](#) course.
30. **ADD STAFF** – Allows you add additional staff and percent of time teaching. Teaching time must add up to be less than 100%
31. **GD TYPE** – Grade Type override of Sponsor or Course Catalog PPP settings.
32. **FEES** – Section's fee amount

Action Button

1. **Delete Scheduled Students by Section** - allows you to delete a group of students at one time
2. **Print Selected Teachers** - allows you to print or save teacher's sections in a list format

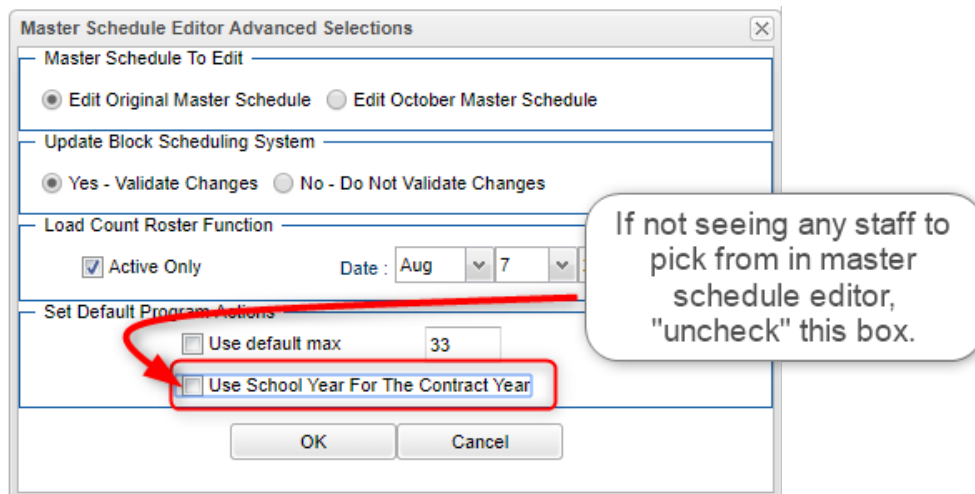
Buttons at the Bottom of the Page

1. **Setup** - returns you to the Setup Box; see instructions above
2. **Help** – Display help information.
3. **Courses** - takes you to the [Course Catalog](#)
4. **Refresh** - refreshes the page to show new counts
5. **Save New** - use only when making a new section using the top blank line
6. **Print** - allows you to print or save the current screen of all teacher's sections in a list format
7. **Init** – When class roster counts are off, click here to re-index class counts.
8. **Remote** - Click to add a class from another site to the master schedule.
9. **Delete** – Delete selected section(s). Note: Class count must be 0 to delete the section(s).

Add a Section to the Master Schedule

1. Click in the top blank cell below the heading "STAFF" above the first teacher

- The list will default to TCH. If the employee is a TCH, make your selection. Other choices include ADM, SCH, DIST, VACANT and VOCATIONAL.
- VOCATIONAL will provide a list of post-secondary persons whose sites are other than a school in the district.
- **Whoops! Not seeing any teachers to pick from?**
 1. Usually this means that the staff have not been rolled over yet.
 2. Do the following to temporarily get a staff pick list from previous years until staff are rolled over...
 - a. On the setup box of Master Schedule Editor, click the **Advanced** button.
 - b. Uncheck the box labeled **“Use School Year for the Contract Year”**.
 - c. Click Ok at the bottom of the “Advanced” box, then click OK at the Master Schedule Editor setup screen.



2. Click in the top blank cell below the heading **"PD"**. Select the period the course will be taught from the pick list then **"OK"**
3. Click in the top blank cell below the heading **"COURSE NAME"**. A pick list of courses will appear. Scroll down the listing or type the course name in the search box. Be sure to pick the course with the appropriate grade level association, number of semesters, and number of periods.
4. Section numbers are automatically generated upon saving the record
5. Click **“Save New”** at the bottom of the screen
6. **“Copy Saved Record”** will appear upon clicking save. Change the number of copies to save for that teacher if the class is being taught more than the class period initially being created. Click **"OK"**

Change an Existing Section

Most items in the Master Schedule Editor can be changed simply by clicking on the existing item and clicking on the desired replacement

- **Note:** When changing items in the Master Schedule Editor, warning/verification boxes will appear. Read each box carefully and answer appropriately
- **Note2:** When changing a teacher's name, one of the questions is "Do you wish to replace all of Teacher A's records with Teacher B?".
 - If Teacher B is taking over all of Teacher A's classes, then click **"Yes"**.
 - If only one or some of the classes are being taken over by Teacher B, then click **"No"**

Delete an Existing Section

- *The system will not allow deletion of a class if there are students still scheduled to the section.*
 - If there are students in the class, move them to another prior to deletion.
- *After the year is underway, the system will not allow deletion of a class if there are graded assignments associated with it.*
 1. Browse to the row containing the section to be deleted.
 2. Select the section(s) by clicking in the select box at the far left.
 3. Click the **Delete** button at the bottom of the screen.
 4. A dialog box asking, "Are you sure you wish to delete this record?" will appear.
 5. Click "Yes" to delete the class. Click "No" to cancel the deletion.

Dual Enrollment Courses in the Master Schedule

1. All Dual Enrollment courses must be unique in name and have an Honor code of "D" in the course catalog.
2. Add the course to the Master Schedule.
3. Once the new Dual Enrollment course is in the Master Schedule Editor, locate that course and then scroll to the right to find the columns **C HRS** and **PSEC SITE**.
4. For **C HRS**, enter the number of college hours the student will earn once the course is completed with a passing grade.
5. For **PSEC SITE**, click in the field and select the college/post-secondary site the college hours apply to.

Remote Classes in the Master Schedule

Remote classes are classes in which the student at a school takes a class at another location in the district. The steps below identify how the host school can designate classes to be offered to other sites, and how other sites can incorporate this class into their master schedule. Doing this allows for the host site teacher to have one gradebook roster with students from other sites.

1 Host School – Remote Class Creation

- a. In the master schedule of the Host school, create the new class as normal. Locate the **MREM** (Max Remote) and **REM** (Remote) fields on the far right.
- b. Click in the **MREM** (Max Remote) field and enter the maximum count of students allowed from each site. In the example below, a count of 10 will be allowed from each other site.
- c. Click in the **REM** (Remote) cell. This will turn the row green. This signifies that the course is a remote class offered by the host school to other locations in the district.

2 Other Schools – Adding Remote Class to Master Schedule

- a. In the master schedule, locate the **Remote** button in the lower right of the screen. Click to open. In the upper left, click the school to obtain the Remote class from.
- b. On the right, a selection of remote classes from the host school appears. Click to select the desired classes to bring in, and then click the **Import** button to bring the classes into the master schedule. When done, close the **Remote** program.
- c. In the **Master Schedule Editor**, the Remote courses brought into the master schedule will be yellow. Further, the **RSITE** (Remote Site) field will have the site number of the Host school.

Team Scheduling

Starting the Team Scheduling Update Utility

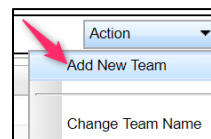
1. In the navigation pane on the left, select **Scheduling**.
2. Click the little plus sign (+) next to **Loaders** to expand the selection pick list.
3. Select **Team Scheduling Update Utility**

Setup Box Options

1. Set the correct **Year**. If working on next year students, be sure to set to the matching year.
2. Verify the **District** and **School**. These default values are based on your security settings.
3. Select **Grade**. Leave the Grade field blank if all grade levels are to be included in the team assignment process. Otherwise click in the box to the right of "Grade" to select the desired grade level(s) to be included.
4. Select **GPA Type**: If the user is allowing the system to spread out students to teams based on GPA, here is where the user indicates which type of GPA is to be used. Usually, a school will use a Final grade GPA calculation, such as F1 (or F2 if on 4x4) for this purpose.
5. Select **Gender**. Leave the Gender field blank if both genders are to be included in the team assignment process. Otherwise, click in the box to the right of Gender to select the desired gender to be included.
6. Select **Ethnic**. Leave the Ethnic field blank if all ethnicities are to be included. Otherwise, click in the box to the right of Ethnic to select the desired ethnicities to be included.
7. Select the **As-of-Date**. This represents active students as of the date you choose. Usually it is set to the first day of school for next year.
8. The **Show** selection allows you to restrict your list of students to Regular Ed only, Special Ed only, or All students.
9. **Select Student Teams**: You may select one or more teams with which to work by clicking in the Student Teams field. All teams can be selected by leaving the Student Teams field blank or by clicking in the field and selecting the check box to the left of the Value at the top of the list.
10. Click **OK** to move to the next screen.

Create a Team

1. Click the **Action** button located in the upper right.
2. Select "**Add New Team**".
3. An 'Enter New Team' popup window appears on the screen. Type the name of the new team. Be sure to limit the name to 10 characters. Click **Save**.
4. The new team will be in the alphabetized list of teams on the right side of the screen. Repeat these steps for each team desired.



Del	Team
<input type="checkbox"/>	ACADEMY

5. **To delete a team:** Click the red 'DEL' cell to the left of the team name. A popup box will ask you to confirm that you want to delete the team. Click **Yes**.
 - If there are students on the team, a prompt will appear asking if you want to remove students from this team. Click **Yes**.

Assigning Students to Teams: Summary of Methods

The user can assign students to teams in one of several methods. These methods are briefly described below:

- **Manual:** The user “hand selects” the students and the corresponding team.
- **Auto:** Students are automatically assigned to teams by the computer system in alternating fashion.
- **Auto-Capability:** Students are automatically assigned to teams by the computer system while balanced by GPA, ethnic, gender.
- **Auto-GPA:** Students are automatically assigned by the computer system to teams based on GPA. You must first decide the GPA range for each of the teams. Do not overlap or duplicate any GPA range.

Manual Assignment of Students to Teams

1. On the left pane will be a list of students with their homeroom, local ID, GPA, and Team. On the right pane will be a list of the existing teams.
2. Locate the “**Team**” column to the right of the student’s name. Click in the cell in the Team column by the student’s name. An asterisk marker (*) will appear in the field. Repeat the click in each “**Team**” cell for the desired students.
3. After all students have been selected, click the Team name on the right to which this group of students is being assigned. The user will see the “**Team**” cells with asterisks will update to the selected Team name.

Team Update Utility For YEAR: 1819 District: School:							Action		
GD	Student	Homeroom	Sidno	GPA	Program	Team	Del	Team	Stus
1	09		9009777			*			
2	09		7049943					ACADEMY	22
3	09		9009802						
4	09		7069999			*			
5	09		8049986						
6	09		7049996						
7	09		1018887			*			
8	09		9119999						
9	09		9009828						
10	09		9009786			*			

4. Repeat the process to assign other students to a different team.
5. **To re-assign a student to a different team,** click on the existing team by the student names of any student changing to the same team. This will change the Team name to an asterisk marker (*). Then select the new team name on the right side of the screen. The asterisk markers will update to the new Team name selected.
6. **To remove student(s) from a team,** click by a student's name in the Team column. An asterisk marker (*) will appear in the field. Continue clicking for each student that is to be removed from a Team. Next, click on the blank line at the top of the list of Teams. You will get a prompt to confirm that all teams are to be removed. Click “Yes”. The asterisk markers (*) will then update to blanks.

Assign Classes/Sections to a Team

****Your master schedule needs to be completed before assigning courses/classes to the teams.**

1. On the lower left, click on the **Class Section Teams** tab. The new window will show Master Schedule records on the left of the screen. The initial sort order is by grade level first, then course name.
 - If you want to sort the listing by course name, click on the “**Course**” column header.
 - If you want to sort the listing by Teacher, click on the “**Teacher**” column header.

- A search box is located at the bottom left to help locate courses to select.
2. Click in the Team column cell to place an asterisk marker (*) for the course. Continue by clicking each course that is to be assigned to the same team. After marking the complete list of courses that are to be assigned to the same Team, select the Team name on the right of the screen. You will see the asterisk markers (*) change to the selected Team name.

Team Update Utility For YEAR: 1718 District: 027 School: 006										Action
GD	Course	Teacher	Room	PD	Sems	Section	Team	Del	Team	Stus
18	07	CONFERENCE/PLA...	405	07	1 2	006178				
19	07	CONFERENCE/PLA...	423	07	1 2	006455			Team A	4
20	07	ELA 7 A	418	01	1 2	006448	*		Team B	1
21	07	ELA 7 A	418	02	1 2	006449				
22	07	ELA 7 A	418	03	1 2	006866				
23	07	ELA 7 A	423	01	1 2	006175	*			
24	07	ELA 7 A	423	02	1 2	006213				

3. **To re-assign a class section to a different team**, click in the Team column beside the section(s) to be changed. An asterisk marker (*) will appear in the Team cell. Click on the new Team on the list of teams on the right. The asterisk will update to the new Team name.
4. **To remove section(s) from a team**, click in the Team column beside the section(s) to be changed (an asterisk marker (*) will appear in the Team cell). Click on the blank line at the upper right above the Team listing. The asterisks will then change to blank cells.