PowerSchool | Customer Education

PowerSchool SIS: Elementary Scheduling

Learn how to set up and manage the features related to elementary scheduling in PowerSchool SIS and in PowerSchool SIS PowerScheduler.

Elementary Scheduling Options

Elementary schools have three options when it comes to creating master schedules:

- Perform all work in PowerSchool SIS
- Perform all work in PowerScheduler or by using the Visual Scheduler tool
- Use a combination of these two methods

A few of the scheduling steps for both processes overlap. As a result, PowerScheduler users will refer to the steps in the PowerSchool SIS option for guidance.

Option 1: Scheduling in PowerSchool SIS

The following is an overview of the scheduling process. You will explore each step in the process.

Consider when you will perform the End of Year (EOY) process. Contact your PowerSchool SIS administrator to find out if you should work on the master schedule before the EOY process (recommended) or after the EOY process. While your system administrator may choose to complete many of these steps using the district Batch School Setup functionality, follow these steps to prepare a school for scheduling at the school level.

You will explore each of these steps:

1. Reviewing student information
2. Completing School Year Setup
    a. Creating years and terms
    b. Making courses available for scheduling
3. Creating and Adjusting the Master Schedule
    a. Copying the master schedule
    b. Verifying the bell schedule and FTEs
    c. Setting up the calendar
    d. Adding new teachers and co-teachers
    e. Adjusting the master schedule
    f. Adding dependent sections
4. Running the end of year (EOY) process
5. Enrolling students into classes
6. Verifying enrollment
7. Printing class rosters
    a. Creating a class roster

If you want to complete all the steps in PowerScheduler, refer to the section in this document titled Option 2: Scheduling in PowerScheduler. You don't have to choose just one option. To use both methods, first commit the schedule in PowerScheduler and then make changes on the PowerSchool SIS side to avoid having PowerScheduler overwrite manual changes made in PowerSchool SIS. Perform the steps that will create the best schedule for the students.

Reviewing Student Information

As you prepare for the next school year, prepare the student data. Two student fields are vital to the EOY process and to the scheduling process. The content of these fields determines the school and grade level that students are promoted to the following year. A third field is vital for scheduling. The information from all these fields is vital to both the PowerSchool SIS and PowerScheduler scheduling processes.

- Sched_NextYearGrade (Next Year Grade)
- Next_School (Next School Indicator)
- Schedule This Student

Select a student and navigate to the student's Scheduling Setup page to enter these values individually. Or use two group functions, Student Field Value and Next School Indicator, to enter data for two fields for an entire grade level or for smaller groups of students.

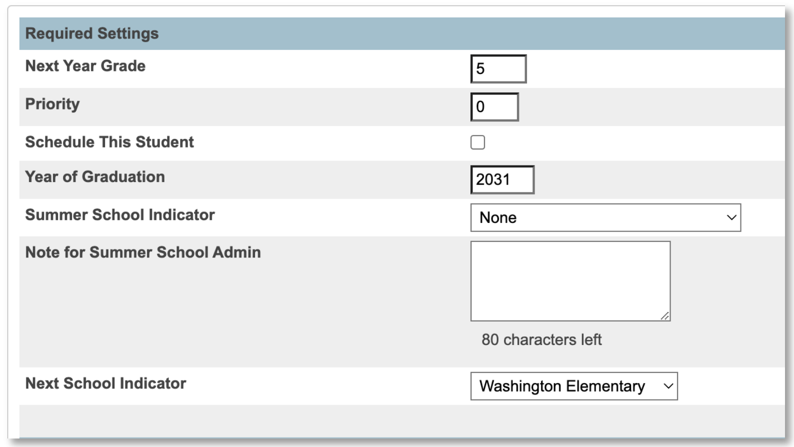
To review scheduling information for students:

1. On the Start Page, in the **Students Search** field enter ***Next_School=***

   The results will list students who are missing a next school indicator.
2. Select a student name
3. In the Scheduling section, click **Scheduling Setup**
4. From the **Next School Indicator** menu, choose the school the student will be attending next year

   If you see that the **Next Year Grade** field is blank as well, enter the grade level the student will be in next year.

   If you see that the **Schedule This Student** field is blank as well, check the box to schedule the student for the following year.



5. Click **Submit**

   Repeat these steps for every student on the list or use the Next School Indicator group function to set the field to a certain grade level for all the selected students.
6. Navigate back to the Start Page; enter ***Sched_NextYearGrade=***

   The results will list students who don't have a next year grade level value.

7. Select a student and click **Scheduling Setup** to enter a value manually

Completing School Year Setup

The next step in the scheduling process for PowerSchool SIS sets up the years and terms for the future scheduling year and makes the courses available to schedule in your school for that year. In a few of the steps outlined for PowerSchool SIS, additional information about how it applies to PowerScheduler users may be mentioned since some information overlaps.

Creating Years and Terms

Create years and terms for the next school year at each school and at the district level. You cannot perform the scheduling process until you complete these steps. Keep in mind that you must enter accurate dates prior to the start of the school year.

To create years and terms at your school:

1. From the main menu on the Start Page, click **School**
2. Below Scheduling, click **Years & Terms** > **New**
3. Enter the name, abbreviation, and first and last days of the school year, using the correct date format

		Example Entry
Name of School Year	2023-2024	2001-2002
Abbreviation	23-24	01-02
First Day of School	8/1/2023	08/23/2001
Last Day of School	7/28/2023	06/05/2002

Note: Once a year has been created, it cannot be deleted.

4. Click **Submit**
5. Click **Edit Terms** > **New**

   You can also click **Edit Terms** to modify existing terms.

6. Define the terms sequentially from longest to shortest

   For example, create the year, then all the semesters, then all the quarters. Not creating the terms in sequential order results in an incorrect internal term ID. Enter the name, abbreviation, and first and last days of the term.

7. Choose what fraction of the school year the term represents

Field	Value
Name of Term	Semester 1
Abbreviation	S1 (example: Q1) Note: This abbreviation must start with a letter. Do not use a number by itself.
First Day of Term	8/1/2023
Last Day of Term	1/28/2024
What portion of the school year does this term represent?	1/2
Suppress Classes For This Term From Parent/Student Users	
Import File Term #	 0

8. Click **Submit**

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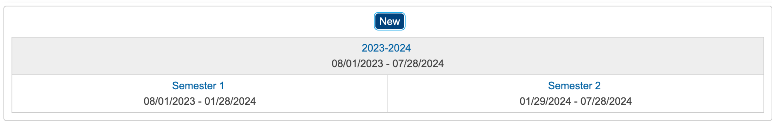
9. Repeat steps 5 through 8 to define all the terms for the year

   When you define all the terms, the hierarchy will look like this:



   Once the school's years and terms are set up, the PowerSchool SIS administrator must add the future school year at the District Office by navigating there and then clicking **District** > **Years & Terms**.

Making Courses Available for Scheduling

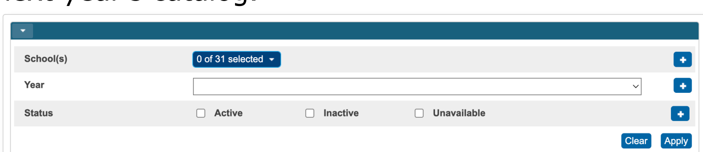
Once you've set up the years and terms, you are ready to create the scheduling course catalog. Use the Course Management feature of PowerSchool SIS to control and set up course catalogs for each school year and for each school in the district.

At the school level, you can only schedule courses that are made available to your school.

Contact the PowerSchool SIS administrator if you don't have access to courses that you should have access to.

To make courses available for scheduling:

1. Navigate to the District Office and click **District** > **Courses**
2. Use the School(s), Year, and Status fields when creating next year's catalog.



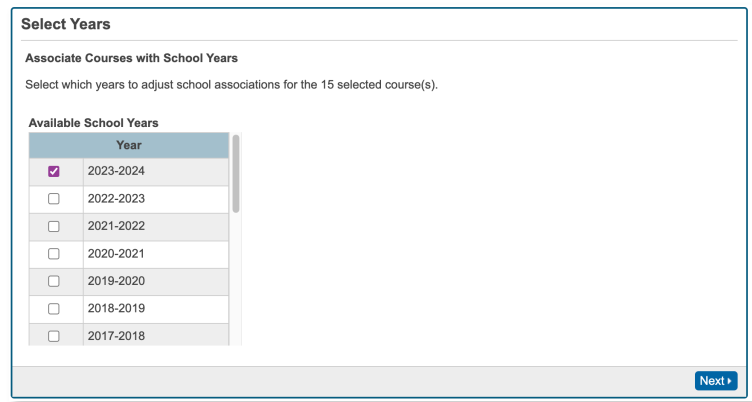
3. Open the **School(s)** menu and select the school or schools that you're creating a schedule for

   Use the current course catalog for this school as a starting point to decide which courses to make available for the following year. Do not select more than 999 courses.

4. Below the filters, verify that all the courses are checked

   If you have a course scheduled this year but you won't offer it next year, leave the course active for now. After you've copied the master schedule, you will make the course unavailable.

5. Below the list of courses, click **Edit Availability for Schools and Years**
6. Select the next school year and click **Next**



7. Select the school(s)

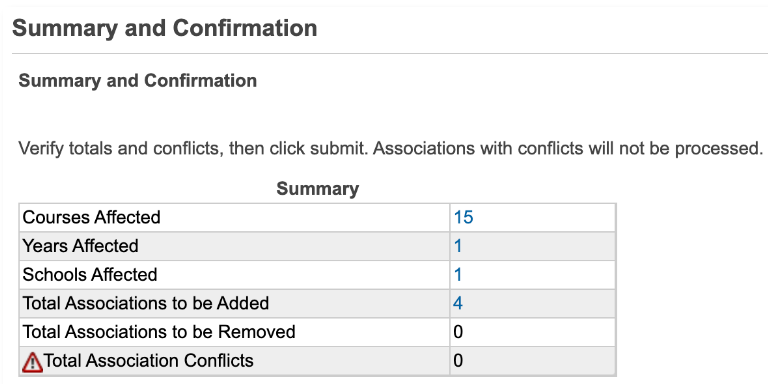
   Use the Basic Filter option to limit the schools that are displayed.

8. Confirm that **Make Available** is selected

   You can choose to make a course available or unavailable for the selected school, but the default option is to make the course available. Use the default option.

9. Click **Next**

   Use the Summary and Confirmation page to verify what you're about to do and view any conflicts. Click any of the number links to view the items being affected. Resolve any conflicts, such as a future year not having been created at the school.



Summary and Confirmation

Summary and Confirmation

Verify totals and conflicts, then click submit. Associations with conflicts will not be processed.

Summary

Courses Affected	15
Years Affected	1
Schools Affected	1
Total Associations to be Added	4
Total Associations to be Removed	0
Total Association Conflicts	0

10. Click **Submit**

11. On the Courses page, filter the results for a school and for the next school year

12. Verify that the correct courses are listed

    To make a single course available, find and select the course name. Select the **Availability** tab to modify the schools where the course(s) can be scheduled next year. Click **Edit** to update the Available list.

Creating and Adjusting the Master Schedule

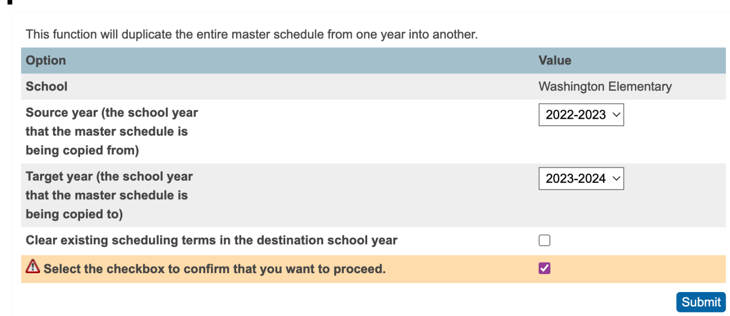
Use your current master schedule to create your schedule for next year. Learn how to copy the master schedule and verify your bell schedule and your fulltime equivalencies (FTE). Then learn how to set up the school calendar and add new teachers. Finally, learn how to adjust the master schedule and to create dependent sections.

Copying the Master Schedule

If you're creating student schedules on the live side manually, you will either build the master schedule manually or you will copy an existing master schedule.

To copy the master schedule:

1. Navigate to the elementary school
2. On the Start Page, click **System** > **Copy Master Schedule**
3. From the **Source year** menu, choose the year from which you want to copy the master schedule
4. From the **Target year** menu, choose the year to which you want to copy the master schedule
5. Check **Select the checkbox to confirm that you want to proceed**



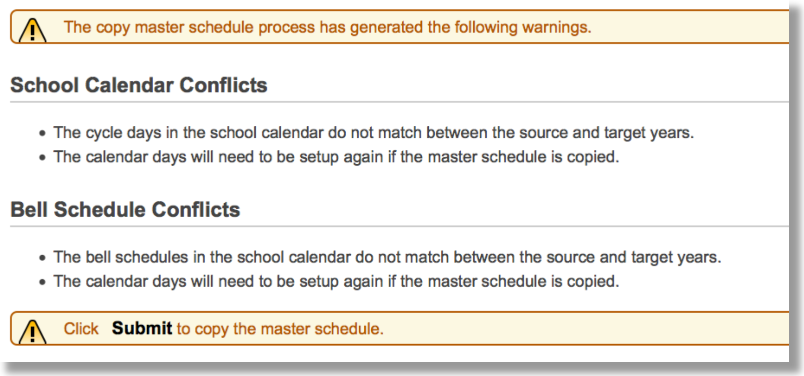
This function will duplicate the entire master schedule from one year into another.

Option	Value
School	Washington Elementary
Source year (the school year that the master schedule is being copied from)	2022-2023
Target year (the school year that the master schedule is being copied to)	2023-2024
Clear existing scheduling terms in the destination school year	☐
Select the checkbox to confirm that you want to proceed.	☑

Submit

6. Click **Submit**

   A warning will appear if there are calendar, bell schedule, or course conflicts. Make the courses that are listed available before copying the schedule. Don't proceed with unavailable courses or you'll lose those sections.



7. Click **Submit**

   Copying the master schedule in the same school saves time and minimizes errors. The copied schedule information also includes the final grade setup information. The Master Schedule system report provides a starting point for making schedule changes.

Verifying Bell Schedules and FTEs

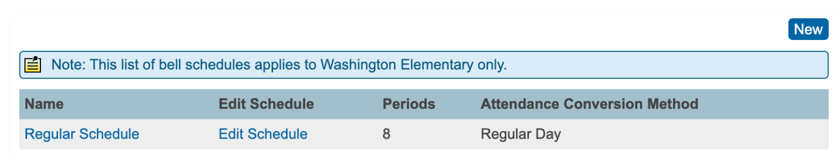
When working on next year's master schedule, you will perform a few tasks before you begin the tasks for the EOY process. First, verify that the bell schedules and full-time equivalencies (FTEs) are set up correctly. Keep in mind that when you sign in to PowerSchool SIS, the current year is the default year; however, you will perform this task and all the following tasks in the future school year. In the navigation toolbar, choose the future year from the **Term** menu.

Bell Schedules

The bell schedules are copied to the new school year when you copy the master schedule, but you should still verify that the schedule is correct. Bell schedules indicate the start and end times for each period. All periods used for scheduling purposes must have an associated bell schedule. For example, a bell schedule might have just two periods: morning and afternoon.

To review or modify the bell schedule:

1. On the Start Page, open the **Term** menu in the upper-right corner
2. Select the future school year
3. Click **School** > **Bell Schedules**



4. Click the bell schedule name to modify it, choose an attendance conversion method, then click **Submit**

5. Click **Edit Schedule** to review the periods in the bell schedule

   Click **New** to add periods to the bell schedule. Click the period number to make changes to a period or to remove a period. If the school uses daily attendance, choose one bell period to act as the bridge to the daily attendance record, and check **Counts for ADA** and **Use For Daily Attendance**.

FTEs

Full-time equivalencies (FTEs) define how daily attendance values are calculated for students. The FTE setting answers the question, “Is this a full-time student?” Verify that next year’s FTE “Default for these grades” values are defined for all grade levels in the school.

If a grade level is not associated with an FTE when you run the EOY process, students moved into that grade level will not receive an FTE for the upcoming school year, and you will have to assign FTEs manually.

The New FTE and Edit FTE pages have options for you to choose from for the "Default for these grades" area. When a new FTE is created, these boxes are not checked. FTEs are unique to each school year, but you can copy over existing FTEs to a newly created school year.

To review and verify FTEs:

1. On the Start Page, verify that you’re in the future school year
2. Click **School** > Full-Time Equivalencies (FTE)

Name	Description	Def. Att. Mode	Def. Att. Conversion
Full Time		Daily	CodeDay
Half Day		Meeting	PeriodDay

3. Select and review each FTE

   Verify that a default FTE is set for each grade level at the school.

Setting Up the Calendar

Before enrolling students, you must define the term dates within the future school calendar. Verify that you have chosen the future school year from the **Term** menu.

Navigate to the calendar by clicking **School** > **Calendar Setup**. Choose one of two methods to complete the setup: set up each day manually or use the automated calendar setup. When you set up the calendar manually, you’ll select the appropriate cycle day, bell schedule, in-session flag, and membership value for each day of the school year.

When you use the automated setup, you’ll start by making some manual changes. First, clear the In Session check box for each holiday and vacation day, and set any non-standard bell schedules (for example, early release days).

Then, return to the School Setup page and click **Automated Calendar Setup** to establish cycle day patterns, set standard bell schedules, adjust membership values, and maintain track in-session date ranges for the whole school year.

Adding New Teachers

You're almost ready to work with the master schedule. The last step is to add any new teachers and co-teachers. Associate teachers to all schools where they will teach a course. Then assign teachers and additional staff to the courses they will teach. Keep in mind that to schedule a teacher, you must add him or her to PowerSchool SIS.

To add a new teacher:

1. On the Start Page, click **Create Staff**

   If you haven't performed the EOY process, make sure you are working in the future school year.

2. Enter the staff member's name and complete the applicable fields

   You may not be required to complete all the fields, but add phone numbers, a home address, a Social Security number, a date of birth, a gender, and ethnicity.

3. In the **Teacher Number** field, enter an ID **number**
4. From the **Staff Type** menu, choose **Teacher**

   Setting a staff type makes searching for staff members easier.

5. Click **Submit**

Adjusting the Master Schedule

Now you're ready to work with the new year's schedule. For most elementary schools, a manual change means assigning a new teacher to a former teacher's sections when the former teacher isn't returning for the new school year.

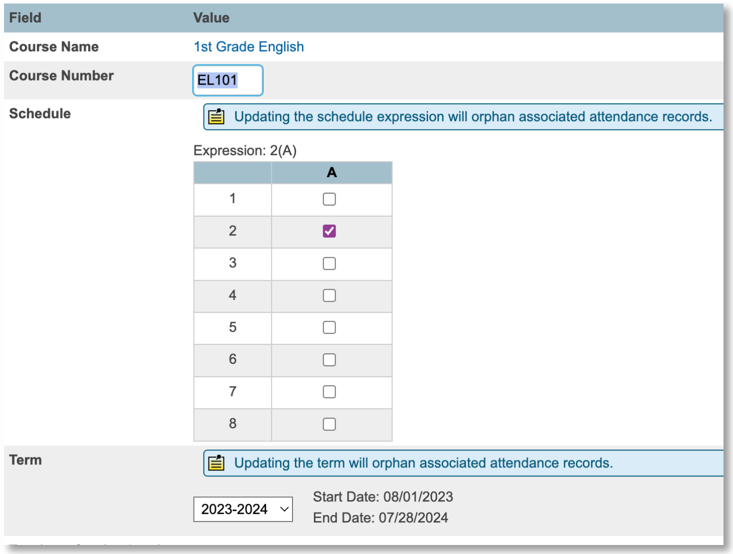
Once you add the new teacher to PowerSchool SIS, reassign the former teacher's sections to the new teacher. You may also want to make minor changes to the master schedule that you copied. For example, you may want to move a course section, create a new course section, or add a co-teacher.

If you haven't performed the EOY process, do not make changes to the current school year's schedule. You must perform all the schedule changes in the future school year.

To modify the master schedule:

1. On the Start Page, click **School**
2. Below Scheduling, click **Sections**
3. Click the course for which you want to modify a section
4. Click the section number you want to change

   The following image is a portion of the Edit Section page.



5. Click the teacher's name to activate the Teacher – Section Lead fields and choose a different teacher
6. For Teachers/Staff – Additional, click **Add** to add a co-teacher to this section
7. Enter or edit information in the **Gradebook Type**, **Room**, or scheduling information fields, as needed
8. Click **Submit** to save your changes

Using Dependent Sections

Set up dependent sections for a course section so that when you enroll students into one section, the system enrolls them into the dependent sections automatically.

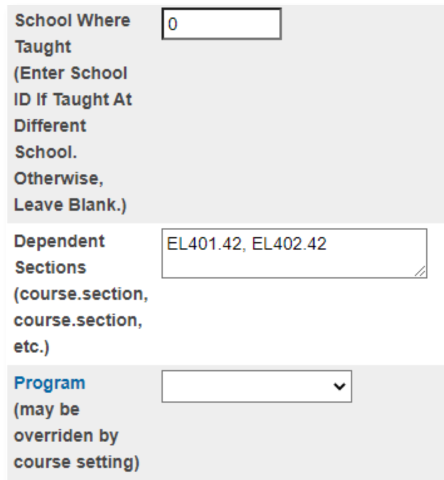
For example, suppose you want students in a particular homeroom class to also be enrolled in a certain art section, music section, and gym section. Rather than enroll students into four sections separately, enter the art, music, and gym sections as dependent sections on the homeroom's Edit Section page.

Then when you enroll students in that homeroom section, they will be enrolled in the art, music, and gym sections automatically, and all four sections will appear on the students' schedules. Enter dependencies only for sections that you want to link to other sections.

To add dependent sections:

1. On the Start Page, click **School** > **Sections**
2. Click the course for which you want to adjust a section
3. Click the section number
4. Scroll to the **Dependent Sections** field
5. Enter all the other course and section (course.section) numbers that the selected students must be enrolled in

   Separate section numbers with a comma. For example, ***EL401.42, EL402.42***.



6. Click **Submit**

Running End of Year Process

Now that you've completed these first several steps in elementary scheduling in PowerSchool SIS, best practice recommends you run your end of school year process now to advance all the students to their next grade level before enrolling them into their classes for next year. For more information see our Professional Development Plus (PD+) or instructor led courses on the end of year (EOY) process in PowerSchool SIS.

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Enrolling Students into Classes

After you've completed the scheduling setup, you are ready to start scheduling students individually or in a group. Adjust student schedules on an individual basis when needed, but you won't schedule all students individually. Enrolling a group of students in a class is a better option. Elementary schools often use the mass enroll method to schedule a group into the same homeroom class.

Mass Enrolling Students Manually

As with modifying the master schedule, be careful when you schedule students—by either mass enrolling or scheduling individually—before you have performed the EOY process. Even though you've switched to the next school year, the students remain in their current grade levels. Verify that you're selecting the correct students.

You may need to schedule students into new sections that you created in PowerSchool SIS. Rather than scheduling the students one at a time, enroll a group of students all at once. To mass enroll students into a class, first select the group of students you want to enroll. Then, use the Mass Enroll group function to enroll the students into the same class.

To mass enroll students manually:

1. On the Start Page, click the grade level that you want

   For example, click **4** to work with the entire 4th grade. Or if you're working in the future year, click **3** to work with next year's 4th graders.

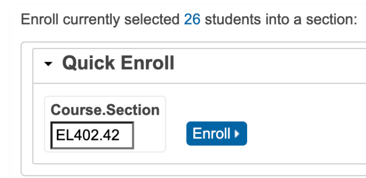
2. Below the student names, click **Select By Hand**

   Use the Select By Hand function to choose the students that you want to enroll in the class. If you want to enroll an entire grade level, click the grade level, click the **Select Function** arrow, and choose **Mass Enroll**.

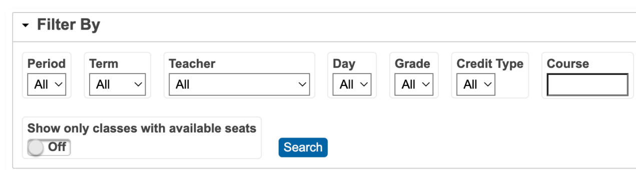
3. Clear the **Student** column header check box
4. Select the students that you want in the group
5. Click **Update Selection**

   The students you selected are now the current selection.

6. Click the **Select Function** arrow and choose **Mass Enroll**
7. Do one of the following:
   a. In the **Quick Enroll** area, enter the course and section information and click **Enroll**

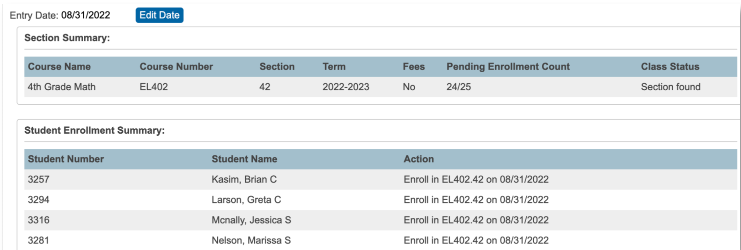


   b. Use the filters to search for a class, click **Search**, then select the course name



8. By default, the enrollment date will be the first day of the section term, so click **Edit Date** if you need to edit the enrollment date

9. In the Section Summary, verify that the course information is correct, that the enrollment count doesn't exceed the maximum number, and that the section is found



Entry Date: 08/31/2022 Edit Date

Section Summary:

Course Name	Course Number	Section	Term	Fees	Pending Enrollment Count	Class Status
4th Grade Math	EL402	42	2022-2023	No	24/25	Section found

Student Enrollment Summary:

Student Number	Student Name	Action
3257	Kasim, Brian C	Enroll in EL402.42 on 08/31/2022
3294	Larson, Greta C	Enroll in EL402.42 on 08/31/2022
3316	Mcnally, Jessica S	Enroll in EL402.42 on 08/31/2022
3281	Nelson, Marissa S	Enroll in EL402.42 on 08/31/2022

10. Below the list of students, click **Enroll Students**

    If you're not using dependent sections, click **Enroll Students and Reschedule** and repeat these steps for each class in which the students will enroll.

Scheduling a New Student

You may also have new students to schedule. Whether you are changing a homeroom for an existing student or creating a schedule for a new student, navigate to the same screen; this can now be done on the live side of PowerSchool SIS. Select a student and click **Modify Schedule**.

The Modify Schedule – Enrollments page lists the student's section enrollments for the current year and school. It also lists current course requests for existing students. You will pick sections in which to enroll the student. You can also add and drop sections manually to change a student's schedule.

Keep an eye on two very important dates: the school year in which you are scheduling the student and the start date of the student's enrollment.

When enrolling new students before the EOY process, make sure you choose the future school year. The new students will be designated as pre-registered.

When enrolling new students after the EOY process, you won't have to choose the new school year. However, the new students will be designated as pre-registered until their first day of school.

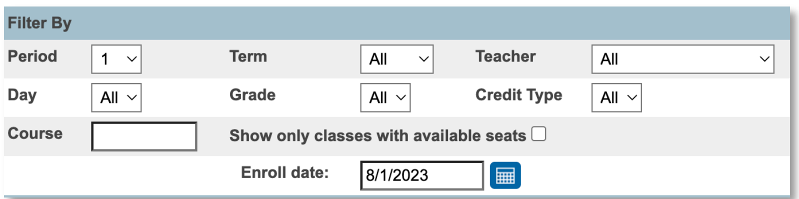
To find those pre-registered students, enter ***/enroll_status=-1*** on the Start Page. Every pre-registered student, regardless of his or her grade level, will be listed. If you know the student's name, put a forward slash in front of the search command. For example, enter ***/smith*** to find all active and inactive students with the last name Smith.

To schedule a pre-registered student after the EOY process:

1. Search for the student using the forward slash (/)
2. Select the student's name
3. In the Scheduling section, click **Modify Schedule**
4. In the **Effective Enrollment Date** field, enter the date the student will begin classes

5. Choose a period and click **Find** to search the available classes or the applicable homeroom section

   If you know the exact course and section number, use the **Quick Enroll** tool.



6. Use the search filters to narrow the results
7. Verify that the enrollment date is the first day that the student will attend class
8. Click the homeroom course that you want to enroll the student in

   If you entered dependent sections for each homeroom, selecting that homeroom means that the dependent sections will be scheduled also.

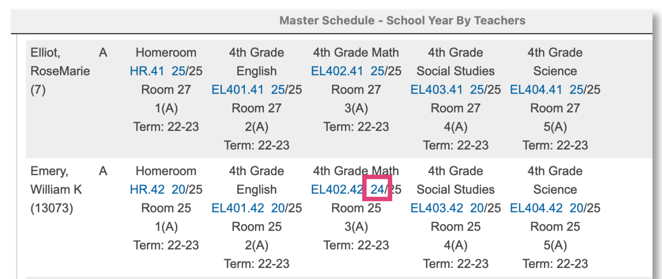
Verifying Enrollment

When you mass enroll the students, it's good practice to verify the enrollment numbers. Learn how to verify enrollment and then learn how to create and print class rosters.

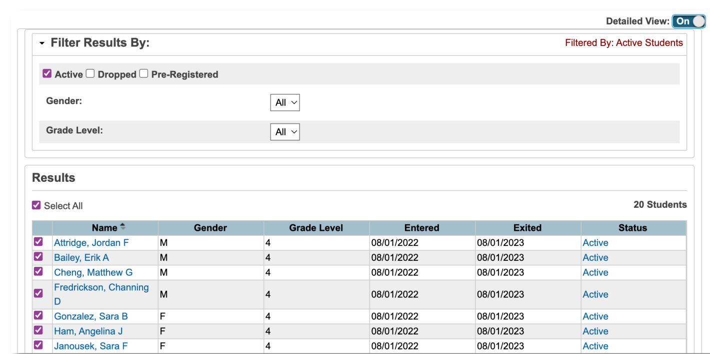
Verify the roster for every section, especially if you use dependent sections.

To use the Master Schedule to verify section enrollments:

1. On the Start Page, click **Master Schedule**
2. On the Master Schedule Preference page, use the default selections for **All Periods**, **All Days**, **All Rooms**, and **All Teachers**
3. For Group By / Sort By, select **Teacher / Teacher Name**
4. For View By, select **Matrix**
5. Then to view the Master Schedule, click **Submit**
6. On the Master Schedule under the course name, click the enrollment number of the section to view a list of students who are now enrolled in that section



7. Turn on the **Detailed View** in the upper-right corner



8. Click the first student's name to navigate to the student pages menu for that student

   Or, to work with the group of students, select **Make Current Student Selection**.

9. Below Scheduling in the student pages menu, click **List View**

Exp	Trm	Crs-Sec	Course Name	Teacher	Room	Enroll	Leave
1(A)	22-23	HR-42	Homeroom	Emery, William K	25	08/01/2022	08/01/2023
2(A)	22-23	EL401-42	4th Grade English	Emery, William K	25	08/01/2022	08/01/2023
3(A)	22-23	EL402-42	4th Grade Math	Emery, William K	25	08/01/2022	08/01/2023
4(A)	22-23	EL403-42	4th Grade Social Studies	Emery, William K	25	08/01/2022	08/01/2023
5(A)	22-23	EL404-42	4th Grade Science	Emery, William K	25	08/01/2022	08/01/2023
6(A)	22-23	EL2000-42	Art	Hershey, Kathleen	Art Room	08/01/2022	08/01/2023
7(A)	22-23	EL1000-42	General Music	Kim, Sung Lee L	Music Room	08/01/2022	08/01/2023
8(A)	22-23	EL3000-42	Physical Education	Williams, Rachel	Gym	08/01/2022	08/01/2023

10. Verify that the dependent sections are listed on the student's schedule

    If you made the whole class the current selection, you can check each student's schedule. At the top of the student pages menu, click the forward arrow located next to List to view the next student's schedule.

Printing Class Rosters

Use the Class Rosters report to create a PDF that displays student information for the teacher or teachers that you select. The Class Rosters report gets data from PowerSchool SIS.

When setting up the report, save time by copying and pasting text that you enter in the "Heading text" and "Roster columns" fields into a text document. Then, instead of retyping the text each time you want to change the class roster, just copy the text from your document and paste it back into the report.

Another way to print a quick roster is to use the Print icon on the Teacher Schedules page.

When you print rosters before the EOY process, remember that the grade level of the students will be the grade they are currently in, not the grade level they'll be in next year. If the report indicates the students are in the next grade level, it may confuse teachers with inaccurate information, so you might consider leaving the grade level off the roster report until after the EOY process.

Creating a Class Roster

Format a class roster report and run the report for 1st period.

Important: If you're working with the future schedule, begin by selecting the future school year from the **Term** menu and leave the grade level field off the report.

To create a class roster:

1. On the Start Page, click **System Reports** > **Class Rosters (PDF)**
2. Select a teacher's name or select multiple teachers' names by Control-clicking the names on a PC or Command-clicking the names on a Mac
3. Select period **1**
4. Include students who are currently enrolled in the class
5. For the "Size, line height, style" field, check **Bold**
6. Use the default values for the remaining heading format fields
7. Enter the following information in the **Heading text** field:

   Teacher: ^(teachername)
   Room: ^(room)
   Course Name: ^(coursename)
   Number of students enrolled: ^(no_of_students)
   Maximum seats available: ^(maxenrollment)

8. Use the default values for the column format fields

9. Enter the following information in the **Roster columns** field:

   ^(count)\#\.5\C
   Lastfirst\Name\1.75\L
   Grade_level\Grade\.5\C

10. Use the default values for the remaining fields
11. Click **Submit**
12. View the completed report from the Report Queue (System) page

Teacher: Barker, Margaret J
Room: 11
Course Name: Homeroom
Number of students enrolled: 25
Maximum seats available: 25

#	Name	Grade
1	Adams, Brandon G	1
2	Blankenship, Barry F	1
3	Brown, Amanda	1
4	Brown, Rachel	1
5	Brown, Riley C	1
6	Dandy, James	0

Option 2: Scheduling in PowerScheduler

Use this information to help you perform all the scheduling work in PowerScheduler. The advantage of using PowerScheduler is that you can work on next year’s schedule and schedule students into classes during the current year. Also, use the data validation tool to find errors.

Keep in mind that you must know how students will be divided into sections to schedule them using PowerScheduler.

To schedule students, perform these steps:

1. Reviewing student information
2. Completing School Year Setup
   a. Creating years and terms
   b. Making courses available for scheduling
3. Performing the Auto Scheduler Setup process
   a. Using the Editing Build scenario
4. Setting the schedule year
5. Creating the course catalog
6. Copying the master schedule
7. Adjusting course and section preferences
   a. Setting up rooms
   b. Updating student and teacher information
1. Using Visual Scheduler
2. Enrolling students into classes
   a. Manually scheduling an individual or a group
   b. Using the PowerScheduler Engine to enroll students
3. Moving to PowerSchool SIS:
   a. Adding co-teachers and making additional schedule changes (in PowerSchool SIS)
   b. Scheduling new students
4. Verifying enrollment and printing class rosters

If you want to complete all the steps in PowerSchool SIS, refer to the section in this document titled *Option 1: Scheduling in PowerSchool SIS*. You don't have to choose just one option—either using PowerScheduler or PowerSchool SIS; you can use a combination of both methods. To use both methods, first commit the schedule in PowerScheduler and then make changes on the PowerSchool SIS side to avoid having PowerScheduler overwriting manual changes made in PowerSchool SIS. Perform the steps that will create the best schedule.

Reviewing Student Information and Completing School Year Setup

In the Creating Years and Terms section above, note for PowerScheduler, create only the full year term in PowerSchool SIS since the Autoscheduler Setup process in PowerScheduler will copy over the additional terms to PowerSchool SIS.

For more information on the two above topics, see these same headings in Option 1: Scheduling in PowerSchool SIS. The content and the how-to steps are outlined there whether you are scheduling in PowerSchool SIS or in PowerScheduler.

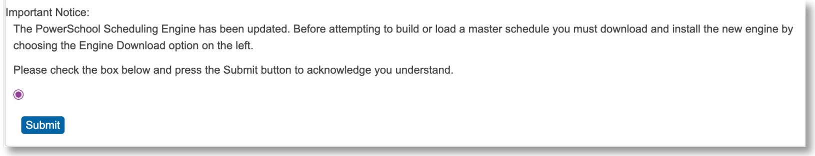
Performing the Automatic Scheduler Setup

The Automatic Scheduler process will produce the additional terms for your scheduling year. Verify the full year term for the future scheduling year is set up on the PowerSchool SIS side and then proceed with this process to set up the rest of the years and terms.

To run the Auto Scheduler Setup process to create a build scenario:

1. Switch from the District Office to an elementary school
2. On the Start Page, switch from the live side of PowerSchool SIS to the scheduling side by clicking **PowerScheduler**
3. If you see the notice below, select the option and click **Submit**

   This notice is a reminder that you must download the PowerSchool SIS Scheduling Engine before you build the schedule. Not every district must perform this step, but first-time PowerScheduler users will.

4. In the left-side menu, below Scheduling Setup, click **Auto. Scheduler Setup**

5. Choose the term length of the school's shortest courses, the number of periods, and the number of days, then click **Continue**

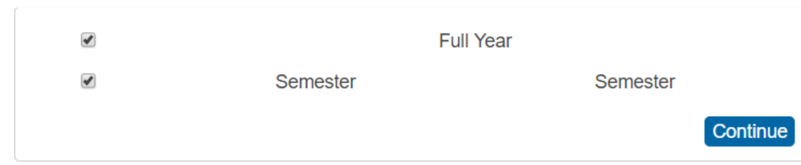
   The **Lowest term level division** menu refers to the types of course offerings. It does not refer to when you store grades or send out report cards. For example, suppose your school sends out report cards every quarter. But students don’t change courses each quarter; they change each semester. In this case, you would choose **Semesters** from the **Lowest term level division** menu.

   If your school uses blocks instead of periods, use the **Number of periods** menu to select the number of blocks.

   Use the **Number of days** menu to define the number of days in the rotation or day cycle, not how many days school is in session each week. In other words, select the number of days that occur before the cycle is repeated.

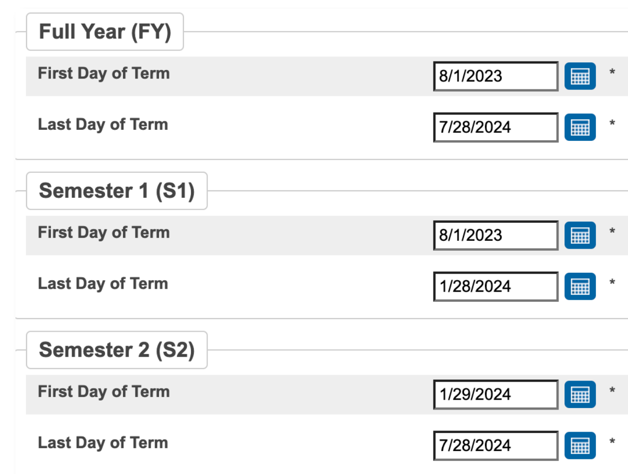
6. Check the scheduling terms to define for your school, then click **Continue**

   These terms apply to scheduling only, not grading terms. The full year term is selected by default, since the full year term is required.



7. Enter the dates for each of the terms and click **Continue**

   Make sure no gaps exist between the term dates. If your school hasn’t finalized the exact dates, don’t worry. You can change the dates at any time while working on the schedule, up until the moment you commit it. Committing the schedule is the last step in PowerScheduler.



8. Select **Build and Load** to use the scenario to build a master schedule and load students into the schedule

   Select **Load Only** if you plan to load students into a previously or manually created master schedule. You can use the Load Only steps with a Build and Load scenario; however, if you select a Load Only scenario and later want to build a schedule too, you will need to create a new build and load scenario.

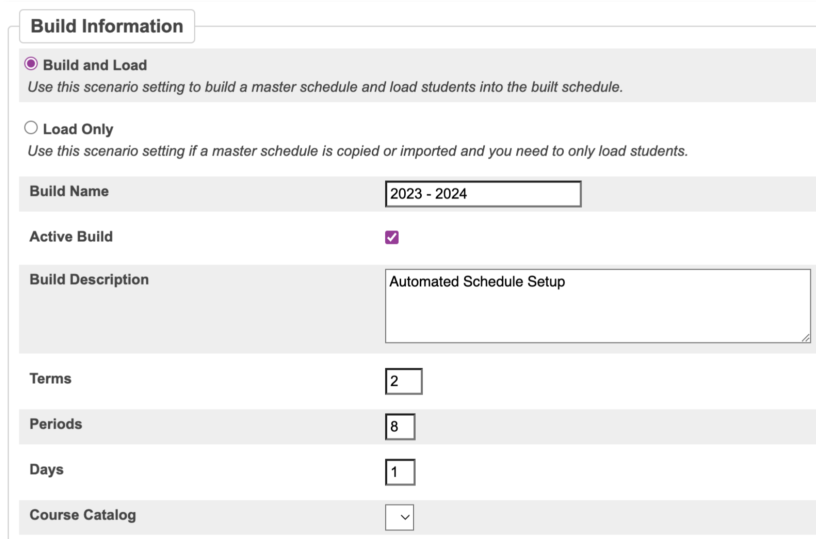
9. Edit the build name and description of the build, if needed

   The build name defaults to the name of the full year term, and the build description defaults to ***Automated Schedule Setup***. If you plan to create more than one scenario to try out different schedules—for instance, to compare a scenario with eight periods on a one-day cycle to a scenario with four periods on a two-day cycle—edit the Build Name and Build Description fields.

   The **Terms**, **Periods**, and **Days** fields contain the information you generated during the Auto Scheduler Setup process

10. The Course Catalog menu will not contain options for first-time PowerScheduler users

    When first-time users submit the scenario, PowerScheduler will create an initial course catalog. If course catalog options are present, don't choose one. It is recommended that you create a new scheduling course catalog each year. You will create a new course catalog in Step B.



11. Do not change the default values in the Build Optimizations, Load Optimizations, and Best Schedule Weights fields at this time

    Use these fields only if you are actively building the schedule and encounter problems with the amount of time it takes to build the schedule.

12. Click **Submit** to complete the Auto Scheduler Setup process

Editing the Build Scenario

After you use the Auto Scheduler function, the Scenarios page will appear. The new scenario will contain the information you entered during the Auto Scheduler Setup process. While you can create several scenarios using Auto Scheduler Setup, only one scenario can be active at a time in each school. Create a new scenario using the previous steps.

If you need to change the terms, periods, or days in an existing scenario, do not perform the Auto Scheduler Setup process again. Instead, navigate to the Scenarios page, select the name of the active scenario, and make the necessary changes on the Edit Build Scenario page.

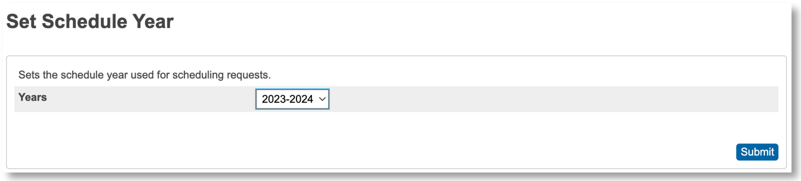
Setting the Schedule Year

You can enter student course requests for the current year and future years. To ensure that student course requests that come in via PowerScheduler, PowerSchool SIS Student Portal, or the Modify Future Requests student page this year are associated with the future scheduling year, set the scheduling year. By setting the scheduling year, the request screens you create in PowerScheduler will apply to the future school year.

To set the schedule year to the future year that you created:

1. In PowerScheduler, below Tools, click **Functions**
2. Scroll down the Functions page and click **Set Schedule Year**
3. Choose the future schedule year from the menu

   Only the years established on the Years & Terms page are listed in the menu.



4. Click **Submit**

Creating the Course Catalog

Submitting a scenario at the end of the Auto Scheduler Setup process creates a new course catalog for first-time PowerScheduler users.

Next, verify that the catalog contains the courses you need. Or create a whole new catalog, if necessary.

To check the catalog that was created automatically:

1. Below Scheduling Setup, click **Course Catalogs**
2. For the new catalog, click **Edit Course Catalog**

   If you see the warning icon (red triangle), you have at least one course that is offered currently, but that is not marked as available for scheduling next year.

Catalog	Edit Catalog
2023 - 2024	Edit Course Catalog

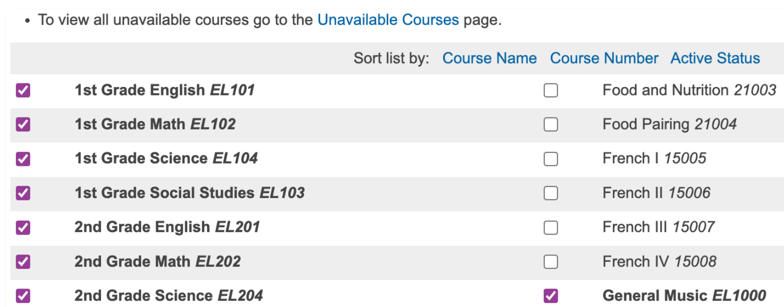
To create a new course catalog:

1. Below Scheduling Setup, click **Course Catalogs** > **New**
2. Enter a name and description for the catalog
3. Click **Submit**

   The course catalog you created appears in the list, but the catalog is not yet active. You can only edit the course catalog that is associated with the active build scenario.
4. Click **Scenarios** and select the active scenario
5. From the Course Catalog menu, choose the catalog that you just created
6. Click **Submit**
7. Below Scheduling Setup, click **Course Catalogs**
8. Click **Edit Course Catalog** in the row of the catalog that you created
9. By default, the system checks all courses offered last year

   Clear the check box next to each course that you want to remove from the course catalog. New courses added in PowerSchool SIS after you create the catalog will appear unchecked. Select the new courses to make them part of the scheduling course catalog in the future year, but do not select more than 999 courses.

   If you don’t see a previously offered course on the list, click **Unavailable Courses** to find the course and make it active. You will see a warning icon for the active scheduling catalog until you navigate to the PowerSchool SIS course catalog and make the unavailable course available for scheduling next year.



10. Click **Submit**

PowerSchool SIS: Elementary Scheduling Quick Reference Card

Copying the Master Schedule

Copying the master schedule is optional. You can use Visual Scheduler to create a master schedule from scratch, but master schedules are often similar from year to year. Save time by copying a master schedule, then modify the active scenario.

To copy the master schedule in PowerScheduler:

5. Below Tools, click **Functions** > **Copy Master Schedule**
6. From the **Source year** menu, choose the year to copy from
7. Select **Check here to confirm you want to proceed**
8. Click **Submit**
9. Navigate to the **Years & Terms** page and verify that the school year name, terms, and dates are correct
10. Below Scheduling Setup, click **Scenarios**
11. Select the active scenario by clicking the title

Build Scenario	Periods	Days	Last Build	Last Load	Advanced	Description
2023 - 2024	8	1	0/0/0	0/0/0	Edit	Automated Schedule Setup

12. Next to the Terms field, click **Associate**
13. Check the year and terms that you will use

14. Click **Submit** > **Submit**

Adjusting Course and Section Preferences

Whether you've copied last year's schedule or you're starting from scratch, complete the course and section information. You'll enter course preferences manually for some courses; for other courses, you'll auto-fill course information.

Use the auto-fill method to enter preferences for a group of courses at the same time.

Use the auto-generate method to copy certain preferences from the current master schedule to the active PowerScheduler catalog.

To verify the course preferences under Resources, click **Courses**. Then select the course you want to review. By default, the course opens to the **Preferences** tab. Be sure to complete the following fields for each course being offered:

- Schedule This Course
- Departments for courses and teachers (optional)
- Maximum Enrollment of the courses and existing sections
- Target Number of Sections to Offer
- Periods Per Meeting
- Frequency
- Valid Terms

If you copied the master schedule, you'll have existing sections. You may have to make changes to those sections as well.

Important: Think about how you format section numbers. PowerScheduler requires that section numbers be numbers. If you use letters for certain sections, you'll have to work in PowerSchool SIS.

PowerSchool SIS: Elementary Scheduling Quick Reference Card

Auto-generating Room and Course Information

If you're a first-time PowerScheduler user, generate room and course information for the master schedule.

To auto-generate rooms or course information:

1. Below Tools, click **Functions** > **Auto Generate Rooms**
2. Select the check box and click **Submit**
3. Below Resources, click **Rooms** and verify that you have rooms listed
4. Below Tools, click **Functions** > **Auto Generate Course Information**
5. Select the check box and click **Submit**
6. Click **Confirm Submit**

Updating Student and Teacher Information

The next step is to verify that teacher and student information is available for scheduling for next year.

Use the Teacher List report to identify which teachers are marked for scheduling or to find teachers who aren't marked for scheduling. Enter teacher information manually, or auto-fill teacher information and auto-generate teacher assignments.

Use the Student List report to verify that students have scheduling preferences in the system. Use the Update Selections function to update certain fields for several students at a time. Auto-fill scheduling preferences for students by year of graduation, and update student scheduling preferences manually.

If you're not seeing students in PowerScheduler, complete the Next School Indicator fields on the students' Scheduling Setup pages. The best way is to complete the fields using group functions.

Running the Teacher List Report

The Teacher List and Student List reports are similar. Review the Teacher List report to verify that departments and preferred rooms are listed.

To review the Teacher List report:

1. Below Tools, click **Reports** > **Teacher List**
2. Click **Submit** to confirm the local language

   If the report is blank, complete the Schedule This Teacher fields for all teachers on the live side of PowerSchool SIS before proceeding. If teachers are listed, verify that departments and rooms are listed.
3. To complete the fields manually, click **Teachers** below Resources
4. Select a teacher's name
5. On the Preferences tab, associate a department (optional) and a room, then click **Submit**

   Instead of completing the fields one at a time, use the Update Selections and Auto-Fill Teacher Information functions to complete the fields for a group of teachers.

Using Visual Scheduler

Once you've completed the scheduling setup, use Visual Scheduler to create a master schedule from scratch or to make master schedule changes manually. Also, you can make some of the changes manually by navigating to PowerScheduler and clicking **Sections**.

PowerSchool SIS: Elementary Scheduling

Quick Reference Card

Sometimes a master schedule requires more than a few manual changes. Click a course name to create or edit the sections. To edit a section, click the section number. To create a new section, click **New**.

Understanding the Grid

Visual Scheduler is a digital whiteboard that provides an overall view of the master schedule. Each tile in Visual Scheduler represents a section. Determine the term length by the size of the section tile. A year-long section fills the entire section cell, a semester section fills half the cell, and a quarter section fills a quarter of the cell.

The columns contain teachers' names, and the rows contain periods. The cell colors indicate the target number of sections for the course.

- Singleton courses are pink (courses with one section)
- Doubleton courses are green (courses with two sections)
- Courses with three or more sections are gray
- Cells with gray stripes indicate that the teacher has a teacher-free constraint for that period

Note: If you copied the master schedule but have not completed the course setup, all courses will appear as gray tiles, regardless of the number of sections.

Adapting the Grid

Visual Scheduler contains several tools that you can use to modify the grid. Zoom in on the section tiles when the terms are shorter in length, or when you have multiple sections scheduled for the same teacher, day, period, or term.

Zoom out to view the master schedule at a higher level and to identify gaps in the schedule. Undo and redo changes to explore different options in the schedule.

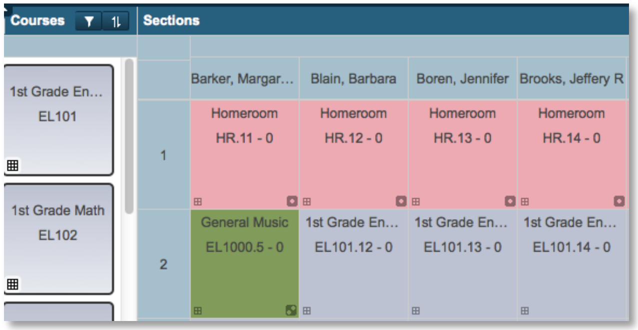
Filtering and Sorting the Courses

Apply filters to see all courses, or to see courses that are not scheduled. Also, filter courses by term length so that you can schedule the longer-term-length classes first, then the shorter-term-length classes.

Sort the courses by course name or by course number. Use the sort function to find the courses you want to schedule next.

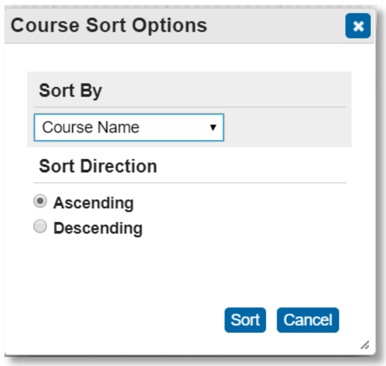
To use Visual Scheduler:

1. Below Schedule, click **Visual Scheduler**
2. Above the Courses column, click the Courses Filter icon



3. Select a term
4. Choose to view all courses or unscheduled courses
5. Click **Filter**
6. Next to the Filter icon, click the Sort Criteria icon

7. Choose what to sort the courses by (for example, **Course Name**)



8. Select **Ascending** as the sort direction and click **Sort**

Scheduling and Filtering Sections

Once you have formatted the grid, you can make changes. If you want to change a section from one period to another, you don't have to open the section details. Instead, drag and drop the cell to the new period. The cell will be highlighted in orange so you know that it is in the right position.

Follow the same process to move a section from one teacher to another, or to place multiple sections in the same cell. Note that when you drag a section from one teacher to another, the room number will also change.

To create a new section, drag the course cell to the scheduling grid. Remember that the data on the course preferences page affects the new sections. After you use the drag and drop feature to create a section, open the section details to complete all the required fields, including the **Maximum Enrollment**, **Team**, **Section Type**, and **Period** fields.

Filter the sections using these categories: **Teacher**, **Time**, **Location**, and **Section**. For example, search by the Time category and then select one period or multiple periods.

Changing the Section Details

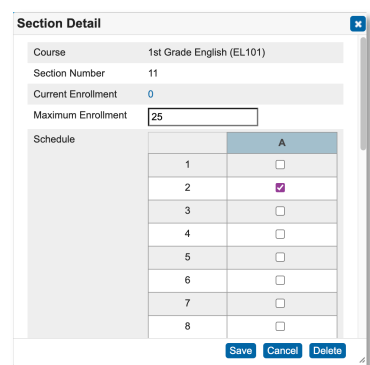
In addition to creating sections, you can also adjust section details from the scheduling grid. You can edit section information manually by selecting a section cell. Make adjustments, such as changing a room number, choosing a new teacher, increasing the maximum enrollment, selecting a different period, or adding dependent sections.

Also, drag and drop sections to different periods or teachers. You can change the period or the teacher in both places, so use the method that best works for you.

When you select a section cell to edit the section information, the fields should look familiar. Those same fields also appear on the Edit Section page in PowerSchool SIS. Keep in mind that only some of those fields are available in Visual Scheduler.

To edit section information from Visual Scheduler:

1. Click a section to open the section details
2. Enter a maximum enrollment, such as ***25***

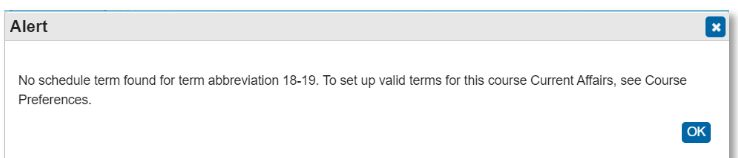


3. Scroll down and select a different teacher
4. Next to the Dependent Sections field, enter dependent sections

   Be sure to separate section numbers with a comma. For example: ***EL401.2, EL402.2, EL403.2***.
5. If you've performed a load already, click the current enrollment number to see a list of students who are scheduled in the section
6. Click **Save**

   Click **Delete** to remove the section.
7. Find a course or section with an Error icon (exclamation point) and click the icon

   An Error icon indicates that a course or section has invalid details, such as an invalid term. You cannot schedule a course that has an Error icon. Under Resources, click **Courses** and select the course to fix the error.



8. Click **OK** to close the window
9. Click the square icon in the lower left corner of a section to view course request information

   For each course and section, view the total number of course requests and the number of course requests that are related to other courses.
10. Close the window

Viewing the Seats Available Chart

Below the Zoom icons in the upper right corner, click the small triangle to open the Seats Available Chart. The Seats Available Chart is a dynamic count of the number of seats available for each period and grade level.

For example, in the image shown below, 75 1st graders are enrolled. If you have 75 students, then you need 75 seats for each period. The image shows 72 seats for one of the periods, so you either must increase the course maximum for each section or create additional sections.

At a glance, you'll know whether you have enough seats. If no seats are available, check the course preferences and student requests.

Seats Available Chart			
Grade 0 2	Grade 1 75	Grade 2 77	Grade 3 78
0	72	74	75
0	75	77	78
0	88	90	91

Checking Course Preferences

You may need to check the course preferences. Rather than navigating away from Visual Scheduler, roll your cursor over a course name. A small window appears with course details listed.

Printing the Grid

Use the Printer icon to print the master schedule. Select the printing options that best fit the master schedule. Preview the master schedule before you print to confirm that the information will be readable.

To print the master schedule:

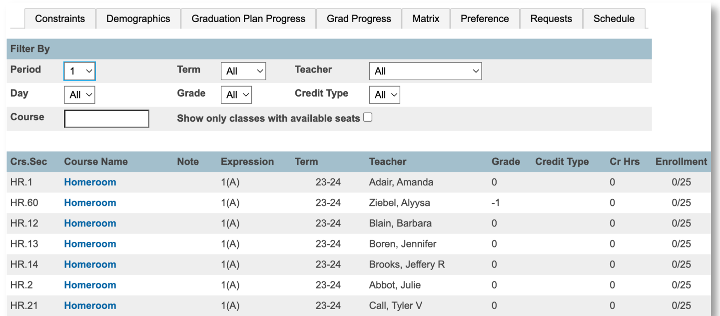
1. Above the scheduling grid, click the **Print** icon
2. Change the paper size and margins
3. Choose to print the schedule in black and white or color
4. Check **Fill Entire Page**
5. Enter the number of teachers to print per page
6. Select **Filtered Sections** to print just the sections showing on the grid
7. Click **Preview & Print**
8. Click **Cancel** to close the print window and view the PDF
9. Close the window and repeat these steps to adjust the printing options

Enrolling Students into Classes

Once you've completed the master schedule, you can start scheduling students in classes while in PowerScheduler.

To enroll a single student into classes manually:

1. Below Resources, click **Students**
2. On the Scheduling page, search for a student
3. Select that student
4. From the left-side menu, select that student again and click the **Schedule** tab
5. From the **Enroll** menu, choose a period
6. Click a course name



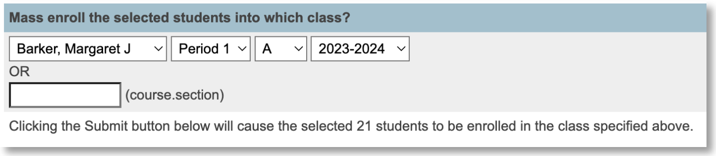
Crs.Sec	Course Name	Note	Expression	Term	Teacher	Grade	Credit Type	Cr Hrs	Enrollment
HR.1	Homeroom		1(A)	23-24	Adair, Amanda	0		0	0/25
HR.60	Homeroom		1(A)	23-24	Ziebel, Alyysa	-1		0	0/25
HR.12	Homeroom		1(A)	23-24	Blain, Barbara	0		0	0/25
HR.13	Homeroom		1(A)	23-24	Boren, Jennifer	0		0	0/25
HR.14	Homeroom		1(A)	23-24	Brooks, Jeffery R	0		0	0/25
HR.2	Homeroom		1(A)	23-24	Abbot, Julie	0		0	0/25
HR.21	Homeroom		1(A)	23-24	Call, Tyler V	0		0	0/25

7. Continue selecting a period and a course until the student's schedule is complete

To enroll a group of students into the same class:

1. Below Resources, click **Students**
2. To select a group of students, click a grade level and then click **Select Students By Hand**
3. Control-click on a PC, or Command-click on a Mac, the students who will be enrolled in the class
4. Click **Functions** > **Schedule Mass Enroll**
5. Do one of the following to enroll the selected students in a section:
   a. Choose a teacher, period, day, and term from the menus

b. Enter the course and section number in the "course.section" format, such as ***EL102.12***



6. Click **Submit**
7. Confirm the Mass Enroll with Dependent Sections by clicking **Submit**

Using the PowerScheduler Load Process to Enroll Students

Use PowerScheduler to enroll students into classes. Run a load validation to check for errors. Resolve any scheduling errors using the Invalid Requests function in PowerSchool SIS. Use the load process to reenter student schedules into PowerScheduler. Make necessary manual changes. Then commit the schedule before running your end of year process in PowerSchool SIS.

To verify student schedules, run a load validation:

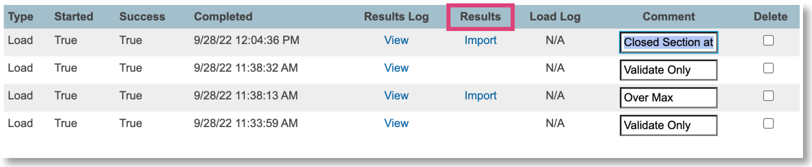
1. In PowerScheduler, under Processing, click **Load**
2. Select **Validate only**
3. For Load type, use the default selection, **Load all students**
4. Click **Execute**
5. Review the Results Log and resolve any errors
6. Navigate back to PowerScheduler to exit the page

   Don't click Import following a validation only process.

To use the Load Process:

1. In PowerScheduler, under Processing, click **Load**
2. For Load type, use the default selection, **Load all students**
3. Make your selection for the following options:
   a. Best practice recommends, select **Close sections at maximum**
   b. Use global course substitutes (see Course Preferences)
   c. Use student course substitutes (see Requests)
4. Click **Execute**
5. On the Results Log page, click **Import**

   Note: Click Load **(Q)** page to review previous Imports.. Click Import for a previous load to reload that student data. Notice the Loads with the comment Validate Only do not have imports available. Add applicable comments on this page and select Delete to remove previous loads. To accept changes, click **Submit**.



Type	Started	Success	Completed	Results Log	Results	Load Log	Comment	Delete
Load	True	True	9/28/22 12:04:36 PM	View	Import	N/A	Closed Section at	
Load	True	True	9/28/22 11:38:32 AM	View		N/A	Validate Only	
Load	True	True	9/28/22 11:38:13 AM	View	Import	N/A	Over Max	
Load	True	True	9/28/22 11:33:59 AM	View		N/A	Validate Only	

When Log Errors appear in your Load Validations or regular Loads, try the following to resolve errors with student schedules:

1. Review the Results Log to evaluate the errors in the message
2. In PowerScheduler, under Functions, click **Resolve Invalid Requests**

PowerSchool SIS: Elementary Scheduling

Quick Reference Card

To make a manual scheduling change, see the Enrolling Students into Classes section. Before you commit the new schedule, rReview the new Master Schedule Report on the PowerScheduler side..

1. From the PowerSchool SIS Start Page, click **PowerScheduler**
2. In the PowerScheduler menu under Schedule, click **Master Schedule**
3. Review the default selections for the options listed on the Master Scheduler Preference page and make any changes
4. To view the Master Schedule, click **Submit**
5. Review the schedule and make modifications as needed

   Once the master schedule shows the correct data, you can proceed with committing the schedule and copying the new master schedule to the PowerSchool SIS side.

To commit the schedule:

1. In PowerScheduler, under Processing, click **Commit**
2. Use the default selection, **Sections & Student Schedules**
3. Click **Submit**
4. On the Verify Commit Master Schedule page, review the messages and if you want to proceed, click **Submit**
5. A Progress page shows the results as the files move to the live side

   The message “Schedule Commit – Complete” will show at the bottom of the page when the process finishes.

To run the end of year process, see our PD+ or instructor-led course on the EOY process for PowerSchool SIS for more information.

Moving to PowerSchool SIS

You’ve completed the master schedule and scheduled the students. Now you have a few tasks to perform in PowerSchool SIS.

If you worked on the master schedule in PowerScheduler during the current year, you’ll have to wait until school finishes before proceeding. While you wait, consider running the load validation process and searching for resolve invalid requests. Then make any necessary adjustments to the schedule on the PowerScheduler side. Then after you’ve committed the new schedule and performed the EOY process, finish the scheduling work in PowerSchool SIS.

Adding Co-teachers and Making Schedule Changes

Now you’re working with the new-year schedule. For most elementary schools, assigning a new teacher to a former teacher’s sections means a manual change. The original teacher associated with the section in PowerScheduler is categorized as the lead teacher. To make the switch, you will reassign the original lead teacher’s sections to the new teacher.

You may also want to make minor changes to the master schedule. For example, you may want to move a course section, create a new course section, or add a co-teacher. You can add additional lead teachers and additional staff, but only one lead teacher can be active during a distinct time frame, such as a quarter, semester, or year.

To change the teacher or teachers associated with a section:

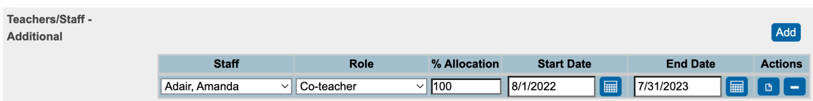
1. On the Start Page, click **School** > **Sections**
2. Select a course name, then select a section number
3. Click the lead teacher’s name to activate the fields and then choose a different teacher

4. For Teachers/Staff – Additional, click **Add** to add a co-teacher

   The teacher fields will appear with default values for the allocation (if set up on the Co-Teaching Roles page) and with start and end dates based on the term you chose from the menu.

5. From the **Staff** menu, choose the teacher's name
6. Choose the role
7. Enter an allocation percentage

   The Allocation field is for regulatory compliance reporting purposes; you don't have to make the total allocation 100%, but you must enter a percentage.



8. Verify that the start and end dates are correct for the time that the co-teacher will be in the classroom
9. Click **Submit**

Scheduling a New Student

For more information on this topic, see the same heading in Option 1: Scheduling in PowerSchool SIS. The content and the how-to steps are the same regardless of whether you are scheduling in PowerSchool SIS or in PowerScheduler.

Verifying Enrollment and Printing Class Rosters

For more information on these two topics, see these same headings in Option 1: Scheduling in PowerSchool SIS. The content and the how-to steps are the same regardless of whether you are scheduling in PowerSchool SIS or in PowerScheduler.