How to Review Student Records

via WebOrder

Process overview

You now have the ability to submit all the information necessary to complete the APH Census online, through the KLAS WebOrder portal. Once you have completed this process, you will have a complete and accurate list of your current, qualified students.

1. Log into WebOrder.
2. Use Find to load a list of all students currently on your record.
3. Review current students and make updates and corrections as needed.
4. Add new students as necessary using the ADD PATRON link.

Step 1 – Log into WebOrder

The first time you log into WebOrder, you will need to follow the link from your "Online Registration & Ordering – Account Information" email in order to set a password. Please make a note of your username.

Any time after you have set your password, log in using your username and password at the URL provided by your Instructional Resource Center.

Step 2 – Search for all current students

1. Click the FIND STUDENT/DISTRICTS link in the Main Menu on the left.
2. Set the TYPE drop-down to **Student** and leave the other fields blank. This search will return all students currently associated with your account.
3. Click the SEARCH button. The results will be loaded onto the same page, beneath the SEARCH button.



Step 3 – Review current students

1. Click on any student's name from the search results to update their information.

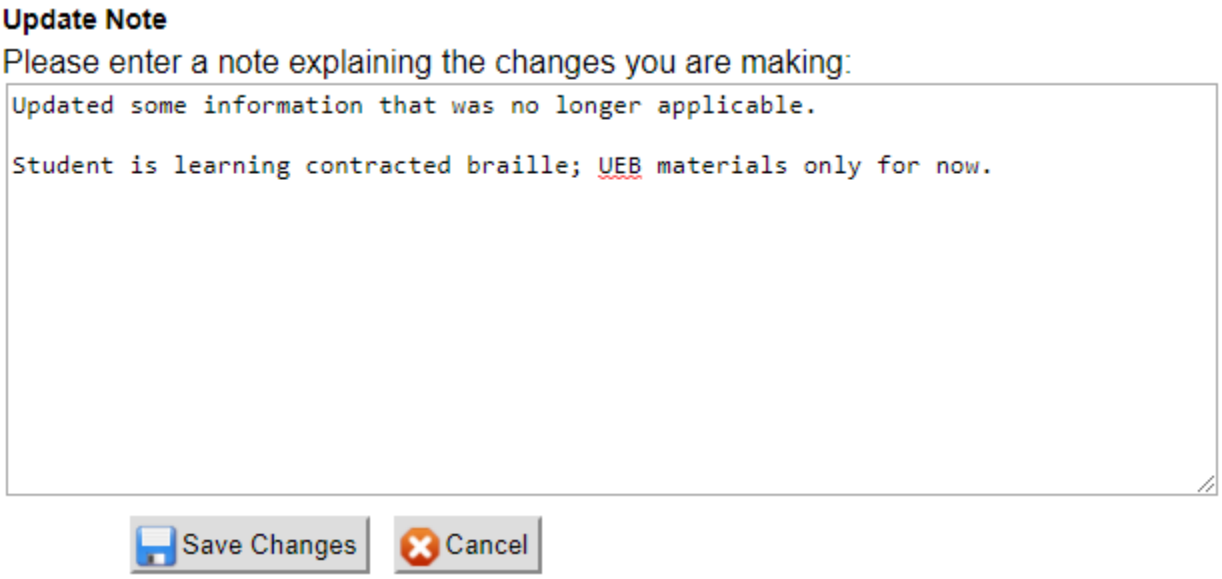
   Note: If you may need to order materials for a student during the coming year, their status must be Active.

   As you review the list, please watch for:

   - Duplicate accounts, usually created when a student has been entered under both their legal name and a nickname.
   - Students who have graduated, moved, or are otherwise no longer in your district.

2. Always include an Update Note when making updates, including the reason for the update (such as "correcting errors" or "out of date information") and any context or service needs that your Instructional Resource Center needs to be aware of.

3. When you have made all the updates needed for a student, click the SAVE CHANGES button. All entered information will be saved to the student's record.



Step 4 – Add new students

For any qualifying students that are not already on your list, you will need to create a student record to include them in the APH Census and to be able to order materials for them.

Note: If you know the student has received materials from your Instructional Resource Center previously, you can contact them to have the student's existing record linked to your account instead of creating a new one.

1. Click ADD PATRON in the Main Menu or Patron Menu.
2. Please fill in as much information as possible.
    - First Name, Last Name, and Date of Birth (DOB) are required.
3. The note field is also required; please include any information that will help the Instructional Resource Center better serve your student.
    - If the student received (or may have received) materials from an Instructional Resource Center while attending a previous school, include their previous district in the Note field, as well as when they changed schools.
    - If the student has siblings who also receive materials from the Instructional Resource Center, please include that information so the new record is not mistaken for a duplicate account.
4. When you have entered all of that students' information, click the ADD PATRON button to create the record.

Note: If you need to go back and add or correct any information after adding the student, you can search for them and update them as in Step 3.

