

Counseling Module

User Guide

Version 23.2

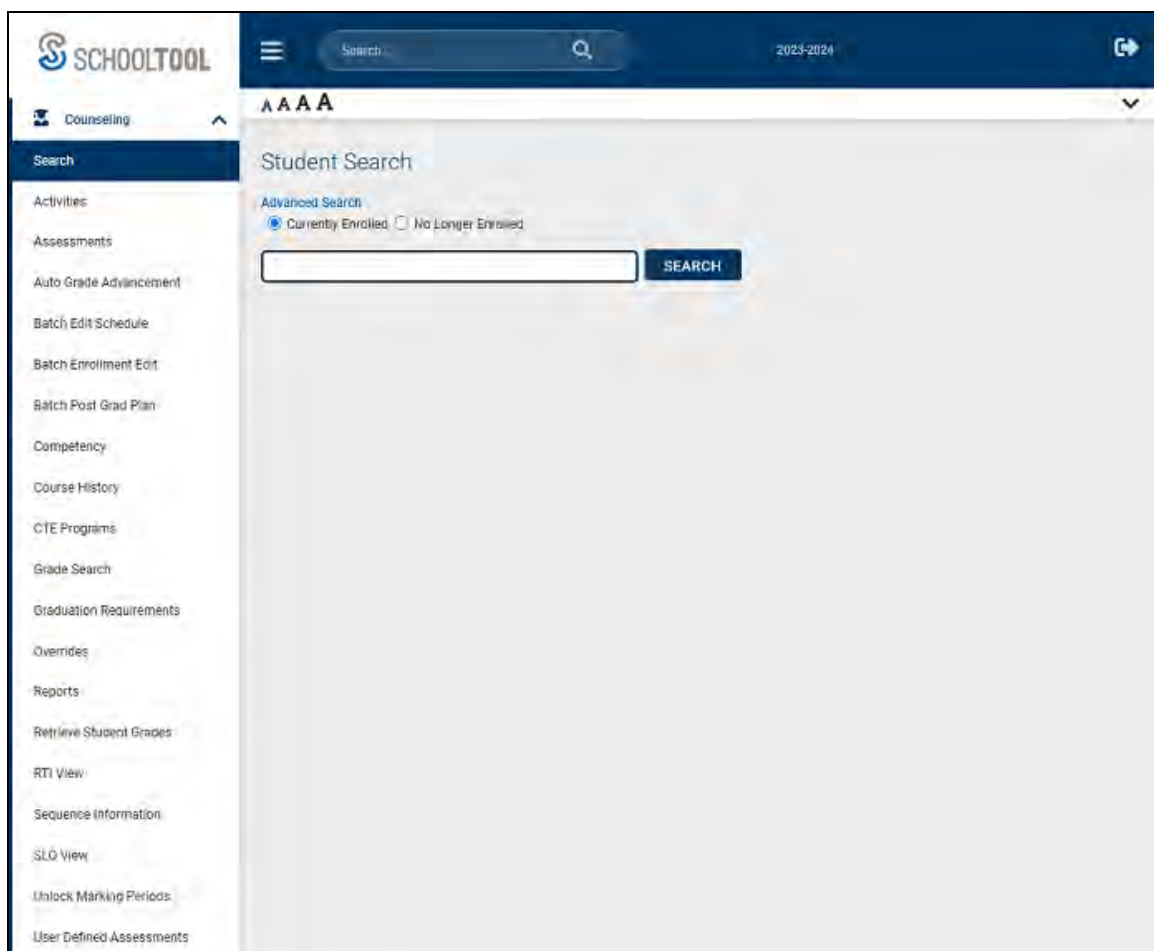


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Counseling Module Overview

The Counseling Module is where guidance counselors and other school administrators will view and modify student grades and schedules after the Master Schedule has been locked. This is also where counselors and administrators can maintain assessments, competencies, graduation requirements and sequencing information.

Grade search tools are available here to help locate students who are at risk or eligible for honors and many reports are provided throughout this module to print such things as grade search results, scheduling information, progress reports and report cards.

Counseling Sub-modules

The Counseling module is divided up into several sub-modules, as summarized here. For more specifics about any sub-module, refer to the appropriate section in this manual.

Counseling Search – This is the default sub-module that opens when you select the Counseling module. From this sub-module, you are able to search for a student using the radio buttons to define criteria – one who is currently enrolled or one who is no longer enrolled (i.e., graduated, transferred, etc). In addition, you have access to the Advanced Search link, which allows you to find a student or group of students using the Batch Selector.

Activities – This is where you create Activities that students can be assigned to such as: Boys Varsity Basketball, Chorus, French Club, etc. You have the options of including the Activity in a Transcript and making the Activity Active or Inactive. You may then Batch Add students to these activities using the Batch tab.

Assessments – This is where you manage the various assessments required for graduation (NYS exams plus local midterms and finals) and where you schedule the NYS exam dates and times needed for state reporting.

Auto Grade Advancement – This is where you will automatically advance students from one grade to the next. Students can be advanced selectively by building, grade and year.

Batch Edit Schedule – This is where you will batch add supplemental courses (those without any assigned period), drop supplemental courses, add courses, drop/withdraw/switch courses to student schedules. You will also be able to remove pending schedules using the batch selector.

Batch Enrollment Edit – This area allows you to edit Official or Alternate enrollment records for a batch of students. For Official enrollments, the most recent record will be

edited (whether this record is current or not). For Alternate enrollments, you can choose which records to edit. You can edit any fields you have permissions for which may include a class year, counselor, diploma type, or homeroom. You can also modify the “Is Placed” flag.

Batch Post Grad Plan - This area allows users to add or remove Post Graduate Plan notes for a group of students.

Competency – These are subject areas that are tied to Assessments. In order to graduate, students would need to satisfy one of the assessments tied to each competency. Users can then review grading information in the Counseling area and see what is required for graduation, to ensure students are meeting minimum requirements. Competencies are for middle/high school only.

Course History - This area allows users to view the full course history for a given year, including schedule changes, for all students and courses.

- **Important Note:** Users should exercise caution when making any changes to the data on this screen. Changes to data here are permanent, and will have impact throughout SchoolTool in areas such as attendance letters, data warehouse, and other views and reports. Also note that changes to one row of data may not be reflected in other rows.

CTE Programs - This area is used to assist districts in configuring CTE program groups. A CTE Program group consists of a primary CTE course that contains push-in courses and assessment groups (where one assessment score is calculated based on other assessment scores). Grading is handled with a behind-the-scenes, customized procedure.

Grade Search – This is where you can view student grades. Use the various fields to set the criteria and run the report.

Graduation Requirements – This is where you may set up and maintain the number of units of each subject that is required for graduation with a specific diploma type.

Overrides - This area allows users to access override tools. It contains an Elementary Subject Pass/Fail Final Grade override area that allows users to indicate which students have failed a 3-8 subject area (as mapped in Maintenance > Export > State Course Code Mappings). It also includes the Minutes Verification and Override area, which allows users to review course minutes per relationship and, if they have the appropriate permissions, manage overrides for relationship minutes, and responsibility weight for exports.

Reports – This sub-module lists all of the pre-defined counseling reports set up for your school/district.

Sequence Information – This is where you will build subject-specific “majors”, which detail all of the courses required for specialization in one area (i.e. Business or Technology).

Retrieve Student Grades - This area allows districts to retrieve and import students' course grades from another SchoolTool district. This allows a component district to import a student's grades from BOCES. After grades have been imported, this data can be updated and managed as the component district sees fit.

RTI View - This area allows users to review, add, or edit student RTI (Response to Intervention) records.

SLO View - This sub-module allows users to retrieve information about courses for SLO (student learning objective) targets. It also allows users to manage which course sections have been assigned an active SLO. Finally, users with the appropriate permissions can view and/or submit SLO scores for students in those active SLO sections.

Unlock Marking Period - This area allows districts to unlock a single course section for marking period grading. Unlock requests become effective immediately after they are submitted and allow the marking period to remain unlocked only until the expiration date/time has been reached. When a section is unlocked, it will be unlocked for all faculty members assigned to that section in the master schedule.

User Defined Assessments - This area allows users to batch add, edit, or remove records for user defined assessments for a selected group of students.

Counseling > Student Record

When you Select  a student from a list, you will see that student's Personal Information Record, also known simply as the Student Record.

Most SchoolTool users deal with student records most often, but every individual in SchoolTool has his/her own Person Record where all information related to that person is stored. This document will focus on working with a Student Information Record, as these typically contain the most detail.

The Student Record contains all information about a student. There are 2 main parts to the Student Record: the Personal Information section and the Student Information section. When using certain modules, additional sections may appear at the bottom of the record with module-specific information. This information is available based on user permissions and the module you are using; therefore not all users will have access to every tab in the Student Information section(s).

Use the Show/Hide buttons   to collapse sections of the student's record that you do not wish to see. This will result in less scrolling needed to view the student's record.

If you are viewing the results of a student search, you can use the following options:

1. Click the Next and Previous buttons   to move forward and backward between students in your search results.
2. Click the Cancel Search  button to cancel the current search and remain on the current student.
3. Click the  Back button to return to the previous screen.

Personal Information Section

The Personal Information section at the top of the student record contains a summary of the student's information. This information includes the student's name, gender, age, primary language, and contact information. It also shows the student's grade, homeroom, homeroom teacher (with an email link), locker number (with an icon  that shows the locker combination in a mouse-over), counselor (with an email link), enrollment type, building/school level, and home district (if applicable). The student locator text in the bottom left corner of this section shows the current location of that student, based on the student's schedule and attendance data. If the student has any alerts, those icons will display for users with the appropriate permissions.

Personal Information

View search
Cancel search
Previous/Next

Help

MY HOME
CENSUS
SCHEDULING
MEDICAL
DISCIPLINE
ATTENDANCE
COUNSELING
TRANSPORTATION

↑ Allen, James
48074

First: James (Jimmy (He/His))
Middle: A
Last: Allen
Gender: Male
DOB: 11/5/2006 (15 yr 11 mo)
1st Language: English
Email: JAllen@yoschool.com

Address: 12 E Island Road
Rochester, NY 12345
Phones: H: (555) 531-6786
Grade: 10
Class of: 2023-2024
Cohort: 2020-2021
Homeroom: 163
Locker: 3058
Counselor: Williams, Melissa
Type: 0011-Regular School Year Enrollment
Building: Mindex HS/High School

Cycle day B, Period 4 (12:48PM to 11:59PM)
EARTH SCIENCE R in Room 180 Teacher: Richardson/Campbell
Created by Heather Anderson on 2/24/2020 at 2:25 PM
Modified by Morgan Martin on 5/20/2022 at 9:09 AM

Note: The specific information available here is based on Maintenance settings; not all users will see all fields/data.

There are several types of alerts that may be visible on a teacher's class roster and also on individual students' Personal Information Records. In addition, the alert icons may provide more information on the specific alert, which displays in a text box that appears when the user holds the mouse over an alert icon.

Available alerts include the following icons and corresponding mouse-over text:

AIS Program Service	IEP Viewer	Medical Alerts	Custom Alerts	Send Notification
Icon:	Icon:	Icon:	Icon:	Icon:
Mouse-over text:	Mouse-over Text:	Mouse-over text:	Note: Custom Alerts are indicated by a flag or other image and may be any color defined by the district. The mouse-over text will display the name of the custom alert	Clicking this icon opens a pop-up where users can enter a message to send to this student via direct notification in the SchoolTool mobile app

			as defined in Maintenance.	
Student RTI Information Icon: 	View Shared District Data Icon: 	Student Dashboard Viewer Icon: 	WebEdge Student Portfolio Viewer Icon: 	MTSS Summary Report Viewer Icon: 
Hovering the mouse over this icon will display a list of that student's active RTI records.	Clicking this icon opens a window to display student data shared by another district. This icon appears only when districts have configured data sharing.	Clicking this icon opens a window to display the Student View dashboard for that student.	Clicking this icon opens a window to display the WebEdge Student Portfolio for that student.	Clicking this icon opens a window to display the MTSS Summary Report for that student.

The visibility of these alerts is controlled by district permission settings. Users may be able to see the alert icon only, the mouse-over text description only, both, or none of these, depending on their user permissions. Separate permissions also control whether users may see these icons on a teacher's Roster.

The Send Notification  button appears for students who have opted to receive direct notifications in the SchoolTool mobile app (this also requires that the district has configured that building school level to allow direct notifications). Click the Send Notification  button and enter a title and message to send to the student, then click Send. The message will be delivered as a notification on the student's mobile device.

Message to Patrick Turner (27059)

Title:
Exam retakes

Message:
I will be offering the Unit #3 Exam retake tomorrow. If you want to take it, please stop by my classroom during Advisory period. Thanks!

119 Characters Remaining

SEND

Users with permission to view students' SchoolTool Premier dashboards may see a SchoolTool Dashboard Viewer  icon for students who have a Student ID and have ever had an in-district enrollment. If this icon appears, users can click on the Viewer icon to view that student's dashboard in a new window.

If shared data is available from another SchoolTool district, a View District Data  icon may appear on in the alerts area. This will allow the user to view data from another district that has been configured for district-to-district data sharing (most likely between a BOCES and home district). To view shared data (or shared report cards and/or transcripts), hover over the District Data  icon and Select  the desired option (View District Data, View District Report Card, or View District Transcript) from the dropdown.

↑ Young, Patricia

First: Patricia
Middle: M
Last: Young
Gender: Female
DOB: 3/6/2004 (17)

No Photo

View Home District A Data
View Home District A Report Card
View Home District A Transcript

Users with the Mouseover Information permission can hover over the RTI  icon to see a list of the student's active RTI records.



If the user has View or Edit rights, corresponding buttons will be available for each record (either an Edit  icon, for users with Edit permissions, or a Select  icon, for users with View permissions).



Viewing RTI Records

Users with View rights only will see Select  icons for each record in the list.

Select a record to view details in read-only mode. Click the Back  button to return to the student record. Click the RTI Detail Report  icon to print the RTI record and its associated intervention details.

Lowell, Patricia (36078) 🖨️ ← Back Help ?

Start: 1/20/2022 End:

Level: Tier I

Type:

Timeline:

Faculty: Martin, Kathleen

Description:

Date	Faculty	Intervention	Effect Type	Description
2/7/2022	Copeland, Katie			This is a description.

Editing RTI Records

Users with Edit rights can click the Edit  button for any of the RTI records listed.

Click the Edit  icon for any record to open it in edit mode. Make changes as needed and click Save  to return to the student record. Please note that any number of interventions may be edited or added, but the top section of the RTI record cannot be changed from this screen. Click the RTI Detail Report  icon to print the RTI record and its associated intervention details.

Young, Patricia (36078) 🖨️ Save Cancel Help ?

Start: 1/20/2022 End:

Level: Tier I

Type:

Timeline:

Faculty: Martin, Kathleen

Description:

+ Add

Date	Faculty	Intervention	Effect Type	Description
 	2/7/2022	Copeland, Katie		

Student Tab

The **Student** tab contains all program service records, including enrollment information, Student Lite information, AIS, section 504, disabilities, LEP, etc. Depending on your permissions, you may or may not have access to add or view all program service records for a student. By default, the Student Tab typically displays the Enrollment view. The view may be changed by selecting another option from the drop-down in the upper left corner.

The screenshot shows the 'STUDENT' tab selected in the top navigation bar. Below the navigation bar, the 'Counseling' section is active, with a dropdown menu set to 'Enrollment'. The main content area displays the 'Enrollment' view, which includes a 'Show history' link and a '+ Add' button. The enrollment record shows 'Official Enrollment' for '0011-Regular School Year Enrollment: 10/28/2024 - 12/27/2024' at 'Mindex HS / High School'. The 'Class of: 2027-2028' is selected, and the 'Grade: 9' is displayed. The 'Exit reason: (170) Transferred to Another NYS Public School Outside This District with Documentation' is shown. The record was created by SchoolTool on 10/28/2024 at 1:56 PM and modified by SchoolTool on 10/28/2024 at 5:31 PM. Below this, the 'Projected Enrollment' section shows '0011-Regular School Year Enrollment: 12/31/2024' at 'Mindex HS/High School' for the 'School Year: 2024-2025'. The 'Class of: 2026-2027' is selected, and the 'Grade: 10' is displayed. The 'Exit reason for current enrollment:' is shown. The record was created by Eden WA on 10/28/2024 at 4:53 PM and modified by Eden WA on 10/28/2024 at 4:53 PM.

Enrollment View

The various program service records can be accessed by selecting the appropriate view from the drop-down menu in the upper left corner of the Student tab. Depending on your permissions, you may or may not have access to add or view all program service records for a student.

The Enrollment view is the default.

Note: Each student must be enrolled before they can be scheduled for classes. A student cannot be enrolled unless he or she has the following information entered in SchoolTool:

- First Name
- Last Name
- Date of Birth
- Gender
- First language

From the drop-down list under the **Details** tab, select the Enrollment program service. Three types of enrollment records may be added here:

- The Official Enrollment record is the active record for the current school year. It assumes that the student is enrolled and will begin attending classes immediately.
- The Projected Enrollment record is a placeholder for a future official enrollment record. It assumes that the student has registered but will not begin attending until a specified date in the future. When that future date arrives, users will need to create an Official Enrollment record in order to schedule the student, using the **Census > Batch Enrollment** sub-module. Students with projected enrollments can be scheduled but will not appear in teacher lists for attendance until they are officially enrolled.
- The Alternate Enrollment record allows students to be scheduled in multiple locations. While alternate enrollments can be added without an official enrollment, at least one official or projected enrollment is required before a schedule can be created. A student may have one or more alternate enrollments for a given school year.

Adding a New Official Enrollment

This is where you will add current “official” enrollment information for the student. A student must be enrolled in a district-based school before they can be scheduled for classes.

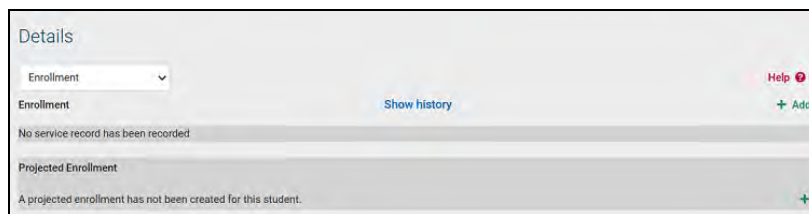
Note: An Official Enrollment is a current enrollment which started in the past or today, but not a date in the future.

You may also add official enrollments to keep track of students who reside in your district but do not attend district-based schools, and students who may have left school or been transferred to another out-of-district school. Remember that accuracy is critical when adding these records, as they will impact state and district reports.

Open the **Student** tab. The Enrollments view is the default.

If the student is already enrolled, the existing records will display.

If there is no enrollment, the “No service record has been recorded” message appears.

The screenshot shows a web interface for student enrollment. At the top, there's a 'Details' header. Below it is a dropdown menu currently set to 'Enrollment'. To the right of the dropdown is a 'Help' icon with a red circle. Below the dropdown, the word 'Enrollment' is displayed, followed by a 'Show history' link. To the right of 'Show history' is a green '+ Add' button. Below this, a message states 'No service record has been recorded'. Further down, there's a section for 'Projected Enrollment' with a message 'A projected enrollment has not been created for this student.' and a green '+' icon to the right.

Note: The Enrollment view of the Student tab also allows for the entry of a projected enrollment. If you wish to add an enrollment for a date in the future, reference the section on Projected Enrollments.

Click once on the green Add **+** button to the right of the Enrollment section. The Enrollment Category drop-down defaults to Official Enrollment. Leave this selected if you are adding the current active enrollment record for this student.

Use the additional fields to complete the enrollment data. The following example illustrates adding an enrollment for a high school student.

The screenshot shows the 'Details' page for an enrollment record. At the top, there's a 'Details' header and a 'Help' link. Below that, the 'Enrollment' section contains a dropdown for 'Enrollment' and a 'Save' button. The 'Enrollment Category' is set to 'Official Enrollment'. The 'Enrollment Type' is '0011-Regular School Year Enrollment'. The 'Start' date is '7/1/2023'. The 'End' date is 'Current'. The 'Date Registered' field is empty. The 'Provider' section has a radio button for 'Minix HS' and a dropdown for 'High School'. Below that, there are checkboxes for 'Is Placed' and 'Include in Rank'. The 'Grade' is '9'. The 'Class of' is '2027-2028'. The 'Counselor' is 'NONE'. The 'Special Education' checkbox is unchecked. The 'Exit Reason' is a dropdown menu. The 'Entry Note' is a text area. There are 'Save' and 'Cancel' buttons in the top right corner.

Enter the enrollment information:

Note: After each selection, wait for the screen to refresh. Depending on your selections, more options may appear or data in lists may change.

- **Enrollment Type:** this is the enrollment type – i.e. Regular School Year (the default), Foreign Exchange, District-based BOCES, etc. Select the appropriate type from the drop-down list.

Note: Enrollment types are determined and configured in Maintenance by each district. For definitions, please contact your SchoolTool liaison.

- **Start date:** This is the effective date of the enrollment. Use the pop-up calendar or manually enter the date in mm/dd/yyyy format. This date cannot be a date in the future, such as tomorrow or next week. (If you are entering an enrollment for a future date, you must enter a Projected Enrollment instead of an Official Enrollment.)
- **End:** Choose the radio button for Current (the default).
- **Date Registered:** This is the date the student registered in our district. This date also appears on the student's Demographics tab. If you have already entered a Date Registered there, it will appear here. If not, use the pop-up calendar or manually enter the date in mm/dd/yyyy format.
- **Provider:** For students enrolled in and attending district-based schools: Select the first radio button (the default), which includes the district school level and building

drop-down lists. For students who attend non-district schools, use the second radio button to select a non-district school from the drop-down list of NYS BEDS code providers. If entered, the non-district provider will be displayed in the top information section of the student's record.

Note: Once you select a Provider and save this record, the Provider cannot be changed.

Note: If the non-district school is not found in the list, you may need to add a new one.

- **Is Placed** means that this student has been placed at this non-district provider by your district so he or she can receive program services your district cannot provide, OR that another district has placed this student in your school so he or she can receive services that their home district does not provide. Check the box as appropriate.

Note: The use of the Is Placed flag is critical in order to make sure that student enrollment program service data exports correctly to STEP and the NYS Data Warehouse.

- **Include In Rank:** This means that this student will be ranked (or not) along with peers. The default is for the box to be checked. If the box is checked, the student will be ranked and will have a class rank. If the box is not checked, the student will not be ranked. This is often the case with foreign exchange students.
- **Grade:** select the grade you are enrolling the student in from the drop-down list. This list will contain all the grades set up for the selected provider and could include grades such as 13, 14, UE/UGE, or US/UGS for ungraded levels.
- **Alternate NYS Reported Grade:** Ungraded (UGE/UGS) students may now be assigned a grade that is appropriate for their courses, while a different grade is reported to the state. This information exists in student enrollment records only for Data Warehousing purposes.

This field is an optional field that only needs to be filled in if the grade level reported to NYS is different from the student's in-district grade level

If needed, select the appropriate value from the drop-down list. The alternate grade will appear in parentheses in an enrollment record.

If no alternate grade is selected, the field value will default to N/A and will not appear in View mode of enrollment records.

- **Class:** there are two drop-down lists here:

- The first is for the student's year of graduation.
- The second is for the projected month of graduation. (The default value for this field is None.)



Note: Depending on the grade selected, the Class may automatically update.

- **Homeroom:** select the homeroom the student is assigned to from the drop-down list. The list of Homerooms is particular to the selected provider.
- **Counselor:** select the student's counselor from the drop-down list. The list of Counselors is defined by your district. Contact your SchoolTool liaison if names are missing or incorrect.
- **Diploma:** select a diploma type from the drop-down list, if appropriate. Choose None for elementary students.

Note: This Diploma type does not get exported to the NYS Data Warehouse, it is for informational purposes only. This list of Diploma options is fully configurable in Maintenance.

- **Race:** this drop-down field only appears on the very first enrollment record, and is required if this information has not yet been included in a student record. Depending on how the district has configured SchoolTool options, the field may appear pre-filled with a district-set default value.

Note: After the initial enrollment is saved, the Race field will no longer appear on enrollment records.

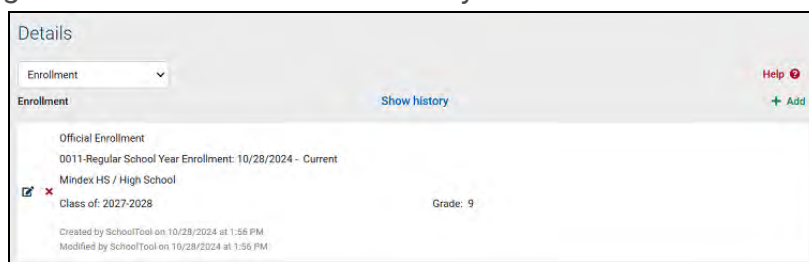
- **Special Education:** check the box if the student should be counted as Special Ed on reports, such as the Regents Exam report which breaks down general education and special education populations. The default assumes that the student is part of the general education population for Data Warehouse reporting.

Note: After you have saved a new enrollment, Special Education information is found in the Student tab, General Program Services information area. It is no longer part of the active enrollment.

- **Entry Note:** Enter a free-text entry note, if applicable. Entry note details might include transfer details if the student came from another school, or ranking information.

Note: If entry note information exists, it will be exported to the NYS Data Warehouse.

When you have completed the new enrollment, click once on the green Save  button in the upper right corner to save this enrollment program service record. The tab will refresh showing the enrollment data in read-only mode.



The screenshot shows the 'Details' tab for an enrollment record. At the top, there is a dropdown menu set to 'Enrollment' and a 'Help' icon. Below this, the 'Enrollment' section is active, with a 'Show history' link and a '+ Add' button. The main content area displays the following information: 'Official Enrollment', '0011-Regular School Year Enrollment: 10/28/2024 - Current', 'Mindex HS / High School', 'Class of: 2027-2028', and 'Grade: 9'. At the bottom, it states 'Created by SchoolTool on 10/28/2024 at 1:56 PM' and 'Modified by SchoolTool on 10/28/2024 at 1:56 PM'.

Note: This current enrollment record drives several NY State-aid reports. It is critical that information such as the Enrollment type, the Provider, Start and End dates, the Is Placed flag, the Special Ed flag, and Grade, are entered correctly.

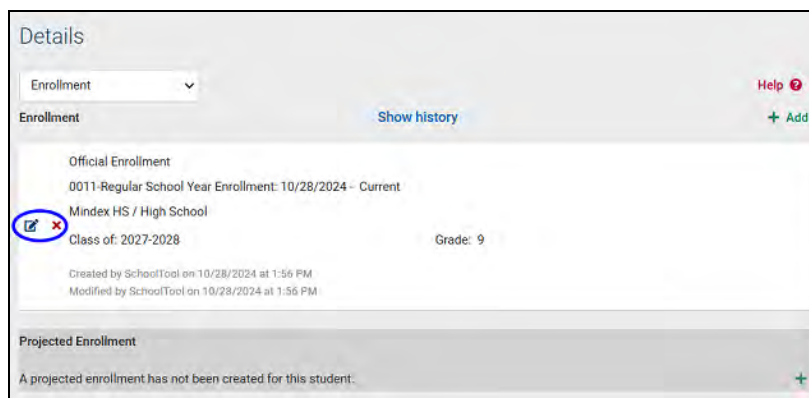
Note: If your district places students in alternate institutions such as other schools or BOCES-locations, you must have current enrollment records reflecting students enrolled in these alternate providers.

Note: If your district is required to report on students living in the district who do not attend your district's schools, there must be current enrollments for each of those students to show where they are attending. Without such records, reports may not be accurate.

Editing an Official Enrollment

Sometimes, enrollment data may be incomplete, or may need to be updated. For example, you may need to add an entry note, or change the student's year of graduation or Homeroom. Use this procedure to make changes to existing current enrollments.

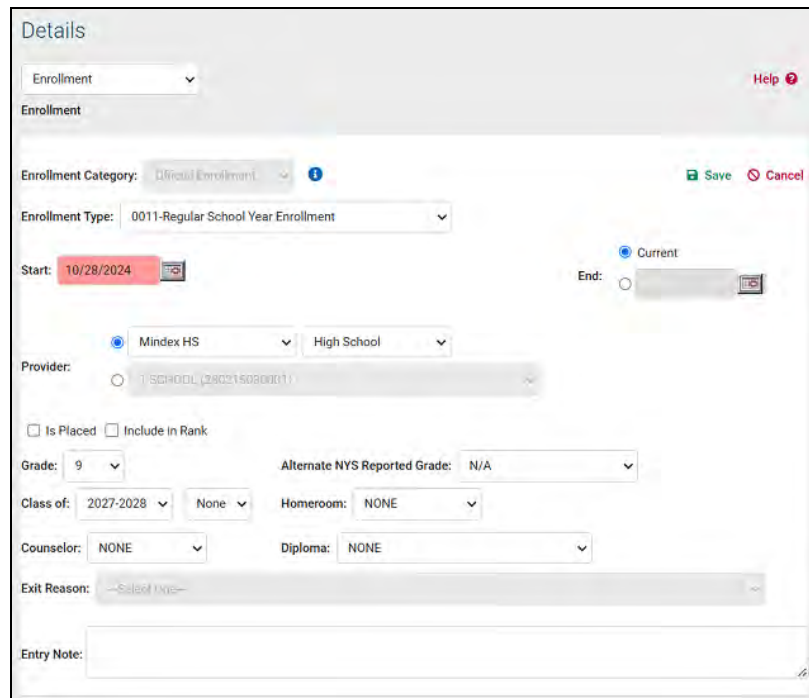
Open the student's **Student** tab. The tab will refresh with the current enrollment record in read-only mode.



This screenshot is similar to the previous one, but it highlights the 'Mindex HS / High School' field with a red circle and a red 'x' icon, indicating that this field is editable. The rest of the form, including the 'Official Enrollment' header, the '0011-Regular School Year Enrollment: 10/28/2024 - Current' date range, the 'Class of: 2027-2028' and 'Grade: 9' information, and the creation/modification timestamps, remains the same. Below the main enrollment section, there is a 'Projected Enrollment' section with the message 'A projected enrollment has not been created for this student.' and a '+ Add' button.

Click once on the Edit  button to the left of the **Official Enrollment** information. The tab will refresh in the edit mode, where you can make changes.

Note: The Enrollment Category cannot be edited once it has been saved.



The screenshot shows a web form titled "Details" for editing enrollment information. At the top, there is a dropdown menu set to "Enrollment" and a "Help" link. Below this is the "Enrollment" section. The "Enrollment Category" is set to "Official Enrollment" with an information icon. To the right are "Save" and "Cancel" buttons. The "Enrollment Type" is set to "0011-Regular School Year Enrollment". The "Start" date is "10/28/2024" with a calendar icon. The "End" date is currently blank, with a "Current" radio button selected. Below these are dropdowns for "Provider" (set to "Mindex HS") and "High School". A "Provider" dropdown shows a selected option "1 SCHOOL (280215020001)". There are checkboxes for "Is Placed" and "Include in Rank". The "Grade" is set to "9", and the "Alternate NYS Reported Grade" is "N/A". The "Class of" is "2027-2028", with a "None" button. The "Homeroom" is set to "NONE". The "Counselor" and "Diploma" are both set to "NONE". There is an "Exit Reason" dropdown set to "Select None". At the bottom is an "Entry Note" text area.

Edit the enrollment information. If you need more information about the fields and options, refer to the Adding a New Official Enrollment section.

Note: After each selection, wait for the screen to refresh. Depending on your selections, more options may appear, or data in lists may change.

When you have finished, click once on the green Save  button in the upper right corner of the Official Enrollment record to save this enrollment information. The tab will refresh showing the enrollment data in read-only mode.

Ending an Official Enrollment

When students leave a school, their enrollment records need to be closed. Use this procedure to end an existing current enrollment. Examples might be when a student graduates, moves on to the next school level within the district, or leaves the district for a specific reason. (For more information about transferring students, reference the Transferring Enrollments section).

This procedure would also be used when the student's enrollment type changes, such as switching from a Regular School Enrollment to a District-based BOCES enrollment.

Navigate to the **Student** tab. The tab will refresh with the current enrollment record in read-only mode.

The screenshot shows the 'Details' page for a student's enrollment. At the top, there's a dropdown menu set to 'Enrollment' and a 'Help' icon. Below this, the 'Enrollment' section is active, with a 'Show history' link and an 'Add' button. The main content area displays 'Official Enrollment' information: '0011-Regular School Year Enrollment: 10/28/2024 - Current', 'Minde HS / High School', and 'Class of: 2027-2028'. A red circle highlights the 'Edit' icon (a pencil) to the left of the school name. Below this, it says 'Grade: 9' and provides creation/modification timestamps. The 'Projected Enrollment' section at the bottom states 'A projected enrollment has not been created for this student.' with an 'Add' button.

Click once on the Edit  button to the left of the Official Enrollment information. The tab will refresh in the edit mode, where you can end this record.

To end the enrollment, you must first specify an end date. Choose the radio button to the left of the date field, and enter an end date for the enrollment record. End dates must be in the same school year as the start date.

The screenshot shows the enrollment record in edit mode. At the top, there's a dropdown menu set to 'Enrollment' and a 'Help' icon. Below this, the 'Enrollment' section is active, with 'Save' and 'Cancel' buttons. The 'Enrollment Category' is 'Official Enrollment'. The 'Enrollment Type' is '0011-Regular School Year Enrollment'. The 'Start' date is '10/28/2024'. The 'End' date is '1/3/2025', with a radio button selected next to it. The 'Provider' is 'Minde HS / High School'. There are checkboxes for 'Is Placed' and 'Include in Rank'. The 'Grade' is '9', and the 'Alternate NYS Reported Grade' is 'N/A'. The 'Class of' is '2027-2028', and the 'Homeroom' is 'NONE'. The 'Counselor' is 'NONE', and the 'Diploma' is 'NONE'. The 'Exit Reason' dropdown is highlighted with a red box and a blue arrow pointing to it. Below this are fields for 'Entry Note' and 'Exit Note'.

Note: After each change or new selection, you must wait for the screen to refresh. Depending on your selections, more options may appear, or data in lists may change.

The screen will refresh, allowing you to specify why this enrollment is ending. Select an appropriate reason from the Exit Reason drop-down list.

Enrollment

Enrollment Category: Official Enrollment ?

Enrollment Type: 0011-Regular School Year Enrollment

Start: 10/28/2024 📅

End: 1/3/2025 📅

Provider: MindeX HS High School

Grade: 9

Class of: 2027-2028 None

Counselor: NONE

Exit Reason: --Select One--

Entry Note: Completed grade

Exit Note: High School Completers

Projected End: 0011-4

MindeX HS

Class

Exit re

Create

Modify

Save Cancel

Help

Alternate NYS Reported Grade: N/A

Homeroom: NONE

Diploma: NONE

Is Placed ☐ Include in Rank ☐

085 - Earned IEP Diploma

085 - Earned Commencement Credential in Career Development & Occupational Studies

085 - Earned Commencement Credential in Skills and Achievement

629 - Previously Earned an IEP Diploma

629 - Previously Earned Commencement Credential in Career Development & Occupational Studies

629 - Previously Earned Commencement Credential in Skills and Achievement

High School Equivalency (HSE)

816 - Earned a High School Equivalency (HSE) Diploma

Transfers to Other Schools

153 - Transferred to Another School in This District or to an Out-of-District Placement

170 - Transferred to Another NYS Public School Outside This District with Documentation

204 - Transferred to a NYS religious and independent (nonpublic) school with documentation

Note: The values in this drop-down list correspond with NYS Data Warehouse exit reasons. Each item in the list contains its numeric NYS Data Warehouse Code and the name of the exit reason.

Click here for more information about ending enrollments for P-Tech students

For students with a P-Tech program service record that is not ended or that has been ended with a reason of None or Completed, choosing code 0065 or 0071 (071) as the exit reason will report the selected code in the School Entry Exit Data Warehouse export.

If either code is chosen, an additional drop-down for Credential Type appears. The value chosen in this drop-down will report in the Student Lite Data Warehouse export along with the Career Path selected on the Demographics tab.

Enter a free-text Exit Note, if appropriate. An exit note might include information such as why this enrollment has ended or where the student has gone.

Save your work by clicking once on the green Save  button in the upper right corner of the tab. The screen will refresh showing you the details of the edited official enrollment in read-only mode.



The screenshot shows a web interface for an enrollment record. At the top, there is a dropdown menu labeled 'Enrollment' and a 'Show history' link. Below this, the record details are displayed: 'Official Enrollment', '0011-Regular School Year Enrollment: 10/28/2024 - 12/27/2024', and 'Mindex HS / High School'. A red 'X' icon and the text 'Class of: 2027-2028' are visible, along with 'Grade: 9'. An 'Exit reason' is listed as '(170) Transferred to Another NYS Public School Outside This District with Documentation'. At the bottom, it says 'Created by SchoolTool on 10/28/2024 at 1:56 PM' and 'Modified by SchoolTool on 10/28/2024 at 5:31 PM'. In the top right corner, there are 'Help' and '+ Add' buttons.

Add the new enrollment at the new district school or provider; reference the Adding New Official Enrollment section for more information.

Note: This current enrollment record drives several state-aid reports. It is critical that information such as type of Enrollment and enrollment Provider are entered correctly.

Note: If your district places students in alternate institutions such as other schools or BOCES-locations, you must have current enrollment records reflecting students enrolled in these alternate providers in order for the Data Warehouse export to be accurate.

Note: If your district is required to report on students living in the district who do not attend your district's schools, there must be current enrollments for each of those students to show where they are attending. Without such records, reports may not be accurate.

Transferring Enrollments

This procedure covers all transfer scenarios, including when students leave the district to attend school elsewhere, and when students in large districts move and must transfer between schools in the same district. The actual steps involved are to end the current active enrollment and create a new enrollment to reflect where the student has gone.

Note: Do not use this procedure if the student has completed the highest grade in this school building, or if they have graduated, left without information, or been permanently expelled. Refer to the Ending an Official Enrollment section for more information in these cases.

Navigate to the student's **Student** tab. The tab will refresh with the current enrollment record in read-only mode.

Details

Enrollment

Enrollment

Official Enrollment

0011-Regular School Year Enrollment: 10/28/2024 - Current

MindeX HS / High School

Class of: 2027-2028

Grade: 9

Created by SchoolTool on 10/28/2024 at 1:56 PM

Modified by SchoolTool on 10/28/2024 at 1:56 PM

Projected Enrollment

A projected enrollment has not been created for this student.

Click once on the Edit button to the left of the Official Enrollment information. The tab will refresh with the current enrollment data in the edit mode. End the current enrollment by selecting an end date and then specifying an exit reason.

End Date: Choose the radio button to the left of the date field, and enter the date the student's enrollment in this school ends. (Enter the date in the mm/dd/yyyy format or select a date by using the pop-up calendar.) End dates must be in the same school year as the start date.

Enrollment

Enrollment

Enrollment Category: Official Enrollment

Enrollment Type: 0011-Regular School Year Enrollment

Start: 10/28/2024

End: 1/3/2025

MindeX HS

High School

Provider:

Is Placed

Include in Rank

Grade: 9

Alternate NYS Reported Grade: N/A

Class of: 2027-2028

None

Homeroom: NONE

Counselor: NONE

Diploma: NONE

Exit Reason: --Select One--

Entry Note:

Exit Note:

The tab will refresh allowing you to select an Exit reason from the formerly grayed-out Exit reason drop-down list.

Note: Enrollment records should only be ended AFTER a student has left this school. It is not possible to have an old enrollment that ended today and a new enrollment

beginning today. For example, if the student is transferring between buildings, end the enrollment at building A on the last day at building A and begin a new enrollment in building B on the first day they will attend the new school. If the end date of the one is the same as the start date of the other, a date range conflict will occur. Remember you cannot enter an official enrollment for a date in the future.

Exit Reason: Select the appropriate Exit Reason from among the various transfer options listed in the drop-down list, or select the Completed Grade option to transfer the student to the next level in this school.

Note: The values in this drop-down list correspond with NYS Data Warehouse exit reasons. Each item in the list contains its numeric NYS Data Warehouse Code and the name of the exit reason.

Enter a free-text Exit Note, if appropriate. An exit note might include information such as why this enrollment has ended or where the student has gone.

Save your work by clicking once on the green Save  button in the upper right corner of the tab. The screen will refresh showing you the details of the edited official enrollment.

Add a new enrollment at the new district school or provider; reference the Adding New Official Enrollment section for more information.

Note: This current enrollment record drives several state-aid reports. It is critical that information such as type of Enrollment and enrollment Provider are entered correctly.

Note: If your district places students in alternate institutions such as other schools or BOCES-locations, you must have current enrollment records reflecting students enrolled in these alternate providers in order for the Data Warehouse export to be accurate.

Note: If your district is required to report on students living in the district who do not attend your district's schools, there must be current enrollments for each of those students to show where they are attending. Without such records, reports may not be accurate.

Adding or Editing a Projected Enrollment

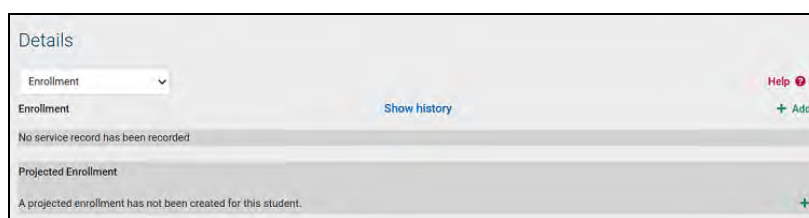
This process is for adding a new “pre” or projected enrollment record for a student who has registered, but will not begin attending courses until a date in the future. Once a student has been pre-enrolled, he/she can be scheduled for courses. For example, incoming elementary students, new students who are transferring to your district mid-year, etc. require a projected enrollment.

The **Projected Enrollment** record serves as a placeholder. When the student's projected start date arrives, this information can be transferred over to a current Official

Enrollment record using the **Census > Batch Enrollment** sub-module or on a per-student basis using the Auto Start feature.

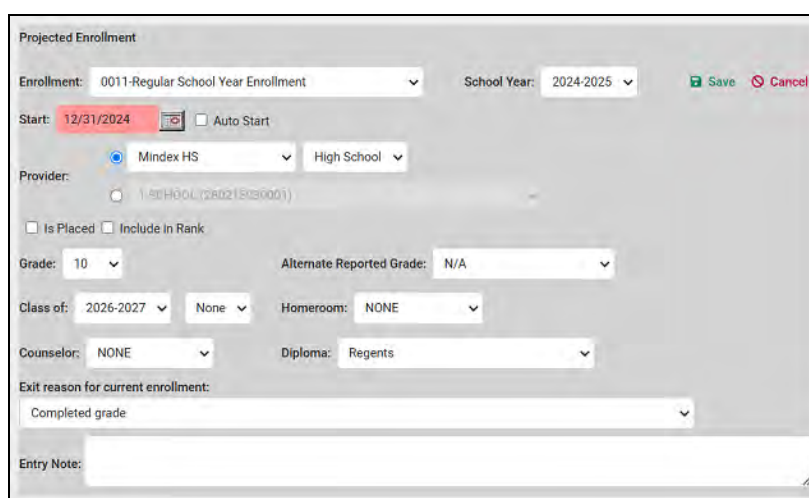
Note: Currently there are no alerts or reminders tied to projected start dates. If projected enrollments are not set to automatically start, users must check the **Batch Enrollment** sub-module each day, transitioning over enrollments as they become official.

Navigate to the **Student** tab.



Note: In the drop-down list under the Details tab, the option for Enrollment appears. This is the default program service.

Click once on the green Add **+** button to the right of the Projected Enrollment section. This is where you add the projected future enrollment record for this student. The tab will refresh with fields where enrollment data may be added.

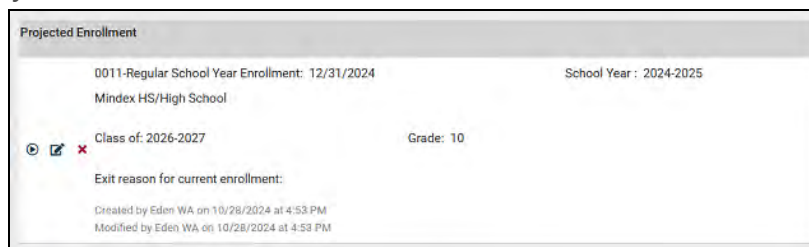


Note: The Projected Enrollment record contains all of the same fields found in the Official Enrollment, except one – the school year. Choose the year the student is being projected to enroll in first. If the student will begin attending classes today, an **Official Enrollment** is needed instead of a projected enrollment.

Note: An “Auto Start” checkbox may appear beside the Start Date, depending on your district’s settings. If available, checking this option will cause the projected enrollment to automatically transition to a current official enrollment on the specified start date.

Enter the projected enrollment information. For more information on how to complete each field, reference the procedure for Adding a New Official Enrollment.

When you have finished completing all known details for the projected enrollment, click once on the green Save  button in the upper right corner of the Projected Enrollment record to save this enrollment information. The tab will refresh showing the enrollment data in read-only mode.



The screenshot shows a 'Projected Enrollment' form. At the top, it displays '0011-Regular School Year Enrollment: 12/31/2024' and 'School Year : 2024-2025'. Below this is 'Mindex HS/High School'. The 'Class of: 2026-2027' and 'Grade: 10' are shown. There are icons for edit, delete, and a green save button. Below the form, it says 'Exit reason for current enrollment:' and 'Created by Eden WA on 10/28/2024 at 4:53 PM' and 'Modified by Eden WA on 10/28/2024 at 4:53 PM'.

Now that the student has a projected enrollment record, you will be able to retrieve him/her in searches, report on them, and schedule them into classes.

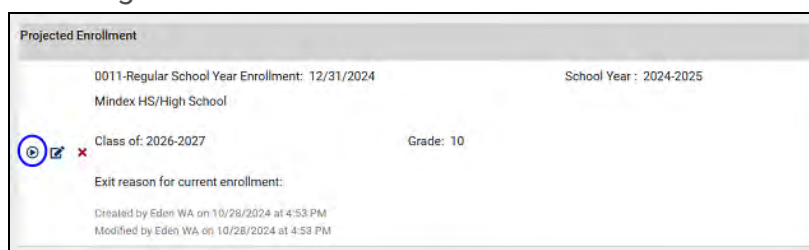
Note: To make course selections for a student who will transfer to a district school for the following school year, refer to the Scheduling User Guide documentation for more information (specifically, see the section on Course Selection > Projected Schedule for a Transfer Student).

Note: A student can only have one projected enrollment at a time.

Note: You can also add Projected Enrollments in Batch mode by using the Batch Enrollment sub-module.

A Projected Enrollment can be edited at any time by clicking the Edit  button, modifying the appropriate fields, and clicking the green Save  to apply the changes.

Depending on district settings, users may also see a Start Projected  button on projected enrollments. Clicking on this button will transition the projected to a current official enrollment using the current date as the enrollment start date.



This screenshot is identical to the one above, but the 'Start Projected' button (a circle with a right-pointing triangle) is highlighted with a blue circle.

Creating New Providers

Occasionally you may need to add new providers to the list of non-district educational institutions where students who live in your district may attend or be placed. The

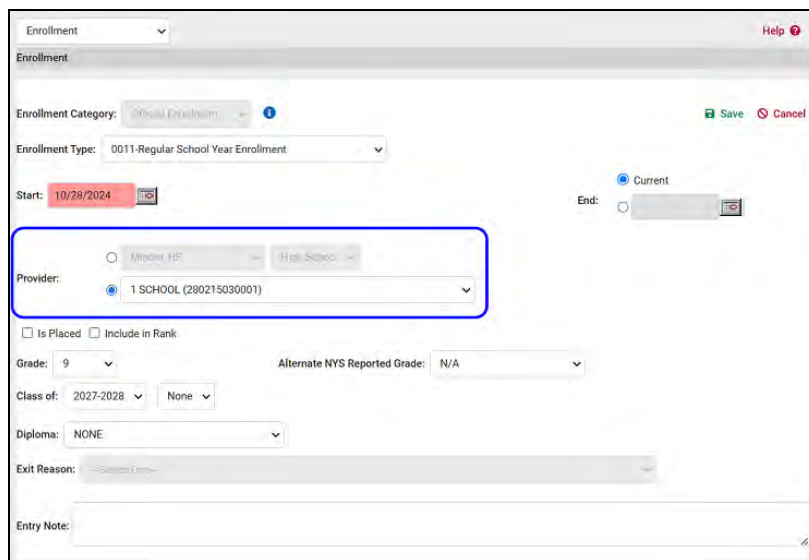
process for adding a new provider for a new student involves adding the new provider at the same time that the initial enrollment record is created.

If you need to add a new provider for an existing student, the assumption is that the student is being placed at the new provider by the district, or is transferring there (and thus leaving a district-based school). In either case, the existing enrollment must be ended with an appropriate reason, so a new one, with the new provider, can be created. Before proceeding with the steps below, follow the steps in the Transferring Enrollments section to end the current enrollment with an appropriate exit reason (such as Transferred to Another NYS Public School Outside This District with Documentation). Once that's complete, add a new enrollment record and use the steps below to create the new provider during that process.

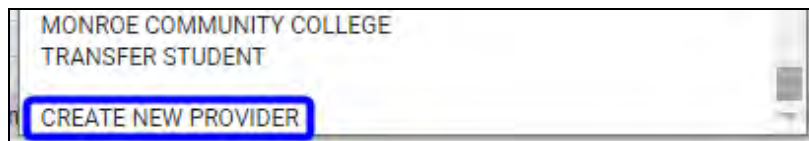
Adding a New Provider for a New or Existing Student:

Add a new enrollment record (refer to the *Adding a New Official Enrollment* section for more information).

Locate the Provider radio buttons and select the second radio option, to the left of the non-district drop-down list.

The screenshot shows the 'Enrollment' form in the SchoolTool system. The form has a title bar with 'Enrollment' and a 'Help' icon. Below the title bar, there's a section for 'Enrollment' with a dropdown menu. The 'Enrollment Category' is set to 'Official Enrollment'. The 'Enrollment Type' is '0011-Regular School Year Enrollment'. The 'Start' date is '10/28/2024'. The 'End' date is 'Current'. The 'Provider' dropdown menu is highlighted with a blue box, showing a list of providers including '1 SCHOOL (280215030001)'. Below the dropdown, there are checkboxes for 'Is Placed' and 'Include in Rank'. The 'Grade' is '9'. The 'Alternate NYS Reported Grade' is 'N/A'. The 'Class of' is '2027-2028'. The 'Diploma' is 'NONE'. The 'Exit Reason' is 'Select Exit Reason'. The 'Entry Note' field is empty.

Open the list to reveal the list of existing non-district providers. Scroll to the bottom of the list and select the CREATE NEW PROVIDER option.

The screenshot shows a list of providers. The list includes 'MONROE COMMUNITY COLLEGE TRANSFER STUDENT' and 'CREATE NEW PROVIDER' at the bottom. The 'CREATE NEW PROVIDER' option is highlighted with a blue box.

A New Provider window will appear with fields for the school details.

Add the school name and BEDS code (required). If you have a contact name, address, and phone number, enter those details at this time.

Note: If you do not have a BEDS code, the field will accept a zero.

Note: After adding a new BEDS code provider, contact SchoolTool support to ensure the new BEDS code is formally entered in the table. If this is not done, reports may not reflect accurate enrollments at this provider.

When you have finished defining the new provider, click once on the green Save  button in the upper right corner. The new school will now appear at the bottom of the list.

Continue adding the rest of the enrollment for this student. The newly added provider will automatically appear as the chosen alternate provider.

Note: Immediately after adding a new provider to the list, it appears at the bottom of the list, just above the CREATE NEW PROVIDER option. After you save, the new provider will automatically sort in the appropriate alpha order along with other providers, so it may be used again for other enrollments after you save the enrollment.

Note: If the provider is out of state, i.e. a school in Florida, enter a “0” as the BEDS code.

Note: Once you have saved the new provider, you can no longer edit the details like the name, contact, address, BEDS code, etc. from within this area. If you need to make a change, contact your SchoolTool liaison.

Managing Alternate Enrollments

Alternate enrollments can be managed for all students in the following areas:

- **Census > Batch Enrollment:** Add and/or remove alternate enrollments for groups of students
- **Counseling > Batch Edit Enrollment:** Edit alternate enrollment fields on selected records

They can also be added, edited, and deleted for an individual student from the Enrollment view on the **Census > Student** tab or the **Counseling > Student** tab.

The Enrollment view on the Student tab shows any existing alternate enrollments for current and future school years.

Enrollment

Enrollment

Official Enrollment

0011-Regular School Year Enrollment: 7/1/2023 - Current

Mindex HS / High School

Include in Rank

Class of: 2025-2026

Grade: 10

Homeroom: 180

Counselor: Roberts

Created by SchoolTool on 7/7/2023 at 9:42 AM

Modified by SchoolTool on 9/18/2023 at 11:07 AM

Alternate Enrollment

10/28/2024 - Current

Mindex MS / Middle School

Created by SchoolTool on 10/28/2024 at 10:45 AM

Modified by SchoolTool on 10/28/2024 at 10:46 AM

Projected Enrollment

A projected enrollment has not been created for this student.

Click the “Show History” link to view a history of past alternate enrollments.

Details

Enrollment

Enrollment

Official Enrollment

0011-Regular School Year Enrollment: 7/1/2023 - Current

Mindex HS / High School

Include in Rank

Class of: 2025-2026

Grade: 10

Homeroom: 180

Counselor: Roberts

Created by SchoolTool on 7/7/2023 at 9:42 AM

Modified by SchoolTool on 9/18/2023 at 11:07 AM

Alternate Enrollment

10/28/2024 - Current

Mindex MS / Middle School

Created by SchoolTool on 10/28/2024 at 10:45 AM

Modified by SchoolTool on 10/28/2024 at 10:46 AM

Official Enrollment

0011-Regular School Year Enrollment: 7/1/2022 - 6/30/2023

Mindex HS / High School

Include in Rank

Class of: 2025-2026

Grade: 9

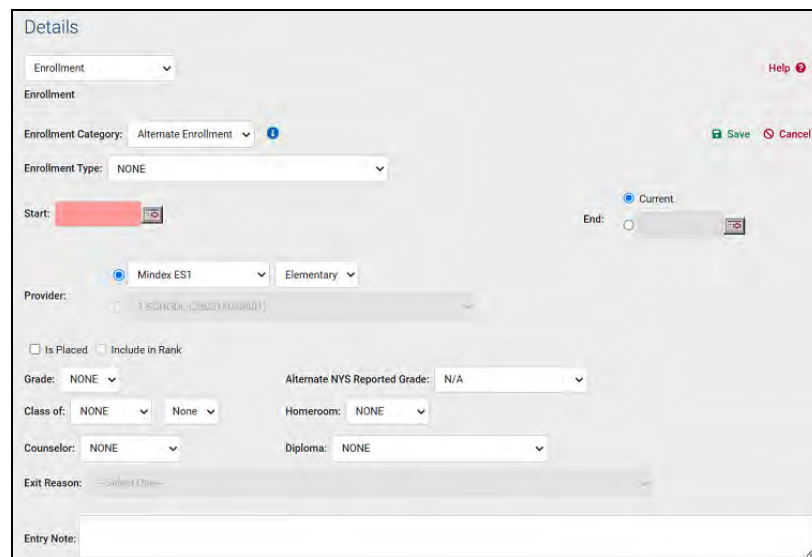
Homeroom: 154

Counselor: Roberts

Created by SchoolTool on 7/8/2022 at 10:23 AM

Modified by SchoolTool on 7/7/2023 at 9:42 AM

To add a new alternate enrollment, click the Add **+** button. The screen will refresh with the enrollment fields. Choose Alternate Enrollment from the Enrollment Category drop-down.



Select any of the following fields: Enrollment Type, Start Date, Provider, Grade, Alternate NYS Reported Grade, Class of, Homeroom, Counselor, Diploma, and Entry Note. You can check the "Is Placed" checkbox if applicable.

Note: The out-of-district provider radio button is disabled as alternate enrollments can only be created for in-district providers. The Include in Rank checkbox is disabled as it is specifically tied to Rank/GPA calculations.

Note: If an End Date is chosen, the Exit Reason field will become available. This is not required.

Click Save  once the desired fields have been completed.

Once an alternate enrollment has been added, the student can be scheduled into courses for that location for that school year.

Current Program Services View

The Current Program Services view provides a list of all currently active program service records for that student. This view is read-only.

1. Open the program services drop-down list in the upper left corner of the **Student** tab
2. Select Current Program Services from the drop-down menu. The information will display in read-only mode. To modify any of these records, navigate to the

appropriate program service's view using the drop-down menu.

The screenshot shows a dropdown menu titled 'Current Program Services'. The first option is 'CIP' with details: '(S29999) Business, Management, Marketing and Related Support Services, Other', 'Mindex HS/High School', 'Conventional CTE Program', 'Participant', and dates '2/1/2021 - Current'. The second option is 'IEP' with details: 'Mindex ES2/Elementary', and dates '8/20/2012 - Current'. Both options include creation and modification timestamps by Jerry Garcia and Linda Stewart.

General View

The General view provides users with access to that student's individual locker assignments, student ID, and their Special Education flag status (if designated as Special Ed on their official enrollment record).

1. Open the program services drop-down list in the upper left corner of the **Student** tab.
2. Select General from the top of the list. The General information will display in read-only mode.

The screenshot shows the 'General' view with a dropdown menu set to 'General'. It displays fields for 'Special Education' (Yes), 'Universal Student ID' (480740), and 'Student ID' (48074). Below these are 'Lockers' with checkboxes for 'Primary' (checked), 'Locker' (3058), 'Padlock', and 'Combination' (14-33-25). An 'Add' button is visible on the right.

3. Click once on the Edit  button in the upper right corner of the tab. The information will appear in edit mode.

The screenshot shows the 'General' view in edit mode. The 'Special Education' field is a dropdown menu set to 'Yes'. The 'Universal Student ID' and 'Student ID' fields are text input boxes containing '480740' and '48074' respectively. There are 'Update' and 'Cancel' buttons in the top right corner.

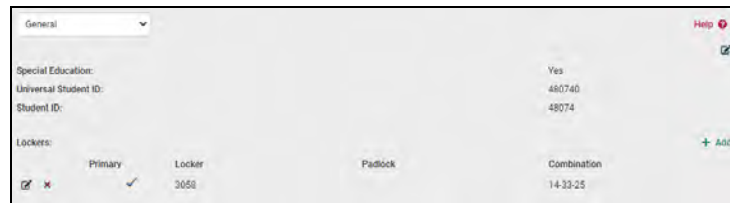
4. When you have finished, click the Update  button to save any changes.

Student ID Numbers

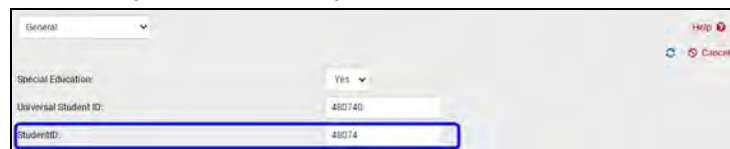
As students are added to SchoolTool, their ID numbers are auto-generated based on a seed number defined in Maintenance. However, SchoolTool allows you to override the student ID number when you enroll a student into the district. To do this, you must have entered in all the valid information to enroll the student properly. For example, a student who previously left may return and the district may wish to give that student his/her old student ID number again.

Override a Student ID Number

1. Locate the student that you wish to change using the **Census** or **Counseling > Search** sub-module.
2. Select the student's **Student** tab and once the screen refreshes, you will see their enrollment information.
3. From the program service drop down list select General. This is where you can change the ID number generated for the student.
4. When the screen refreshes, you will see a read-only view of general information about this student.



5. Click the Edit  button to change information in this area. When the screen refreshes in edit mode, remove the ID from the Student ID field and add the "new" ID number. Spaces are not permitted.



6. Save your work by clicking the blue Update  button in the upper right. If the Student ID number contains more than 9 characters, you will see a warning message; click OK to save the ID as is, or click Cancel to return and enter a different ID number.

Note: If you enter in a number that is already in use, you will get an error message indicating that you cannot enter in a number that is active. ID numbers that include leading zeroes will not be considered to be unique compared to those that do not include leading zeroes.

Note: Student ID number may only contain numeric values.

Note: Access to the student ID field is permission driven. If you cannot see or change the information here, you do not have rights to do so. Contact your SchoolTool liaison for more information.

Delete a Student ID Number

Sometimes a student ID number is incorrectly assigned to a parent or guardian. This could occur when an incorrect relationship was entered between the parent/guardian and the child. The following steps illustrate how to delete/remove the ID. Keep in mind ID numbers for students tied to certain types of data cannot be deleted.

1. Locate the parent/guardian using the **Counseling Search** sub-module.
2. Go to the **Student** tab and select General from the drop down menu.
3. Click the Delete **X** button to remove the ID number.
4. You will be asked to confirm the deletion. click OK to continue.
5. The ID number will now be removed.

Edit Special Education Information for a Student

After an official enrollment has been saved for a student, the Special Ed check box (flag) moves from the Enrollment program service record to the General program service record.

1. Select General from the top of the list. The General information view will display in read-only mode.

2. Click once on the Edit button in the upper right corner of the tab. The information will appear in edit mode.

3. Change the Special Education designation (yes/no) by selecting the appropriate value from the drop-down list.
4. When you have finished, click the Update button to save this change.

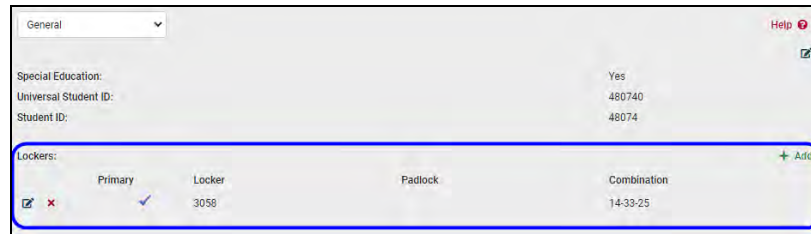
Note: This Special Education designation is what drives the special education student-population percentages on certain reports such as the Regents Exam report.

Note: Special Education doesn't mean the student has an IEP, section 504, or receives AIS services. It is simply a flag to denote a Special Education population for reports.

Note: Your district-specific permissions determine whether you can access and alter special education information. If you are unable to select the General program service, or edit the record, you may not have the necessary permissions. Contact your district liaison for more information.

Student Lockers

The Lockers section displays a list of locker and/or padlock assignments.



The screenshot shows the 'General' tab of a student record. Under the 'Lockers' section, there is a table with the following data:

Primary	Locker	Padlock	Combination
☒	3058		14-33-25

An 'Add' button with a green plus icon is located to the right of the table.

To add a locker and/or padlock, click the Add **+** button. A new row will appear in the Lockers list. Specify whether or not this is a primary locker/padlock assignment, select the locker and/or padlock from the drop-down, and click the Save **S** button to apply these changes. Combinations are assigned to lockers and padlocks in the Maintenance module and will be populated on this screen automatically after selections are saved.



The screenshot shows the 'General' tab of a student record. Under the 'Lockers' section, there is a table with the following data:

Primary	Locker	Padlock	Combination
☒	3058		14-33-25
☐	NONE	NONE	

Below the table, there are 'Save' and 'Cancel' buttons. The 'Add' button is also visible to the right of the table.

Referral View

The Referral view is used to add Referrals to outside agencies. This view is used by districts who are familiar with the referral process and assumes the person entering the referral is knowledgeable about the fields contained on this screen.

1. To access the Referral view, select Referral from the drop-down menu in the top left corner of the Student tab.
2. Click the Add **+** button to add a new referral record.
3. On the Add Referral screen, complete all required fields and enter any other information as appropriate.

4. When you have finished, click the Update  button to save this change.

Student Lite View

The Student Lite View area allows users with the appropriate security rights to view and/or edit the information exported to the Data Warehouse for the Student Lite export for that student.

1. To access the Student Lite View, select it from the Program Services drop-down list.
2. The screen will refresh to display the Student Lite View in read-only mode. This view defaults to the current school year and the Standard Data Warehouse export format. To change the view, simply select the appropriate value from the school year or export format drop-downs and click the Select  button to refresh the information.

#	Field Name	Student Value
1	DISTRICT CODE	NY261600
2	LOCATION CODE	0003
3	SCHOOL YEAR DATE	2022-12-30
4	STUDENT ID	000048074
5	LAST NAME	Allen
6	FIRST NAME	Jathen
7	MIDDLE INITIAL	A
8	GRADE LEVEL	10
9	HOME ROOM	163
10	BIRTH DATE	2006-11-05
11	GENDER	M
12	ETHNICITY	W
13	HOME LANGUAGE	ENG
14	CHALLENGE TYPE	
15	LEVEL OF INTEGRATION	
16	LEP PARTICIPATION	

- A. If a student does not have an enrollment record for the selected year, the user will see a message to that effect:



- B. If a student has an enrollment record for the selected year but the student's records will not be exported (based on the export rules defined in **Maintenance > Export**), the user will see a message about the student's enrollment record values:



3. To modify this information, click on the Edit  button.

The screenshot shows the 'Student Life View' header with a dropdown menu. Below the header, a table displays student information. The table has columns for '#', 'Field Name', and 'Student Value'. The data is as follows:

#	Field Name	Student Value
1	DISTRICT CODE	NY261600
2	LOCATION CODE	0003
3	SCHOOL YEAR DATE	2022-12-30
4	STUDENT ID	000048074
5	LAST NAME	Allen

An 'Edit' button with a pencil icon is circled in blue in the top right corner. A 'Help' button with a red icon is also visible.

4. The screen will refresh with the view in edit mode, and editable fields will appear next to the current values.

- A. Editable fields will be populated with the current data. To change these values, simply enter the new information and click Save.

The screenshot shows the 'Student Life View' header with a dropdown menu. Below the header, a table displays student information. The table has columns for '#', 'Field Name', and 'Student Value'. The data is as follows:

#	Field Name	Student Value
1	DISTRICT CODE	NY261600
2	LOCATION CODE	0003
3	SCHOOL YEAR DATE	2022-12-30
4	STUDENT ID	000048074 48074
5	LAST NAME	Allen Allen
6	FIRST NAME	James James

'Cancel' and 'Save' buttons are visible in the top right corner. A 'Help' button with a red icon is also visible.

Note: Changes made in this area will be reflected in the Data Warehouse export **and in the student's record**. Therefore, use caution when modifying any information in this area.

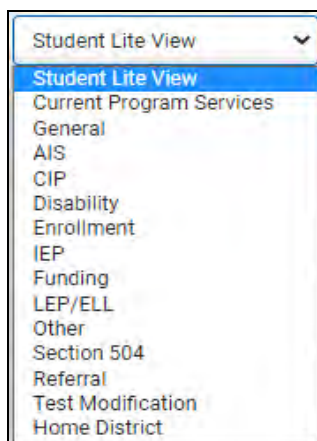
Program Services Views

Note: The AIS and IEP program services have icons that may be visible in the Student Information Record. These icons also have mouse-over text and pop-up windows (pop-up screens are activated when the icon is clicked). Individual permissions control the rights to see each feature (icons, mouse-over text, and/or pop-up windows) for each of the two program services. Therefore some users may be able to see only the AIS details but not IEP details, others may see only icons but no mouse-over text or pop-up screens, and others may not see any references at all to these items.

Note: While the basic procedure for adding, editing, or deleting a program service record is the same for all program services, each program service has its own set of fields. Some program services are dependent on others; therefore, some records cannot be added until a corresponding record has been created for another program service. The specific dependencies, along with screen shots and descriptions of the fields available when adding each program service, are detailed in Counseling Appendix: Program Services

Adding Program Service Records

1. Select the appropriate program service type from the drop-down list on the Student tab. In this example, we see an AIS (Academic Intervention Services) record.



2. When the record refreshes, use the green Add **+** button to add a new record.

Note: If no record exists, a message indicating “No service record has been recorded” appears. If a record exists, it will appear in read-only mode.

3. Complete all required fields, and any other fields for which you have information.

The screenshot shows a web-based form for creating or editing a program service record. At the top left is a dropdown for 'AIS'. Below it are 'Start' and 'End' date pickers. The 'End' date has a 'Current' radio button. The 'Provider' section has a radio button for 'Mindex ES1' and a dropdown for 'Elementary'. Below that is a dropdown for 'Entry Reason' (N/A) and 'Exit Reason' (N/A). The 'Service or Monitor' section has a radio button for 'Service' and a dropdown for 'Academic'. Below that is a dropdown for 'Service Type' (Support) and a dropdown for 'Intervention Type' (N/A). The 'Frequency/Intensity' section has a dropdown for 'N/A'. The 'Building' section has a dropdown for 'Mindex ES1' and a dropdown for 'Teacher'. The 'School Level' and 'Department' sections have dropdowns for 'ALL' and 'ALL' respectively. At the bottom is a large text area for 'Comments'. In the top right corner, there are 'Update' and 'Cancel' buttons.

4. When you have finished, click once on the Update button. The tab will refresh with the record in read-only mode.
5. Repeat these steps for each different program service record.

Note: The fields will vary depending on the program service you selected. The options that appear in the drop down lists are created in Maintenance. Contact your SchoolTool liaison if something needs to be added.

Note: A failure message will result for any of the following situations:

- Adding a program service to a student that already has that program service, if duplication is not allowed.
- Adding a program service to a student that is missing a DOB
- Adding a program service to a student that is missing a Primary Language
- Trying to remove a program service for any student that doesn't already have one that matches the specified criteria.

Deleting Program Service Records

1. Select the Program Service to be edited from the drop down list. Click the Delete button to the left of the record.
2. You will be asked to confirm the deletion. Click OK to delete the record.

Editing Program Service Records

1. Select the Program Service to be edited from the drop down list. Click the Edit button to the left of the record. In this case we will use an AIS record.

2. Edit the appropriate fields and click the Update  button

3. You will now see the record in read-only mode with your changes.

Home District View

To add, edit, or view home district assignments, navigate to the Student tab and select Home District from the drop-down. Any existing home district records will be displayed.

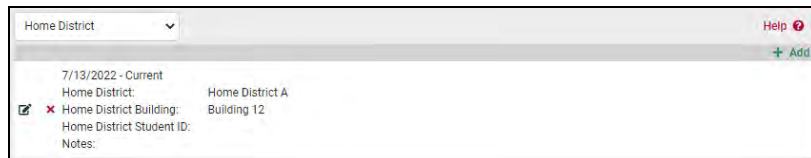
In order for data sharing to function, home districts and district connections must be defined, and the student must have corresponding home district records at both districts. This means that both districts must enter a home district (which must be tied to the appropriate district connection in Maintenance) *and* the student's ID at the other district in this record.

Home district records may only be assigned to individuals who have a Student ID.

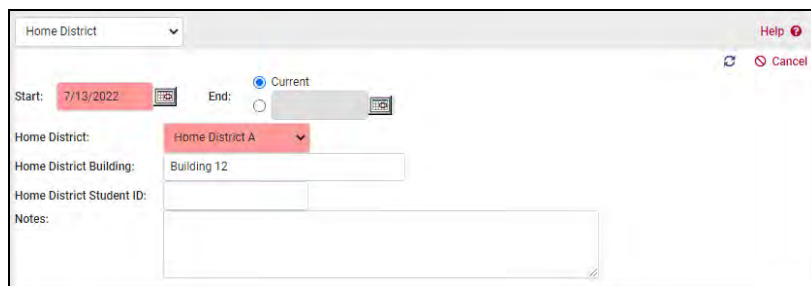
This option will not be available in the drop-down if no home districts have been defined in Maintenance.

In order to properly track historical data, home district assignments should be treated similarly to enrollment records. That is, when the student changes to a different home district, the prior record should be ended and a new record should be created. This allows the district to maintain an accurate historical representation of that student's home district assignments.

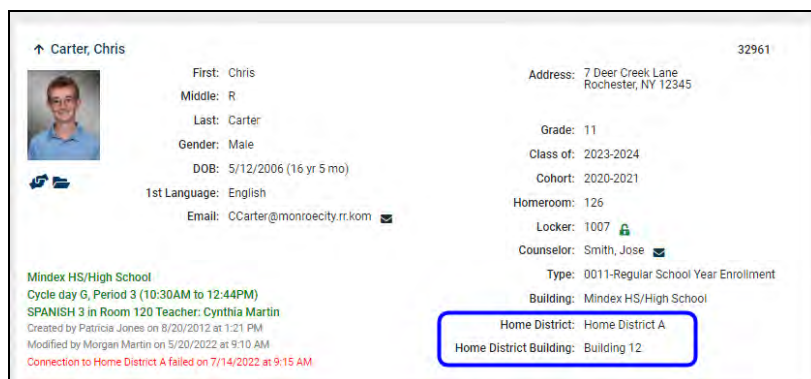
Click Add  to create a new home district record or click Edit  to modify an existing record. To remove a record entirely, click the Delete  button.



When adding or editing a home district record, users have access to fields for home district building, home district student ID, and a free-text notes field.

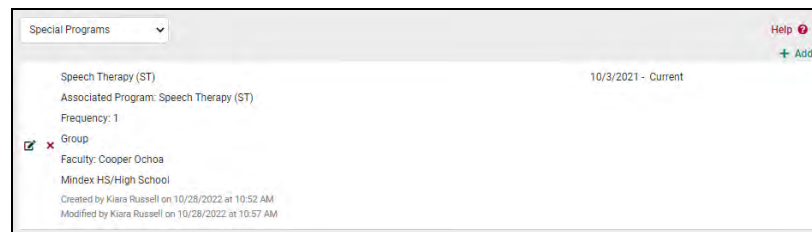


Users with permission to see the Home District field in the Personal Information section (at the top of each student record) will now see the home district building and home district student ID for any current home district assignments that include those fields.



Special Programs View

Special programs are used for students receiving services that are associated with a specific cost. These programs are defined in Maintenance and are typically used for BOCES billing purposes. Special programs may include yearly (e.g., 12:1:1 or 1:1 Aide programs) or weekly (e.g., speech therapy or counseling) services.

A screenshot of a web application form titled "Special Programs". At the top left is a dropdown menu labeled "Special Programs". At the top right are "Help" and "Add" buttons. The form contains the following fields: "Speech Therapy (ST)" with the value "10/3/2021 - Current"; "Associated Program: Speech Therapy (ST)"; "Frequency: 1"; "Group" with a checked checkbox; "Faculty: Cooper Ochoa"; "Mindex HS/High School"; and a footer note: "Created by Kiara Russell on 10/28/2022 at 10:52 AM" and "Modified by Kiara Russell on 10/28/2022 at 10:57 AM".

A Special Program record as seen on the Student Tab

1. Select a school year, then choose a program from the drop-down (the list of programs is dependent on the school year selected; only programs that have a school year defined will appear in the list for that year).
2. Specify a start date (and end date, if appropriate).
3. Enter a Frequency to indicate the number of times per billing period (yearly or weekly) that the student receives these services.
4. Specify whether the student is receiving group or individual service.
5. Select a provider.
6. If appropriate, choose a faculty responsible for administering or overseeing the service (this field is optional).

Schedule Tab

The information on the **Schedule** tab is derived from the Scheduling module. When accessed through other modules, the Schedule tab is presented in read-only mode, with limited viewing options. Additionally, depending on user permissions and settings in Maintenance, student schedules may not be available until after a specified date. When this is the case, a message will appear in place of the schedule to indicate that schedules are not currently available.

When accessed via the Counseling module, however, counselors and school administrators can see and modify a great deal of information about an individual student's scheduling, including:

- Current course schedule, including supplemental courses scheduled (courses not tied to specific periods of the day)
- A snapshot of the current Master Schedule, with basic section load information

- Historical scheduling information including all previous year's schedules and course selections
- Future scheduling information (where applicable)
- Additionally, counselors will have the ability to manipulate a student's course selections and schedule. This may be done manually or by using "drag and drop" functionality.

The default view for the Schedule tab varies based on several factors, including but not limited to the state of the Master Schedule and user permissions. Available views for the Schedule tab include the following:

- Editable Schedules (available only for the current year when the Master Schedule is locked, or for users with permission to edit unlocked schedules):
 - Student Schedule
 - Descriptor Contracts
- Read Only Schedules (schedules will appear in read-only mode for all past school years and when the Master Schedule is unlocked, except for users who have permission to edit unlocked schedules):
 - Student Schedule – Standard View
 - Student Schedule – Grid View

Depending on your default view, different options may be available when you first access the Schedule tab. To change the view, use the school year drop-down and radio buttons.

Sample elementary schedule:

STUDENT **SCHEDULE** GRADES ASSESSMENTS ACTIVITIES LETTERS USER DEFINED NOTES CONTACTS HOURS

Counseling

000-Grid Student Schedule-Landscape

View Schedule: 2021-2022 Team: Team 1625 Effective Date: Today On

☒ Student Schedule ☐ Descriptor Contracts Credits (Scheduled / Selected): 0 / 0

School Year

	Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
✚ ✖	NONE	02176	3	Social Studies Grade 4	M,T,W,R,F	257	Roberts Elizabeth	8/11/2021
✚ ✖	NONE	02181	3	Science Grade 4	M,T,W,R,F	257	Roberts Elizabeth	8/11/2021
✚ ✖	NONE	02171	3	Math Grade 4	M,T,W,R,F	257	Roberts Elizabeth	8/11/2021
✚ ✖	NONE	02166	3	ELA Grade 4	M,T,W,R,F	257	Roberts Elizabeth	8/11/2021
✚ ✖	NONE	01434	3	Art Grade 4	F	300 Art	Peters Patricia	8/11/2021
✚ ✖	NONE	01454	1	Physical Education Grade 4	W,R	Gym	Hill Jennifer	8/11/2021
✚ ✖	NONE	01444	3	Library Grade 4	T	Library	Scott Angela	8/11/2021
✚ ✖	NONE	01449	1	Music Grade 4	M	278	Walker Mark	8/11/2021
✚ ✖	NONE		NONE		M,T,W,R,F			
✚ ✖	Day		NONE		M,T,W,R,F			

Sample secondary schedule:

STUDENT **SCHEDULE** GRADES ASSESSMENTS ACTIVITIES LETTERS USER DEFINED NOTES CONTACTS HOURS

Counseling

000-Grid Student Schedule-Landscape

View Schedule: 2021-2022 Effective Date: Today On

Credits (Scheduled / Selected): 7.5 / 7.5

Fall Semester

	Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
✚ ✖	NONE	00333	2	12-1:1	B	cafeteria		8/22/2021
✚ ✖	NONE		NONE		B,G			
✚ ✖	1	01314	2	GEOMETRY	G	213	Martin Donna	8/31/2021
✚ ✖	1	00277	1	DRAWING & PAINTING	B	3	Hyphen Susan	8/31/2021
✚ ✖	2	00064	2	GLOBAL HIST & GEO 2R	G	161	Miller Karen Riggs Betty	8/31/2021
✚ ✖	2	00009	2	ENGLISH 10R	B	85	Campbell Michael Taylor Mary Martin Morgan	8/31/2021
✚ ✖	3	00312	13	HEALTH	B	137	Collins Daniel	7/9/2021
✚ ✖	3	00226	9	SPANISH 3	G	120	Martin Cynthia	7/9/2021
✚ ✖	4	00167	3	EARTH SCIENCE R	B	180	Richardson Karen Campbell John	8/31/2021
✚ ✖	4	00325	3	LIFEGUARDING	G	176	Rogers Betty	8/31/2021

The upper left corner of the screen provides a number of different ways to view/print schedules.

STUDENT **SCHEDULE** GRADES ASSESSMENTS ACTIVITIES LETTERS USER DEFINED NOTES CONTACTS HOURS

Counseling

000-Grid Student Schedule-Landscape

View Schedule: 2021-2022 Effective Date: Today On

- **Print Schedule**  – Select a report from the dropdown and click the **Print Schedule**  button to generate the report.

Student Schedule

Mindex HS : High School : 2014-2015
01/29/2015

Changed Date: 01/29/2015

Student ID	Student Name	Counselor	Gender	Grade	Homeroom	DOB
580188710	Mason, Lauren M 9862 Boes Way Taberg, NY 13471	Howell	F	11	140	12/07/1997
					Phone	Locker
					(315) 420-7521	C1374 (21-45-18)

Course ID	Sec.	Semesters	Course Name	Room	Period	Days Met	Teacher
0873	1	51, 52	Math 11			A,B	Rodriguez
1130	1	51, 52	Criminal Justice 1			A,B	Rodriguez
0014	5	51, 52	English 11	140	1	A,B	Adams
9500	3	51	Study Hall	129	2	A	Martinez
0646	3	51, 52	PE Gr 11/12		2	B	Johnson
9500	4	52	Study Hall	129	2	A	Martinez
9500	5	51	Study Hall	129	3	A,B	Martinez
9500	6	52	Study Hall	129	3	A,B	Martinez
0112	5	51, 52	US History & Govt 11	107	4	A,B	Walker
0851	1	51, 52	BOCES 1 - PSD		5-9	A,B	Rodriguez

- **Preview Grid Schedule** ⓘ – This displays the student’s schedule as a grid in a pop-up window. Note that this will display any unsaved changes to the schedule, allowing users to make changes and preview those changes prior to saving and making the changes permanent.

Fall Semester		Spring Semester	
B	G	B	G
12:1:1 cafeteria		12:1:1 cafeteria	
DRAWING & PAINTING Hyphen 3 Pd: 1 7:28 - 8:58	GEOMETRY Martin 213 Pd: 1 7:28 - 8:58	DRAWING & PAINTING Hyphen 3 Pd: 1 7:28 - 8:58	GEOMETRY Martin 213 Pd: 1 7:28 - 8:58
ENGLISH 10R Campbell/Taylor/Martin 85 Pd: 2 9:02 - 10:26	GLOBAL HIST & GEO 2R Miller/Riggs 161 Pd: 2 9:02 - 10:26	ENGLISH 10R Campbell/Taylor/Martin 85 Pd: 2 9:02 - 10:26	GLOBAL HIST & GEO 2R Miller/Riggs 161 Pd: 2 9:02 - 10:26
HEALTH Collins 137 Pd: 3 10:30 - 12:44	SPANISH 3 Martin 120 Pd: 3 10:30 - 12:44	HEALTH Collins 137 Pd: 3 10:30 - 12:44	SPANISH 3 Martin 120 Pd: 3 10:30 - 12:44
EARTH SCIENCE R Richardson/Campbell 180 Pd: 4 12:48 - 11:59	LIFEGUARDING Rogers 175 Pd: 4 12:48 - 11:59	EARTH SCIENCE R Richardson/Campbell 180 Pd: 4 12:48 - 11:59	EARTH SCIENCE 1200 Richardson 214 Pd: 4 12:48 - 11:59

Student Schedule Audit Report  – Generates a summary of all changes made to the student's schedule.

Student Schedule Audit Report			
School Year: 2014-2015			
Student ID 580188710		Student Name Mason, Lauren, M	Grade 11
Faculty	Date	Time	Comment
Woolton, Jerry	1/29/2015	9:09:53AM	Add: Alternate enrollment for 2014-2015 in ES1 / Elementary
Woolton, Jerry	1/29/2015	9:09:53AM	Add Course: AV34, Music - 4, SN:2, Pd:NONE
Woolton, Jerry	1/29/2015	9:10:27AM	Add Course: AV54, English Language Arts-4, SN:2, Pd:NONE

Additional Schedule control buttons are available in the upper right corner.



- Add Schedule in Another Building – allows users with appropriate permissions to schedule students for courses in a location other than the building in which they are officially enrolled (e.g., scheduling a middle school student for a course in the high school).
- Scheduled Course Detail – opens a detailed view of the Master Schedule with periods and headcounts, prefilled with all scheduled courses. This opens in a new window.
- Selected Course List – opens a list view of the Master Schedule with periods and headcounts, prefilled with all course selections. This opens in a new window.
- View Course Selections – refreshes the view to show the student's course selections for the selected year.
- Walk in Scheduler – uses the student's course selections to place the student in courses where space is available.
- Save – saves any changes.
- Cancel – cancels any unsaved tasks/modifications.

Modifying Student Schedules

One of the primary functions of a school counselor is to review and edit student schedules to ensure students are meeting the minimum graduation requirements for their diploma type.

1. From within the Counseling module, open the Counseling Search sub-module and locate the student whose schedule you would like to modify.
2. Perform one of the following editing tasks:
 - Drop a course from the schedule
 - Withdraw a student from a course on the schedule
 - Switch a student from one section of a course to another
 - Add a course to a free period
 - Add a supplemental course

- Contract a course to allow another course to share the same period
- Add a course in another building school level

When a counselor uses the manual method to drop, withdraw, or switch a student from a course that is linked to another course, options can be displayed that will allow the linked section to also be dropped, withdrawn or switched. If this feature is enabled, a counselor will be given the option to perform a Drop, Withdraw, or Switch on a linked course (such as a science lab) at the same time that the primary course is dropped, withdrawn, or switched.

By default, the "Perform the same operation to the Linked Section" option will be checked. With this option checked, the linked course will be dropped, withdrawn, or switched appropriately. If this option is unchecked, the changes will apply only to the primary course, and changes must be made separately to the linked course.

Note: When "Switch Section" is chosen, an additional dropdown will be available for selecting the desired linked section for the change.

Counselors may view and edit future student schedules from this area when the Master Schedule is unlocked.

Note: This option is only available for users who have the appropriate permissions.

To edit a future schedule, simply select a future year from the school year drop-down menu and make the necessary changes.

Note: The only future years that will appear in the drop-down are those for which an unlocked master schedule exists.

Note: Operations such as withdraws and switches are disabled when editing a future schedule.

Student Schedule View

The following image shows the various parts of the schedule that you might see for a typical student. Each course listed shows the Period, Course ID (Crs ID), Section Number (SN), Course name (Course), Days of the week or cycle days (Days), Room, Teacher and Effective Date.

Note: Districts can choose to enable or disable Drop & Withdraw options for each building-school level. If these options are allowed, the red Drop/Withdraw/Switch  button will display additional options for the user. If these options are not allowed, this

button will simply delete (drop) the selected course. The remaining portion of this document assumes these options are enabled.

Using the “Drag and Drop” Method to Modify a Schedule

To drop or withdraw a course section using the “drag and drop” method, click on the Drag and Drop  button and drag the section to the Trash  icon. A list of possible drop/withdraw options for that section will appear. While still holding the mouse button down, move the mouse over the option you wish to select, then release the mouse button. The course will be removed from the schedule (the date of the change will reflect the date the drop or withdraw operation was performed).

	Period	Crs ID	SN	Course
Drop				
Withdraw : Absent				NONE
Withdraw : Incomplete				
Withdraw : Medical		0005	1	English 11
Withdraw : Withdraw				
Withdraw : Withdraw Fail		0847	1	Honors Algebra II
Withdraw : Withdraw Pass		0612	1	AP World History
	2	00919	1	Communications (XCC)

To switch a section, click on the Drag and Drop  button for the appropriate course and drag the section to the desired location. A list of sections that are available for that period will appear. While still holding the mouse button down, move the mouse over the section you wish to select, then release the mouse button. The course will be switched to the selected section, effective upon Save.

	2	00612	1	AP World History
	2	00919	1	Communications (XCC)
	3-1	00103	2	Spanish III
				P.E. 9-12(00161) [A,E] (30/40) SN9 Pd:3-1 in GYM - Jones
				P.E. 9-12(00161) [A,E] (30/50) SN10 Pd:3-1 in GYM - Parker
				P.E. 9-12(00161) [D,F] (42/50) SN11 Pd:3-1 in GYM - Jones
				P.E. 9-12(00161) [D,F] (41/50) SN12 Pd:3-1 in GYM - Murray
	Lunch3	00261	2	Lunch
	Adv			NONE
	4	00161	14	P.E. 9-12

Note: Because courses like lunches and study halls cannot be switched or withdrawn, menus will not appear. These classes may simply be dragged to the Trash  icon to be dropped.

Note: You may only drop the selection in a row that is highlighted green. Sections that are full will be shaded gray (for needs students, sections that are at or above the Needs Max will be shaded).

When a conflict exists, the class that was switched will remain in italics until the conflict is resolved. No changes may be saved until all conflicts has been resolved.

	1	00005	1	English 11	<i>B,D,F</i>	74	Wootton Carter	Jerry William	6/10/2019
	1	00847	1	Honors Algebra II	A,C,E	82	Baker Thomas		6/10/2019

To cancel a switch operation, click the Cancel Switch Section button.

Use the Preview Grid Schedule button to see a preview of your changes prior to saving.

Note: Remember to Save your work to make any changes effective.

To Manually Drop a Course from the Schedule

When a course is dropped, the course information is removed from the student schedule. A record of the course (and any progress report or marking period grades for that course) will remain on the student's Grades tab, but this information will not print on report cards, permanent records or transcripts. The idea is that the course is not continuing and there is no reason to display grade values.

From within the student's Personal Information record, Scheduling tab:

1. Click once on the red Drop/Withdraw/Switch button to the left of the course to be dropped.

Semester 1									
	Period	Cra ID	SN	Course	Days	Room	Teacher		Effective Date
	NONE			NONE	A,B,C,D,E,F				
	1	00005	1	English 11	B,D,F	74	Wootton Carter	Jerry William	6/10/2019
	1	00847	1	Honors Algebra II	A,C,E	82	Baker Thomas		6/10/2019
	2	00612	1	AP World History	B,D,F	71	Right George		6/10/2019
	2	00919	1	Communications (XCC)	A,C,E		Wootton Jerry		1/2/2020
	3-1	00103	2	Spanish III	B,D,F	68	Scott Sallie		6/10/2019

2. If it is not already selected, click once on the Drop radio button.

	2	00919	1	Communications (XCC)	Withdraw Reason: SELECT ONE		A,C,E	Wootton Jerry
				☒ Drop	Date: 6/13/2020	C		
				☐ Switch Section	To: Select a Course Section			

3. Enter the date that the course is to be dropped. The default is today.
4. Click once on the Refresh button to update the row, or on the Cancel button to return the row back to its original state.
5. Click once on the green Save button (upper right corner) to save your schedule changes.
6. Use the Preview Grid Schedule button to see a preview of your changes prior to saving.

Note: If you do not save your work before navigating away from this screen, the schedule will revert back to its original state. Multiple changes may be made to courses before saving.

To Manually Withdraw a Student from a Scheduled Course

This task is typically performed when a student is unable to continue the course but should get credit for any accomplishments to date. You can withdraw a student from a course at any time. If the withdraw action is done after a marking period or periods have passed, any marking period grades are retained and continue to print on the report card. The marking period during which the student was withdrawn will not show a grade, but will instead display a district-designated withdraw code (e.g. W ABS (withdraw – absent), WP (withdraw pass), WF (withdraw fail), etc).

1. Access the student's Personal Information record, **Scheduling** tab, and click once on the red Drop/Withdraw/Switch  button to the left of the course to be withdrawn from.

Semester 1								
	Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
	NONE			NONE	A,B,C,D,E,F			
	1	00005	1	English 11	B,D,F	74	Wootton Carter, William	6/10/2019
	1	00847	1	Honors Algebra II	A,C,E	82	Baker Thomas	6/10/2019
	2	00612	1	AP World History	B,D,F	71	Right George	6/10/2019
	2	00919	1	Communications (KCC)	A,C,E		Wootton Jerry	1/3/2020
	3-1	00103	2	Spanish III	B,D,F	68	Scott Sally	6/10/2019

Note: If the drop/withdraw options are not enabled, the selected course will be deleted from the schedule, leaving the period free. You may skip to the last step (saving the student record).

2. Click once on the Withdraw radio button.

				Communications (KCC)	Withdraw Reason: SELECT ONE	Withdraw Date: 6/13/2020	A,C,E
☒	☐	☐	☐	Withdraw			
☐	☐	☐	☐	Drop			
☐	☐	☐	☐	Switch Section	To: Select a Course Section		

3. Select the reason for the withdrawal from the Reason drop-down list.
4. Click once on the Refresh  button to update the row, or on the Cancel  button to return the row back to its original state.
5. Click once on the green Save  button in the upper right corner of the tab to save your schedule changes.
6. Use the Preview Grid Schedule  button to see a preview of your changes prior to saving.

Note: If you do not save your work, the schedule will revert back to its original state.

To Manually Switch a Student from One Section of a Course to Another

This section describes how to edit an existing schedule to switch one section with another. This task is typically performed when a student continues to attend a course, but needs to take it at a different time.

Use this process when you are moving a student from one section of a course to another section of the same course. For the switch to work:

- The course number must be the same
- The course must be available in the period you are switching to
- The headcount for the section you are switching to has space for additional students (headcount includes any students currently scheduled for that course plus any students with pending schedules for that course)
- Using the switch section feature allows grades given in a previous section to be carried forward.

For example, if a student was scheduled in section 1, period 1 of a course, and receives a first marking period grade for that course, and then during the second marking period switches to section 2, period 2 of that same course, the first marking period grade will “follow” to the new course. The second marking period report card will show the first marking period grade, and the second marking period grade, on the same line, as if the student was attending the new section all year.

On the report card, permanent record and transcript, this creates a seamless continuation of the grades without gaps. Once you have switched a section, all history of the original section is gone.

Do not use this procedure if you are moving a student from one level of a course to another, such as from an AP course to a non-AP version of the same course. In this case, there is no one-to-one match, and SchoolTool is not able to show a seamless continuation of the grades.

1. Access the student’s Personal Information record, **Scheduling** tab.
2. Click on the red Drop/Withdraw/Switch **X** button to the left of the course to be switched.

Semester 1								
	Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
	NONE			NONE	A,B,C,D,E,F			
	1	00005	1	English 11	B,D,F	74	Wootton Carter, Jerry	6/10/2019
	1	00847	1	Honors Algebra II	A,C,E	82	Baker, Thomas	6/10/2019
	2	00612	1	AP World History	B,D,F	71	Right, George	6/10/2019
	2	00919	1	Communications (XCC)	A,C,E		Wootton, Jerry	1/2/2020
	3-1	00103	2	Spanish III	B,D,F	68	Scott, Sallie	6/10/2019

3. Click once on the Switch Section radio button.

	2	00919	Communications (XCC)		A,C,E
			☐ Withdraw	Withdraw Reason: SELECTION	
			☐ Drop	Date: 4/12/2020	
☒ Switch Section	Select a Course Section				

4. Select the new course section and the date for when the switch will take place.
 - A. The screen will display additional information about the section into which you are switching the student.

- B. If the new section was previously dropped or withdrawn from the student's schedule, an additional set of options will appear, prompting you to undo the previous drop or re-add the section.

If you select "Undo previous drop" the section will be re-added without any gap in course enrollment. If you choose to re-add it, the section will be added back to the student's schedule with a new start date, and the dates for the previous instance of that section will remain unchanged (Course History will reflect this as a switch, but the dates will reflect two separate instances of the same section; minutes calculations will not include the time between the two instances).

5. Click once on the Refresh  button to update the row, or on the Cancel  button to return the row back to its original state.
6. The tab will refresh with the entire schedule, if there is a period conflict the switched course will be italicized. The new schedule cannot be saved until the conflict is resolved. If there is no period conflict the switched course will simply appear in the new period time slot.
7. Locate the free period where the course will switch to. Click once on the drop-down field to the right of the free period to reveal courses which are available during this period.

Note: There must be a section of this class in the drop-down field of the free period in order for you to switch another section into the free period.

Note: If the course you have selected is not an exact match, the original section you tried to switch will remain in italics. Either select a different course or find a different free period which contains the course option.

Note: SchoolTool allows users the flexibility to either restrict threshold overrides, or temporarily allow them up to a maximum while switching students. This is to accommodate other students who may later drop/withdraw/switch this section. Each district has control over whether head count thresholds can be overridden or not. A separate setting controls the ability to override Needs Max thresholds.

- Click once on the green Save  button in the upper right corner of the tab to save your schedule changes.
- Use the Preview Grid Schedule  button to see a preview of your changes prior to saving.

Note: If you do not save your work, the schedule will revert back to its original state.

Note: When a course is switched, all the of the linked information for that course, including existing grades and exams (if any), will also move with the course, so the information will appear on the report card just as if the course was originally in the new period.

To Manually Add a Course to a Free Period

You can add courses which are active right now, or you can add courses with a future effective date. For example, you might add a course that a student will take during the next marking period.

- Access the student's Personal Information record, **Scheduling** tab, and click the Edit button to the left of the free period.

Semester 1								
	Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
	NONE			NONE	A,B,C,D,E,F			
	1	00005	1	English 11	B,D,F	74	Wootton Carter, Jerry William	6/10/2019
	1	00847	1	Honors Algebra II	A,C,E	82	Baker Thomas	6/10/2019
	2	00612	1	AP World History	B,D,F	71	Right George	6/10/2019
	2	00919	1	Communications (XCC)	A,C,E		Wootton Jerry	1/2/2020
	3-1	00103	2	Spanish III	B,D,F	68	Scott Sallie	6/10/2019
	3A	00277	1	Alis Algebra	A,C,E	59	Morgan Sandra	2/14/2020
	Lunch2	00261	3	Lunch	A,C,E	CAFE		8/13/2019
	3B	00268	2	Alis- English 9	A,C,E	78	Rogers Susan	3/20/2020
	Lunch3	00261	2	Lunch	B,D,F	CAFE		8/13/2019
	Adv			NONE	A,B,C,D,E,F			
	4	00161	14	P.E. 9-12	A,E	GYM	Murray Charles	6/10/2019

- Click once on the drop-down list to the right of the free period to open the list of available courses.

1	00847	1	Advisory 9(00984) [A,B,C,D,E,F] (17/18) SN4 in 70 - Robinson	A,C,E
2	00612	1	Advisory 9(00984) [A,B,C,D,E,F] (18/18) SN5 in 59 - Morgan	B,D,F
2	00919	1		A,C,E
3-1	00103	2	Advisory 9(00984) [A,B,C,D,E,F] (18/18) SN6 in 40 - Black	B,D,F
3A	00277	1		A,C,E
Lunch2	00261	3	Advisory 9(00984) [A,B,C,D,E,F] (18/18) SN7 in 34 - Johnson	A,C,E
3B	00268	2		A,C,E
Lunch3	00261	2	P.E. 9-12 CCC(00159) [A,C,E] (29/40) SN1 in GYM - Murray/Parker	B,D,F
	Adv		Select a Course Section	A,B,C,D,E,F
4	00161	14	P.E. 9-12	A,E
4	00057	1	Chemistry Honors	B,C,D,F

Note: The drop-down list will only show courses that fit in this period. Perfect matches will sort to the top of the list, with other matches (offered during only some of the cycle days) will appear towards the bottom of the list.

Note: Any sections that have reached capacity will still appear in the list, they will be highlighted in gray (or in light blue, for needs students), to designate that the section has reached capacity.

AP PHYSICS LAB [A] (15/25) SN1 in 127 - ELEFANTE
 CHEM HONORS LAB [A] (23/25) SN1 in 114 - LYONS
 EARTH SCI LAB [A] (23/25) SN3 in 224 - GILBERT
 IND ST/TECH ED [A] (1/5) SN0 in 145 - ROWLEY
 IND STUDY ART [A] (1/5) SN5 in 212 - CLAUDIA
 PE 10/11/12 FALL [A] (24/34) SN9 in NEWGYM - SIDNEY
 PE 10/11/12 FALL [A] (25/34) SN7 in NEWGYM - LYONS
 PE 10/11/12 FALL [A] (27/30) SN39 in OLDGYM - BERKSHIRE
 PE GIRLS 9 FALL [A] (18/34) SN3 in OLDGYM - CAPOSERRE
 VOL SERV FL [A] (1/2) SN135 - GARDNER
 VOL SERV FL [A] (1/2) SN83 in B-4 - LYONS
 VOL SERV FL [A] (1/2) SN43 in B-3 - CEDARS
 VOL SERV FL [A] (1/2) SN29 in 127 - ELEFANTE
 VOL SERV FL [A] (1/2) SN114 - BERKSHIRE
 VOL SERV FL [A] (1/2) SN119 - GOODMAN
 VOL SERV FL [A] (1/2) SN86 - ELEFANTE
 VOL SERV FL [A] (1/2) SN45 in 115 - ROWLEY

STUDY HALL [A,B] (55/55) SN11 in 237 - GIBBS
 STUDY HALL [A,B] (80/80) SN12 in CAFE - GOODMAN
 STUDY HALL [A,B] (103/60) SN8 in CAFE - ELEFANTE
 STUDY HALL [A,B] (39/35) SN47 in 237 - BRYANS

Advanced Study in Television Production 1 [A,B] (18/20) SN1 in 145 - ROWLEY
 AMER LIT REGENTS [A,B] (27/25) SN4 in 100 - GOODHEW
 AP CALCULUS AB [A,B] (16/25) SN1 in 240 - SIDNEY
 ARCH DRAWING/CAD [A,B] (16/24) SN1 in B2 - BERKSHIRE/BURKHART
 CHAMBER SINGERS [A,B] (21/30) SN1 in B-4 - CEDARS
 COMPUTER TOOLBOX [A,B] (20/24) SN1 in B-3 - AVERILL/BERKSHIRE/BRYANS

Perfect matches to this free day/period sort to the top of the list. These are courses that only meet during this slot.

Study Halls which can be used as fill-in for this spot sort next.

Courses which can be contracted for this day/period sort last, in alpha order. These are usually courses that are offered for more cycle days than are available.

3. Select the course to be added by clicking once on the course name. It will appear in the drop-down list field. The details of that class will appear below the drop-down, allowing the user to see the course's meeting pattern and daily headcount for that semester.

PE 9-12 CCC(00159) [A,C,E] (29/40) SN1 in GYM - Murray/Parker

PE 9-12 CCC(00159)

Section: 1

S1, S2 / A,C,E

Teacher(s): Murray/Parker

Period: Adv

Room: GYM

Max: 40

Needs Max: 25

Day Students Needs:

Day	Students	Needs
A	29	5
C	29	5
E	29	5

A,B,C,D,E,F

- A. If the section was previously dropped or withdrawn from the student's schedule, an additional set of options will appear, prompting you to undo the previous drop or re-add the section.

Desktop Publishing(00129) [A,B] (19/22) SN1 in 95 - Murray

Undo previous drop (dropped on 3/24/2013)

Re-add this section (may introduce a gap in course enrollment)

If you select "Undo previous drop" the section will be re-added without any gap in course enrollment. If you choose to re-add it, the section will be added back to the student's schedule with a new start date, and the dates for the previous instance of that section will remain unchanged (Course History will reflect this as a switch, but the dates will reflect two separate instances of the same section; minutes calculations will not include the time between the two instances).

4. Click once on the green Add button to the left of the course to apply the change. Wait for the tab to refresh. The schedule will appear with the added course where the free period used to be, among the other courses.
5. The Effective Date of the newly added course will default to today's date. If you wish to change the date to a date in the future, click once on the Edit button to the left of the course row you wish to update. The row will refresh with editable fields.

Lunch3	00261	2	Lunch	B,D,F	CAFE			8/13/2019
Adv	00159	1	P.E. 9-12 CCC	☒ A ☒ C ☒ E	GYM	Murray Parker	Charles Ronnie	4/13/2020
Adv			NONE	B,D,F				

6. Change the date using the pop-up calendar, or by entering the date manually using the mm/dd/yyyy format.
7. Save the new effective date by clicking once on the Update  button to the left of the row. The screen will refresh showing the course with the new effective date in read-only mode.
8. When you have finished adding/editing the new course, click once on the green Save  button in the upper right corner to save your schedule changes.
9. Use the Preview Grid Schedule  button to see a preview of your changes prior to saving.

Note: If you do not save your work, the schedule will revert back to its original state.

Contract a Course to Allow Another Course

Use this process for students who have the opportunity to take different courses during the same period. If the scheduled course does not require that the student attend every cycle day it meets, the student's schedule can be freed up to accommodate another class, such as a lab or course that might only meet one cycle day per week. Typically, core courses cannot be contracted out, but elective courses can.

Note: Access to contracting options is controlled through the Course Catalog.

1. Access the student's Personal Information record, **Scheduling** tab.
2. Locate the course section to be contracted. In this example, we'll use an elective, Communications in period 2.

Semester 1								
	Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
	NONE			NONE	A,B,C,D,E,F			
	1	00005	1	English 11	B,D,F	74	Wootton Carter	6/10/2019
	1	00847	1	Honors Algebra II	A,C,E	82	Baker Thomas	6/10/2019
	2	00612	1	AP World History	B,D,F	71	Right George	6/10/2019
	2	00919	1	Communications (XCC)	A,C,E		Wootton Jerry	1/2/2020
	3-1	00103	2	Spanish III	B,D,F	68	Scott Sallie	6/10/2019

3. Click once on the Edit  button. The schedule will refresh showing you the contracting options seen in the Days column (as well as open the Effective Date field).
4. In this example, second period Communications takes place on cycle days A, C, and E.

	2	00612	1	AP World History	B,D,F	71	Right George	6/10/2019
	2	00919	1	Communications (XCC)	☒ A ☒ C ☒ E		Wootton Jerry	1/2/2020
	3-1	00103	2	Spanish III	B,D,F	68	Scott Sallie	6/10/2019

5. To free up particular cycle days, deselect them by unchecking the box next to the cycle day(s) that the student will NOT take this course.

	2	00612	1	AP World History	B,D,F	71	Right George	6/10/2019
	2	00919	1	Communications (XCC)	☒ A ☐ C ☒ E		Wootton Jerry	1/2/2020
	3-1	00103	2	Spanish III	B,D,F	68	Scott Sallie	6/10/2019

- Click once on the blue Update  button to save this change and return to the full schedule. The tab will refresh showing the Communications section updated with the “new” cycle day(s), and a second line for that same period, with an Edit  button which allows you to access a drop-down box of available courses to fit into the free period on the other cycle day(s).

1	00847.1	Honors Algebra II	A,C,E
2	00912.1	AP World History	B,D,F
2	00919.1	Communications (XOC)	A
Select a Course Section			
3-1	00103.2	Spanish III	B,D,F

- When you have finished configuring contracting options, click once on the green Save  button to save the updated schedule.

Use the Preview Grid Schedule  button to see a preview of your changes prior to saving.

Note: If you do not save your work, the schedule will revert back to its original state.

Descriptor Contracts View

Typically used for elementary students, this view displays descriptor contracts for students based on subject/grade level based courses. Students can be contracted to different grade levels for a given Course subject, or contracted out of a subject completely.

COUNSELING				
All Off - Grid				
View Schedule: 2019-2020 Team: 121				
Student Schedule Descriptor Contracts				
Trimester 1				
Crs ID	SN	Course	Contract	Teacher
00434	1	Intro to Comp 3	Technology: Grade Level 03	Ms. Campbell
00305	1	Grade 3	Behavior: Grade Level 03 Early Childhood: Grade Level 03 Effort: Grade Level 03 English Language Arts: Grade Level 03	Mrs. Johnson
00480	1	Social Studies 3	Social Studies: Grade Level 03	Mrs. Johnson
00493	1	Science 3	Science: Grade Level 03	Mrs. Johnson

To modify a student's schedule, click the Edit button for the appropriate course.

COUNSELING				
All Off - Grid				
View Schedule: 2019-2020 Team: 121				
Student Schedule Descriptor Contracts				
Trimester 1				
Crs ID	SN	Course	Contract	Teacher
00434	1	Intro to Comp 3	Technology: Grade Level 03	Ms. Campbell
00305	1	Grade 3	Behavior: Grade Level 03 Early Childhood: Grade Level 03 Effort: Grade Level 03 English Language Arts: Grade Level 03	Mrs. Johnson
00480	1	Social Studies 3	Social Studies: Grade Level 03	Mrs. Johnson
00493	1	Science 3	Science: Grade Level 03	Mrs. Johnson

Locate the subject to be changed and select the appropriate new grade level (or select None if contracting the student out of that subject entirely). Click Save  to apply these changes.

Trimester 1				
Crs ID	SN	Course	Contract	Teacher
00434	1	Intro to Comp 3	Technology: Grade Level 03	Ms. Campbell
00305	1	Grade 3	Early Childhood: 03	Mrs. Johnson
			English Language Arts: 04	
			Effort: 03	
			Behavior: 03	
00480	1	Social Studies 3	Social Studies: Grade Level 03	Mrs. Johnson

The Schedule tab will now display the updated grade levels for each subject.

Trimester 1				
Crs ID	SN	Course	Contract	Teacher
00434	1	Intro to Comp 3	Technology: Grade Level 03	Ms. Campbell
00305	1	Grade 3	Behavior: Grade Level 03	Mrs. Johnson
			Early Childhood: Grade Level 03	
			Effort: Grade Level 03	
			English Language Arts: Grade Level 04	
00480	1	Social Studies 3	Social Studies: Grade Level 03	Mrs. Johnson

Note: The descriptors that are visible to a teacher are based on the grade level displayed in this area, regardless of the student's actual grade. The grade levels assigned here are also shown on report cards and are used for TSDL minute calculations.

Projected Schedules

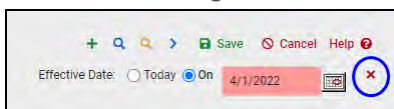
A counselor may want to change a student's schedule at the beginning of the next marking period or next week. This can be accomplished by giving a projected date in the future when the changes will take effect. Once a student has been given a "projected schedule" (also known as a "pending schedule"), their current schedule cannot be edited until either the future date of the projected schedule arrives or you delete the projected schedule.

- From within the student's Personal Information record, **Scheduling** tab, you will see an Effective Date on the right with two radio buttons: Today (default) and On with a pop-up calendar next to it. Effective Date is a required field when "On" is selected.
 - Select the **On** radio button and either type in the effective date using the mm/dd/yyyy format or use the pop-up calendar and select the future effective date. The Effective Date will populate all the effective date fields.

Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
NONE	00333	2	12.1.1	B	cafeteria		8/22/2021
NONE			NONE		B.9		
I	01014	2	GEOMETRY	G	213	Martin, Donna	8/31/2021
I	00277	1	DRAWING & PAINTING	B	6	Imprini, Susan	8/31/2021

- Make the necessary future changes to the students schedule using the Drop/Withdraw/Switch **X** button or the Edit **E** button. Use the Preview Grid Schedule **i** button to see a preview of your changes prior to saving.

3. When you are finished making changes to the projected schedule, you will now see a Delete button next to the Effective Date. This Delete button can be used to remove all pending schedule changes.



4. Click the save button to save the projected schedule changes.
5. The student's schedule will change when the Effective Date arrives.
6. When printing student schedules, reports will show an "Effective as of" field with one of two possible dates:
 - If the "Today" option is selected, the report will display the date the report was printed.
 - If the "On" option is selected and the student has pending schedule changes, the report will display the date of the pending schedule.

Note: The "Effective as of" date logic is only available on certain schedule reports. The "Student Schedule Grid RS" and any custom schedule reports do not include this logic.

Note: The "Delete all pending schedules" button will appear only if a projected schedule exists.

Note: If a projected/pending schedule exists, a counselor will not be able to make regular schedule changes. The walk-in scheduler, edit and delete buttons will be hidden.

Note: If any single transaction fails, the student will receive none of the projected courses; all transactions for that student fail.

Note: An e-mail message is generated to the creator of the projected schedule whenever a projected schedule could not be successfully processed, for any reason. This e-mail will contain the reason for the failure.

Note: If a transaction exceeds a max headcount for a section, a warning is e-mailed to the individual that created the projected schedule. This is not considered a failed transaction; the student will still be scheduled for this section.

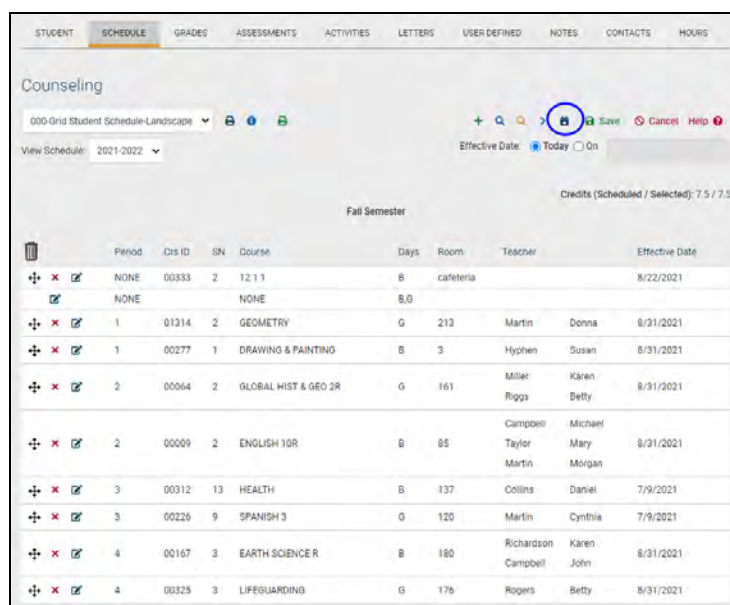
Building a New Student Schedule (Walk-in Scheduler)

There will be times when counselors will have to create a new student schedule once Scheduling has been completed. The steps below will describe the process for building a new student schedule.

Note: The Walk-in Scheduler is not available for read-only schedules.

First, you will need to make course selections for the student. Refer to the **Scheduling User Guide – Course Selection** procedure for more information. Second, build the schedule for the student, using the Walk-in Scheduler.

1. Using Counseling Search, locate the student. Make sure the appropriate radio button (Currently Enrolled or No Longer Enrolled) is selected. If a list results, select the student from the list.
2. His/her Personal Information record will appear, with the Schedule tab (toward bottom of the record) automatically open.
3. Click once on the Walk-in Scheduler  button, located on the left side of the student's Schedule tab.



Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date
NONE	00333	2	12.1.1	B	cafeteria		8/22/2021
NONE	NONE	NONE		B,G			
1	01314	2	GEOMETRY	G	213	Martin Donna	8/31/2021
1	00277	1	DRAWING & PAINTING	B	3	Hyphen Susan	8/31/2021
2	00064	2	GLOBAL HIST & GEO 2R	G	161	Miller Karen Betty	8/31/2021
2	00009	2	ENGLISH 10R	B	85	Campbell Michael Taylor Mary Morgan	8/31/2021
3	00312	13	HEALTH	B	137	Collins Daniel	7/9/2021
3	00226	9	SPANISH 3	G	120	Martin Cynthia	7/9/2021
4	00167	3	EARTH SCIENCE R	B	180	Richardson Karen Campbell John	8/31/2021
4	00325	3	LIFE GUARDING	G	176	Rogers Betty	8/31/2021

4. A confirmation message will appear, alerting you that any changes you make here cannot be cancelled.
5. Click OK to continue. The student's schedule will be created based on course requests and seat availability.
6. Continue to fine tune the schedule as needed.
7. Click once on the Save  button to commit your changes to the database.

Use the Preview Grid Schedule  button to see a preview of your changes prior to saving.

Note: If you do not save your work, the student's schedule will not be saved.

Viewing Read-Only Schedules

To view a schedule for a year other than the current year, select that year from the drop-down menu on the default view of the Schedule tab.

Student Schedule View (Read-Only)

The screen will refresh showing that year's schedule in the Student Schedule – Standard View by default. To view the Student Schedule – Grid View, select the Grid radio button and wait for the screen to refresh.

Standard View

Standard View displays the student's schedule as a read-only list of courses, ordered by period number, along with section number, course name, days the class meets, the room number, and the teacher are listed for each course. Supplemental courses are listed at the top of each list.

When viewing the schedule in Standard View, any unscheduled periods are omitted.

STUDENT SCHEDULE GRADES ASSESSMENTS ACTIVITIES LETTERS USER DEFINED NOTES CONTACTS HOURS									
Counseling									
000-Grid Student Schedule-Landscape									
View Schedule: 2021-2022									
Effective Date: Today On									
Credits (Scheduled / Selected): 7.5 / 7.5									
Fall Semester									
Period	Crs ID	SN	Course	Days	Room	Teacher	Effective Date		
NONE	00333	2	12:1-1	B	cafeteria		8/22/2021		
NONE			NONE	B,G					
1	01314	2	GEOMETRY	G	213	Martin Donna	8/31/2021		
1	00277	1	DRAWING & PAINTING	B	3	Hyphen Susan	8/31/2021		
2	00064	2	GLOBAL HIST & GEO 2R	G	161	Miller Karen Betty	8/31/2021		
2	00009	2	ENGLISH 10R	B	85	Campbell Michael Taylor Mary Morgan	8/31/2021		
3	00312	13	HEALTH	B	137	Collins Daniel	7/9/2021		
3	00226	9	SPANISH 3	G	120	Martin Cynthia	7/9/2021		
4	00167	3	EARTH SCIENCE R	B	180	Richardson Karen Campbell John	8/31/2021		
4	00325	3	LIFEGUARDING	G	176	Rogers Betty	8/31/2021		

Grid View

Grid View displays the student's schedule in a read-only grid format. This provides a visual representation of the student's schedule for each period across each cycle day. Supplemental courses are shown at the bottom of each grid.

When viewing the schedule in Grid View, any unscheduled periods are omitted.

	A	B	C	D	E	F
Period 1 Time 7:33 - 8:47	Learning Lab Miller(CAFE)	Health Johnson(34)	Learning Lab Miller(CAFE)	Health Johnson(34)	Learning Lab Miller(CAFE)	Health Johnson(34)
Period 2 Time 8:51 - 10:05	P.E. 9-12 Smith(OYM)	Living Envir Honors 9 Black(40)	P.E. 9-12 Smith(OYM)	Living Envir Honors 9 Black(40)	Living Envir Honors 9 Black(40)	Living Envir Honors 9 Black(40)
Period Lunch1 Time 10:09 - 10:33	Lunch (CAFE)	Lunch (CAFE)	Lunch (CAFE)	Lunch (CAFE)	Lunch (CAFE)	Lunch (CAFE)
Period 3-2 Time 10:34 - 11:48	Glob Hist & Geog I Honors Walker(72)	Geometry Honors CC Gray(61)	Glob Hist & Geog I Honors Walker(72)	Geometry Honors CC Gray(61)	Glob Hist & Geog I Honors Walker(72)	Geometry Honors CC Gray(61)
Period Adv Time 11:52 - 12:32	Advisory 9 Sanchez(75)	Advisory 9 Sanchez(75)	Advisory 9 Sanchez(75)	Advisory 9 Sanchez(75)	Advisory 9 Sanchez(75)	Advisory 9 Sanchez(75)
Period 4 Time 12:36 - 10:50	English 10 Honors Patterson(62)	Spanish II Clark(37)	English 10 Honors Patterson(62)	Spanish II Clark(37)	English 10 Honors Patterson(62)	Spanish II Clark(37)

Grades Tab

The **Grades** tab is where student grade information is available in the Counseling. There are four (4) sections to this tab: **Official**, with the student's Official Weighted and Unweighted Ranks and GPAs; **In-Progress**, with the student's in-progress Weighted and Unweighted Ranks and GPAs; **Classes**; and **Exams**.

The basic **Grades** tab shows a high-level overview of grade information. The default view shows the grades from the current year. You can also use the drop-down lists under Group to go back in time and view a student's grade information for a previous year or a specific class, or you can choose to isolate grades for only exams or competencies.

You can print various reports using the Print buttons above the Official grades section: Reports created in the Transcript/Permanent Record Report area, Traditional Report Card, Descriptor Report Card, Student Profile Report, and Graduation Requirements Report. The reports available vary depending on the Group selections.

Official					
Weighted			Unweighted		
GPA	Rank	GPA	Rank	GPA	Rank
93.76	29	92.7	34		

In-Progress					
Weighted			Unweighted		
GPA	Rank	GPA	Rank	GPA	Rank
93.76	29	92.7	34		

Note: It may be necessary to use the scroll bar to see all the classes listed here.

While grades are being processed, you will see a message indicating that the rank may change.

Grades are being processed that could impact rank

Official & In-Progress Sections

The columns in this section display the Weighted GPA, Rank GPA, and Rank, as well as the Unweighted GPA, Rank GPA, and Rank for that student. The Official GPA section includes completed courses only. Any course that has a final grade will be included in the Official GPA. The In-Progress GPA section, on the other hand, includes completed courses as well as any submitted Marking Period grades for current courses.

These sections are meant to provide the user with a quick, at-a-glance view of weighted and unweighted ranks and GPAs for this student. If your district does not use weighted and/or unweighted ranks and GPAs, information will still display here, but can be ignored.

Note: As changes are made to grades in the Classes list below, the ranks and GPAs can be refreshed by clicking on the calculator  icon (to recalculate the GPAs) or the Refresh  icon (to refresh the data).

COUNSELING						
Student Schedule Grades Assessments Activities Letters User Defined Notes Contacts Hours						
Group						
Year 2019-2020 Completed Course Audit Report						
Official						
Weighted			Unweighted			
GPA	Rank GPA	Rank	GPA	Rank GPA	Rank	
94.103	94.103	27	92.75	92.75	33	
In-Progress						
Weighted			Unweighted			
GPA	Rank GPA	Rank	GPA	Rank GPA	Rank	
94.103	94.103	26	92.75	92.75	32	

Viewing Legacy Grades

To view Legacy grades, select Legacy from the drop-down in the top left corner of the Grades tab.

Classes

This section displays all the courses the student has been enrolled in for the current year, including those which are active and those which have been dropped or withdrawn. Each course includes grade averages and basic course information as well as an indicator if the course has been designated as Summer School and/or Credit Recovery.

View Options:

- **Show all details** – use the link under the Classes heading to show details for every class the student is currently enrolled in.
- **Hide all details** – once the detailed view is opened, you can use the **Hide all details** link to return to the high-level view of grades for each class.
- **Show details** – use the link to the far right of each class to see more details for that specific class.
- **Hide details** – once the detailed view is opened, you can use the **Hide details** link to return to the high-level view of grades for this class.

The screenshot shows a student's class list. On the left, there are two buttons: 'Edit' (with a pencil icon) and 'Add Classes' (with a plus icon). The main area displays a table of classes. The first class is 'CONCERT CHOIR (626)' for the 2026-2027 school year. Below it, the 'Final Exam' section is expanded, showing 'Marking Period Grades' and 'Progress Report Grades'. To the right of the class list, there are two callout boxes. The first box points to the 'Show all details' link under the 'Classes' heading, stating: 'Show all details view gives you access to more information about every class this student is taking.' The second box points to the 'Hide details' link at the bottom of the expanded class details, stating: 'Hide details link appears after the Show all details link is selected.'

When you have expanded details for a class, the following information becomes available: Marking Period Grades for each marking period; Progress Report Grades for each progress reporting period; Final Exam information and Permanent Record details.

All information can be edited using the Edit  button to the left of the section heading.

Adding Courses to a Student's Permanent Record

Adding multiple courses to a student's permanent record can now be done by selecting a series of courses, adding grades and grade notes to each, and saving the entire screen of courses to the student.

The overall process can be outlined as follows:

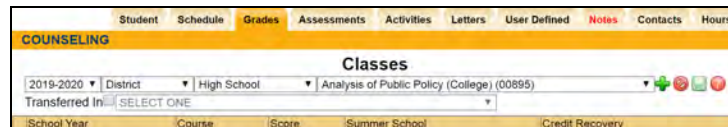
- Select one or more courses and add them to the list
- Select a provider, if needed
- Add grades and/or grade notes to all courses
- Save all courses to the student's record

Add an In-District Course

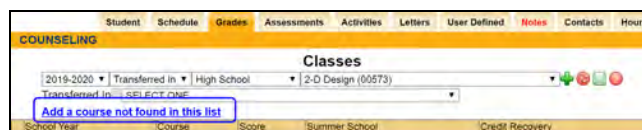
1. From within the Counseling module, navigate to a student's Grades tab.
2. Select the green Add Classes  button to add a series of courses to the selected student.



3. The screen will refresh with a list of options:



- A. **Year** (drop-down, defaults to current year) – the year the course was taken, and will cause the course drop-down to be populated with courses from the course catalog from that year.
- B. **District/Transferred In** and **School Level** (drop-downs, defaults to District) – determines if the course to be added is an existing district course or an existing transferred in course. If “Transferred In” is selected from the drop-down, an option will appear to add a course not in the list.
- C. **“Add a course not found in this list”** (link) – if there is no existing course record for a transferred in record, use this link to add the course. The page will refresh to display a form where the user may create a new course that can be added to this, and any other, student’s permanent record.



Note: This link will only display if the user has selected “Transferred In” *and* has not yet added courses to this student's list. Once a course has been added, the user will need to save the record and repeat the process in order to add other courses to the student’s permanent record.

- D. **Course** (drop-down, defaults to first item in list) – contains all courses that are available in the course catalog for the selected year and category (District or Transferred In). If “Transferred In” is selected, the courses listed will indicate that they are Transferred In courses by a “(TR)” at the end of the course title.
- E. **Transferred In** (check box/drop-down combination) – if this box is checked, the drop-down will allow selection of an outside provider for

every course that is about to be added to this student. This will be applied to *all* selected courses. If this box is not checked, the drop-down will be grayed-out and cannot be used.

4. Select the appropriate options and select a course to add.
5. Continue adding courses as desired, following the steps above. A list will be created at the bottom of the screen containing all courses that will be added to the selected student.
6. A course can be removed from this list by clicking on the red Remove Course **✖** button.
7. Enter scores (grades and grade notes) for each course and indicate whether or not a course should be designated as Summer School and/or Credit Recovery. Grades and Grade notes can be entered for all courses, where appropriate, that are in the list of courses to be added for this student. Simply use the drop-downs (for alpha grading scales and grade notes) or type in appropriate values (for numeric values).

School Year	Course	Score	Summer School	Credit Recovery
2012-2013	Chemistry (00098)	72	☒	☒
2012-2013	Accounting (00120)	Pass	☒	☐

8. Use the green Save **💾** button at the top of the screen to save all of these courses and grades, along with the selected provider, to the student's permanent record.

Note: Courses may be entered in groups and saved periodically. For instance, if there is a great deal of data to enter for a single student, a single year of data may be entered and then saved before another year's worth of data is entered.

Add a Transferred In Course

1. From within the Counseling module, navigate to a student's Grades tab.
2. Select the green Add Classes **+** button to add a series of courses to the selected student.

3. If a transferred-in course already exists in the course catalog for a different year, simply specify the year to which you want to add it, and select the course from the list. If a yearly detail record does not exist for the specified year, it will be created.
4. For example, a student has a transcript from another school that needs to be added to the student's permanent record. The student took a course that is

already in the Course Catalog as a transferred-in course, but only for a past year.

- A. To add this to the current year (or any other year), simply select the appropriate year for the new record and select the course.
- B. Click the green Add Course **+** button to add this course to the student's list.

The screenshot shows the 'Classes' form with the following data:

School Year	Course	Score	Summer School	Credit Recovery
2012-2013	Chemistry (00098)	72	☒	☒
2012-2013	Accounting (00120)	Pass	☒	☐
2012-2013	Auto Body Repair 1 (00250)	None	☐	☐

- C. The course will be added not only to the student record, but also to the corresponding school year's course catalog record, if it did not already exist. The course detail record that is created will contain the same values as the *latest* version of the course. That is, if new details are automatically created for a year, the fields will be pre-populated with values from the most recent year.
- D. Note that once added to the course catalog, a transferred-in course will no longer have to be rolled over from one year to the next.

Note: Lunches and Study Halls do not have course details, and cannot be used as transferred-in courses.

Note: Assessments associated with transferred-in courses will not be carried over to the course's new yearly details. These can be added manually as needed.

5. If there is no existing course record for a transferred in record, click on the **"Add a course not found in this list"** link to add the course.

The screenshot shows the 'Classes' form with the following data:

School Year	Course	Score	Summer School	Credit Recovery
2019-2020	2-D Design (00573)		☐	☐

The link "Add a course not found in this list" is highlighted in blue.

- A. The page will refresh, displaying a form where the user may create a new course that can be added to this, and any other, student's permanent record.

Course Number:

Course Name:

Department:

School Level:

Description:

Gender: ☒ Co-Ed ☐ Male ☐ Female

Course Attributes:

☐ CTE ☐ Regents ☐ AP ☐ Elective ☐ Include in Attendance Policy ☐ Dual Credit

☐ Allow Multiple Course Selections ☐ Instructor must be from this department

Limit Course Recommendations To:

Subjects:

☐ English Language Arts ☐ Library ☐ Social Studies ☐ Mathematics ☐ Science ☐ Languages other than English ☐ Health ☐ Technology ☐ Family and Consumer Studies ☐ Career Development and Occupational Studies ☐ Art ☐ Physical Education ☐ Music ☐ Miscellaneous

Grading Type:

Included on Traditional Report Card:

GPA Credit:

Marking Period Credit:

Transcript Credit:

Post Secondary Credit:

GPA Weighting:

☐ Points ☐ Percentage

☐ Include in Transcript ☐ Include in Unweighted GPA ☐ Include in Weighted GPA ☐ Include in Unweighted GPA for Rank ☐ Include in Weighted GPA for Rank

Shared Course Code:

☒ Active

Skill Sets:

Select a Skill Set to Add:

- B. Complete all required fields (in pink), then Save  the record.
- C. The pending course record will display, and you may then add this course to the student's record.

2019-2020

Transferred In:

Grade:

☐ Summer School ☐ Credit Recovery

☒ Transferred In: 00 AMSTERDAM HS (270100010010)

Final Exams [Show Details](#)

- D. Click the Save  button to add the course to the student's record. The page will refresh again and will show the student's record, with the newly added course listed under the Classes section.

2019-2020

 Basketweaving (TR12) None

Transferred in from 03 Monroeville MS

Final Exams [Show Details](#)

6. Continue adding courses as desired, following the above steps.
7. A list will be created at the bottom of the screen containing all courses that will be added to the selected student. A course can be removed from this list by clicking on the red Remove Course  button.
8. Enter grades and grade notes for each course and indicate whether a course should be designated as Summer School and/or Credit Recovery. Grades and Grade notes can be entered for all courses, where appropriate, that are in the list of courses to be added for this student. Simply use the dropdowns (for alpha grading scales and grade notes) or type in appropriate values (for numeric values).

School Year	Course	Score	Summer School	Credit Recovery
 2012-2013	Chemistry (00098)	72	☒	☒
 2012-2013	Accounting (00120)	Pass	☒	☐
 2012-2013	Auto Body Repair 1 (00250)	None	☐	☐

Note: For years where assessment notes are enabled, a drop-down for assessment notes will appear. Users may enter a score, a note, or both.

- Use the green Save  button at the top of the screen to save all of these courses and grades, along with the selected provider, to the student's permanent record.

Note: Courses may be entered in groups and saved periodically. For instance, if there is a great deal of data to enter for a single student, a single year of data may be entered and then saved before another year's worth of data is entered.



2006-2007 GLOBAL ST. 9 REGENTS (115) Section 9 Period 1 Room 131 Semester 1 A,B Semester 2 A,B Katherine FULMAN 98

Marking Period Grades

Marking Period 1	(82)	82	Marking Period 2	(91)	100
* Good class participation			* keep up the good work		
* Cooperative, good attitude			* Lack of attendance negatively affects grade		
* Completes assignments satisfactorily					
Marking Period 3	(93)	98	Marking Period 4	(92)	87
			* Excellent work in/out of class		

Progress Report Grades

Marking Period 1/Q1	None	Marking Period 2/Q2
* Does not keep up on reading		* Lack of attendance negatively affects grade
* Have a great summer		
Marking Period 3/Q3	None	Marking Period 4/Q4
* Accepts constructive criticism		
* At risk of failure due to absences		

Permanent Record

Include in WOPA	Include in UOPA	Include in WRank	Include in URank
Include in transcript	1 OPA Credit	1 Transcript Credit	User entered class average
Not weighted			

[Hide details](#)

Final Exams

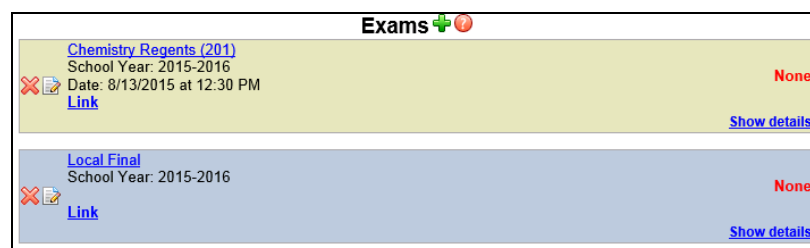
2006-2007	Regents Global Hist & Geo. (203)	91
	Link	
	Taken in English	

[Hide details](#)

Exams

At the end of the Classes section is a section for Exams, where you can see basic information about assessments which will appear on report cards. Most exams should be automatically tied to the courses in which they are given. If this has been set up in the Course Catalog, the exam will display under the course to which it is tied (as seen above).

In some cases, students may take an exam for a course they are not currently attending, such as when they retake a Regents assessment, or take their ACTs. These stand-alone exams (i.e. those not tied to a course) appear in the Exams section of the Grades tab.

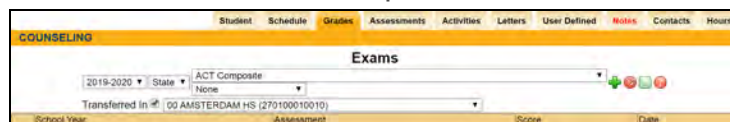


Exams  

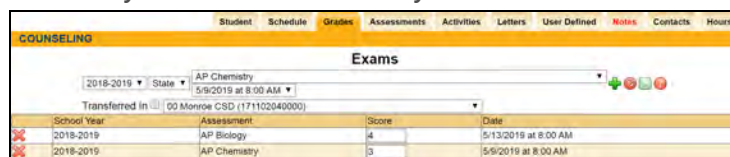
Chemistry Regents (201) School Year: 2015-2016 Date: 8/13/2015 at 12:30 PM Link	None	Show details
Local Final School Year: 2015-2016 Link	None	Show details

Add an Exam

1. Use the green Add Exam  button at the bottom of the Grades tab to add an exam. The tab refreshes with exam options.



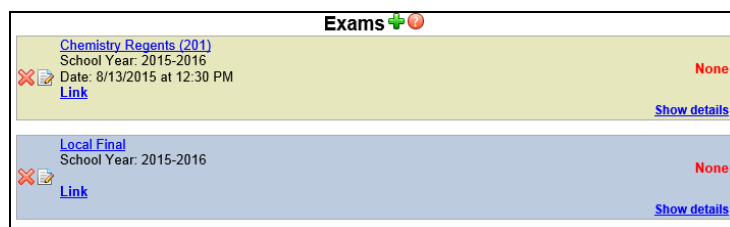
2. Select the appropriate values from the drop-down lists (school year, state vs. local, exam name), and verify that the Transferred In checkbox and provider options are accurate.
 - A. If you have rights to add assessment schedules, you will see an option to add a new date in the Date drop-down. This option allows you to add an exam to a date that was not already populated in the assessment schedule; dates added using this option will then become part of the assessment schedule and will be available for other students.
3. To add another exam, click the Add  button to the right of the Exam drop-down. The selected exam will be added to the list of exams, with blank fields where the user may enter scores for any of these exams.



School Year	Assessment	Score	Date
2018-2019	AP Biology	4	5/13/2019 at 8:00 AM
2018-2019	AP Chemistry	3	5/6/2019 at 8:00 AM

Note: For years where assessment notes are enabled, a drop-down for assessment notes will appear. Users may enter a score, a note, or both.

4. When you are finished adding exams, click the Save  button to add the exams and any scores that were entered to that student's record. The new assessments will be added to Exams list for the appropriate school year(s), sorted alphabetically by exam name. Any exam that is also included in another year will show up as a hyperlink, which the user can click to view related exam information.



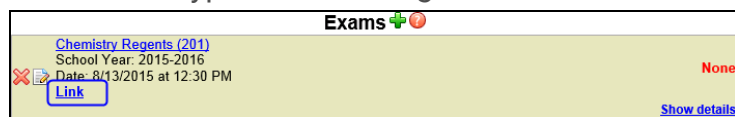
Exam Name	School Year	Date	Actions
Chemistry Regents (201)	2015-2016	8/13/2015 at 12:30 PM	 Link Show details
Local Final	2015-2016		 Link Show details

Note: You can use the Edit  button to make changes to an exam, or use the Delete  button to remove an exam from the **Counseling > Grades** tab.

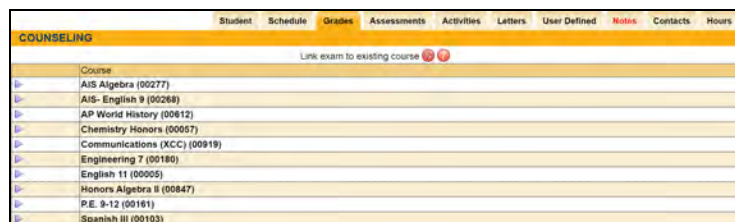
Link an Exam to an Existing Course

If an exam does not appear under its respective course, but should be linked to the course, use this procedure to make the connection.

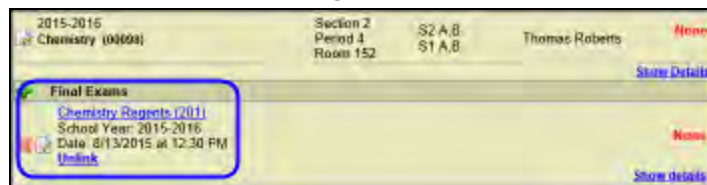
1. Click once on the **Link** hyperlink to the right of the exam name.



2. The tab will refresh with a listing of existing courses. It may be necessary to scroll up or down to see the full list.



3. Click once on the **Select** button to the left of the course you want to link the exam to. The tab will return you to the full list of classes, where the exam is now visible under the course listing.



Note: You can use the Edit  button to make changes to this exam, or use the Delete  button to remove this exam.

Note: To unlink this exam and make it stand-alone, click once on the **Unlink** hyperlink.

Assessments Tab

The Assessments tab displays a student's 3-8 Assessment scores and any User Defined Assessment records for users with the appropriate permissions. To change the view, select the appropriate radio button (if radio buttons do not appear, this means the user has permission to see only one type of record on this tab).

The 3-8 Testing view allows a user to manually add a student's 3-8 Assessment scores as well as see 3-8 Assessment scores that were imported through the Maintenance module. For information on the importing procedure, contact your SchoolTool liaison.

Use the radio buttons to view either 3-8 Testing data (the default view) or User Defined Assessment records.

CONTACTS SCHEDULE ATTENDANCE DISCIPLINE GRADES ASSESSMENTS ASSIGNMENTS USER DEFINED HOURS NOTES						
Student						
☒ 3-8 Testing ☐ User Defined Assessments						
School Year	Assessment	Date	Performance Level	Raw Score	Scale Score	
2017-2018	Grade 6 Math	5/1/2018	1	14	590	
2017-2018	Grade 6 ELA	4/10/2018	1	19	582	
2015-2016	Grade 4 Sci: Scale	5/25/2016	4	57	88	
2015-2016	Grade 4 Math	4/13/2016	2	33	299	
2015-2016	Grade 4 ELA	4/5/2016	2	20	289	
2014-2015	Grade 3 ELA	4/14/2015	2	26	294	
2014-2015	Grade 3 Math	4/22/2015	2	41	308	

Student Schedule Grades ASSESSMENTS Activities Letters User Defined Notes Contacts Hours						
COUNSELING						
☒ 3-8 Testing ☐ User Defined Assessments						
School Year	Assessment	Date	Performance Level	Raw Score	Scale Score	
 2017-2018	Grade 8 Sci: Scale	5/23/2018	3		75	
 2016-2017	Grade 7 ELA	3/27/2017	3	43	326	
 2016-2017	Grade 7 Math	5/1/2017	1	19	291	
 2015-2016	Grade 6 ELA	4/5/2016	2	37	311	

To add a new 3-8 Assessment, click the Add  button and enter the appropriate information for the assessment.

Student Schedule Grades ASSESSMENTS Activities Letters User Defined Notes Contacts Hours						
COUNSELING						
☒ 3-8 Testing ☐ User Defined Assessments						
School Year:	2019-2020	Assessment:	Grade 3 ELA	Date:		
Performance Level:	SELECT ONE	Raw Score:		Scale Score:		

To delete a 3-8 Assessment, click the Delete  button for that record. This action can only be performed from within the Counseling module.

To view user defined assessment records, select the appropriate radio button and use the drop-down to specify the type of user defined assessments to view. All records for the selected user defined assessment will be shown on the screen.

CONTACTS SCHEDULE ATTENDANCE DISCIPLINE GRADES ASSESSMENTS ASSIGNMENTS USER DEFINED HOURS NOTES						
Student						
☐ 3-8 Testing ☒ User Defined Assessments						
UDA Math  						
☒ 2013-2014						
TermName: Spring 2014						
TestName: Math Survey w/ Goals 2-5 NY V6 (CCSS)						
TestDurationInMinutes: 30						
TestPercentile: 40						
TypicalGrowth: 13						

To add a new user defined assessment record, click the Add  button and complete the fields as appropriate. Use the Edit  or Delete  buttons to modify or remove records as necessary.

Note: When adding a user defined assessment, the school year is a required field.

Add a New 3-8 Assessment

1. In the Counseling module, use Counseling Search to locate the student.
2. Click on the Assessment tab and select the 3-8 Testing radio option.

COUNSELING					
* 3-8 Testing * User Defined Assessments					
School Year	Assessment	Date	Performance Level	Raw Score	Scale Score
2017-2018	Grade 8 Sci: Scale	5/23/2018	3		75
2016-2017	Grade 7 ELA	3/27/2017	3	43	326
2016-2017	Grade 7 Math	5/1/2017	1	19	291
2015-2016	Grade 6 ELA	4/5/2016	2	37	311

3. To add a new 3-8 Testing record to a student's record, click the green Add  button to the right of the screen.
4. The screen will refresh allowing the user to select the School Year, Assessment type, and Performance Level from the drop down lists.
 - A. You may also enter a date for the assessment. Date is not required, but is recommended in order to ensure accuracy in SchoolTool Dashboards.
5. Enter the Raw Score (required; 0-100) and Scale Score (required; 0-1000). Each 3-8 Assessment record must contain at least one of the following: Performance Level, Raw Score, or Scale Score.

COUNSELING					
* 3-8 Testing * User Defined Assessments					
School Year:	2019-2020	Assessment:	Grade 3 ELA	Date:	
Performance Level:	SELECT ONE	Raw Score:		Scale Score:	

6. Click the Save  button to save the 3-8 Assessment. You may click the cancel  button to cancel.

Note: You may print an individual student's 3-8 Assessment from within the 3-8 Testing Tab by using the Print button or you can print the report from the Report sub-module. The Reports sub-module allows you to search the Elementary Assessment Report by All Students, Per Homeroom, Per Grade, By Student as well as Sort by: Student, Homeroom, Counselor, Grade, or Zip Code.

Edit a 3-8 Assessment

1. In the Counseling module, use the Counseling Search to locate the student.
2. Click on the Assessments tab and select the 3-8 Testing radio option.
3. To edit a 3-8 Testing to a student's record, click the Edit  button to the right of the screen.
4. The screen will refresh allowing to select the School Year, Assessment type, Performance Level from drop down list, enter the Raw Score (required; 0-100) and Scale Score (required; 0-1000). Each 3-8 Assessment record must contain at least one of the following: Performance Level, Raw Score, or Scale Score.
5. Click the Save  button to save the 3-8 Assessment. You may click the Cancel  button to cancel .

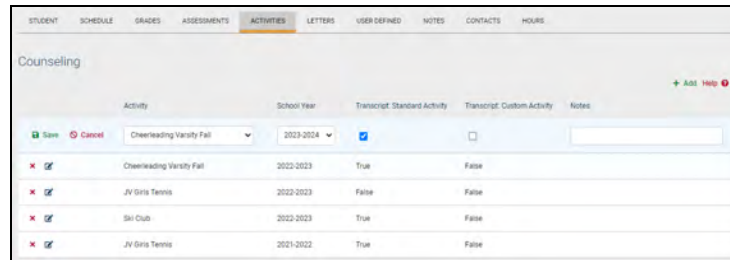
Activities Tab

The Activities Tab allows a user to select an activity for the student from a list of Activities previously set up. You will have the option to have the Activity included in the transcript and add additional notes regarding this activity. The **Activities** Tab is also Historical and allows you to see previous years' activities.

STUDENT	SCHEDULE	GRADES	ASSESSMENTS	ACTIVITIES	LETTERS	USER DEFINED	NOTES	CONTACTS	HOURS
Counseling									
				Activity	School Year	Transcript: Standard Activity	Transcript: Custom Activity		Notes
X				Cheerleading Varsity Fall	2023-2024	True	False		
X				Cheerleading Varsity Fall	2022-2023	True	False		
X				JV Girls Tennis	2022-2023	False	False		
X				Ski Club	2022-2023	True	False		
X				Jr Girls Tennis	2021-2022	True	False		

Add or Edit an Activity

1. To edit an existing Activity on a student's record, click the Edit  button to the left of the activity and modify as appropriate. Click the Save  button to save the activity or click the Cancel  button to cancel. To add a new Activity to a student's record, click the green Add  button to the right of the screen.
2. Select the appropriate activity from the available drop down list. If an Activity does not appear in the drop-down list, it will need to be added by first going to **Counseling > Activities** sub-module and creating it.



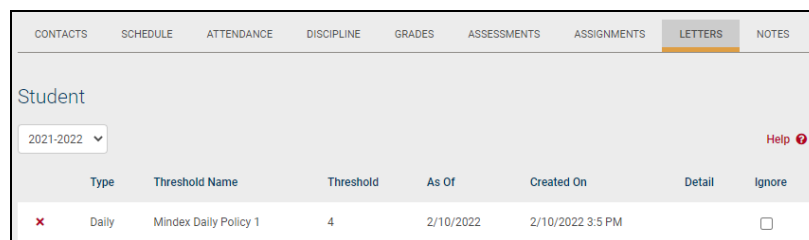
Activity	School Year	Transcript Standard Activity	Transcript Custom Activity	Notes
Cheerleading Varsity Fall	2023-2024	☒	☐	
Cheerleading Varsity Fall	2022-2023	True	False	
JV Girls Tennis	2022-2023	False	False	
Ski Club	2022-2023	True	False	
JV Girls Tennis	2021-2022	True	False	

3. After selecting the Activity from the drop-down list, make sure the appropriate school year displays (defaults to current year). Use the checkboxes to specify whether or not this Activity on transcripts as either the Standard Activity (shows in the "Activities" section) or a Custom Activity (shows in the "Custom Activities" section) on some transcript formats). You may also enter an Activity Note.

Letters Tab

On the Letters tab of a Student Record, users will see the student's Attendance Letter history. The list is read-only unless the user has permission to delete letters or mark them as ignored, and may be sorted by any column. Users may view other years' Attendance Letters by using the drop-down menu.

Users with the appropriate permission may delete any letter from the Letters tab. If this permission is enabled, a Delete  button will appear next to each letter in the list.



Type	Threshold Name	Threshold	As Of	Created On	Detail	Ignore
 Daily	Mindex Daily Policy 1	4	2/10/2022	2/10/2022 3:5 PM		☐

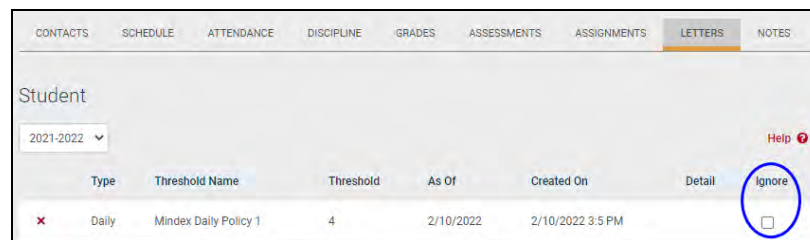
The Attendance Letters history shows the following information:

- **Type:** Displays the policy type that was used for that letter (this is determined based on the Attendance Policy settings in Maintenance). The values shown here may be Daily, Course, or Tardy, depending on the type of policy.
- **Threshold Name:** The name of the Attendance Policy stage that was used to generate this letter.
- **Threshold:** Shows the number of misses used for that particular Attendance Policy threshold.
- **As Of:** Reflects the date entered by the user when running the Attendance Letters search
- **Created On:** Displays the date on which the user actually generated that letter
- **Detail:** Provides details about the course for which the letter was run. The details, which are separated by commas, are Course ID, Course Name, and Section Number (SN), respectively.
- **Ignore:** When checked, a letter will be marked as “ignored” and SchoolTool will behave as though the letter was never sent. When a letter is ignored, the comment entered by the user as the reason for ignoring the letter will be displayed in a second row.

Details will only display when the policy Type is Course; if the Type is Daily or Tardy, the Details field will be blank.

Users with the appropriate permissions may mark a student's attendance letter as “ignored.” When a letter is marked as “ignored,” SchoolTool will keep the historical record to indicate that the letter was sent. However, when determining which students need attendance letters, SchoolTool will behave as though that particular letter was never sent.

To ignore an attendance letter, click the Ignore checkbox on the right side of the screen for the letter you wish to ignore.



In the pop-up window that appears, enter a brief comment to indicate a reason for ignoring the letter and click OK to continue.



Ignore Comment

Please enter a reason to ignore this letter:

OK CANCEL

When a letter is marked as “ignored,” the letter will display on the student's Letters tab in gray text. To remove the “ignore” status, simply uncheck the Ignore checkbox (this will also remove the comment).

CONTACTS

SCHEDULE

ATTENDANCE

DISCIPLINE

GRADES

ASSESSMENTS

ASSIGNMENTS

LETTERS

NOTES

Student

2021-2022

Help

Type	Threshold Name	Threshold	As Of	Created On	Detail	Ignore
 Daily	Mindex Daily Policy 1	4	2/10/2022	2/10/2022 3:5 PM		☒

corrected data

User Defined Tab

The User Defined tab is available on the Person Record for students, residents, or faculty. This tab displays any active user defined screens created in Maintenance. These screens are created and configured by the district and may contain any number of custom fields and field types. Select a user defined screen from the drop-down menu to view a list of all active records for that screen.

If the individual has data entered for any user defined screen, this information will appear in read-only mode on this tab. Click Show History to show all records for that screen, including inactive records. Users can also click the Print  button to generate a report of that person's user defined screens.

Users with Edit permission may add, modify, or remove records. To modify an existing record, click the Edit button and modify as needed. Click the Delete button to permanently remove a record.

To add a new record, select the screen from the drop-down menu and click the Add button. A new record will open in edit mode. All required fields are highlighted in pink.

Enter information in each field as appropriate and Save the record when finished. Field types are indicated for all fields except drop-downs, and may include any of the following field types:

- Drop-down List
- Text
- Real (real numbers; can include decimal points)
- Integer (whole numbers only)
- Date
- Checkbox (Yes/No)

Active fields, field types, drop-down content, and maximum field lengths are specified in Maintenance for each user defined screen. Refer to the Maintenance Module documentation for detailed information on configuring a user defined screen.

All records must have a Start Date, which is used to indicate the date the record became active. If an End Date is entered, that indicates the date that record expires. Once the End Date has passed, the record will become inactive and will be visible when a user clicks “Show History.”

CONTACTS SCHEDULE ATTENDANCE DISCIPLINE GRADES ASSESSMENTS ASSIGNMENTS **USER DEFINED** HOURS NOTES

Student

Parking Assignments + Add Help

[Hide history](#)

☒ 10/11/2022 - Current

Application Date: 10/5/2021
Reviewed by (enter name): Carol N. Fitzhugh
Documents checked?: Yes
Approval Date: 10/6/2021
Lot Assignment: Senior Lot A
Permit Number: 1234
Notes: Sticker valid as of Monday 10/11/2021, acceptance packet delivered in homeroom

☒ 9/27/2021 - 9/29/2021

Application Date: 9/27/2021
Reviewed by (enter name): Carol N. Fitzhugh
Documents checked?: Yes
Approval Date:
Lot Assignment:
Permit Number:
Notes: Not approved - needs parent signatures and proof of insurance. Instructed to resubmit

Hours Tab

The Hours tab allows users to track hours for various student activities. This includes [Work-Based Learning hours](#) and [CTE Hours](#).

This tab also allows users to manage the master list of [categories](#) and/or [locations](#) that are available to any student in SchoolTool.

Adding Hours

To add hours for a student, begin by clicking the **Add Category/Location** + button above the appropriate Hours grid.

Student

Hours CTE Hours

Work-Based Learning

Category / Location

Internship / Ally's Accounting
Supervisor: Allison Andrews
Phone: (305) 999-8887
Notes about this location

Total Hours: 8.00
4.00

Date	Hours	Notes
2/10/2022	2.00	notes for 2/10
2/9/2022	2.00	Notes for this daily entry

In the pop-up that appears, begin by entering text to search for an existing category. A list of possible matches will appear as you type.

Work-Based Learning

Category:

Internship
Category Type: Work-Based Learning
Job Shadowing
Category Type: Work-Based Learning

ADD NEW CATEGORY

Location:

CANCEL

If a matching category is found, click the **Use** button to select it.

If no match is found, you can create a new one by clicking on the Add New Category button. Note that creating a new category from this area will add a category to the master Categories list that will be available for any student.

Work-Based Learning

Category:

Internship
Category Type: Work-Based Learning
Job Shadowing
Category Type: Work-Based Learning

ADD NEW CATEGORY

Location:

CANCEL

After selecting a category, you can specify a location or simply click **Continue** if you don't wish to assign a location.

To search for an existing location, simply begin typing in the Location field. As with Categories, click the Use button to select a location or click Add New Location to add a new one (again, adding a location from here will make that location available for any student).

The screenshot shows the 'Work-Based Learning' form. The 'Category' is set to 'Internship'. The 'Location' dropdown menu is open, displaying a list of locations: 'A Cut Above' (Supervisor: Michael Jones, Phone: (585) 555-1234), 'Ally's Accounting' (Supervisor: Allison Andrews, Phone: (585) 999-8887), and 'Aspirations Inc.' (Supervisor: Anna Jones, Phone: (585) 777-4444 Ext. 1023). An 'ADD NEW LOCATION' button is at the bottom of the dropdown. The 'Continue' button is highlighted with a blue box at the bottom of the form.

After selecting a category (and a location, if desired), click the Continue button.

The screenshot shows the 'Work-Based Learning' form after selecting a location. The 'Category' is 'Internship' and the 'Location' is 'Ally's Accounting'. The 'Continue' button is highlighted with a blue box at the bottom of the form.

You will be directed to the Hours Entry screen. If you selected a category/location combination that is already in use for this student, you will see the existing information associated with that category/location.

In the Hours Entry pop-up, you may enter notes for that category which may be displayed on certain reports (Employability Profile reports, CDOS reports, and some transcripts). Category notes are specific to that student for the selected category/location combination, and will not be shared with other students using that category, nor will they be shared with other categories or locations on that student's record. You may also change the category or location by clicking the Edit Category/Location  button near the top of the screen.

Note: If you select a category/location combination that already exists for that student, you will be taken to that category/location hours screen instead. Any existing hours for the original category/location will remain on the student's Hours tab and will not be modified.

Click the Add Hours  button to begin entering hours for this category. Fill in the fields in the row that appears. The Notes field for each row of hours is for informational purposes only and will not be displayed on reports.

Hours Entry

Category / Location: Internship / Ally's Accounting

Supervisor: Allison Andrews

Phone: (585) 999-8887

Notes: Notes about this location

230 characters remaining

Date	Hours	Notes
2/9/2022	2	Notes for this daily entry

229 characters remaining

After entering all appropriate information, click the Save  button to return to the student's Hours tab.

Once a category has been added to the student's Hours tab, you may use the Show/Hide  buttons to expand rows, click the Edit  button to add/edit category/location details and hours, or Delete  the row (you will not see a Delete  button if the row has hours associated with it; you must first delete all hour entries if you wish to remove a category/location).

Work-Based Learning +

EDIT CATEGORIES EDIT LOCATIONS

Category / Location

Internship / Ally's Accounting

Supervisor: Allison Andrews

Phone: (585) 999-8887

Notes about this location

4.00

Date Hours Notes

2/10/2022 2.00 notes for 2/10

2/9/2022 2.00 Notes for this daily entry

Job Shadowing / Franklin Tax & Accounting

Supervisor: David Franklin

Phone: (585) 555-3333 Ext 235

4.00

Managing Categories

Click on the **Edit Categories** button to view a list of all existing categories.

Work-Based Learning +

EDIT CATEGORIES EDIT LOCATIONS

Category / Location

Internship / Ally's Accounting

Supervisor: Allison Andrews

Phone: (585) 999-8887

Notes about this location

4.00

Date Hours Notes

2/10/2022 2.00 notes for 2/10

2/9/2022 2.00 Notes for this daily entry

Job Shadowing / Franklin Tax & Accounting

Supervisor: David Franklin

Phone: (585) 555-3333 Ext 235

4.00

A pop-up will appear, displaying all categories.

Type	Category
Community Service	Event Assistance
Community Service	Volunteer
Work-Based Learning	Internship
Work-Based Learning	Job Shadowing

Click Add **+** to create a new category. You will be prompted to select an hours Type (current options are Work-Based Learning or Community Service) and enter a Category Name.

Click the Delete **X** button to delete a category. Note that categories can only be deleted if they are not tied to any students.

To modify a category, click the Edit button and make the necessary changes. Keep in mind that changes to a category will impact any other students who are already associated with that location.

Managing Locations

Click on the **Edit Locations** button to view a list of all existing locations.

A pop-up will appear, displaying all locations. Click Add **+** to create a new location.

Edit Locations

</

If a location is in use, you may click on the Show Students  button to view a list of all students associated with this location. Locations can only be deleted if they are not tied to any student.

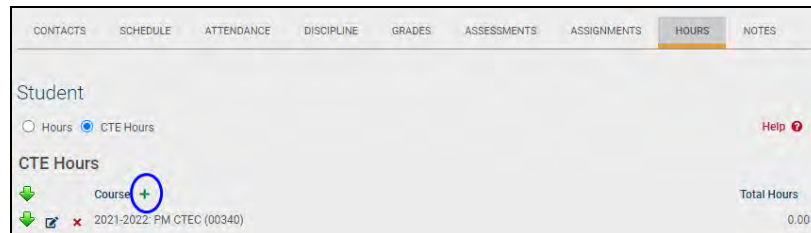
Students
The following students are located at Wegmans East Ave Pharmacy: - Adams, Aaron J (25372) - Turner, Jason M (19484)

To modify details for a location, click the Edit  button and make the necessary changes. Keep in mind that changes to a location in this area will impact any other students who are already associated with that location.

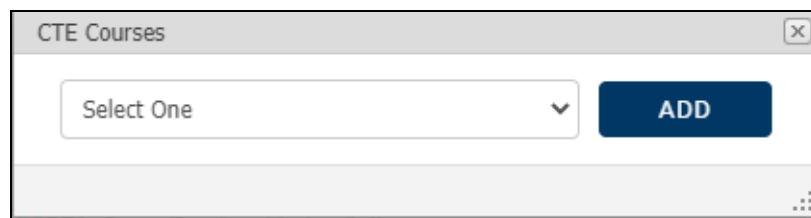
Edit Location	
Warning: Any changes made will affect other students	
Location:	Ally's Accounting
Supervisor:	Allison Andrews
Phone:	(585) 999-8887
Ext:	
UPDATE	

CTE Hours

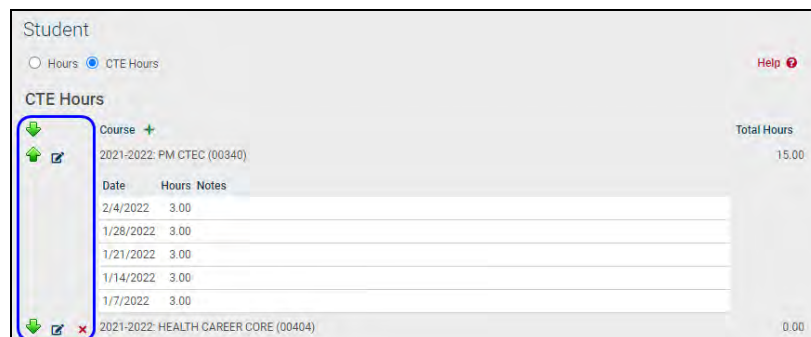
To enter CTE Hours, begin by clicking the Add Course **+** button to select a CTE course.



A pop-up will appear with a drop-down list of all courses on that student's schedule that are designated as CTE courses. Select the appropriate course and click the Add button.



The course will be added to the student's Hours tab. You may use the Show/Hide **↓↑** buttons to expand rows, click the Edit **✎** button to add/edit hours, or Delete **✖** a course if it does not have hours associated with it (you may not delete a row that has hours associated with it; you must first delete all hour entries if you wish to remove a course).



To add CTE course notes and view or edit hours, click the Edit **✎** button for the appropriate row.

Student

☐ Hours ☒ CTE Hours Help ?

CTE Hours

Course +

2021-2022: PM CTEC (00340)

Date Hours Notes

2/4/2022	3.00	
1/28/2022	3.00	
1/21/2022	3.00	
1/14/2022	3.00	
1/7/2022	3.00	

2021-2022: HEALTH CAREER CORE (00404)

Total Hours

15.00

0.00

In the Hours Entry pop-up, you may enter notes for that course which may be displayed on certain reports (Employability Profile reports, CDOS reports, and some transcripts). These notes are specific to that student for the selected course, and will not be shared with other students in that course, nor will they be shared with other courses on that student's record.

Hours Entry

Course: 2021-2022: PM CTEC (00340)

Notes:

216 characters remaining

Click the Add Hours + button to begin entering hours for this course. Fill in the fields in the row that appears. The Notes field for each row of hours is for informational purposes only and will not be displayed on reports.

After entering all appropriate information, click the Save  button to return to the student's Hours tab.

Managing Categories and Locations

Users with appropriate permissions will see Edit Categories and Edit Locations buttons on the Hours tab. Clicking on these buttons allows a user to manage the categories and/or locations that are available to any student in SchoolTool. Note that categories and locations that are currently associated with students' hours cannot be deleted.

Editing Categories

Click on the **Edit Categories** button to view a list of all existing categories.

Category / Location	Supervisor	Phone	Notes
Internship / Ally's Accounting	Supervisor: Allison Andrews	Phone: (585) 999-8887	Notes about this location
Job Shadowing / Franklin Tax & Accounting	Supervisor: David Franklin	Phone: (585) 555-3333 Ext: 235	

A pop-up will appear, displaying all categories.

Type	Category
Community Service	Event Assistance
Community Service	Volunteer
Work-Based Learning	Internship
Work-Based Learning	Job Shadowing

Click Add **+** to create a new category. You will be prompted to select an hours Type (current options are Work-Based Learning or Community Service) and enter a Category Name.

Type: Work-Based Learning

Category Name:

SAVE CANCEL

Click the Delete **X** button to delete a category. Note that categories can only be deleted if they are not tied to any students.

To modify a category, click the Edit  button and make the necessary changes. Keep in mind that changes to a category will impact any other students who are already associated with that location.

Editing Locations

Click on the **Edit Locations** button to view a list of all existing locations.

Work-Based Learning +

EDIT CATEGORIES EDIT LOCATIONS

Category / Location

☒ Internship / Ally's Accounting
 Supervisor: Allison Andrews
 Phone: (585) 999-8887
 Notes about this location

Date Hours Notes
 2/10/2022 2.00 notes for 2/10
 2/9/2022 2.00 Notes for this daily entry

☒ Job Shadowing / Franklin Tax & Accounting
 Supervisor: David Franklin
 Phone: (585) 555-3333 Ext. 235

Total Hours: 8.00

4.00

4.00

A pop-up will appear, displaying all locations. Click Add + to create a new location.

Edit Locations

+ Help

Location	Supervisor	Phone
☒ A Cut Above	Michael Jones	(585) 555-1234
☒ Ally's Accounting	Allison Andrews	(585) 999-8887
☒ Aspirations Inc.	Anna Jones	(585) 777-4444 Ext. 1023
☒ Buggles Day Care		(585) 444-8888
☒ MCSD Supply Inventory	Nancy Smith	(585) 555-8889
☒ Mindex CSD Administration	Joseph Jones	
☒ Mindex Pediatrics	Diane Martin	(585) 555-7878
☒ Mindex Recreation Center	Mitchell Doe	(585) 555-2323

If a location is in use, you may click on the Show Students  button to view a list of all students associated with this location. Locations can only be deleted if they are not tied to any student.

Students

The following students are located at Wegmans East Ave Pharmacy:

- Adams, Aaron J (25372)
- Turner, Jason M (19484)

To modify details for a location, click the Edit  button and make the necessary changes. Keep in mind that changes to a location in this area will impact any other students who are already associated with that location.

Edit Location

Warning: Any changes made will affect other students

Location:

Supervisor:

Phone:

UPDATE

Notes Tab

Each person record contains a **Notes** tab where you can add other information about this person. For a student, you might add notes about club participation or record meetings with parents. This is also where Orders of Protection are added. Be careful about the confidentiality of the information you add, as some notes can be seen by all users.

Printing Student Notes

Users may print a report of all Student Notes listed on the Notes tab by clicking the Print  icon in the upper left corner of the Notes area. The report will include all notes that are visible to that user, and will display the note type, the dates the note was created and/or modified, the note text, and will indicate whether or not the note has any attachments.

If the user has permission to view Orders of Protection, the report will also include these notes. The report will include all Effective dates and Expiration dates indicated on the Order of Protection note.

Student Note Report
Billy Hall · Mindex HS · High School

Type: Building Only, Passed With Promotion

Created by Jerry Woolton on 8/7/2018 at 8:59:33PM
Modified by Jerry Woolton on 8/7/2018 at 8:59:35PM

Billy has been working to pass Math by attending extra tutoring sessions.

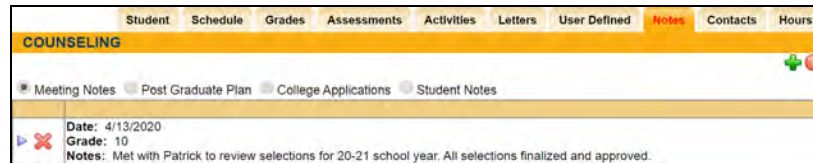
Attachments:

Adding or Deleting Notes

1. Use the radio buttons to the left of each note type to select that type. Each screen will have a green Add  button, which will allow you to enter that specific note.
2. Each note screen will contain a free-text field for information about the student, and a green Save  and red Cancel  button. Here are some examples of what you can do with each of the note types.
3. Use the red Delete  button to delete a note, or the Edit  button to make any changes.

Meeting Notes

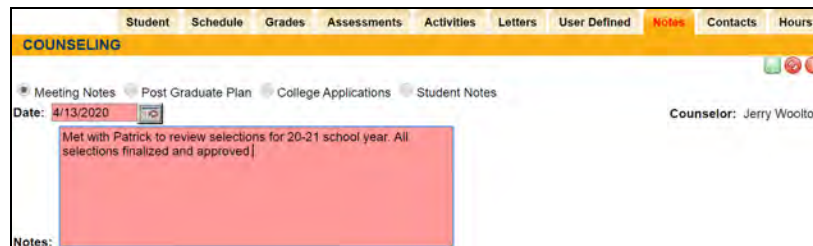
This is where Counselors might note details about any visits they've had with the student to discuss the student's class position, averages, schedule change requests, etc.



The screenshot shows the Counseling module interface with the following elements:

- Tabs: Student, Schedule, Grades, Assessments, Activities, Letters, User Defined, **Notes**, Contacts, Hours.
- Section: **COUNSELING**
- Sub-sections: Meeting Notes (selected), Post Graduate Plan, College Applications, Student Notes.
- Form fields:
 - Date: 4/13/2020
 - Grade: 10
 - Notes: Met with Patrick to review selections for 20-21 school year. All selections finalized and approved.

Use the blue Select > button to edit an existing note or click Add + to add a new one.



The screenshot shows the Counseling module interface with the following elements:

- Tabs: Student, Schedule, Grades, Assessments, Activities, Letters, User Defined, **Notes**, Contacts, Hours.
- Section: **COUNSELING**
- Sub-sections: Meeting Notes (selected), Post Graduate Plan, College Applications, Student Notes.
- Form fields:
 - Date: 4/13/2020
 - Grade: 10
 - Notes: Met with Patrick to review selections for 20-21 school year. All selections finalized and approved.
- Counselor: Jerry Woolton

Once the Note has been saved, the tab refreshes with a read-only view of the note.

Post Graduate Plan

This is where guidance counselors can note details about the student's plans after graduation.

The screenshot shows the Counseling module interface with the following elements:

- Navigation tabs: Student, Schedule, Grades, Assessments, Activities, Letters, User Defined, **Notes**, Contacts, Hours.
- Section header: **COUNSELING**
- Radio buttons: Meeting Notes, **Post Graduate Plan**, College Applications, Student Notes.
- Plan details:
 - Plan: Attend 4-year college in NYS
 - Update Received: 4/13/2020
 - Source: (empty field)
 - Notes: Patrick is interested in teaching math. He's currently interested in finding out more about the SUNY K-12 teaching programs. He will attend the career fair next week at the school and we will discuss further in our next meeting.

Use the blue Select > button to edit an existing note or click Add + to add a new one. There is a drop-down list with options and additional fields for more information.

The screenshot shows the Counseling module interface with the following elements:

- Navigation tabs: Student, Schedule, Grades, Assessments, Activities, Letters, User Defined, **Notes**, Contacts, Hours.
- Section header: **COUNSELING**
- Radio buttons: Meeting Notes, **Post Graduate Plan**, College Applications, Student Notes.
- Plan details:
 - Plan: Attend 4-year college in NYS (dropdown menu is open)
 - Update Received: 4/13/2020
 - Source: (empty field)
 - Notes: Patrick is interested in teaching math. He's currently interested in finding out more about the SUNY K-12 teaching programs. He will attend the career fair next week at the school and we will discuss further in our next meeting.

Once the Note has been saved, the tab refreshes with a read-only view of the note.

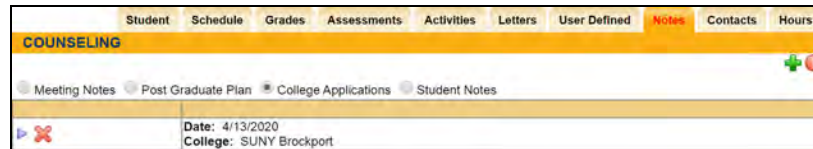
To run a Post Graduate Plan Report for an individual student. When in the **Counseling > Student Record > Notes Tab > Post Graduate Plan** area, use the Print Post Graduation Plan button to print all Post Graduate Plan notes for that student.

The screenshot shows the Post Graduate Plan Report for Billy Hall (1235) Mindex HS High School Class of 2018-2019. The report includes the following information:

- Plan: Attend 4-year college in NYS
- Update Received: 08/09/2018
- Source: (empty field)
- Notes: (empty field)

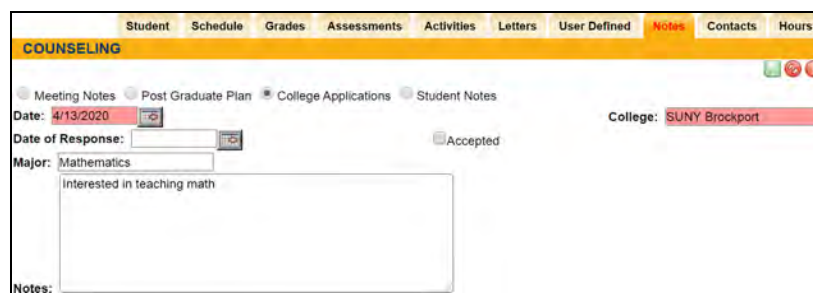
College Applications

This is where Counselors can note details about the applications a student has made to different colleges. Counselors might note if scholarships were applied for, if credits apply, and if/when a student has been accepted to a college.



The screenshot shows the 'COUNSELING' module with tabs for Student, Schedule, Grades, Assessments, Activities, Letters, User Defined, Notes, Contacts, and Hours. The 'Notes' tab is active, and the 'College Applications' sub-tab is selected. The form displays 'Date: 4/13/2020' and 'College: SUNY Brockport'. A blue 'Select' button and a green 'Add' button are visible.

Use the blue Select > button to edit an existing note or click Add + to add a new one.



The screenshot shows the 'COUNSELING' module with the 'College Applications' sub-tab. The form displays 'Date: 4/13/2020', 'College: SUNY Brockport', 'Major: Mathematics', and a text area with 'Interested in teaching math'. The 'Accepted' checkbox is checked. The 'Notes' section is visible at the bottom.

Once the Note has been saved, the tab refreshes with a read-only view of the note.

Student Notes

This is where guidance counselors can note information about the student which doesn't fit into other areas, such as a family event which may affect grades, or a food allergy that other school staff needs to be aware of.

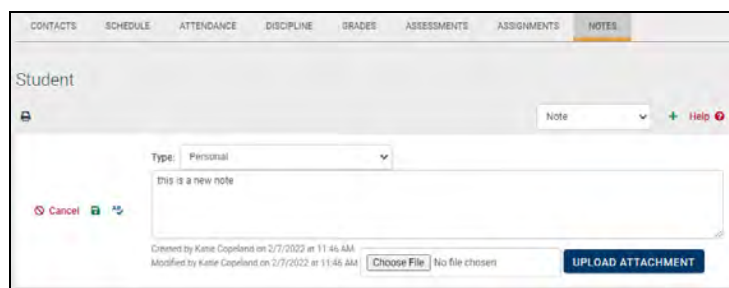
The screenshot shows the 'COUNSELING' module interface. At the top, there is a navigation bar with tabs: Student, Schedule, Grades, Assessments, Activities, Letters, User Defined, Notes (highlighted in red), Contacts, and Hours. Below this, there is a sub-navigation bar with tabs: Meeting Notes, Post Graduate Plan, College Applications, and Student Notes (selected). The main content area displays a list of student notes. The first note is titled 'Type: Order of Protection' and contains the text 'OOP pending; guardian to provide copy of order once confirmed.' It has an 'Expiration Date: 4/10/2020' and was created by Jerry Woolton on 4/10/2020 at 2:18 PM. The second note is titled 'Type: Building Only, Not Passed With Promotion' and contains the text 'Patrick is working hard to improve in math by taking advantage of review sessions. Tutoring is also an option but so far he has declined this offer.' It was created by Jerry Woolton on 4/10/2020 at 2:14 PM and modified by Jerry Woolton on 4/10/2020 at 2:14 PM. A 'Note' dropdown menu is visible on the right side of the interface.

There are two (2) kinds of Student Notes: Note, which contains general information, and Order of Protection, which contains custody-related information.

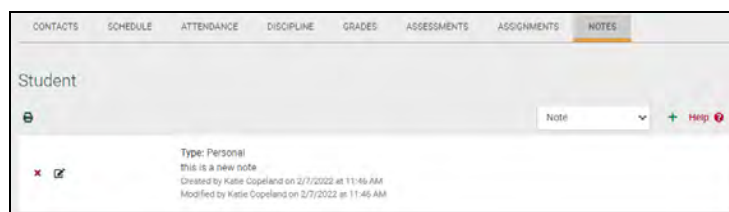
Depending on your permissions, you may or may not be able to add/view Orders of Protection.

General Notes

1. Click once on the green Add Note **+** button.
2. Select a Note type. There are four (4) types of General Notes:
 - A. Global – which, when saved, are available to all SchoolTool users.
 - B. Building Only, Not Passed with Promotion – which become a part of the student's record only until he/she advances to the next building. Notes are only visible for the student's most recent official enrollment location.
 - C. Building Only, Passed with Promotion – which, when saved, become a part of the student's record and remain as he/she advances to the next building.
 - D. Personal – which are only available to the user that entered the note.
3. Enter the note content in the free-text area. This field will accept up to 1,000 characters.



4. Add any supporting documents by clicking once on the Browse button and locating a file on the hard drive. Files may be any format (Word documents, spreadsheets, HTML, emails, etc), and there is no limit to the number of attachments which may be included. Once a file is located, it must be uploaded to SchoolTool in order for it to be saved with this note.
5. Once the Note is saved, the tab will refresh showing the notes in read-only mode.



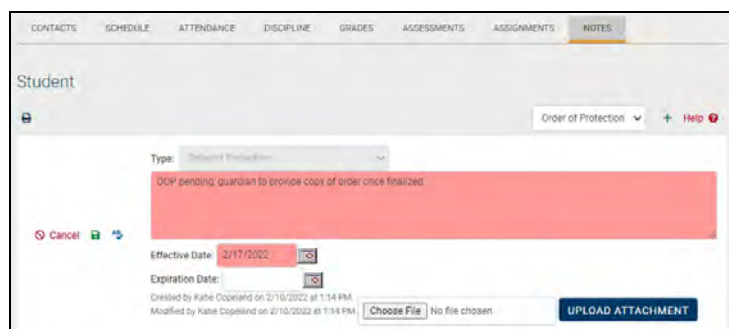
6. The Notes tab title will display a green circle to indicate that “new” notes exist on that student's record. Notes are considered new for a specified number of days after they have been created or modified, as defined by the district.

The Notes tab title will display a red circle when an active Order of Protection note exists, regardless of whether or not new notes exist.

7. Use the Delete  and Edit  buttons to remove or make changes to existing notes.

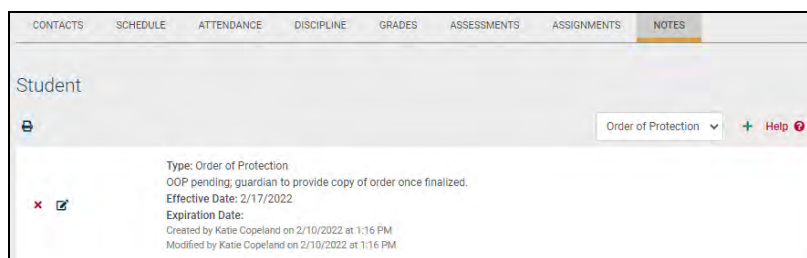
Orders of Protection

1. Select Order of Protection from the drop-down list at the right of the tab.
2. Click once on the green Add Note  button. An Order of Protection record will appear.



The screenshot shows the 'Student' tab in the application. The 'Order of Protection' dropdown is selected. A red box contains the text: 'Type: Order of Protection', 'OOP pending, guardian to provide copy of order once finalized.', 'Effective Date: 2/17/2022', and 'Expiration Date:'. Below the red box, there is a 'Cancel' button, a green 'Add Note' button, and a blue 'Upload Attachment' button. A small text area at the bottom shows 'Created by Katie Copeland on 2/10/2022 at 1:14 PM' and 'Modified by Katie Copeland on 2/10/2022 at 1:14 PM'.

3. Complete the Order of Protection:
 - A. Type a free-text description (required) of the order in the box under the word Type.
 - B. Enter an Effective Date (required). Type the date manually in the mm/dd/yyyy format, or use the pop-up calendar.
 - C. Enter an Expiration Date (if any). Type the date manually in the mm/dd/yyyy format, or use the pop-up calendar.
 - D. Attach any digital supporting documents by using the Browse and Upload Attachment buttons.
4. Click once on the green Save  button to the left of the description comments box.



The screenshot shows the 'Student' tab in the application. The 'Order of Protection' dropdown is selected. The record is now saved and displayed in the notes area. It includes the text: 'Type: Order of Protection', 'OOP pending, guardian to provide copy of order once finalized.', 'Effective Date: 2/17/2022', and 'Expiration Date:'. Below this, it shows 'Created by Katie Copeland on 2/10/2022 at 1:16 PM' and 'Modified by Katie Copeland on 2/10/2022 at 1:16 PM'. There is a red 'X' icon and a green 'Add Note' button to the left of the record.

Once the Order of Protection has been saved, the Notes tab will display a red circle, alerting users that there is an Order of Protection for this student.

Orders of Protection can be Edited  and Deleted  as necessary.

The Created By and Modified By audit tracking will update as users add and update this information.

Printing Student Notes

Users may print a report of all Student Notes listed on the Notes tab by clicking the Print  icon in the upper left corner of the Notes area. The report will include all notes that are visible to that user, and will display the note type, the dates the note was created and/or modified, the note text, and will indicate whether or not the note has any attachments.

If the user has permission to view Orders of Protection, the report will also include these notes. The report will include all Effective dates and Expiration dates indicated on the Order of Protection note.

Student Note Report	
Billy Hall · Mindex HS · High School	
Type: Building Only, Passed With Promotion	
Created by Jerry Woolton on 8/7/2018 at 8:29:33PM	
Modified by Jerry Woolton on 8/7/2018 at 8:59:33PM	
Billy has been working to pass Math by attending extra tutoring sessions.	
Attachments:	

Contacts Tab

The **Contacts** tab gives users immediate access to this student's parents/guardians. Each contact associated with this student will appear on this tab.

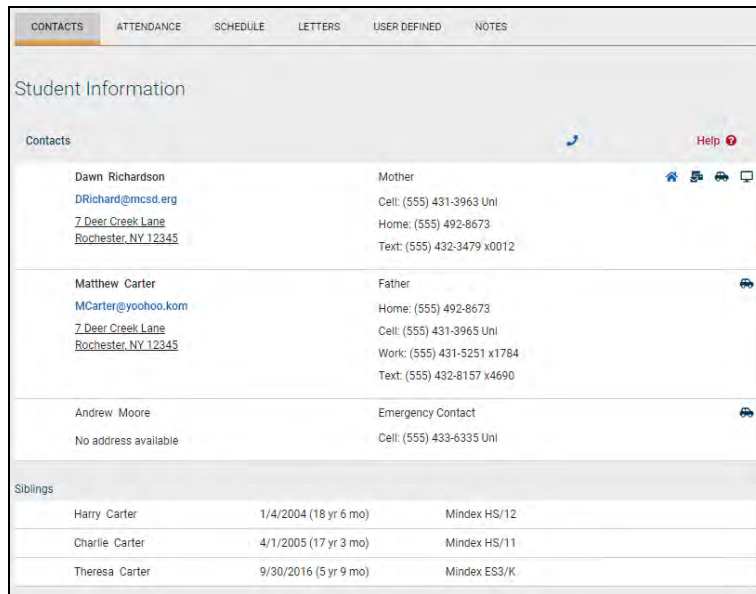
To view the Contact Call Order for a student, click the View Call Order  button at the top of the Contacts tab.

Additional buttons appear to the right of each contact, giving you more information about this contact and their rights/responsibilities. To see more information about the contact, hold the mouse over each button and tool tips will appear giving more details:

- The Primary  icon lets you know this contact is the primary guardian.
- The Receives Mail  icon lets you know this contact will receive report cards, discipline letters, and other mailings about this student.
- The Pickup  icon lets you know this contact is legally allowed to pick the student up at school.
- The email  icon lets you know this guardian may be contacted by email. Users may be able to click the icon to send an email to that person.
- The Custody Alert  icon lets you know that there is a custodial situation regarding the student.
- The Parent Portal  icon lets you know that this contact is allowed to see that student in their Home > My Home > Students tab (Parent Portal). Users with the appro-

ropriate permissions may be able to view that contact's login history (the maximum number of logins shown here is based on district settings).

- The Restricted View  icon indicates that the person has restricted access to contact information for that student. The adult is unable to see contact information for anyone who does not live in his/her household.



CONTACTS ATTENDANCE SCHEDULE LETTERS USER DEFINED NOTES

Student Information

Contacts      

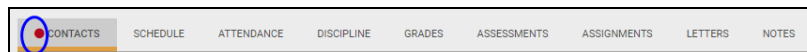
Dawn Richardson DRichard@mcsd.org 7 Deer Creek Lane Rochester, NY 12345	Mother Cell: (555) 431-3963 Uni Home: (555) 492-8673 Text: (555) 432-3479 x0012	   
Matthew Carter MCarter@yoofoo.com 7 Deer Creek Lane Rochester, NY 12345	Father Home: (555) 492-8673 Cell: (555) 431-3965 Uni Work: (555) 431-5251 x1784 Text: (555) 432-8157 x4690	
Andrew Moore No address available	Emergency Contact Cell: (555) 433-6335 Uni	

Siblings

Harry Carter	1/4/2004 (18 yr 6 mo)	Mindex HS/12
Charlie Carter	4/1/2005 (17 yr 3 mo)	Mindex HS/11
Theresa Carter	9/30/2016 (5 yr 9 mo)	Mindex ES3/K

The information on this tab is view-only. If changes need to be made, this information should be shared with anyone who maintains student and contact information.

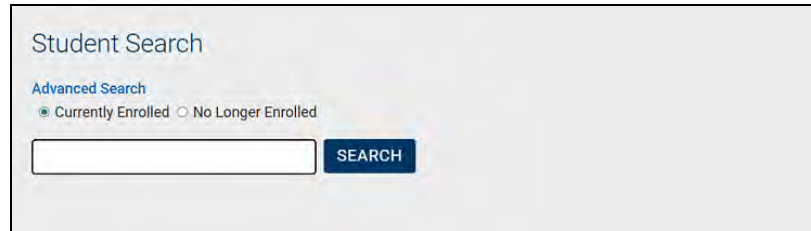
If there is a custody alert associated with that student, the Contacts tab will show a red circle.



CONTACTS SCHEDULE ATTENDANCE DISCIPLINE GRADES ASSESSMENTS ASSIGNMENTS LETTERS NOTES

Counseling > Search

The Counseling Search sub-module is the default when entering the Counseling module, and is introduced by a fairly typical student search screen. You may use your normal searching techniques to locate a particular student to work with, though note that in this sub-module, we have the ability to search only for currently enrolled students, or to look for students that were once actively enrolled.

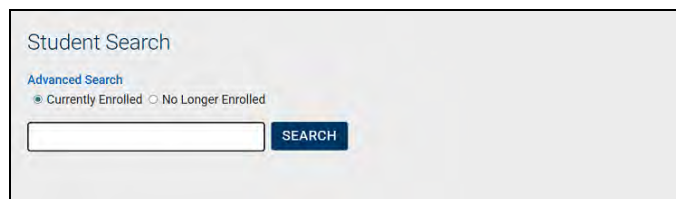


The screenshot shows a web interface titled "Student Search". Below the title is a link for "Advanced Search". There are two radio buttons: "Currently Enrolled" (which is selected) and "No Longer Enrolled". Below these is a text input field and a blue "SEARCH" button.

Searching for a Student

To search for a student from within the Counseling Search sub-module:

1. Select the appropriate Enrollment radio button option.
 - **Currently Enrolled:** Will search through only students that have a current and active enrollment record.
 - **No Longer Enrolled:** Will search through all students that have an enrollment record that is no longer active, allowing us to easily view past students.



This screenshot is identical to the one above, but the "No Longer Enrolled" radio button is selected instead of the "Currently Enrolled" one.

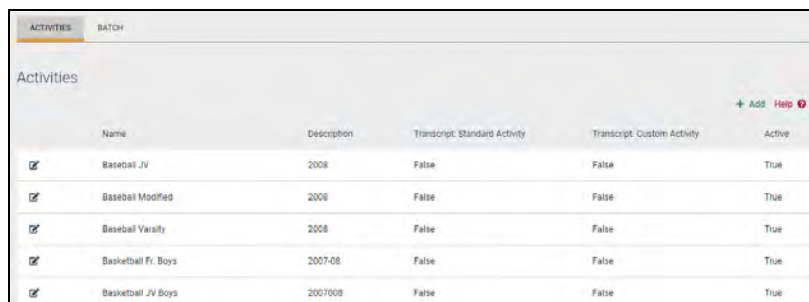
2. Use your normal searching method to locate the specific student you wish to view or edit.
 - Remember that you may type any part of a student's name, their contacts' last name, or student number. See the Introduction to SchoolTool documentation for specifics on searching.
 - Remember that you may use wildcards to assist in your search. See the Introduction to SchoolTool documentation for specifics.
 - You can click on the Advanced Search link to use the Batch Selector for more complex searches. Note that using this option will ignore what you may have chosen in step 1. See the Batch Selector User Guide for specifics.

3. Click on the **Search** button.
 - If your search results in no matches, a message “No Search Results” will display.
 - If your search results in one (1) match, the screen will refresh with that student’s record.
 - If your search results in multiple matches, the screen will be refreshed with all matches, and you may use the Select  button to view a specific student.

Counseling > Activities

The Activities sub-module is where you will add activities (such as Boys Varsity Basketball, Chorus, French Club, etc.). When creating new Activities using the **Activities** tab, you have the option to include it on the transcript and make it active (the default).

The Activities sub-module also has a **Batch** tab that allows you to batch add or remove an activity for a group of students using the Batch Selector.

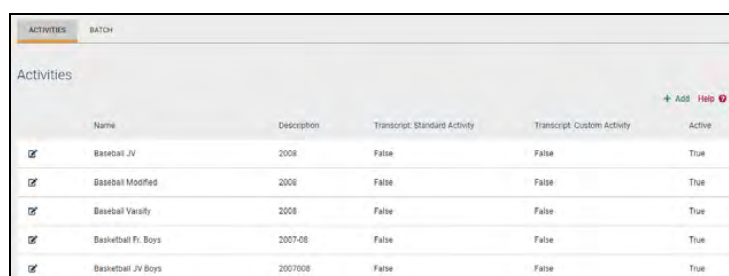


The screenshot shows the 'Activities' sub-module interface. At the top, there are two tabs: 'ACTIVITIES' (selected) and 'BATCH'. Below the tabs, the word 'Activities' is displayed. In the top right corner, there are links for '+ Add' and 'Help'. The main content is a table with the following columns: Name, Description, Transcript: Standard Activity, Transcript: Custom Activity, and Active. The table contains five rows of activities, each with a checkbox in the first column.

	Name	Description	Transcript: Standard Activity	Transcript: Custom Activity	Active
☒	Baseball JV	2008	False	False	True
☒	Baseball Modified	2008	False	False	True
☒	Baseball Varsity	2008	False	False	True
☒	Basketball Fr. Boys	2007-08	False	False	True
☒	Basketball JV Boys	2007/08	False	False	True

Add an Activity

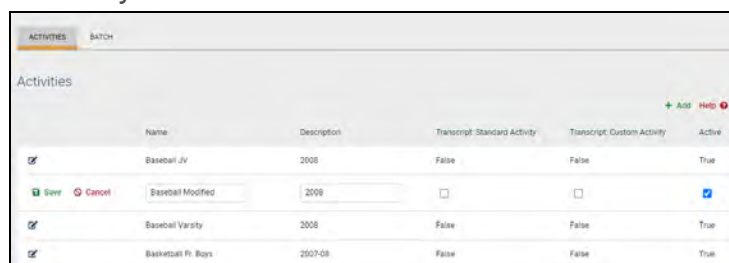
1. From the Counseling module, select the Activities sub-module.
2. Click on the Add  button in the upper right corner. To edit an existing Activity, click the Edit  button for the appropriate item and modify the fields as appropriate.
3. The screen will refresh allowing you to enter a Name and Description for the activity as well as indicate whether to include the Activity on the Transcript as either a Standard Activity (shows in the "Activities" section) or a Custom Activity (shows in the "Custom Activities" section on some transcript formats) and make it Active.



This screenshot is identical to the one above, showing the 'Activities' sub-module interface with the same table of activities.

	Name	Description	Transcript: Standard Activity	Transcript: Custom Activity	Active
☒	Baseball JV	2008	False	False	True
☒	Baseball Modified	2008	False	False	True
☒	Baseball Varsity	2008	False	False	True
☒	Basketball Fr. Boys	2007-08	False	False	True
☒	Basketball JV Boys	2007/08	False	False	True

4. Enter in the Activity's information and click the Save  button when done.

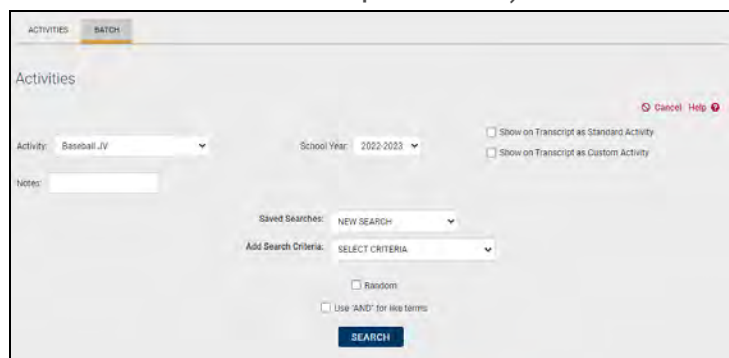


	Name	Description	Transcript: Standard Activity	Transcript: Custom Activity	Active
☒	Baseball JV	2008	False	False	True
☒	Baseball Modified	2008	☐	☐	☒
☒	Baseball Varsity	2008	False	False	True
☒	Basketball Fr. Boys	2007-08	False	False	True

Note: An Activity can be only be deleted if no students have been given that activity. If students have already been assigned to the Activity but it is no longer an activity, you can make it inactive by deselecting the Active checkbox.

Batch Add or Remove Activities

1. From the Counseling module, select the Activities sub-module and click on the **Batch** tab.
2. The screen will refresh and allow you to select the Activity and School Year from the drop-down lists and enter a Note (optional). You can also specify whether this Activity should show on transcripts as either a Standard Activity (shows in the "Activities" section) or a Custom Activity (shows in the "Custom Activities" section on some transcript formats).



Activities

Activity: Baseball JV School Year: 2022-2023

Notes:

☐ Show on Transcript as Standard Activity
☐ Show on Transcript as Custom Activity

Saved Searches: NEW SEARCH

Add Search Criteria: SELECT CRITERIA

☐ Random
☐ Use "AND" for like terms

SEARCH

3. Use the Batch Selector to locate the group of students to add this Activity to by using a Saved Search, Saved Results, or selecting Search Criteria. Click Search when you have selected your criteria.
4. In the list of results that appears, use the check boxes to select the students for whom you want to add or remove the activity.

Activities

Activity: Baseball JV School Year: 2022-2023

Notes:

Transcript Standard Activity
Transcript Custom Activity

Save Searches: NEW SEARCH

Activity: School Year:

Random
Use "AND" for the terms
MODIFY SEARCH

Found 16 students

Name	Student ID	Address	Phone	Age	Grade	Home Room
Murphy, Andrea B	52153	220 Lighthouse Court	W (555) 534-0772	6	K	347
Murphy, Arthur M	37082	41 Joana Drive	H (555) 402-1481	11	5	311
Murphy, Ashley R	57002	521 Monroe Bridge Road	H (555) 953-6574	13	7	23

- Click the appropriate action button to perform the batch operation:
 - Batch Add **+** button: allows users to batch add Activities for the specified Activity and School Year.
 - Batch Remove **×** button: removes the selected students from the specified Activity and School Year.
 - Cancel **⊘** button: cancels the current action and returns the user to the main Batch Activities screen.

Activities

Activity: Baseball JV School Year: 2022-2023

Show on Transcript as Standard Activity
Show on Transcript as Custom Activity

- SchoolTool will provide a confirmation when the operation is complete.

Activities

Activity successfully added.

Activity: Baseball JV School Year: 2022-2023

Show on Transcript as Standard Activity
Show on Transcript as Custom Activity

Counseling > Assessments

The Assessments sub-module functions like a maintenance area, allowing users to view, add, edit and schedule state and local exams. All NYS exams are provided for each school year with grading scales and passing grade parameters by your SchoolTool liaison. Local exams, such as mid-term and final exams, can be defined here, per district. Any Assessment listed in this sub-module is accessible to all school levels and buildings. Even local assessments are available to all users.

All assessments added here can then be tied to individual courses in the Course Catalog, as well as to competencies in the Competency sub-module, where they are used to help define graduation requirements.

1. To access the Assessments sub-module, click once on Assessments in the menu at the left. The **Assessments** tab will appear by default, listing all the existing state and local exams. The Schedule tab is for use with state exams only, and is where users will designate the date and time each exam is to be given. For all state exams, the exam name will be followed by the state-defined “short name” as defined within SchoolTool. Exams that are added manually will not include a short name.

Note: It is important to make sure state assessments have a scheduled date, if applicable. The date for assessments is required for State reporting.

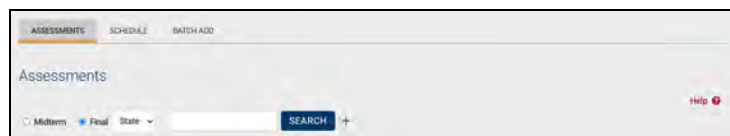


The screenshot shows the 'Assessments' tab in the SchoolTool interface. At the top, there are tabs for 'ASSESSMENTS', 'SCHEDULE', and 'BATCH ADD'. Below the tabs, the title 'Assessments' is displayed. There are radio buttons for 'Midterm' and 'Final', and a dropdown menu for 'State'. A search bar with a 'SEARCH' button and a plus icon is also present. A table lists existing assessments with columns for 'Name (Short Name)', 'Is State', and 'Is Final'.

Name (Short Name)	Is State	Is Final
> ACT English Test (ACT English)	Yes	Yes
> ACT Mathematics Test (ACT Math)	Yes	Yes
> ACT Reading Test (ACT Reading)	Yes	Yes
> ACT Science Reasoning (ACT Science Reasoning)	Yes	Yes

Add a New Local Assessment

1. Select the appropriate radio button for the exam you wish to add: **Midterm** or **Final**. If you are adding a Final exam, select the type: **State**, **Local** or **Both**, from the drop-down list.



The screenshot shows the 'Assessments' tab in the SchoolTool interface. At the top, there are tabs for 'ASSESSMENTS', 'SCHEDULE', and 'BATCH ADD'. Below the tabs, the title 'Assessments' is displayed. There are radio buttons for 'Midterm' and 'Final', and a dropdown menu for 'State'. A search bar with a 'SEARCH' button and a plus icon is also present.

- Click once on the green Add Assessment **+** button in the upper left corner of the Assessments tab. The Edit Assessment tab will appear.
- Enter assessment details. Type a free-text **Name** for this exam. This field is required.

- Choose the exam **Type** by clicking once in the appropriate radio button. Depending on whether you select Midterm or Final, more options may become available.

For a Local Midterm or Final

- Select the exam status as **Active** or not. Active (checked) is the default.

- Choose to **Include** this exam **in Transcript** or not. Include (checked) is the default.
- Select an appropriate **Grading Scale Type** from the drop-down list. These grading scales are controlled by district settings.

Note: Grading Scales can be added to the list at any time. Contact your district SchoolTool liaison for more information.

For a State Final

Edit Assessment

Name:

Type:
☐ Midterm ☒ Final
☒ State ☐ Local
Assessment Type:

☒ Active
☒ Include In Transcript
☐ Include In Data Warehouse Assessment Export

Grading Scale Type:

1. Select the Assessment Type from the drop-down list.
2. Select an appropriate Grading Scale Type from the drop-down list. These grading scales are controlled by district settings

Note: State assessments are automatically Active and Included in Transcripts.

3. Choose whether or not to include the assessment in the Data Warehouse Assessment Export. This option is checked by default.

☒ Include In Data Warehouse Assessment Export

Note: This option is only available for state final exams.

4. When you have finished adding the assessment details, click once on the green Save  button in the upper right corner of the Edit Assessment tab to save this local assessment to the list of other exams.

Edit Assessment

Name:

Type:
☐ Midterm ☒ Final
☒ State ☐ Local
Assessment Type:

☒ Active
☒ Include In Transcript
☒ Include In Data Warehouse Assessment Export

Grading Scale Type:

View or Modify an Existing NYS or Local Assessment

1. Locate the assessment to be viewed or modified by navigating to it or using the Search box.
2. Click once on the Select  button to the left of the assessment to be viewed or edited. The Edit Assessment tab will appear with the details displayed in edit mode.

Edit Assessment

Name:

Type: ☐ Midterm ☒ Final

☒ State ☐ Local Assessment Type:

☒ Active

☒ Include in Transcript

☒ Include in Data Warehouse Assessment Export

Grading Scale Type:

3. Review the information.
4. Make any desired changes to the assessment details.
5. Click once on the green Save  button to save the changes to this assessment.

Schedule a State Exam

New York State requires that all state assessments be given a scheduled date. This aids in the tracking and reporting of exam results, since some students may repeat the exam at different times of the year. You must schedule each state exam for each building where it is offered. If an exam is offered in the high school *and* middle school (i.e. Earth Science), you must schedule it twice: once in each building.

Note: SchoolTool adds NYS Regent Assessment dates using the schedule provided by New York State found on www.NYSED.gov. Assessment schedules are not added for any building school levels that already have an assessment scheduled for that month.

1. From the Assessments sub-module, click once on the **Schedule** tab.
2. Select the school buildings where the exam will be taken.

Assessments

ASSESSMENTS **SCHEDULE** BATCH ADD

	Building
>	Minindex ES1
>	Minindex ES2
>	Minindex ES3
>	Minindex HS
>	Minindex MS

3. Select the school year for which you are scheduling the exam.

Assessments

Minindex HS > High School

Save Cancel Help

Year	Dates	BEDS Day
> 1991-1992	07/01/1991- 06/30/1992	08/21/1991
> 1992-1993	07/01/1992- 06/30/1993	08/21/1992
> 1993-1994	07/01/1993- 06/30/1994	08/21/1993
> 2022-2023	07/01/2022- 06/30/2023	10/06/2022
> 2023-2024	07/01/2023- 06/30/2024	10/04/2023
> 2024-2025	07/01/2024- 12/30/2025	10/02/2024
> 2025-2026	12/31/2025- 06/30/2026	10/01/2025

4. Locate the final exam to be scheduled. You can search using the drop-down list for State, Local or Both, or type the exam name (or a key word) in the search field.

Assessments

Minindex HS > High School > 2025-2026

Save Cancel Help

Midterm Final State

State

Local

Both

SEARCH

1 2 3 4 5 6 7 8 9 10

5. To schedule the exam, click once on the green Add Schedule + button to the right of the exam row.
6. The exam details will refresh with fields where exam date and time may be entered.

Assessments

Minindex HS > High School > 2025-2026

Save Cancel Help

Midterm Final State

Regents

SEARCH

1 2 3 4 5

Regents Algebra I

Administered On

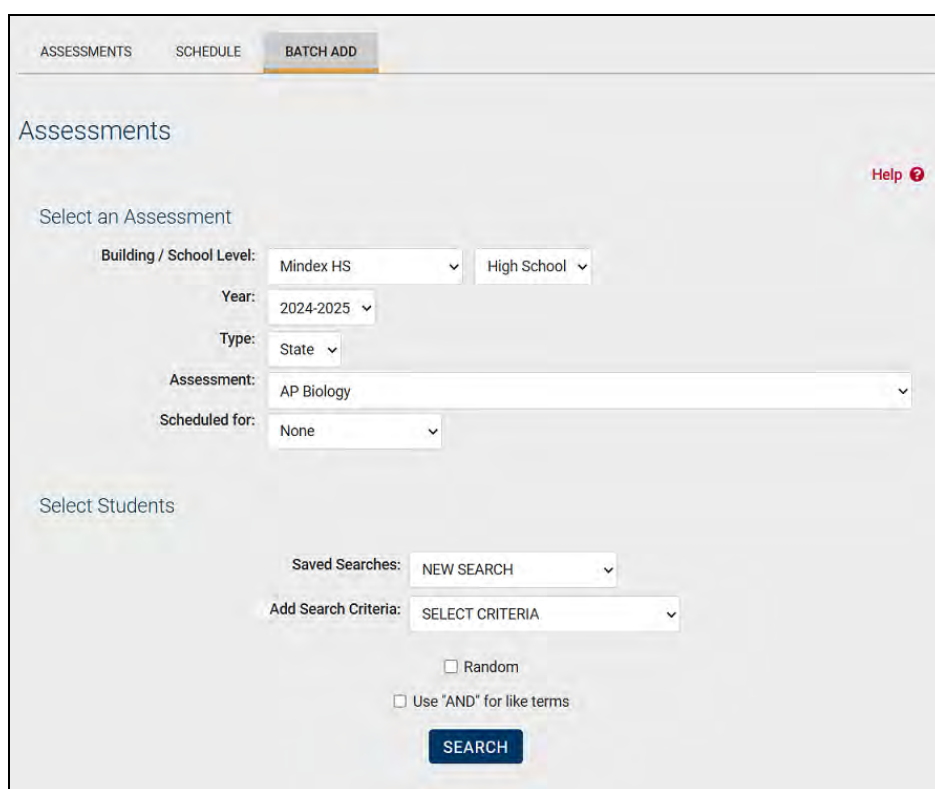
✖	8/19/2025	08	30	AM
✖	1/21/2026	01	15	PM
✖	6/17/2026	09	15	AM

7. Complete the **Administered On** details, including AM or PM.
 - For the date, you may enter the date manually using the dd/mm/yyyy format, or you may use the pop-up calendar.
 - For the time, use the drop-down lists to select the hour and minute combinations.
8. When you have finished, click once on the green Save  button in the upper right corner of the tab to save the Administered On (scheduled) date and time.

Note: Some districts have specific guidelines on how the Administered On dates are reported to New York State. It is recommended that the date entered in this area reflect the actual administration date. If some other date (the first day of a date range, such as Regents week, for example) is needed, an override date may be entered by the district in the **Maintenance** module, *not* in this area.

Batch Add Assessment

Use this area to add assessments to multiple students in a single operation.



The screenshot shows the 'Batch Add' tab in the 'ASSESSMENTS' section. The 'Assessments' sub-section contains a 'Select an Assessment' form with the following fields: 'Building / School Level' (with dropdowns for 'Mindex HS' and 'High School'), 'Year' (dropdown for '2024-2025'), 'Type' (dropdown for 'State'), 'Assessment' (dropdown for 'AP Biology'), and 'Scheduled for' (dropdown for 'None'). A 'Help' link is visible in the top right. The 'Select Students' sub-section includes 'Saved Searches' (dropdown for 'NEW SEARCH'), 'Add Search Criteria' (dropdown for 'SELECT CRITERIA'), checkboxes for 'Random' and 'Use "AND" for like terms', and a 'SEARCH' button.

1. Select the Year, Type, and Assessment.
 - A. **Building/School Level**– Use the building and school level dropdowns to locate the appropriate assessment schedules (assessment dates will only include dates scheduled for the selected building/school

level).

- B. **Year** – can be any school year, past or present. Default is current school year.
- C. **Type** – State or Local. Default is State.
- D. **Assessment** – The name of the assessment to be added based on previously selected Type. Defaults to first item in the list.

2. Use the Batch Selector to locate the student(s) you want to Batch Add.

ASSESSMENTS SCHEDULE **BATCH ADD**

Assessments Help ?

Select an Assessment

Building / School Level: Mindex HS High School

Year: 2024-2025

Type: State

Assessment: AP Chemistry

Scheduled for: 5/6/2025 at 8:00 AM

Select Students

Saved Searches: NEW SEARCH

Add Search Criteria: SELECT CRITERIA

MASTER SCHEDULE / COURSE SELECTION

Students: ☒ With ☐ Without Scheduled Courses

Building School Level: Mindex HS High School

School Year: 2024-2025

Department: Science

Course: AP CHEMISTRY (00198)

Section: ANY

Semester: ☒ Fall Semester ☒ Spring Semester

☐ Random

☐ Use "AND" for like terms

SEARCH

- Review the results list, select the students, and click Continue.

ASSESSMENTS SCHEDULE **BATCH ADD**

Assessments Help ?

Select an Assessment

Building / School Level: Mindex HS High School

Year: 2024-2025

Type: State

Assessment: AP Chemistry

Scheduled for: 5/6/2025 at 8:00 AM

Select Students

Saved Searches: NEW SEARCH

MASTER SCHEDULE / COURSE SELECTION

Students: ☒ With ☐ Without Scheduled Courses: -

Building School Level: Mindex HS High School

School Year: 2024-2025

Department: Science

Course: AP CHEMISTRY (00198)

Section: AP CHEMISTRY - Period: 2 - Section: 1

Semester: ☒ Fall Semester ☐ Spring Semester

☐ Random

☐ Use "AND" for like terms

MODIFY SEARCH **CONTINUE**

Found 20 students

☒	Name	Student ID	Address	Phone	Age	Grade	Home Room
☒	Anderson, Patrick	33167	34 Branding Iron Lane	H:(555) 434-2656	18	12	168
☒	Baker, Robert	57387	486 Telford Court	H:(555) 533-5368	17	11	5
☒	Collins, Shirley L.	33166	5 Branding Iron Lane	H:(555) 473-9604	18	12	2
☒	Green, Jennifer P	33420	3 William Drive	H:(555) 494-0985	17	11	156

- The screen will refresh displaying an entry area for each student with the options to enter the student's score, or check the options for absent, unscorable, or exempt.

Note: For years where assessment notes are enabled, a drop-down for assessment notes will also appear. Users may enter a score, a note, or both.

Student ID	Student	Assessment	Score
33167	Anderson, Patrick	AP Chemistry (00A01) on 5/6/2025 8:00:00 AM	☐ Absent ☐ Unscorable ☐ Exempt NONE
57387	Baker, Robert	AP Chemistry (00A01) on 5/6/2025 8:00:00 AM	☐ Absent ☐ Unscorable ☐ Exempt NONE

5. Enter the necessary scores and information and click Save  when done. The cancel button will cancel the Batch Add operation.
6. You will see a confirmation box appear indicating the number of student records that the assessment will be added to and if you wish to continue. Click the OK button if you are sure you want to add the assessments to the students' records.
 - A. An error message may display if grading information has not been entered in at least on of the four grading fields for all students or if an entered grade is out of the range for that assessment.
7. You will now see a read-only screen with the list of students who it added the assessments.

The following students received scores for the AP Chemistry assessment:

- Anderson, Patrick (33167)
- Baker, Robert (57387)
- Collins, Shirley (33166)
- Green, Jennifer (33420)

8. Use the Done  button to return to the main Batch Add screen.
9. Repeat these steps to add additional steps to other students.
10. To verify the Assessment, locate the student, go to the Grades tab, scroll to the bottom to locate the Exams area and you should see the Assessment that you just Batch Added.

Note: An error message will display if grading information has not been entered in at least one of the four grading fields or if the entered grade is out of the range for that assessment's grading scale. Save will not continue until these have been resolved.

Note: This feature is to Batch Add only. If assessments need to be removed from student records, you will have to delete them one student at a time.

Note: The Batch Add tab is permission based. If you do not see this tab, please contact your SchoolTool liaison.

Counseling > Auto Grade Advancement

The **Counseling > Auto Grade Advancement** sub-module is where you will automatically advance students from one grade to the next. Students should **not** be advanced to the new school year until all current-year grades have been entered and the school year has officially ended. **Once students have been advanced, it is not possible for you to reverse the advancement.** Take care when setting up options and selecting students before committing the advances.

When advancing one grade at a time, users should begin by advancing 12th grade (graduates) and work back to 1st grade (i.e., graduate 12th graders, then move 11th graders to 12th grade, then move 10th to 11th, and so on). If you choose to advance students in “ascending” order (i.e., 1st to 2nd, then 2nd to 3rd, and so on), you will see grade duplication on the screens. You will still be able to keep last year’s grades separate from this year’s grades (i.e., last year’s first graders who are now second graders will be separated from last year’s second graders who haven’t been advanced to third graders yet) by using the Expected Year of Graduation, but this requires the user to know the expected year of graduation for every grade. This area can also be used to end enrollments without advancing to another grade or graduating the students.

When using the “All” option to advance multiple grades, users should work with a single building at a time by advancing the entire building and then using the Class Of option to advance the highest grade in that building. The highest grade in each building will not automatically be advanced when “All” is selected; therefore other grades must be advanced first when using this option to avoid advancing a group of students more than once.

This section includes general instructions as well as further detail on how to advance specific groups of students: seniors, transitional students (from one building to another); it also describes what to do for students who are held back.

Advancing a Group of Students

General Instructions

1. Navigate to **Counseling > Auto Grade Advancement** and choose In District or Out of District (some options may or may not be available depending on this selection).
2. Use the pre-screen options to locate the students to be advanced. Click “Select Students” to use the batch selector.

Note The batch selector will also filter the results based on the options selected on the pre-screen.

- To advance all grades within a building school level, select “All” from the Grade drop-down (the school level drop-down will be unavailable when “All” is selected).

Note: Selecting “All” will advance only grades within that building; students whose next grade is in a different building will not be advanced. If the highest grade has not been advanced prior to performing the auto advance for other students in that building, select the appropriate Class Of option and manually perform the auto advance as needed.

- After using the pre-screen to set the appropriate options, the Auto Advance screen opens additional options at the top and a list of students at the bottom.
- Specify the details for the new enrollments that will be applied to all selected students.

Advance	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Adams	Aaron	W	21854		09
☒	Adams	Linda	E	20863		11
☒	Adams	Michael	A	23666		11
☒	Adams	Michelle	M	20890		10
☒	Adams	Sallie	N	21707		11

- If advancing all grades, select “Next Grade” from the Advance to Grade drop-down. This will automatically advance all selected students to the logical next grade unless they are in the highest grade within that building school level.
- To advance In District students, set the auto advancement details:
 - Select the Advance To Grade using the drop-down fields. This field contains values for each grade and includes an option for “Graduated” which should be used for graduating seniors. Select “End

Enrollments” and choose an appropriate exit code to end students’ enrollments without graduating them or advancing to another grade.

Note: When you select a value from this drop-down, the screen will refresh. Additional options may appear, or may become grayed out. Make sure you WAIT for the system to fully refresh before continuing.

- ii. Enter the Current Enrollment End Date and Next Enrollment Start Date. Enter the dates manually using the mm/dd/yyyy format, or use the pop-up calendar.

Keep in mind that there are rules regarding start and end dates.

- Rule #1: The Current Enrollment End Date and the Next Enrollment Start Date cannot be the same.
 - Rule #2: You cannot enter a Next Enrollment Start Date for a future date. Schooltool only allows active, official enrollment records with a current start date or a date in the past. Attendance will not start until the semester officially begins, though, so this will not be a problem.
 - Rule #3: You may not enter an End Date and Start Date that are both within the same school year using this feature. Students in these situations must be advanced manually.
- iii. Select the appropriate options for Homeroom (remove homeroom assignments, maintain existing homerooms, or automatically assign homerooms either randomly or alphabetically) and Counselor (maintain or remove existing counselor assignments). Homeroom and Counselor assignments are not maintained when students change buildings,

regardless of the options selected in either of these fields.

Note: When advancing a group of In District students with this feature, the Class Of, Graduation Date, and NYS Reported Grade fields are always rolled over from the student's previous enrollment record.

C. To advance Out of District students, set the auto advancement details:

- Advance students (Graduate 12th graders): All selected students will be either advanced or graduated as appropriate. All 12th graders will be graduated with the selected Exit Reason, and all other grades will be advanced to the next grade.
- Advance selected students: All selected students will be advanced to the next grade. Because these students are not graduating, the Exit Reason field is unavailable when this option is selected.
- Graduate selected students: All selected students will be graduated with the selected Graduation Reason. Because their enrollments will be ended and a new enrollment will not be created, the Next Enrollment Start Date field is unavailable when this option is selected. This option should be used only when graduating a student early.
- End Enrollments: All selected students will have their enrollments ended using the selected Exit Reason, without creating a new enrollment. This option should not be used for graduating students, as graduating exit codes are not available using this option.

Note: When advancing students in grades that do not have a "next grade" (e.g., UGE/Ungraded Elementary, UGS/Ungraded Secondary, Grade 14, etc.), those students' enrollments will not be modified. Enrollments must be modified manually to reflect the advancement.

6. Select the students who will be advanced using the above criteria. If the details selected do not apply to all students in the list, scroll through the list and deselect those who will need to be advanced with different details. For example, several students may be held back, or may advance to a different grade. These will need to be advanced separately.

Note: Because students with projected enrollments cannot be advanced automatically, the list of students to be advanced hides students with projected enrollments by default. These students can be viewed in the list by checking the “Show students with projected enrollments” option. Any student in the list with a projected enrollment will be displayed in Red, and cannot be selected for advancement.

7. When you have finished and are ready to advance the students, click once on the Advance Students  button in the upper right corner of the tab. The screen will refresh to display the current job details, including its status. The results of the job, including any errors, will be displayed on the screen. The Job Object History is available on the Auto Grade Advancement pre-screen, as well as from within **Maintenance > Application > Job Object History**.

Description	Status	Start Time	End Time
Auto Grade Advancement	Completed	5/27/2020 12:44:35 PM	5/27/2020 12:44:36 PM
Hide Results			
Auto Grade Advancement Row 3 of 3 (100%)			
Successes =3 Failures =0			

8. After the students have been successfully advanced the job status will state “Completed.” Repeat these steps for each group of students until all students have been advanced appropriately.

Note: If you are missing any information or have selected a date which SchoolTool cannot accept, a verification message will appear.

Advancing Specific Groups of Students:

Transitioning Students to the Next Building

Use this feature to advance students from one building in the district to the next (for example, transitioning 6th graders to Middle School or 8th graders to High School).

1. Navigate to **Counseling > Auto Grade Advancement** and select the appropriate options to locate the students to be advanced.



2. As soon as the screen refreshes with advancement options, the list of all students currently in the selected grade will appear. Use the check boxes next to each student's name to select them for advancement.
3. Set the auto advancement details:



	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Anderson	Janet	M	23692		08
☒	Black	Amy	M	20875		08
☒	Collins	Danny	J	23078		08
☒	Cook	Anthony	J	22110		08

- A. Select the appropriate building and grade from the **Advance To Grade** drop-down menus.

Note: After selecting the Advance to Grade value from the list, you must wait for the screen to fully refresh before continuing.

- B. Enter the Current Enrollment End Date and Next Enrollment Start Date. Enter the dates manually using the mm/dd/yyyy format, or use the pop-up calendar.

Keep in mind that there are rules regarding start and end dates.

- Rule #1: The Current Enrollment End Date and the Next Enrollment Start Date cannot be the same.
- Rule #2: You cannot enter a Next Enrollment Start Date for a future date. Schooltool only allows active, official enrollment records with a current start date or a date in the past. Attendance will not start until the semester officially begins, though, so this will not be a problem.
- Rule #3: You may not enter an End Date and Start Date that are both within the same school year using this feature. Students in these situations must be advanced manually.

C. Select the appropriate options for Homeroom (remove homeroom assignments, maintain existing homerooms, or automatically assign homerooms either randomly or alphabetically) and Counselor (maintain or remove existing counselor assignments).

4. Select the students who will be advanced using the above criteria.

Note: If the options selected in the top section do not apply to all students in the list, scroll through the list and deselect those who will need to be advanced with different details. For example, several students may be held back, or may advance to a different grade. These will need to be advanced separately.

5. When you have finished and are ready to advance the students, click once on the Advance Students  button in the upper right corner of the tab.

AUTO GRADE ADVANCEMENT

In District > Mindex HS > Middle > 08 > 2023-2024

Advance To Grade: Mindex HS 09 Homeroom: Remove

Current Enrollment End Date: 6/30/2020 Counselor: Remove

Next Enrollment Start Date: 7/1/2020

25 students found ☐ Show students with projected enrollments

Advance	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Adams	Karen	E	19525		08
☒	Anderson	Janet	M	23692		08
☒	Bell	Donna	H	20314		08

- After the students have been successfully advanced, the job status will display “Completed.” Repeat these steps as needed until all students have been advanced appropriately.

Advancing (Graduating) Seniors

- Navigate to **Counseling > Auto Grade Advancement** and select Grade 12 and the appropriate graduation year from the pre-screen. Use the radio buttons to choose all students in that grade or use the batch selector to select a specific group of students.

AUTO GRADE ADVANCEMENT

☒ In District ☐ Out of District

Building: Mindex HS

School Level: High School

Grade: 12

Class of: 2018-2019

☒ All Students ☐ Select Students

Search

- Click Search to continue. The screen will refresh with advancement options.
- Choose your advancement options in the top portion of the screen.
 - Select Graduated from the **Advance To Grade** drop-down field.

Note: Once you have selected an option from the list, you must WAIT for the screen to fully refresh before continuing.

- Set Homeroom and Counselor to “Remove” (this should be selected by default).
- Enter the **Current Enrollment End Date**. Enter the date manually using the mm/dd/yyyy format, or use the pop-up calendar.
- Select an exit reason from the **Exit Reason** drop-down list. This field contains only those exit reasons which are appropriate for graduation. The values in this list correspond to the NYS designated reasons for unenrollment, which are identified by the numeric codes accompanying each item in this

list.

Note: The Exit Reason drop-down list only allows you to select one exit reason at a time. You must advance seniors according to earned diploma type, advancing them group by group. For example, first advance all those graduating with a local certificate. Then advance all those graduating with a local diploma, then those with each type of Regents diploma, etc.

The screenshot shows the 'AUTO GRADE ADVANCEMENT' window. At the top, it says 'In District > Mindex HS > High School > 12 > 2019-2020'. Below this, there are two dropdown menus: 'Advance To Grade:' set to 'Graduated' and 'Current Enrollment End Date:' set to '8/30/2020'. A third dropdown menu, 'Exit Reason for Graduating Students:', is set to '238 - Graduated: earned Regents Diploma with Adv Designation Math and Science'. Below these menus, there is a checkbox labeled 'Show students with projected enrollments' which is unchecked. A table lists 133 students found. The table has columns: 'Advance', 'Last Name', 'First Name', 'MI', 'Student ID', 'Homeroom', and 'Grade'. The first four rows are visible, all with the 'Advance' checkbox checked.

Advance	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Adams	Arthur	T	28597		12
☒	Adams	Barbara	E	19954		12
☒	Adams	Benjamin	J	21020		12
☒	Adams	Betty	M	20553		12

4. Select the students who are graduating with the selected exit reason. If the details selected do not apply to all students in the list, scroll through the list and deselect those who will need to be advanced with different details.

This screenshot is identical to the one above, showing the 'AUTO GRADE ADVANCEMENT' window with the same settings and student list. A blue box highlights the 'Advance Students' button in the upper right corner of the window.

5. When you have finished and are ready to advance the seniors, click once on the Advance Students  button in the upper right corner of the tab.
6. After the students have been successfully advanced, the job status will display "Completed."
7. Repeat the above steps for the next group of seniors who are graduating with a different exit reason.
8. Continue this process until all seniors who have earned the required credits have been advanced to graduation.

Holding Back/Failing Students (Retain in Grade)

Students who will be held back should *not* be advanced through the Auto Grade Advancement sub-module. Instead, locate the student's individual record in

Census or Counseling, and manually update the enrollment records.

1. End the current Official Enrollment with an Exit Reason of Completed Grade.

The Completed Grade value does not correspond to any STEP code, resulting in a continuous enrollment record on the program service export.

2. Create a new Official Enrollment for the same grade, same cohort, but with a new graduation year. This ensures that the student can be tracked and scheduled correctly, and that a corresponding STEP program service record for the cohort year appears in the export. When the student finally graduates/leaves this grade, the cohort year value designates that the student has completed a grade twice.

Advance a Group of Students: General Instructions

1. Navigate to **Counseling > Auto Grade Advancement** and choose In District or Out of District (some options may or may not be available depending on this selection).
2. Use the pre-screen options to locate the students to be advanced. Click “Select Students” to use the batch selector.

Note The batch selector will also filter the results based on the options selected on the pre-screen.

The screenshot shows a web form titled "AUTO GRADE ADVANCEMENT" with a yellow header. Below the header, there are two radio buttons: "In District" (selected) and "Out of District". Underneath, there are four dropdown menus: "Building" (set to "Mindex HS"), "School Level" (set to "High School"), "Grade" (set to "10"), and "Class of" (set to "2021-2022"). At the bottom left, there are two radio buttons: "All Students" (selected) and "Select Students". A "Search" button is located at the bottom right of the form.

3. To advance all grades within a building school level, select “All” from the Grade drop-down (the school level drop-down will be unavailable when “All” is selected).

Note: Selecting “All” will advance only grades within that building; students whose next grade is in a different building will not be advanced. If the highest grade has not been advanced prior to performing the auto advance for other students in that building, select the appropriate Class Of option and manually perform the auto advance as needed.

4. After using the pre-screen to set the appropriate options, the Auto Advance screen opens additional options at the top and a list of students at the bottom.
5. Specify the details for the new enrollments that will be applied to all selected students.

Advance	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Adams	Aaron	W	21854		09
☒	Adams	Linda	E	20863		11
☒	Adams	Michael	A	23666		11
☒	Adams	Michelle	M	20890		10
☒	Adams	Sallie	N	21707		11

- A. If advancing all grades, select “Next Grade” from the Advance to Grade drop-down. This will automatically advance all selected students to the logical next grade unless they are in the highest grade within that building school level.
- B. To advance In District students, set the auto advancement details:
 - i. Select the Advance To Grade using the drop-down fields. This field contains values for each grade and includes an option for “Graduated” which should be used for graduating seniors. Select “End Enrollments” and choose an appropriate exit code to end students’ enrollments without graduating them or advancing to another grade.

Note: When you select a value from this drop-down, the screen will refresh. Additional options may appear, or may become grayed out. Make sure you WAIT for the system to fully refresh before continuing.

- ii. Enter the Current Enrollment End Date and Next Enrollment Start Date. Enter the dated manually using the mm/dd/yyyy format, or use the pop-up calendar.

Keep in mind that there are rules regarding start and end dates.

- Rule #1: The Current Enrollment End Date and the Next Enrollment Start Date cannot be the same.
 - Rule #2: You cannot enter a Next Enrollment Start Date for a future date. Schooltool only allows active, official enrollment records with a current start date or a date in the past. Attendance will not start until the semester officially begins, though, so this will not be a problem.
 - Rule #3: You may not enter an End Date and Start Date that are both within the same school year using this feature. Students in these situations must be advanced manually.
- iii. Select the appropriate options for Homeroom (remove homeroom assignments, maintain existing homerooms, or automatically assign homerooms either randomly or alphabetically) and Counselor (maintain or remove existing counselor assignments). Homeroom and Counselor assignments are not maintained when students change buildings, regardless of the options selected in either of these fields.

Note: When advancing a group of In District students with this feature, the Class Of, Graduation Date, and NYS Reported Grade fields are always rolled over from the student's previous enrollment record.

- C. To advance Out of District students, set the auto advancement details:
- Advance students (Graduate 12th graders): All selected students will be either advanced or graduated as appropriate. All 12th graders will be graduated with the selected Exit Reason, and all other grades will be advanced to the next grade.
 - Advance selected students: All selected students will be advanced to the next grade. Because these students are not graduating, the Exit Reason field is unavailable when this option is selected.
 - Graduate selected students: All selected students will be graduated with the selected Graduation Reason. Because their enrollments will be ended and a new enrollment will not be created,

the Next Enrollment Start Date field is unavailable when this option is selected. This option should be used only when graduating a student early.

- End Enrollments: All selected students will have their enrollments ended using the selected Exit Reason, without creating a new enrollment. This option should not be used for graduating students, as graduating exit codes are not available using this option.

Note: When advancing students in grades that do not have a “next grade” (e.g., UGE/Ungraded Elementary, UGS/Ungraded Secondary, Grade 14, etc.), those students’ enrollments will not be modified. Enrollments must be modified manually to reflect the advancement.

6. Select the students who will be advanced using the above criteria. If the details selected do not apply to all students in the list, scroll through the list and deselect those who will need to be advanced with different details. For example, several students may be held back, or may advance to a different grade. These will need to be advanced separately.

Note: Because students with projected enrollments cannot be advanced automatically, the list of students to be advanced hides students with projected enrollments by default. These students can be viewed in the list by checking the “Show students with projected enrollments” option. Any student in the list with a projected enrollment will be displayed in Red, and cannot be selected for advancement.

- When you have finished and are ready to advance the students, click once on the Advance Students  button in the upper right corner of the tab. The screen will refresh to display the current job details, including its status. The results of the job, including any errors, will be displayed on the screen. The Job Object History is available on the Auto Grade Advancement pre-screen, as well as from within **Maintenance > Application > Job Object History**.

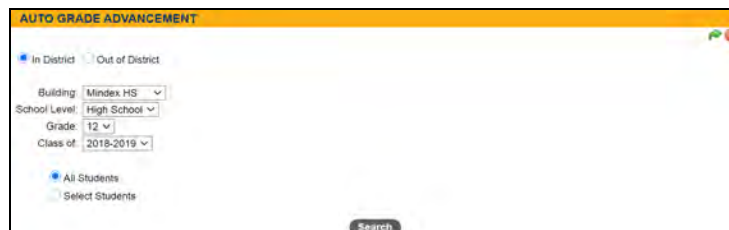
Description	Status	Start Time	End Time
Auto Grade Advancement	Completed	5/27/2020 12:44:35 PM	5/27/2020 12:44:36 PM
Hide Results Auto Grade Advancement Row 3 of 3 (100%) Successes =3 Failures =0			

- After the students have been successfully advanced the job status will state “Completed.” Repeat these steps for each group of students until all students have been advanced appropriately.

Note: If you are missing any information or have selected a date which SchoolTool cannot accept, a verification message will appear.

Advance (Graduate) a Group of Seniors

- Navigate to **Counseling > Auto Grade Advancement** and select Grade 12 and the appropriate graduation year from the pre-screen. Use the radio buttons to choose all students in that grade or use the batch selector to select a specific group of students.



- Click Search to continue. The screen will refresh with advancement options.
- Choose your advancement options in the top portion of the screen.
 - Select Graduated from the **Advance To Grade** drop-down field.

Note: Once you have selected an option from the list, you must WAIT for the screen to fully refresh before continuing.

- Set Homeroom and Counselor to “Remove” (this should be selected by default).
- Enter the **Current Enrollment End Date**. Enter the date manually using the mm/dd/yyyy format, or use the pop-up calendar.
- Select an exit reason from the **Exit Reason** drop-down list. This field contains only those exit reasons which are appropriate for graduation. The values in this list correspond to the NYS designated reasons for unenrollment, which are identified by the numeric codes

accompanying each item in this list.

Note: The Exit Reason drop-down list only allows you to select one exit reason at a time. You must advance seniors according to earned diploma type, advancing them group by group. For example, first advance all those graduating with a local certificate. Then advance all those graduating with a local diploma, then those with each type of Regents diploma, etc.

4. Select the students who are graduating with the selected exit reason. If the details selected do not apply to all students in the list, scroll through the list and deselect those who will need to be advanced with different details.

5. When you have finished and are ready to advance the seniors, click once on the Advance Students  button in the upper right corner of the tab.
6. After the students have been successfully advanced, the job status will display "Completed."
7. Repeat the above steps for the next group of seniors who are graduating with a different exit reason.
8. Continue this process until all seniors who have earned the required credits have been advanced to graduation.

Advance Transitional Students to the Next Building

Use this feature to advance students from one building in the district to the next (for example, transitioning 6th graders to Middle School or 8th graders to High School).

1. Navigate to **Counseling > Auto Grade Advancement** and select the appropriate options to locate the students to be advanced.

2. As soon as the screen refreshes with advancement options, the list of all students currently in the selected grade will appear. Use the check boxes next to each student's name to select them for advancement.
3. Set the auto advancement details:

Advance	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Anderson	Janet	M	23692		08
☒	Black	Amy	M	20875		08
☒	Collins	Danny	J	23078		08
☒	Cook	Anthony	J	22110		08

- A. Select the appropriate building and grade from the **Advance To Grade** drop-down menus.

Note: After selecting the Advance to Grade value from the list, you must wait for the screen to fully refresh before continuing.

- B. Enter the Current Enrollment End Date and Next Enrollment Start Date. Enter the dates manually using the mm/dd/yyyy format, or use the pop-up calendar.

Keep in mind that there are rules regarding start and end dates.

- Rule #1: The Current Enrollment End Date and the Next Enrollment Start Date cannot be the same.
- Rule #2: You cannot enter a Next Enrollment Start Date for a future date. Schooltool only allows active, official enrollment records with a current start date or a date in the past. Attendance will not start until the semester officially begins, though, so this will not be a problem.
- Rule #3: You may not enter an End Date and Start Date that are both within the same school year using this feature. Students in these situations must be advanced manually.

- C. Select the appropriate options for Homeroom (remove homeroom assignments, maintain existing homerooms, or automatically assign

homerooms either randomly or alphabetically) and Counselor (maintain or remove existing counselor assignments).

4. Select the students who will be advanced using the above criteria.

AUTO GRADE ADVANCEMENT

In District > Mindex MS > Middle > 08 > 2023-2024

Advance To Grade: Mindex HS SELECT ONE Homeroom: Remove

Current Enrollment End Date: 6/30/2019 Counselor: Remove

Next Enrollment Start Date: 7/1/2019

25 students found

☐ Show students with projected enrollments

Advance	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Anderson	Janet	M	23692		08
☒	Black	Amy	M	20875		08
☒	Collins	Danny	J	23078		08
☒	Cook	Anthony	I	22110		08

Note: If the options selected in the top section do not apply to all students in the list, scroll through the list and deselect those who will need to be advanced with different details. For example, several students may be held back, or may advance to a different grade. These will need to be advanced separately.

5. When you have finished and are ready to advance the students, click once on the Advance Students button in the upper right corner of the tab.

AUTO GRADE ADVANCEMENT

In District > Mindex MS > Middle > 08 > 2023-2024

Advance To Grade: Mindex HS SELECT ONE Homeroom: Remove

Current Enrollment End Date: 6/30/2020 Counselor: Remove

Next Enrollment Start Date: 7/1/2020

25 students found

☐ Show students with projected enrollments

Advance	Last Name	First Name	MI	Student ID	Homeroom	Grade
☒	Adams	Karen	E	19525		08
☒	Anderson	Janet	M	23692		08
☒	Bell	Donna	H	20314		08

6. After the students have been successfully advanced, the job status will display “Completed.” Repeat these steps as needed until all students have been advanced appropriately.

Hold a Student Back (Fail a Student)

Students who will be held back should *not* be advanced through the Auto Grade Advancement sub-module. Instead, locate the student’s individual record in Census or Counseling, and manually update the enrollment records.

1. End the current Official Enrollment with an Exit Reason of Completed Grade.

The Completed Grade value does not correspond to any STEP code, resulting in a continuous enrollment record on the program service export.

2. Create a new Official Enrollment for the same grade, same cohort, but with a new graduation year. This ensures that the student can be tracked and scheduled correctly, and that a corresponding STEP program service record for the cohort year appears in the export. When the student finally graduates/leaves

this grade, the cohort year value designates that the student has completed a grade twice.

Reviewing the Auto Advance Job Object History

On the main Auto Grade Advancement sub-module screen, users can view job history for batch actions performed from within this sub-module. The list of job objects is displayed at the bottom of the Auto Grade Advancement pre-screen and contains information about all auto advance jobs performed here. The list shows the job Description, Status, Start Time and Finish Times for each job.

The screenshot shows the 'AUTO GRADE ADVANCEMENT' interface. It includes filters for 'In District' (selected) and 'Out of District', 'Building' (Minde HS), 'School Level' (High School), 'Grade' (12), and 'Class of' (2018-2019). There are radio buttons for 'All Students' (selected) and 'Select Students', and a 'Search' button. A 'Show jobs from previous:' dropdown menu is set to '12 Months'. Below these is a table with columns: Description, Status, Start Time, and End Time.

Description	Status	Start Time	End Time
Auto Grade Advancement	Completed	5/27/2020 12:44:35 PM	5/27/2020 12:44:36 PM
Show Results			
Auto Grade Advancement	Completed	5/27/2020 5:22:49 PM	5/27/2020 5:22:49 PM
Show Results			

By default, the list shows all jobs from the past month, but it may be filtered to show jobs from a longer or shorter date range. Users may select their desired timeframe from the drop-down menu at the top of the Job Object History list:

A close-up of the 'Show jobs from previous:' dropdown menu. The menu is open, showing options: 1 Month (selected), 1 Week, 1 Month, 3 Months, 6 Months, 12 Months, and Current School Year.

Users may choose to view additional details about each job by clicking on the Show Results ↓ button below each job description.

A close-up of the 'Show Results' button, which is a green arrow pointing down next to the text 'Show Results'.

The details are specific to each particular job, and will show you how many students were included in that job and of those, how many were processed. This does *not* mean that information was changed in each of those records; rather, it is an indicator of how

many individual records were processed during that job. The details will also display any error messages that were created during that process.

Auto Grade Advancement	Completed	5/27/2020 5:22:49 PM	5/27/2020 5:22:49 PM
 Hide Results			
Auto Grade Advancement Row 2 of 2 (100%)			
Successes =0 Failures =2			
Student Name	Student ID	Error Message	
Williams, Diane J	19598	Student's active enrollment starts after the End Date provided.	
Walters, Robert W	20435	Student's active enrollment starts after the End Date provided.	

To hide these details, click the Hide Results  button.

Note: Job Object History is managed through the Maintenance module. Items may appear to be removed from this list as they are archived from within Maintenance.

Counseling > Batch Edit Schedule

The Batch Edit Schedule sub-module allows you to modify student schedules in batch mode by adding dropping, withdrawing, or switching courses for multiple student schedules at one time. It also allows users to move course sections that already include students to different semesters, periods, or cycle days.

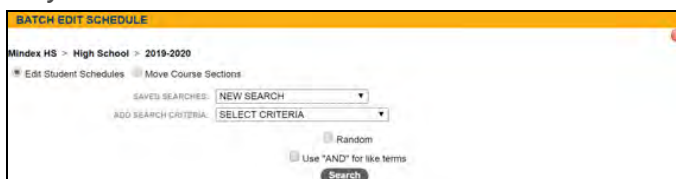
Batch Edit Student Schedules

This option allows users to add, drop, withdraw, or switch courses for a group of students. The actions can be for today's date or a date in the future. This feature utilizes the Batch Selector to locate the groups of students.

All schedule changes follow guidelines that must be followed as if the course is being modified on an individual student's schedule from within Counseling. This includes:

- Enforcement of headcounts, taking into account the scheduling threshold. If there are any headcount violations, then no transactions go through for any student. Headcount limitations are ignored for pending operations.
- If a student fails on any one transaction, for any reason (conflict, etc.) that student will receive none of the listed schedule-change operations.
- For each transaction, the validation process will display a list of students where the transaction failed.
- **Note:** The Batch Edit Schedule uses a validation process when using the check mark or save buttons, please be patient during this process and wait until it reaches 100%.

1. From within the Counseling module, select the **Batch Edit Schedules** sub-module from the menu at the left.
2. Select the Building level where the students are located.
3. If you have access to both options in this area (Edit Student Schedules and Move Course Sections), the "Edit Student Schedules" option will be selected by default.



Batch Add a Course(s) to Multiple Students' Schedules

1. The batch selector (advanced search) screen will appear with the current school year selected.

The screenshot shows the 'BATCH EDIT SCHEDULE' interface. At the top, it indicates 'Mindex HS > High School > 2019-2020'. Below this, there are two tabs: 'Edit Student Schedules' (selected) and 'Move Course Sections'. Under 'Edit Student Schedules', there are two dropdown menus: 'SAVED SEARCHES: NEW SEARCH' and 'ADD SEARCH CRITERIA: SELECT CRITERIA'. There are also checkboxes for 'Random' and 'Use "AND" for like terms', and a 'Search' button at the bottom.

2. Use the batch selector to locate a group of students who you want to work with to add a course(s). Use the checkboxes to select the appropriate students and click Continue.
3. Select the appropriate radio button for the Effective Date for this action. Today is the default or you can select the On radio button and enter a date in the future using the mm/dd/yyyy format or the pop-up calendar.
4. Select the Action by using the drop-down list of available actions. Select Add Course.

This screenshot shows the 'BATCH EDIT SCHEDULE' screen with the 'Action' dropdown menu open. The menu options are: 'Select One', 'Select One', 'Add Course', 'Drop/Withdraw/Switch', and 'Remove Pending Schedule'. The 'Add Course' option is highlighted. The 'Effective Date' is set to 'Today' with an 'On' radio button. There are also three status icons (check, error, warning) in the top right corner.

5. The screen will refresh with a drop down list of all available courses. Use the drop downs to select a Period and a Course to add.

The screenshot shows the 'BATCH EDIT SCHEDULE' screen after selecting 'Add Course'. The 'Action' dropdown is now 'Add Course'. Below it, there are two dropdown menus: 'Period: NONE' and 'Course: Select a Course/Section'. The 'Effective Date' is still 'Today' with the 'On' radio button. The status icons are still present.

6. The screen will refresh to show details about the selected course section.

This screenshot shows the 'BATCH EDIT SCHEDULE' screen with details for a selected course section. The 'Action' is 'Add Course'. The 'Period' dropdown is set to 'Adv'. The 'Course' dropdown is set to 'Advisory 10(00985) [A,B,C,D,E,F] (20/25) SN2 in 31 - Smith'. Below the course name, there are details: 'Section: 2', 'S1, S2 / A,B,C,D,E,F', 'Teacher(s): Smith', 'Period: Adv', 'Room: 31', 'Max: 25', and 'Needs Max: 25'. To the right, there is a table titled 'Day Students Needs' with columns for Day, Students, and Needs.

Day	Students	Needs
A	20	6
B	20	6
C	20	6
D	20	6
E	20	6
F	20	6

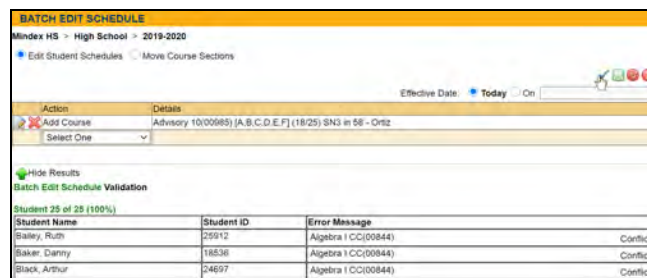
- Click once on the Update  button. The course you selected now appears on the screen . Use the drop-down to perform another action.



BATCH EDIT SCHEDULE
Mindex HS > High School > 2019-2020
* Edit Student Schedules | Move Course Sections
Effective Date: Today On

Action	Details
Add Course	Advisory 10(00985) (A,B,C,D,E,F) (18/25) SN3 in 58 - Ortiz
Select One	

- Use the check mark button  to verify the action before committing to a save or you can just save.
 - If you use the check mark  button, the validator will appear and begin to process the records one at a time. You must wait for the validation process to complete. When it completes, it will display the results.



BATCH EDIT SCHEDULE
Mindex HS > High School > 2019-2020
* Edit Student Schedules | Move Course Sections
Effective Date: Today On

Action	Details
Add Course	Advisory 10(00985) (A,B,C,D,E,F) (18/25) SN3 in 58 - Ortiz
Select One	

Hide Results
Batch Edit Schedule Validation
Student 25 of 25 (100%)

Student Name	Student ID	Error Message
Salery, Ruth	25512	Algebra I CC(00844) Conflic
Baker, Darnny	18536	Algebra I CC(00844) Conflic
Black, Arthur	24697	Algebra I CC(00844) Conflic

- If you use the Save  button, you will get a warning message. Click OK if you are sure you want to save these schedule changes. The save button will also run the validation tool and you will have to wait until it completes.
- You can now go to a student's record that was just changed to verify that the courses were added to the schedule.

Batch Drop/Withdraw/Switch a Course(s) from Multiple Students' Schedules

- The batch selector (advanced search) screen will appear with the current school year selected.



BATCH EDIT SCHEDULE
Mindex HS > High School > 2019-2020
* Edit Student Schedules | Move Course Sections
SAVED SEARCHES: NEW SEARCH
ADD SEARCH CRITERIA: SELECT CRITERIA
Random
Use "AND" for like terms
Search

- Use the batch selector to locate a group of students who you want to work with to add a course(s). Use the checkboxes to select the appropriate students and click Continue.

3. Select the appropriate radio button for the Effective Date for this action. Today is the default or you can select the On radio button and enter a date in the future using the mm/dd/yyyy format or the pop-up calendar.
4. Select the Action by using the drop-down list of available actions. Select Drop/Withdraw/Switch.

BATCH EDIT SCHEDULE
Mindex HS > High School > 2019-2020
* Edit Student Schedules * Move Course Sections

Effective Date: ☒ Today ☐ On

Action: Select One
Select One
Add Course
Drop/Withdraw/Switch
Remove Pending Schedule

5. The screen will refresh with a drop down list of all available courses. Use the drop down arrow to select the period and course that you would like to modify. Select the procedure – drop, withdraw, or switch. If you used a projected date for the Effective Date field, that date will appear on this screen.

BATCH EDIT SCHEDULE
Mindex HS > High School > 2019-2020
* Edit Student Schedules * Move Course Sections

Effective Date: ☒ Today ☐ On

Action: ☒ Drop/Withdraw/Switch

Details: Period: NONE Course: Select a Course Section

☐ Withdraw Withdraw Reason: SELECT ONE

☒ Drop Date: 5/27/2020

☐ Switch Section

6. After selecting a period and course, the screen will refresh to show details about that section.

BATCH EDIT SCHEDULE
Mindex HS > High School > 2019-2020
* Edit Student Schedules * Move Course Sections

Effective Date: ☒ Today ☐ On

Action: ☒ Drop Course

Details: Period: 2 Course: Algebra I CC(00844) [A,C,E] (15/25) SN2 in 59 - Morgan

Section: 2
S1, S2 / A,C,E
Teacher(s): Morgan
Period: 2
Room: 59
Max: 25
Needs Max: 25

☐ Withdraw Withdraw Reason: SELECT ONE

☒ Drop Date: 5/27/2020

☐ Switch Section To: Select a Course Section

7. Click once on the Update button. The course you selected now appears on the screen in read-only mode. You can Edit this action, or you may select another action to perform.

BATCH EDIT SCHEDULE
Mindex HS > High School > 2019-2020
* Edit Student Schedules * Move Course Sections

Effective Date: ☒ Today ☐ On

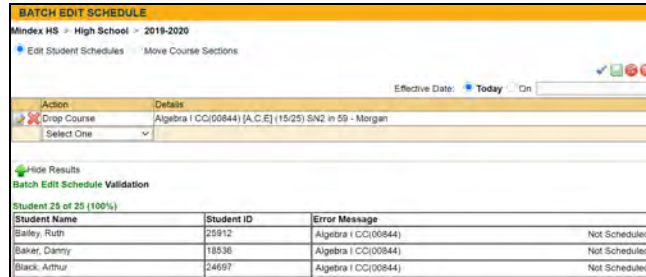
Action: ☒ Drop Course

Details: Period: 2 Course: Algebra I CC(00844) [A,C,E] (15/25) SN2 in 59 - Morgan

☐ Select One

8. Use the check mark button to verify the action before committing to a save or click Save to continue without validating.

- A. If you use the check mark  button, the validator will appear and begin to process the records one at a time. You must wait for the validation process to complete. When it completes, it will display the results.



Student Name	Student ID	Error Message
Calley, Ruth	22912	Algebra I CC(00844) Not Scheduled
Garner, Dantny	18536	Algebra I CC(00844) Not Scheduled
Black, Arthur	24697	Algebra I CC(00844) Not Scheduled

- B. If you use the Save  button, you will get a warning message. Click OK if you are sure you want to save these schedule changes. The save button will also run the validation tool and you will have to wait until it completes.
9. You can now go to a student's record that was just changed to verify that the course was switched in the schedule.

Remove Pending Schedules from Multiple Students

1. The batch selector (advanced search) screen will appear with the current school year selected.



BATCH EDIT SCHEDULE

Mindex HS > High School > 2019-2020

* Edit Student Schedules Move Course Sections

SAVED SEARCHES: NEW SEARCH

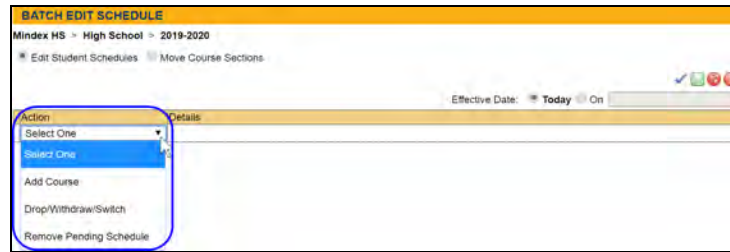
ADD SEARCH CRITERIA: SELECT CRITERIA

☐ Random

☐ Use "AND" for like terms

Search

2. Use the batch selector to locate a group of students who you want to work with to add a course(s). Use the checkboxes to select the appropriate students and click Continue.
3. Select the appropriate radio button for the Effective Date for this action. Today is the default, or you can select the On radio button and enter a future date using the mm/dd/yyyy format or the pop-up calendar.
4. Select the Action by using the drop-down list of available actions. Select Remove Pending Schedules.



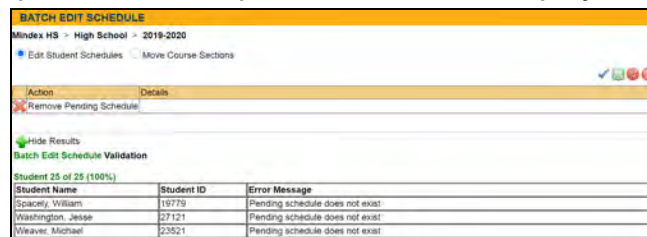
5. Click once on the Update button. The screen will refresh with Remove Pending Schedule selected.



6. Click the Update button to confirm this action. The screen will refresh to show Remove Pending Schedule in the list of actions to be performed.



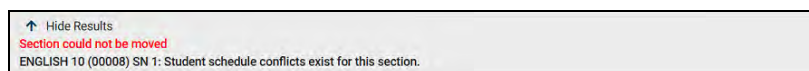
7. Use the check mark button to verify the action before committing to a save or click Save to continue without validating.
 - A. If you use the check mark button, the validator will appear and begins processing the records one at a time. You must wait for the validation process to complete before it will display the results.



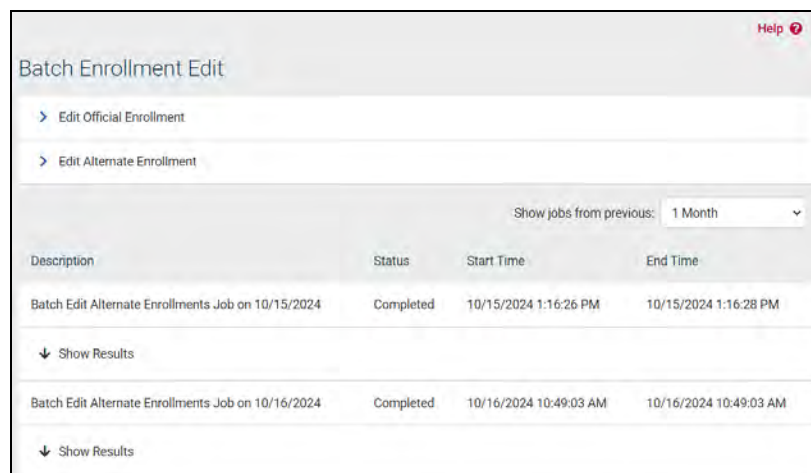
- B. If you use the Save button, you will get a warning message. Click OK if you are sure you want to save these schedule changes. The save button will also run the validation tool and you will have to wait until it completes.
8. You can now go to a student's record that was just changed to verify the changes were successful.

Move Course Sections

1. Use the Move Course Sections area to move sections (and any students assigned to those sections) to different semesters, periods, and/or cycle days.
2. To begin, select the Move Course Sections radio button.
3. The screen will refresh to display drop-downs for Period and Course.
4. Use these drop-downs to locate the first section you wish to move, then click the Add  button.
5. A row will appear for the section that was just added. Use the options to select the new start/end periods, cycle days, and/or semesters for that section.
6. Repeat this process as needed until all section changes have been entered.
7. Once all changes have been entered, click the Save  button to begin processing your changes. SchoolTool will attempt to process all schedule changes and will display a confirmation message after all changes are complete (or, if the changes cannot be processed, will provide an indication of any issues or conflicts).
 - Possible conflicts include the following:
 - Attendance data exists for a section (one or more sections cannot be moved because attendance data exists for one or more students in those sections)
 - Marking period or progress report grading data exists for a section (marking period or progress report grades have been submitted for one or more students in those sections)
 - Grade book assignments exist for a section (grade book assignments have been created for that section)
 - Student schedule conflicts exist for a section (one or more of the moves would result in schedule conflicts for students in these sections)



Counseling > Batch Enrollment Edit



The screenshot shows the 'Batch Enrollment Edit' interface. At the top, there are two links: '> Edit Official Enrollment' and '> Edit Alternate Enrollment'. Below these is a dropdown menu labeled 'Show jobs from previous:' with '1 Month' selected. A table follows with columns: Description, Status, Start Time, and End Time. The table contains two rows of job history for 'Batch Edit Alternate Enrollments Job on 10/15/2024' and '10/16/2024', both marked as 'Completed'. Below each row is a 'Show Results' link.

Description	Status	Start Time	End Time
Batch Edit Alternate Enrollments Job on 10/15/2024	Completed	10/15/2024 1:16:26 PM	10/15/2024 1:16:28 PM
Show Results			
Batch Edit Alternate Enrollments Job on 10/16/2024	Completed	10/16/2024 10:49:03 AM	10/16/2024 10:49:03 AM
Show Results			

The Batch Enrollment Edit sub-module allows users to modify any enrollment record field for a group of students in a single operation. Edits can be made to the most recent official enrollment (regardless of whether or not the enrollment is current) or to any selected alternate enrollments.

Note: Individual permissions exist for each field on the enrollment record. Users will only be able to modify fields for which they have edit rights.

Note: The Job History shown on the main Batch Enrollment Edit screen only contains information related to Alternate Enrollment edits.

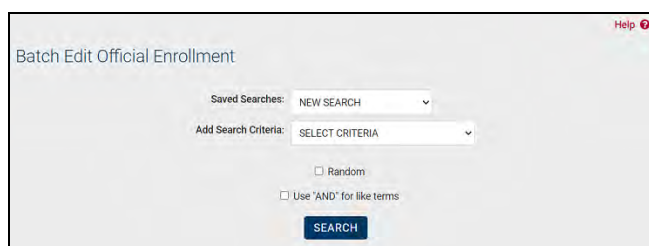
Edit Official Enrollment

1. To begin, navigate to **Counseling > Batch Enrollment Edit** and select Edit Official Enrollment.



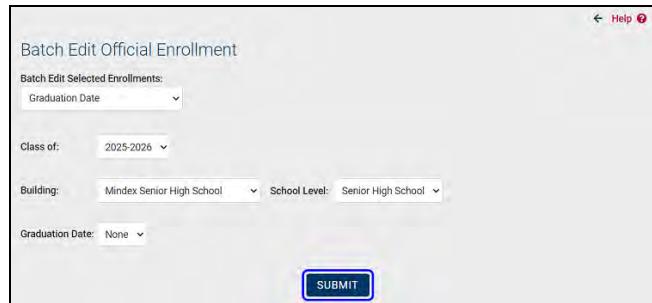
This screenshot shows the 'Batch Enrollment Edit' screen with the '> Edit Official Enrollment' link highlighted by a red rectangle.

2. Use the batch selector to locate the appropriate students.



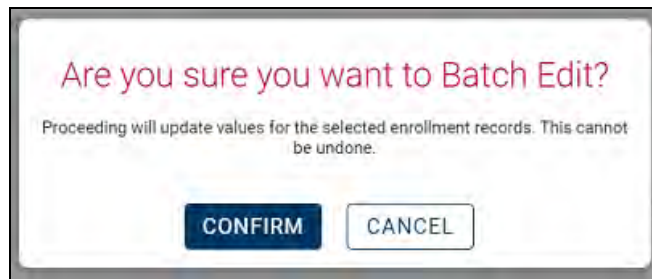
The screenshot shows the 'Batch Edit Official Enrollment' screen. It features a 'Saved Searches:' dropdown with 'NEW SEARCH' selected, and an 'Add Search Criteria:' dropdown with 'SELECT CRITERIA' selected. Below these are two checkboxes: 'Random' and 'Use AND for like terms'. A blue 'SEARCH' button is at the bottom.

3. After selecting students, click **Continue** and choose an enrollment field to modify for those students. Additional options may be displayed, depending on the field selected.
4. Make the desired selections in the available fields then click **Submit**.



The screenshot shows a web form titled "Batch Edit Official Enrollment". At the top right is a "Help" icon. Below the title is a section "Batch Edit Selected Enrollments:" with a dropdown menu currently set to "Graduation Date". Below this are several other dropdown menus: "Class of:" set to "2025-2026", "Building:" set to "Mindex Senior High School", "School Level:" set to "Senior High School", and "Graduation Date:" set to "None". A blue "SUBMIT" button is located at the bottom right of the form.

5. A pop-up will appear asking if you are sure. Click **Confirm** to update the enrollment records or **Cancel** to return to the previous screen.



6. Once the operation is complete, a confirmation message will display to indicate the number of successful changes. Any errors will also be indicated, and all students (names and IDs) who could not be updated will be listed below the message(s).

Important Note: Modifications made from this area will permanently modify students' enrollment records. Please remember that these changes do not start a new enrollment record but simply modify the most recent enrollment record (regardless of whether or not the enrollment is current).

Edit Alternate Enrollment

1. To begin, navigate to **Counseling > Batch Enrollment Edit** and select Edit Alternate Enrollment.

Batch Enrollment Edit

> Edit Official Enrollment

> Edit Alternate Enrollment

2. Use the batch selector to locate the appropriate students.

Batch Edit Alternate Enrollment

Saved Searches: NEW SEARCH

Add Search Criteria: SELECT CRITERIA

☐ Random

☐ Use "AND" for like terms

SEARCH

3. After selecting students, click **Continue**. On the next screen locate the specific alternate enrollment records being edited.

Batch Edit Alternate Enrollment

Current Official Enrollment: Mindeh Elementary A Elementary

Alternate Enrollment: Mindeh Elementary A Elementary

School Year: 2024-2025

☒ Include Ended Alternate Enrollments

SEARCH CONTINUE

Total rows selected: 0 / 0

Student	Current Official Enrollment	Alternate Enrollment	Start Date	End Date
No data to display				

- The Current Official Enrollment and Alternate Enrollment fields default to the first choice in the list. If a preference has been set, these fields will default to the building and school level configured in Preferences. The School Year defaults to the current school year.
 - If alternate enrollments that already have end dates should be included, check the "Include Ended Alternate Enrollments" box.
4. Make the desired selections for Current Official Enrollment and Alternate Enrollment.

If the School Year is changed or the Include Ended Alternate Enrollments box is checked, click **Search** to refresh the records list.

5. Check the records that should be adjusted and click **Continue**.

Batch Edit Alternate Enrollment

Current Official Enrollment: ALL ALL

Alternate Enrollment: ALL ALL

School Year: 2024-2025

☐ Include Ended Alternate Enrollments

SEARCH CONTINUE

Total rows selected: 3 / 6

Student	Current Official Enrollment	Alternate Enrollment	Start Date	End Date
☒ Abbott, Tina (111117179)	Mindex Elementary C / Elementary	BOCES / BOCES	10/1/2024	
☒ Baldwin, Thomas (111117176)	Mindex Middle School / Middle School	Mindex Senior High School / Senior	10/16/2024	
☒ Bean, John (11112895)	Mindex Senior High School / Senior	BOCES / BOCES	10/17/2024	
☐ Chase, Harley (111110855)	Mindex Senior High School / Senior	BOCES / BOCES	10/16/2024	
☐ Gill, Margold (11112186)	Mindex Senior High School / Senior	BOCES / BOCES	10/16/2024	
☐ McFarland, Leah (11112488)	Mindex Senior High School / Senior	Mindex Middle School / Middle School	7/1/2024	

- On the next screen, choose an enrollment field to modify for those students. Additional options may be displayed, depending on the field selected.

Note: If an exit reason

Make the desired selections in the available fields then click **Submit**.

Batch Edit Alternate Enrollment

Batch Edit Selected Enrollments:

Counselor: [dropdown]

Counselor: NONE [dropdown]

SUBMIT

- A pop-up will appear asking if you are sure. Click **Confirm** to update the enrollment records or **Cancel** to return to the previous screen and make different selections.

Are you sure you want to Batch Edit?

Proceeding will update values for the selected enrollment records. This cannot be undone.

CONFIRM CANCEL

- Once the operation is complete, the job will expand to show the number of students that were impacted and any errors.

Batch Edit Alternate Enrollment

Help

Show jobs from previous: 1 Month

Description	Status	Start Time	End Time
Batch Edit Alternate Enrollments Job on 10/18/2024	Completed	10/18/2024 2:32:41 PM	10/18/2024 2:32:41 PM

↑ Hide Results

Batch Edit Alternate Enrollments

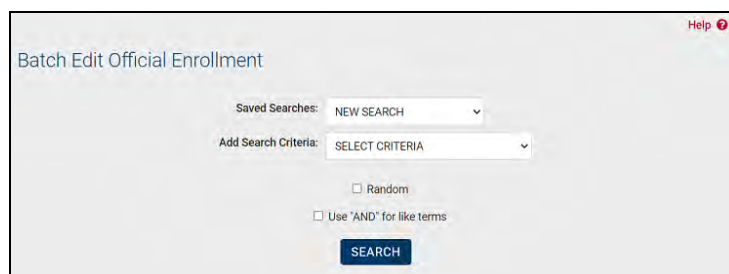
Student 3 of 3 (100%)

Batch Edit Official Enrollment

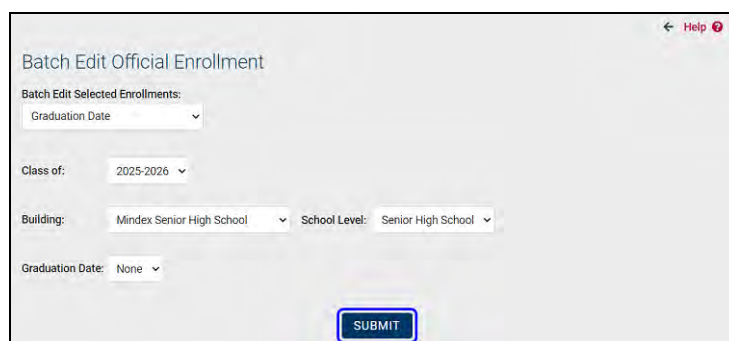
1. To begin, navigate to **Counseling > Batch Enrollment Edit** and select Edit Official Enrollment.



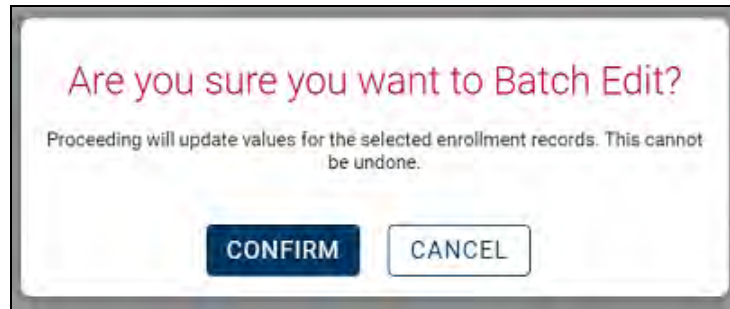
2. Use the batch selector to locate the appropriate students.



3. After selecting students, click **Continue** and choose an enrollment field to modify for those students. Additional options may be displayed, depending on the field selected.
4. Make the desired selections in the available fields then click **Submit**.



5. A pop-up will appear asking if you are sure. Click **Confirm** to update the enrollment records or **Cancel** to return to the previous screen.



6. Once the operation is complete, a confirmation message will display to indicate the number of successful changes. Any errors will also be indicated, and all students (names and IDs) who could not be updated will be listed below the message(s).

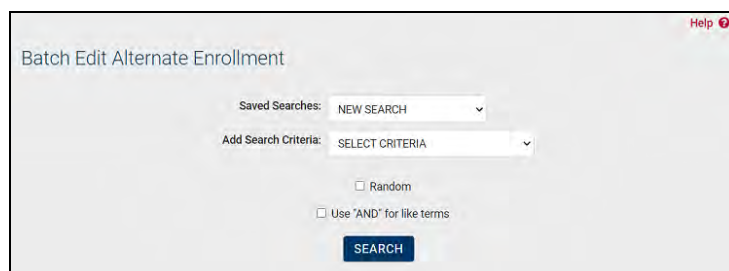
Important Note: Modifications made from this area will permanently modify students' enrollment records. Please remember that these changes do not start a new enrollment record but simply modify the most recent enrollment record (regardless of whether or not the enrollment is current).

Batch Edit Alternate Enrollment

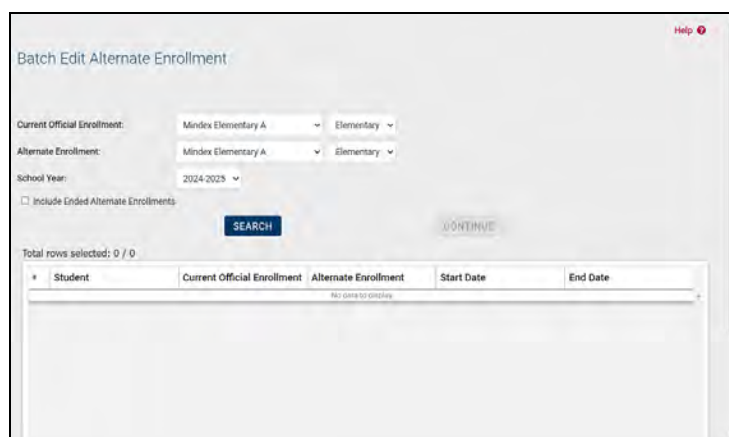
1. To begin, navigate to **Counseling > Batch Enrollment Edit** and select Edit Alternate Enrollment.



2. Use the batch selector to locate the appropriate students.



3. After selecting students, click **Continue**. On the next screen locate the specific alternate enrollment records being edited.



- The Current Official Enrollment and Alternate Enrollment fields default to the first choice in the list. If a preference has been set, these fields will default to the building and school level configured in Preferences. The School Year defaults to the current school year.
- If alternate enrollments that already have end dates should be included, check the "Include Ended Alternate Enrollments" box.

4. Make the desired selections for Current Official Enrollment and Alternate Enrollment.

If the School Year is changed or the Include Ended Alternate Enrollments box is checked, click **Search** to refresh the records list.

5. Check the records that should be adjusted and click **Continue**.

Batch Edit Alternate Enrollment

Current Official Enrollment: ALL ALL

Alternate Enrollment: ALL ALL

School Year: 2024-2025

☐ Include Ended Alternate Enrollments

SEARCH **CONTINUE**

Total rows selected: 3 / 8

☐	Student	Current Official Enrollment	Alternate Enrollment	Start Date	End Date
☒	Alkott, Tina (111117179)	Mindex Elementary C / Elementary	BOCES / BOCES	10/1/2024	
☒	Balwin, Thomas (111117116)	Mindex Middle School / Middle School	Mindex Senior High School / Senior	10/16/2024	
☒	Bean, John (111112895)	Mindex Senior High School / Senior	BOCES / BOCES	10/17/2024	
☐	Chase, Harley (111110835)	Mindex Senior High School / Senior	BOCES / BOCES	10/16/2024	
☐	Gill, Mangold (111113188)	Mindex Senior High School / Senior	BOCES / BOCES	10/16/2024	
☐	McFarland, Leah (111112488)	Mindex Senior High School / Senior	Mindex Middle School / Middle School	7/1/2024	

6. On the next screen, choose an enrollment field to modify for those students. Additional options may be displayed, depending on the field selected.

Note: If an exit reason

Make the desired selections in the available fields then click **Submit**.

Batch Edit Alternate Enrollment

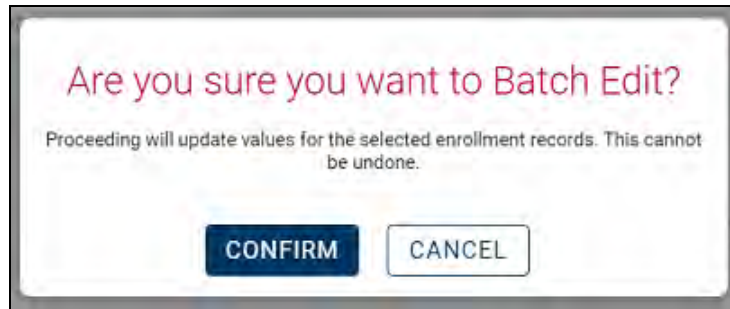
Batch Edit Selected Enrollments:

Counselor: [dropdown]

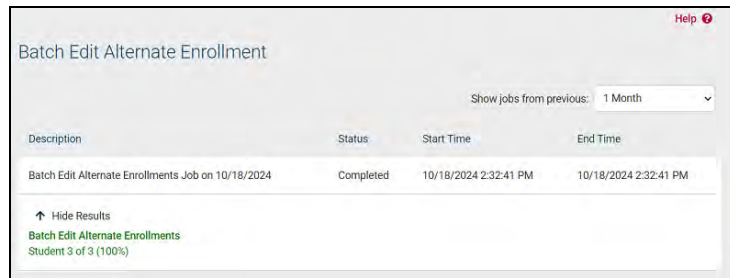
Counselor Name: NONE

SUBMIT

7. A pop-up will appear asking if you are sure. Click **Confirm** to update the enrollment records or **Cancel** to return to the previous screen and make different selections.



8. Once the operation is complete, the job will expand to show the number of students that were impacted and any errors.



Counseling > Batch Post Grad Plan

The **Counseling > Batch Post Grad Plan** allows users to add or remove Post Graduate Plan notes for a group of students.

BATCH POST GRAD PLAN			
▶ Batch Add Post Grad Plan			
▶ Batch Remove Post Grad Plan			
Show jobs from previous: 1 Month			
Description	Status	Start Time	End Time
Batch Add Post Grad Plan	Completed	5/29/2020 11:10:30 AM	5/29/2020 11:10:30 AM
⬇ Show Results			
Batch Remove Post Grad Plan	Completed	5/29/2020 11:22:32 AM	5/29/2020 11:22:32 AM
⬇ Show Results			

Batch Add Post Grad Plan

1. To batch add Post Graduate Plans from a group of students, click Batch Add Post Grad Plan and use the batch selector to specify the appropriate students.
2. Enter information in each field as appropriate to add this post graduate plan to the selected students. Click the Add **+** button to add.

BATCH ADD POST GRAD PLAN	
Plan: Attend 4-year college in NYS	
Update Received:	Source:
Notes:	

3. The job will process and will display a confirmation and, once complete, any errors that occurred.

Batch Remove Post Grad Plan

1. To batch remove Post Graduate Plans from a group of students, click Batch Remove Post Grad Plan and use the batch selector to specify the appropriate students.
2. Enter criteria used to locate the records to be deleted from those students.
 - Check the “Most Recent Record Only” option to match this criteria to only the most recent record for students with multiple Post Graduate Plan records.
 - If a field is left blank on this screen, the matches will include any records

with no value in that field.

BATCH REMOVE POST GRAD PLAN

Find records that match the following ☐ Most Recent Record Only

Plan: ANY

Update Received: From 5/1/2020 To 5/29/2020 Source:

Notes:

3. Click Check ✓ to review the job operation (this will perform a validation and provide information on any potential errors without committing changes).

BATCH REMOVE POST GRAD PLAN

Find records that match the following ☐ Most Recent Record Only

Plan: ANY

Update Received: From 5/1/2020 To 5/29/2020 Source:

Notes:

Description	Status	Start Time	End Time
Batch Remove Post Grad Plan	Completed	5/29/2020 11:22:32 AM	5/29/2020 11:22:32 AM

Hide Results

Batch Remove Post Graduate Plan Validation:
Student 1 of 1 (100%) Success = 1 Failures = 0

4. Click Delete ✗ to perform the batch remove operation. Click OK to confirm and process the job, permanently removing all post graduate plans meeting the criteria specified above.

Batch Post Grad Plan Job Object History

On the main Batch Post Grad Plan sub-module screen, users can view job history from a list of all batch actions performed from within this sub-module. The list shows the job Description, Status, Start Time and Finish Times for each job.

BATCH POST GRAD PLAN

Batch Add Post Grad Plan

Batch Remove Post Grad Plan

Show jobs from previous: 1 Month

Description	Status	Start Time	End Time
Batch Add Post Grad Plan	Completed	5/29/2020 11:10:30 AM	5/29/2020 11:10:30 AM
Batch Remove Post Grad Plan	Completed	5/29/2020 11:22:32 AM	5/29/2020 11:22:32 AM

Show Results

By default, the list shows all jobs from the past month, but it may be filtered to show jobs from a longer or shorter date range. Users may select their desired timeframe from the drop-down menu at the top of the Job Object History list:

Show jobs from previous:

1 Month
1 Week
1 Month
3 Months
6 Months
12 Months
Current School Year

Users may choose to view additional details about each job by clicking on the Show Results ⬇ button below each job description.

Description	Status	Start Time	End Time
Batch Remove Post Grad Plan	Completed	5/29/2020 11:29:14 AM	5/29/2020 11:29:14 AM
⬇ Show Results			

The details are specific to each particular job, and will indicate the number of success and failures, as well as error messages for any failures.

Description	Status	Start Time	End Time
Batch Remove Post Grad Plan	Completed	5/29/2020 11:29:14 AM	5/29/2020 11:29:14 AM
⬆ Hide Results Batch Remove Post Graduate Plan Validation: Student 3 of 3 (100%) Success = 3 Failures = 0			

To hide these details, click the Hide Results ⬆ button.

Note: Job Object History is managed through the Maintenance module. Items may appear to be removed from this list as they are archived from within Maintenance.

Counseling > Competency

The Competency sub-module is where Counselors can tie assessments to subject-matter graduation requirements. Use this sub-module as a maintenance and reference area, where competency requirements can be created and reviewed.

From within the Counseling module, select the Competency sub-module from the menu at the left. The Competency tab will open.

COMPETENCY			
	Competency	Rank	Active
	SAT I	1	Yes
	Math	1	Yes
	ELA	1	Yes
	Social Studies	1	Yes
	Science	1	Yes

Note: If any competencies exist, they will display in a list under the heading line for Competency/Rank/Active.

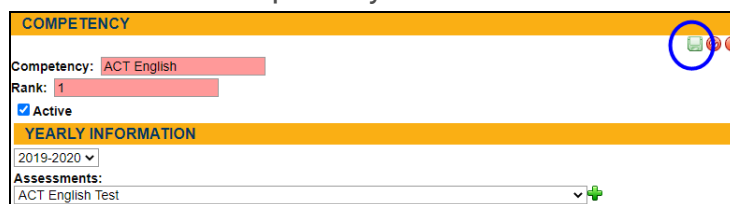
Add a New Competency

1. Click once on the green Add  button in the upper right corner of the Competency tab. The tab will refresh with fields for Competency and Rank, and a tab for Yearly Information.

COMPETENCY	
Competency:	
Rank:	
☒ Active	
YEARLY INFORMATION	
2019-2020	
Assessments:	
ACT Composite	

2. Enter the name of the Competency into the free-text field. Competency name is required.
3. Enter the numeric Rank into the free-text field. (This is used for sorting competencies in a list.)
4. The Active check box will default to Active; deselect Active by clicking once if desired.
5. Enter Yearly Information details:
 - A. Use the year drop-down list to select the school year that this competency will be valid for.
 - B. Use the Assessments drop-down field to select the name(s) of the exam(s) which is required to satisfy this competency:
 - C. Click once on the green Add Assessment  button to the right of the drop-down field to add this exam to the list of requirements for this competency.

- Repeat steps 1-6 until all required exams have been added.
- Click once on the green Save  button in the upper right corner of the Competency tab to save this Competency.



COMPETENCY

Competency: **ACT English**

Rank: **1**

☒ Active

YEARLY INFORMATION

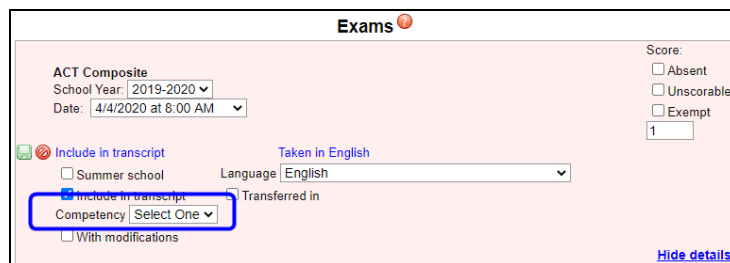
2019-2020

Assessments:

ACT English Test

- The tab will refresh to show the new competency in the list.

Note: To later use competency information, locate a student in the Counseling module, and review their Grades tab information. When Exams are added or graded in that area, a guidance counselor or administrator can designate a student as exempt from the exam, or they can select the appropriate competency satisfied by the exam.



Exams

ACT Composite

School Year: 2019-2020

Date: 4/4/2020 at 8:00 AM

Score:

☐ Absent

☐ Unscorable

☐ Exempt

1

☒ Include in transcript

☐ Summer school

Taken in English

Language: English

☒ Include in transcript

Competency: Select One

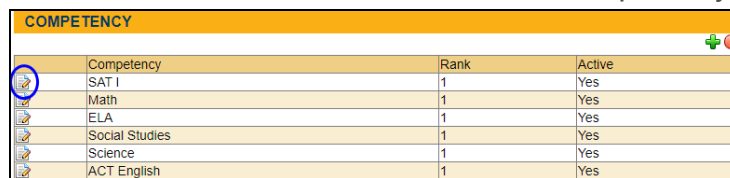
☐ With modifications

Transferred in

Hide details

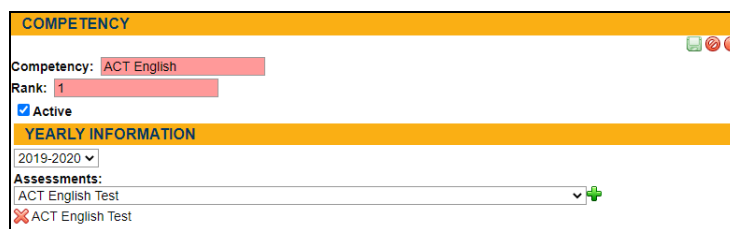
Edit an Existing Competency

- Click once on the Edit  button to the left of the Competency name.



Competency	Rank	Active
SAT I	1	Yes
Math	1	Yes
ELA	1	Yes
Social Studies	1	Yes
Science	1	Yes
ACT English	1	Yes

- The Competency tab will refresh with details of the selected competency in edit mode.



COMPETENCY

Competency: **ACT English**

Rank: **1**

☒ Active

YEARLY INFORMATION

2019-2020

Assessments:

ACT English Test

ACT English Test

- Make any required changes to the Competency name, Rank, Active status, or Yearly Information, including adding new Assessments or deleting existing Assessments.

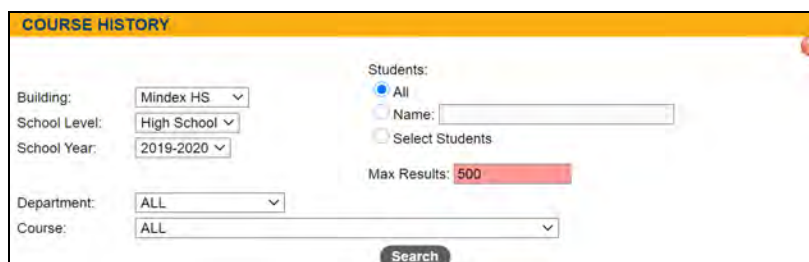
4. Click once on the green Save  button in the upper right corner of the tab to save your changes.

Note: Changes made here automatically “trickle down” to student records where competencies are in use.

Counseling > Course History

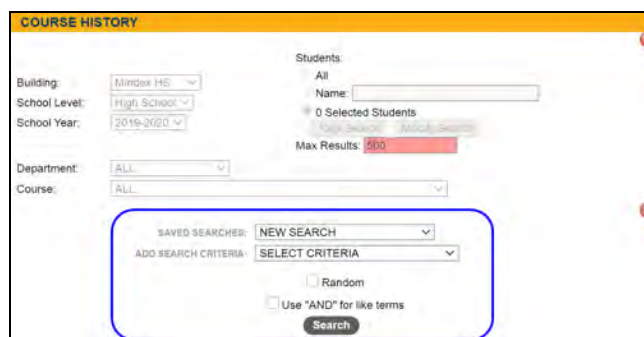
The Course History sub-module allows users to view the full course history for a given year, including schedule changes, for all students and courses.

Important Note: Users should exercise caution when making any changes to the data on this screen. Changes to data here are permanent, and will have impact throughout SchoolTool in areas such as attendance letters, data warehouse, and other views and reports. Also note that changes to one row of data may not be reflected in other rows.

A screenshot of the 'COURSE HISTORY' search interface. It features a yellow header bar with the title. Below the header, there are several search criteria: 'Building' (dropdown menu with 'Mindex HS' selected), 'School Level' (dropdown menu with 'High School' selected), 'School Year' (dropdown menu with '2019-2020' selected), 'Department' (dropdown menu with 'ALL' selected), and 'Course' (dropdown menu with 'ALL' selected). To the right of these criteria, there is a 'Students' section with radio buttons for 'All' (selected) and 'Select Students'. A 'Name' text input field is next to the 'Select Students' option. Below the 'Students' section, there is a 'Max Results' field with the value '500'. A 'Search' button is located at the bottom right of the search criteria area.

To review Course History:

1. Select the desired building, school level, and school year (the school year drop-down contains any year for which a locked master schedule exists for the selected building/school level).
2. Specify a department and/or individual course to limit the results to only those courses.
3. Choose the students for whom you wish to review course history (choose whether to search all, a single grade, a single counselor, or specific students using the batch selector).
 - A. When a user clicks the Select Students option, the screen will refresh to show a batch selector. Select the appropriate terms to locate students (or click Cancel  to return to the main screen).

A screenshot of the 'COURSE HISTORY' batch selector interface. It features a yellow header bar with the title. Below the header, there are several search criteria: 'Building' (dropdown menu with 'Mindex HS' selected), 'School Level' (dropdown menu with 'High School' selected), 'School Year' (dropdown menu with '2019-2020' selected), 'Department' (dropdown menu with 'ALL' selected), and 'Course' (dropdown menu with 'ALL' selected). To the right of these criteria, there is a 'Students' section with radio buttons for 'All' and 'Select Students'. A 'Name' text input field is next to the 'Select Students' option. Below the 'Students' section, there is a 'Max Results' field with the value '500'. A 'Search' button is located at the bottom right of the search criteria area. A blue box highlights the 'Batch Selector' section, which includes a 'SAVED SEARCHES' dropdown menu with 'NEW SEARCH' selected, an 'ADD SEARCH CRITERIA' dropdown menu with 'SELECT CRITERIA' selected, a 'Random' checkbox, a 'Use AND for like terms' checkbox, and a 'Search' button.

- B. Once students are selected, the radio button will show “Selected Students” (including the number of students selected). Click New Search to clear the search and find a new group of students or click Modify Search to return to the previous search criteria.

Students:

☐ All

☐ Name:

☒ 10 Selected Students

- Set the Max Results value if needed. This value is set to 500 by default to improve performance on this screen. Numbers over 500 may cause performance delays when loading results or performing operations on this page. If too many records are found when the user clicks Search, an error will appear; if this occurs, use the filters to narrow the search and try again.
- Click the **Search** button to view the course history. The results will display at the bottom of the screen.

COURSE HISTORY

Building:

Mindex HS

School Level:

High School

School Year:

2019-2020

Department:

ALL

Course:

ALL

Students:

☐ All

☒ Name

☒ 13 Selected Students

New Search

Modify Search

Max Results:

500

Search

Found 3 Students (21 Records)

Student ID	Student	Course ID	Course	Section	Period	Start	End	Entry Reason	Exit Reason
19700	Turner, Maria	00261	Lunch	2	Lunch3	8/20/2019		Manual	
19700	Turner, Maria	00289	Learning Lab	2	2	8/20/2019		Manual	
19700	Turner, Maria	00888	Advisory 11	1	Adv	8/20/2019		Manual	
19700	Turner, Maria	01175	Music Improvisation	1	4	9/8/2019		Manual	
19740	Turner, Patrick	00055	English 11	1	1	7/1/2019		Manual	
19740	Turner, Patrick	00037	Chemistry Honors	1	4	7/1/2019		Manual	
19740	Turner, Patrick	01103	Spanish III	2	3-1	7/1/2019		Manual	
19740	Turner, Patrick	00181	P.E. 9-12	14	4	7/1/2019		Manual	
19740	Turner, Patrick	00261	Lunch	3	Lunch3	8/13/2019		Manual	
19740	Turner, Patrick	00261	Lunch	2	Lunch3	8/13/2019		Manual	
19740	Turner, Patrick	00268	AIIS-English 9	2	3B	3/20/2020		Manual	
19740	Turner, Patrick	00277	AIIS Algebra	1	3A	2/14/2020		Manual	
19740	Turner, Patrick	00289	Learning Lab	4	3A	8/13/2019	2/11/2020	Manual	Drop
19740	Turner, Patrick	00289	Learning Lab	5	3B	8/13/2019	3/2/2020	Manual	Drop
19740	Turner, Patrick	00812	AP World history	1	2	7/1/2019		Manual	
19740	Turner, Patrick	00847	Honors Algebra II	1	1	7/1/2019		Manual	
19740	Turner, Patrick	00919	Communications (KCC)	1	2	1/2/2020		Manual	
19740	Turner, Patrick	00885	Advisory 10	3	Adv	8/13/2019	3/2/2020	Manual	Drop
20482	Turner, Angela	00189	P.E. 9-12 CCC	1	Adv	6/12/2019		Manual	
20482	Turner, Angela	00802	English 11 CCC	1		7/31/2019		Manual	
20482	Turner, Angela	01171	Advisory CCC	2	Adv	8/20/2019		Manual	

- Users with the appropriate permissions may be able to edit or delete certain rows in the course history results. Only some rows may be modified or deleted, depending on the data that row represents.
 - An Edit  button will appear for rows containing fields that can be modified:
 - Start Date: When editable, modifying the start date will change the effective date for that row. Note that this field may be blank for past switches, and will not be modifiable in that case.
 - End Date: This can be modified unless the course is currently on the student's schedule or if the exit reason is "Enrollment End."

- Exit Reason: This can only be modified if the Exit Reason is a drop or withdrawal reason.

19740	Turner, Maria	00277	AS Algebra	1	2A	2/14/2020	8/11/2020	Manual	
19740	Turner, Maria	00289	Learning Lab	4	2A	8/13/2019	8/11/2020	Manual	Drop
19740	Turner, Maria	00289	Learning Lab	8	2B	8/13/2019	8/2/2020	Manual	Drop
19740	Turner, Maria	00612	AP World History	1	2D	7/1/2018		Manual	
19740	Turner, Maria	00647	honors Algebra 2	5	2	7/1/2018		Manual	

B. A Delete  button will appear for rows that can be deleted:

- Switches: These rows can be deleted if the section does not contain any type of grade information (e.g., grade book assignments, marking period grades, assessment grades, etc.). When the row is deleted, SchoolTool will have no history of the student's having been in the removed section. This cannot be undone or re-added, and will also have impact on attendance policy letters and other areas throughout SchoolTool.
- Dropped courses: These too can be deleted if the section does not contain any type of grade information (e.g., grade book assignments, marking period grades, assessment grades, etc.). Attendance data will also be removed from any dropped course that is deleted. Again, this will have impact on other areas throughout SchoolTool.
- Withdrawn courses: These cannot be deleted. If the user has Edit rights, however, the withdrawal can be changed to a drop, which can then be deleted according to the rule for dropped courses.

7. Users with edit rights can also batch edit the start date for multiple records at one time:

A. Click the Edit  button in the Start Date column heading.

Student ID	Student	Course ID	Course	Section	Period	Start	End	Entry Reason	Exit Reason
19700	Turner, Maria	00261	Lunch	2	Lunch3	8/20/2019		Manual	
19700	Turner, Maria	00289	Learning Lab	2	2	8/20/2019		Manual	
19700	Turner, Maria	00686	Advisory 11	1	Adv	8/20/2019		Manual	
19700	Turner, Maria	01178	Shades Impressionism	1	A	8/6/2019		Manual	

B. The screen will refresh to display the column in edit mode. Use the check boxes to specify which rows should be modified.

Student ID	Student	Course ID	Course	Section	Period	Start	End	Entry Reason	Exit Reason
19700	Turner, Maria	00261	Lunch	2	Lunch3	8/20/2019		Manual	
19700	Turner, Maria	00289	Learning Lab	2	2	8/20/2019		Manual	
19700	Turner, Maria	00686	Advisory 11	1	Adv	8/20/2019		Manual	
19700	Turner, Maria	01178	Shades Impressionism	1	A	8/6/2019		Manual	

C. Enter the appropriate dates to change or use the Copy  button to apply the same date to all checked rows. If using the Copy feature, click Copy  then enter the desired date in the pop-up dialog when prompted and click OK.

sbweb6 says

Enter Start Date

9/5/2019

OK Cancel

- D. Once all changes have been entered, click the Save  button to apply the changes.
8. Click the Print  icon to view a printable report of the results. The report will respect any on-screen sorting.

Student ID	Student	College ID	Course	Section	Start	End	Entry Method	Exit Method
10	Spacely, Robert	00049	English I	4	06/04/2010	06/30/2011	SSB	Enrollment End
1009	Lopez, Donna	00051	English 10	2	06/07/2010	06/30/2011	Manual	Enrollment End
1009	Lopez, Donna	00057	ELA 9/10 AIS	10	06/19/2010	06/30/2011	Manual	Enrollment End
1067	Morris, Amanda	00051	English 10	8	06/04/2010	06/30/2011	SSB	Enrollment End
1068	Rivers, Nancy	00057	ELA 9/10 AIS	10	06/05/2010	06/30/2011	Manual	Enrollment End
1068	Rivers, Nancy	00145	English 9	1	06/19/2010	06/30/2011	Manual	Enrollment End
106	Spacely, Elizabeth	00054	English 11H	2	06/04/2010	06/30/2011	SSB	Enrollment End
1067	Hyghren, Steven	00057	ELA 9/10 AIS	8	06/07/2010	06/30/2011	Manual	Enrollment End
1067	Hyghren, Steven	00187	English 10	4	06/04/2010	06/30/2011	SSB	Enrollment End
1068	Reppert, George	00049	English I	5	06/16/2010	06/30/2011	Manual	Enrollment End

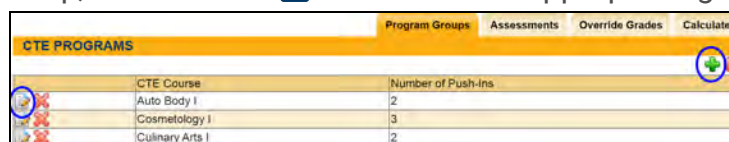
Counseling > CTE Programs

The **Counseling > CTE Programs** sub-module is used to assist districts in configuring CTE program groups. A CTE Program group consists of a primary CTE course that contains push-in courses and assessment groups (where one assessment score is calculated based on other assessment scores). Grading is handled with a behind-the-scenes, customized procedure.

Program Groups

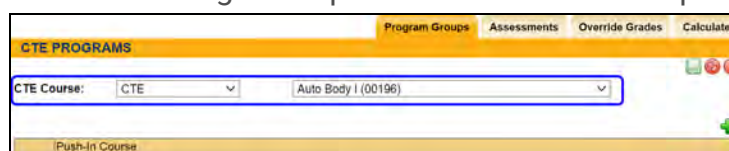
To define a program group, navigate to the **Counseling > CTE Programs > Program Groups** tab.

1. Click the Add **+** button to create a new Program Group (to modify an existing Program Group, click the Edit **✎** button for the appropriate group).



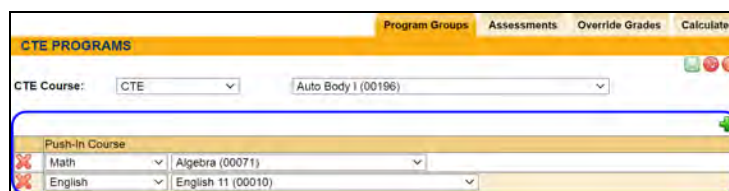
CTE Course	Number of Push-Ins
Auto Body I	2
Cosmetology I	3
Culinary Arts I	2

2. Select a CTE Course using the department and course drop-downs.



CTE Course: CTE Auto Body I (00196)

3. In the grid below, use the dropdowns to select one or more push-in courses. Click the Add **+** button to add more rows to the grid. Remove push-in courses using the Delete **✕** button as needed.



Push-In Course
Math Algebra (00071)
English English 11 (00010)

4. Click the Save **💾** button in the upper right corner when you are finished to apply these changes.

Assessments

Multiple assessments may be assigned to the calculated assessment that is defined in the course catalog. To assign assessments, navigate to the **Counseling > CTE Programs > Assessments** tab. The calculated assessment will be used for all CTE Program course grading according to customized CTE grading calculations.

CTE PROGRAMS

Program Groups Assessments **Override Grades** Calculate

School Year: 2019-2020

Calculated Assessment: Final Exam Percent of Final Average: 10

Assessment	Category
Local Final	Local
CTE Assessment	CTE

1. Select the school year for which the calculated assessment should be defined and click Add  to specify a calculated assessment.
2. Select the appropriate local exam to be used as the calculated assessment score for CTE courses and specify the Percent of Final Average value (this percent will override any percentage defined for that exam in the course catalog).
3. To add an assessment to be included in the calculated assessment score, click the Add  button, select an assessment from the drop-down and assign a category for the assessment.
4. Continue adding assessments as needed until all associated assessments have been added.
5. Once saved, the calculated assessment score will be calculated based on the average of all associated assessments. This calculated assessment value will be used for the defined percent of the student's final CTE program grade.

Note: All assessments (the calculated assessment as well as any individual associated assessments) must be linked to the course in the course catalog.

Override Grades

The Override Grades tab allow users to manually override submitted marking period averages and/or grade book subject averages. To view a list of students in a particular CTE Program Group, use the filters at the top of the screen to specify criteria and click the Refresh  button to update the list.

Program Groups

Assessments

Override Grades

Calculate

CTE PROGRAMS

Building:

Mindex HS

 School Level:

High School

 School Year:

2019-2020

Marking Period:

Quarter 3

 Program Group:

Auto Body I

Student	ID	Grades						
Davidson, Ashley M	20915	<table> <tr> <th>Course/Subject</th> <th>Average</th> </tr> <tr> <td> Auto Body I</td> <td>85</td> </tr> <tr> <td> Daily Living Skills</td> <td>100</td> </tr> </table>	Course/Subject	Average	Auto Body I	85	Daily Living Skills	100
Course/Subject	Average							
Auto Body I	85							
Daily Living Skills	100							
Hill, Christopher T	26459	<table> <tr> <th>Course/Subject</th> <th>Average</th> </tr> <tr> <td> Auto Body I</td> <td></td> </tr> <tr> <td> Daily Living Skills</td> <td>100</td> </tr> </table>	Course/Subject	Average	Auto Body I		Daily Living Skills	100
Course/Subject	Average							
Auto Body I								
Daily Living Skills	100							
White, Cheryl A	20225	<table> <tr> <th>Course/Subject</th> <th>Average</th> </tr> <tr> <td> Auto Body I</td> <td></td> </tr> <tr> <td> Daily Living Skills</td> <td>95</td> </tr> </table>	Course/Subject	Average	Auto Body I		Daily Living Skills	95
Course/Subject	Average							
Auto Body I								
Daily Living Skills	95							

To override any grade, click the Edit  button for the appropriate course or subject and enter the override average. Click Save  button to apply the change.

Davidson, Ashley M	20915	Course/Subject		Average	
			Auto Body I	85	None ▾
			Daily Living Skills	100	

Note: Because average calculations run from the Calculate Tab will overwrite any average overrides, these values should be entered *after* all calculation jobs have been completed.

Calculate

The Calculate tab allows users to manually trigger average calculations for CTE Program Groups. This will overwrite existing marking period grades and any subject grades that have already been generated using this tab.

Program Groups	Assessments	Override Grades	Calculate
CTE PROGRAMS			
Calculation Type: ☒ Marking Period : ☐ Assessment			
Building: Mindex HS ▾ School Level: High School ▾ School Year: 2019-2020 ▾			
Marking Period: Quarter 3 ▾ Program Group: ALL ▾			

To use this feature, select a calculation type (Marking Period or Assessment) and use the filters to select the program group(s) to be included in the calculation job. Click the Calculate  button to trigger the job. A warning will appear; click OK to confirm the operation.

Once the selected calculation job has been triggered, a confirmation message will appear. The job may take several minutes to run before it is complete.

Program Groups	Assessments	Override Grades	Calculate
CTE PROGRAMS			
The Calculate Marking Period Average job has been added to the queue. This may take several minutes before it completes.			

Counseling > Grade Search

This is where you can generate lists of students whose grades (or averages) meet certain criteria. For example, use Grade Search to see students who may be failing, or to determine eligibility for scholastic awards or sports participation. Users may also use Grade Search to monitor teachers and see which faculty has students who are failing, or review how teachers are grading students from marking period to marking period.

1. From within the Counseling module, select the **Grade Search** sub-module from the menu at the left. The Grade Search tab will open.
2. Select the search type:
 - **Grade** – Allows users to locate students who meet the specified criteria for either marking period grades, progress report grades, in progress course averages, final course averages, or withdrawn courses. These options locate students with either a specific grade or grade range, specific grade note(s), or those who have not received a grade. If the district uses skill set grading, users can also search for students who have received specified grades for the specified skill(s).

GRADE SEARCH

☒ Grade ☐ Ineligible ☐ Assessment ☐ Comment

☒ Marking Period ☐ Progress Interval ☐ In Progress Average ☐ Final Average ☐ Withdraw

Building: Mindex HS
School Level: High School
School Year: 2018-2019
Marking Period: Quarter 1

☒ Grading Scale: 0-100 Range: 0 - 100
☐ Grade Note
☐ No Grade

Filters
Teacher: ALL
Course: ALL
Student: ☒ Active Enrollments ☐ Ignore Enrollments ☐ Advanced Search

Search

Note: Options which appear in the Grade Note drop-down are defined by the district. If you have values in the drop-down that are not used, or need additional values to be added to the list, contact your SchoolTool liaison for support.

- **Ineligible** – Allows users to locate students who have received the selected grade note(s) a specified number of times for the selected marking period or progress report, or for a final course average, as well as students who had failing averages during the selected grading interval.

GRADE SEARCH

☐ Grade
 ☒ Ineligible
 ☐ Assessment
 ☐ Comment

☒ Marking Period
 Building:

☐ Progress Interval
 School Level:

☐ Final Average
 School Year:

Marking Period:

Grade Notes:

Number of Times at Least:

Filters

Teacher:

Course:

Student:
 ☒ Active Enrollments
 ☐ Ignore Enrollments
 ☐ Advanced Search

Search

Note: If you do not select any Grade Notes, Grade Search will locate students with failing grades.

- **Assessment** – Allows users to locate students who have received an assessment score within the designated range or who received an assessment note for either a final exam, midterm, 3-8 assessment, or user defined assessment.

GRADE SEARCH

☐ Grade
 ☐ Ineligible
 ☒ Assessment
 ☐ Comment

☒ Finals
 School Year:

☐ Midterms
 Date Taken: -

☐ 3-8 Assessments
 Grading Scale: Range: -

☐ User Defined Assessments
 Assessment Note:

Filters

Assessment:
 ☒ Local and State
 ☐ Local
 ☐ State

Course:
☒ All
 ☐ Select

Student:
 ☒ Active Enrollments
 ☐ Ignore Enrollments
 ☐ Advanced Search

Search

- **Comment** – will search for students who have the comment that you entered.

GRADE SEARCH

☐ Grade
 ☐ Ineligible
 ☐ Assessment
 ☒ Comment

☒ Marking Period
 ☐ Progress Interval

Building:
 School Level:
 School Year:
 Marking Period:

Comment: 

Filters

Teacher:

Course:

Student: ☒ Active Enrollments
 ☐ Ignore Enrollments
 ☐ Advanced Search

Search

You must type in the comment or key word then click the Add  button to add the comment to the search criteria.

GRADE SEARCH

☐ Grade
 ☐ Ineligible
 ☐ Assessment
 ☒ Comment

☒ Marking Period
 ☐ Progress Interval

Building:
 School Level:
 School Year:
 Marking Period:

Comment: 

Comment:

3. Define any additional filters at the bottom of the screen. These may vary depending on the type of search and other options.
4. Define the students to include in the search (this may be all students with active enrollments, all students independent of enrollment status, or criteria specified using the advanced search batch terms).
5. Click the Search button to return a list of results. To print the Grade Search report, click the Print  icon at the top of the results.

Counseling > Graduation Requirements

The Graduation Requirements area is the default area when accessing the **Counseling > Graduation Requirements** sub-module.

The screenshot shows the 'GRADUATION REQUIREMENTS' interface. At the top, there are two dropdown menus: 'Cohort Year' set to '2019-2020' and 'Import From Cohort Year' set to '2018-2019', followed by an 'Import' button. Below this, there are two sections: 'Course Areas' and 'Assessment Areas'. Each section has a green plus icon, a 'Name' field, 'Credits' and 'Rank' dropdowns, and a table with columns 'Name', 'Credits', 'Rank', and 'Active'. The 'Assessment Areas' section also includes a 'Prior Graduation Requirements' link at the bottom.

Note: Districts who were using the previously existing Graduation Requirements area may still access the legacy feature using the “Prior Graduation Requirements” link at the bottom of the Graduation Requirements screen.

1. To specify graduation requirements for a given year, navigate to the **Counseling > Graduation Requirements** sub-module and select the Cohort Year for which these requirements should be added.
2. If no requirements have been added for the selected cohort year, an option to import from a different year will be available at the top of the screen. Users may either import or manually add requirements for the selected year. Once details have been added, the import option will no longer be available.

This screenshot is identical to the one above, but a blue rectangular box highlights the 'Import From Cohort Year' dropdown menu and the 'Import' button, indicating the import functionality.

3. To generate a report for graduation requirements, click the report icon  in the upper right corner of the screen. Specify the students to include in the report using the radio buttons (choose whether to run the report based on the following options: By Cohort Year, By Class Of, By Counselor, or By Student). Specify additional options for the report using the Options checkboxes (Show Summary, Show Detail, Show Current Program Services, and Show Signature Lines).

GRADUATION REQUIREMENTS

☒ By cohort year: 2019-2020

☐ By class of:

☐ By counselor:

☐ By student:

Options

☒ Show Summary

☒ Show Detail

☐ Show Current Program Services

☒ Show Signature Lines

Run Report

[Prior Graduation Requirements Report](#)

Note: Use the “Prior Graduation Requirements Report” link at the bottom of the screen to access the previously existing report for the legacy Graduation Requirements feature.

- Once options are set appropriately, click the Run Report button to generate the report.

Mindex City CSD					
Graduation Requirements Worksheet					
Name:	Adams, Amy			Options:	Regents Advanced
Student ID:	3596			Counselor:	Murray, Deborah
Cohort:	2007-2008			Homeroom:	1040(Misc)
Grad Date:	2010-2011				

Course Area	Required	Completed	Expected
ELA	4.00	3.00	4.00
Social Studies	4.00	4.00	6.00
Mathematics	4.00	0.00	0.00
Science	4.00	0.00	0.00
Health	0.50	0.00	0.00
Lang Other than English	1.00	0.00	0.00
Sequence Credits, Elect	2.50	0.00	0.00
Art/Music	2.00	0.00	0.00
Technology	2.00	0.00	0.00
Total	25.00	3.00	8.00

Assessment Area	Required	Completed	Expected
Comprehensive English	1.00	1.00	1.00
Global Hist & Geo	1.00	1.00	1.00
US Hist & Gov	1.00	1.00	1.00
Total	3.00	3.00	3.00

Courses	Grade	Year	Course	Mark	Credits
ELA	9	2007-2008	00049 English 9	87	1.00
	10	2008-2009	00051 English 10	85	1.00
	11	2009-2010	00053 English 11	89	1.00
	12	2010-2011	00055 English 12		1.00 scheduled

Assessments	Grade	Year	Course	Mark	Credits
Comprehensive English	11	08/16/2010	English Regents	87	1.00

Global Hist & Geo	Grade	Year	Course	Mark	Credits
	10	08/15/2009	Global History Regents	85	1.00

US Hist & Gov	Grade	Year	Course	Mark	Credits
	11	08/16/2010	U.S. History Regents	92	1.00

Note: If a student receives an attribute of Exempt for an assessment included on this report, the assessment will be counted as having met the requirement and will receive credit appropriately.

Graduation Requirements Courses

To add requirements for course areas manually, enter the name of the course area (e.g., Social Studies), the total number of credits required, and the rank for this course area. Click the Add + button to add the requirement and repeat the process as needed until all course areas have been added. To modify an existing requirement, click the Edit ✎ button and make changes in the row as needed and save the changes.

GRADUATION REQUIREMENTS

Cohort Year: 2019-2020

Course Areas:

Name: Credits: Rank: 1

Name	Credits	Rank	Active
ELA	4	1	True
Social Studies	4	2	True
Math	3	3	True
Science	3	4	True
LOTE	1	5	True
Art/Music	1	6	True
Phys Ed	2	7	True
Health	0.5	8	True
Electives	3.5	9	True

To add courses to a course area requirement, Select  that course area. Use the appropriate filter options to add courses from the course catalog or from legacy data by selecting the department and course then clicking the Include  button. Repeat this process until all necessary courses have been added. Remove a course from the list of selected courses using the Exclude  button. Click the Done  button to return to the main Graduation Requirements screen.

GRADUATION REQUIREMENTS

Graduation Requirement Courses for: Social Studies (Cohort year: 2019-2020)

Add Course from: ☒ Course Catalog ☐ Legacy

Department: Social Studies

☒ All Courses ☐ Exclude Elective Courses ☐ Only Elective Courses

Available Courses:

- CC: (00895) Analysis of Public Policy (College)
- CC: (00540) Academic Skills Social Studies
- CC: (00956) Adirondack Humanities
- CC: (00567) American History
- CC: (00033) American History (MindexCC)
- CC: (00903) Ancient Civilizations I
- CC: (00904) Ancient Civilizations II
- CC: (00042) Anthropology
- CC: (00945) AP Economics
- CC: (00701) AP European History

Selected Courses:

- CC: (00567) American History
- CC: (00036) Economics
- CC: (00039) Economics - New Visi
- CC: (00336) Economics CR
- CC: (00027) Glob Hist & Geog I
- CC: (00293) Glob Hist & Geog I Honors
- CC: (00028) Glob Hist & Geog II
- CC: (00041) Glob Hist & Geog II
- CC: (00569) Global 10
- CC: (00669) Global 9

Graduation Requirements Assessments

To add requirements for assessment areas manually, enter the name of the assessment area (e.g., Social Studies), the total number of credits required, and the rank for this assessment area. Click the Add  button to add the requirement and repeat the process as needed until all assessment areas have been added. To modify an existing requirement, click the Edit  button, make changes in the row as needed and save the changes.

Assessment Areas:

Name: Credits: Rank: 1

Name	Credits	Rank	Active
ELA	1	1	True
Global Hist & Geo	1	2	True
US Hist & Govt	1	3	True
Living Environment	1	4	True
Algebra I	1	5	True
Earth Science	1	6	True
Geometry	1	7	True
Algebra II	1	8	True
Chemistry	1	9	True
Physics	1	10	True
FLACS	1	11	True

To add assessments to a assessment area requirement, Select ➤ that course area. Use the appropriate options to add assessments from the current Assessments list or from legacy data by selecting the assessment and then clicking the Include ➡ button. Repeat this process until all necessary assessments have been added. Remove a assessment from the list of selected assessments using the Exclude ← button. Click the Done ← button to return to the main Graduation Requirements screen.

GRADUATION REQUIREMENTS

Graduation Requirement Assessments for: US Hist & Govt (Cohort year: 2019-2020)

Add Assessment from: ☒ Standard ☐ Legacy

ALL

Available Assessments:

- Standard: ACT Composite
- Standard: ACT ELA
- Standard: ACT STEM (ACT STEM)
- Standard: ACT Writing Test
- Standard: CTE Assessment
- Standard: Final Exam
- Standard: Local Final
- Standard: Midterm
- Standard: Regents in Algebra I (Common Core)
- Standard: Regents in English Language Arts (Common Core)

Selected Assessments:

- Standard: AP U.S. Government & Politics
- Standard: AP U.S. History
- Standard: RCT U.S. History and Government
- Standard: Regents U.S. History and Government
- Legacy: U.S. HISTORY
- Legacy: US HIST/GVT

Prior Graduation Requirements

The Graduation Requirements sub-module is where counselors and/or administrators can designate the subject units required to achieve each diploma type. Use this sub-module as a maintenance and reference area, where graduation requirements can be created, edited and reviewed.

1. Navigate to the Counseling > Graduation Requirements sub-module and click on the link to Prior Graduation Requirements at the bottom of the screen.

GRADUATION REQUIREMENTS

Cohort Year: 2019-2020

Course Areas:

Name	Credits	Rank	Active
ELA	4	1	True
Social Studies	4	2	True
Math	3	3	True
Science	3	4	True
LOTE	1	5	True
Art/Music	1	6	True
Phys Ed	2	7	True
Health	0.5	8	True
Electives	3.5	9	True

Assessment Areas:

Name	Credits	Rank	Active
ELA	1	1	True
Global Hist & Geo	1	2	True
US Hist & Govt	1	3	True
Living Environment	1	4	True
Algebra I	1	5	True
Earth Science	1	6	True
Geometry	1	7	True
Algebra II	1	8	True
Chemistry	1	9	True
Physics	1	10	True
FLACS	1	11	True

[Prior Graduation Requirements](#)

2. The Graduation Requirements tab will open with a list of school years. Select ➤ the school year you wish to review or add requirements for. The tab will refresh with a list of diploma types valid for the selected year.

GRADUATION REQUIREMENTS	
2019-2020	
Diploma Type	
▶	Local
▶	GED
▶	IEP
▶	Certificate
▶	Regents
▶	Regents with Honors
▶	Regents Advanced
▶	Regents Adv. with Honors
▶	Regents with CTE Endorsement
▶	Regents Advanced with CTE Endorsement
▶	Local with CTE Endorsement
▶	Regents Diploma with Advanced Designation Math
▶	Regents Diploma with Advanced Designation Science
▶	Regents Diploma with Advanced Designation Math & Science
▶	Regents Diploma with Advanced Designation & Honors Math
▶	Regents Diploma with Advanced Designation & Honors Science
▶	Regents Diploma with Advanced Designation & Honors Math & Science
▶	Skills and Achievement Credential
▶	CDOS
▶	Regents Advanced with Honors and CTE Endorsement
▶	Regents Diploma with Adv. Designation Science and CTE Endorsement

3. Select ▶ a diploma type from the list.
 - A. If graduation requirements for that type exist, they will appear in a list.

GRADUATION REQUIREMENTS			
2019-2020 > Regents			
▶	✗	Requirement	Units
▶	✗	English	4.0
▶	✗	Math	3.0
▶	✗	Social Studies	3.0

- B. If there are no graduation requirements defined for the selected diploma type, the tab will refresh but the list area will be empty.

GRADUATION REQUIREMENTS			
2019-2020 > Regents			
		Requirement	Units

Add Graduation Requirements

1. Click once on the Add + button (in the upper left corner of the tab) for this diploma type.

GRADUATION REQUIREMENTS	
2019-2020 > Regents	
+	Requirement
	Units

2. An entry area for the **Requirement** name and **Units** will appear.

GRADUATION REQUIREMENTS	
2019-2020 > Regents	
Requirement:	Units: 0

- Enter the **Requirement** name. This field is required. Examples might be the subjects required for graduation, such as English or Math.
- Enter the number of **Units** required for this diploma. This field is required and accepts only numbers. Examples might be 4 units of English or 2 units of Math.

GRADUATION REQUIREMENTS	
2019-2020 > Regents	
Requirement: English	Units: 4.0

- Click once on the green Save  button in the upper left. The tab will refresh with the details of the newly added requirement in read-only mode.

GRADUATION REQUIREMENTS	
2019-2020 > Regents	
Requirement: English	Units: 4.0

Note: If you wish to edit this requirement, click once on the Edit  button. Make any changes and save your work.

Note: If you wish to add another requirement for this diploma type, click once on the Done  button. The tab will refresh showing you the diploma type and a row for the requirement you have added.

GRADUATION REQUIREMENTS		
2019-2020 > Regents		
	Requirement	Units
	English	4.0
	Math	3.0
	Social Studies	3.0

- Repeat the steps above for each requirement which must be completed to achieve this diploma type.

Edit Existing Graduation Requirements

- Select  the diploma type you wish to edit requirements for. The tab will refresh with a list of requirements and their respective units for the selected diploma.

GRADUATION REQUIREMENTS		
2019-2020 > Regents		
	Requirement	Units
	English	4.0
	Math	3.0
	Social Studies	3.0

- Click once on the Details  button to the left of the requirement row you wish to edit. The requirement details will appear in read-only mode.

GRADUATION REQUIREMENTS	
2019-2020 > Regents	
Requirement: English	Units: 4.0

- Click once on the Edit  button in the upper left corner of the tab. The tab will refresh with the details in edit mode.

GRADUATION REQUIREMENTS	
2019-2020 > Regents	
Requirement: English	Units: 4.0

- Make any changes to the requirement name (subject) and/or units.
- When you have finished making changes, click once on the green Save  button in the upper left to save your work. The tab will refresh with the new details of the requirement in read-only mode.

GRADUATION REQUIREMENTS	
2019-2020 > Regents	Units: 4.0
Requirement: English	

6. Click once on the Done  button. The tab will refresh showing you the diploma type and the updated requirement in the list of other requirements.

GRADUATION REQUIREMENTS			
2019-2020 > Regents			
		Requirement	Units
		English	4.0
		Math	3.0
		Social Studies	3.0

Note: You can remove a requirement at any time by clicking once on the Remove  button to the left of the requirement row.

Counseling > Overrides

The **Counseling > Overrides** sub-module contains the following override areas:

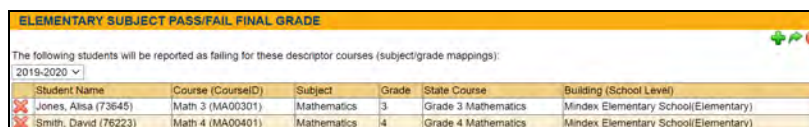
- **Elementary Subject Pass/Fail Final Grade:** This area allows users to indicate which students have failed a 3-8 subject area (as mapped in **Maintenance > Export > State Course Code Mappings**).
- **Minutes Verification and Override:** This area allows users to review course minutes per relationship and, if they have the appropriate permissions, manage overrides for relationship minutes, and responsibility weight for exports.



Elementary Subject Pass/Fail Final Grade

This sub-module contains an **Elementary Subject Pass/Fail Final Grade** override area that allows users to indicate which students have failed a state-mapped descriptor-based course (either mapped directly to a NYS course code or via subject/grade level mappings). Students on this list will be marked as failing those subjects when performing student grade extracts for NYS data warehouse exports.

When users first enter this area they will see a list of all students who are currently on the list. If the user has Edit rights for this area, buttons will be available to Add **+** or Delete **×** students from this list.

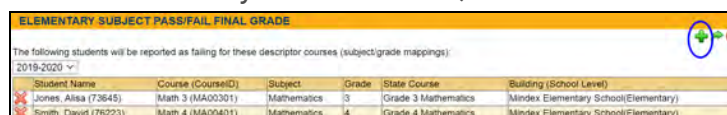


A screenshot of the "ELEMENTARY SUBJECT PASS/FAIL FINAL GRADE" screen. At the top, it says "The following students will be reported as failing for these descriptor courses (subject/grade mappings):". Below this is a dropdown menu showing "2019-2020". A table follows with the following data:

Student Name	Course (CourseID)	Subject	Grade	State Course	Building (School Level)
Jones, Aisa (73645)	Math 3 (MA00301)	Mathematics	3	Grade 3 Mathematics	Mindex Elementary School(Elementary)
Smith, David (76223)	Math 4 (MA00401)	Mathematics	4	Grade 4 Mathematics	Mindex Elementary School(Elementary)

Add a Student to the Pass/Fail List

1. Be sure the correct school year is selected, then click the Add **+** button.



2. A new screen will open with search options to locate the student.

3. In the search results list, click the Select > button to view a student's schedule.

First Name	MI	Last Name	Address	Phone	ID	Age	Grade	Homeroom
Aaron	W	Adams	354 Blackjack Pleasant Road	H: (556) 433-9008	21654	14	09	
Aaron	J	Adams	1702 Molino Bridge Road		25372	9	03	118
Aaron	J	Adams	90 Mulberry Street		27717	12	06	

4. Use the checkboxes to select one or more course/subject combinations that the student is failing.

Section	Course	Subject	Grade
☒	Grade 3 ELA (ELA00471)	English Language Arts	3
☒	Grade 3 Social Studies (SS00291)	Social Studies	3
☒	Grade 3 Science (SCI 00493)	Science	3
☐	Grade 3 Math (MA00301)	Mathematics	3

5. Click Save to add the student to the Failing list and return to the list. The student who was just added will appear in the list.
6. Repeat this process with additional students as needed until all failures have been indicated.

Minutes Verification and Override

The **Minutes Verification and Override** area allows users to review course minutes per relationship and, if they have the appropriate permissions, manage overrides for relationship minutes, and responsibility weight for exports. Depending on the user's permissions, the screen may include options to View Minutes, Edit Override Values for Export, or both.

A similar area is available in a Teacher's **Home > My Home > Reports Tab**. The two areas function nearly identically, except that when accessing the area from a Teacher's My Home, only that teacher's students are available, while all students to which the user has access are available from within Counseling.

Note: Due to the large number of calculations, this screen may load slowly; using filters to narrow the results will help.

Minutes Verification and Override

← Back Help ?

School Year: 2021-2022

Building School Level: Minck HS High School

Dates: ☒ View Minutes From 7/1/2021 To 6/30/2022 ☐ Edit Override Values For Export

Students: ☒ All ☐ Select Students

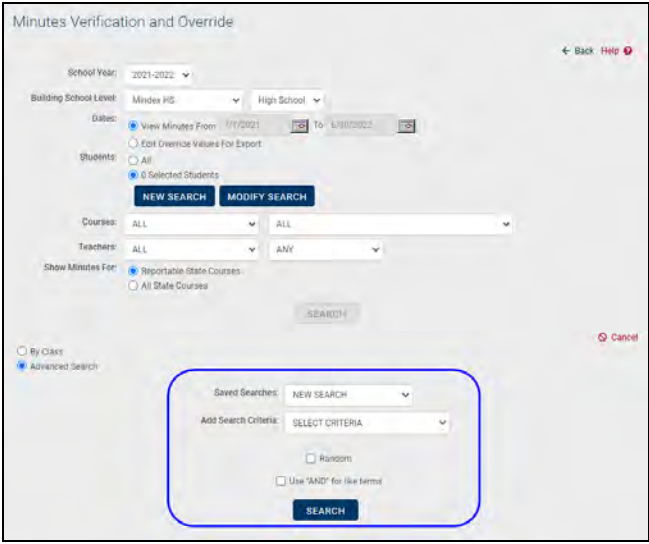
Courses: ALL ALL

Teachers: ALL ANY

Show Minutes For: ☒ Reportable State Courses ☐ All State Courses

SEARCH

1. To begin, use the dropdowns to select a School Year, Building and School Level as appropriate.
 2. Select whether to View Minutes or Edit Override Values for Export (these options are available based on permissions; View will present the results in read-only mode, while Edit will allow users to add, edit, or clear overrides).
 - A. If the View option was selected, users can specify a Date Range. The results list will show records where a relationship existed during the selected dates; all minutes calculations will be performed based on these dates, allowing users to see the minutes accumulated for a relationship for that date range.
- Note:** When the Edit option is selected, records will reflect the selected school year; users will not be able to specify a date range due to the nature of minutes calculations.
3. Select Students (all students or specific students using the batch selector).
 - A. When a user clicks the Select Students option, the screen will refresh to show a batch selector. Select the appropriate terms to locate students (or click Cancel  to return to the main screen). Select the appropriate students and click Continue (or click Cancel  to return to the main screen)



- B. Once students are selected, the radio button will show “Selected Students” (including the number of students selected). Click New Search to clear the search and find a new group of students or click

Modify Search to return to the previous search criteria.

Students:
☐ All
☒ 25 Selected Students

NEW SEARCH
MODIFY SEARCH

- Specify a Department, Course and/or Teacher.
- Choose whether to view minutes for only reportable state courses or for all state courses.
- Click the Search button to generate the results list (results will only include rows for courses that are mapped to a state course).

The results list will display any relationships that meet the selected filter criteria (if in View mode, the list will be presented in read-only mode). The list will include relationship start and end dates, the student ID and name, the course department, ID (including section number and period), course name, state course code, and teacher. It will also include calculated values for Total Planned, Potential, and Actual Minutes, Responsibility Weight, and any existing overrides for Potential Minutes, Actual Minutes, and Weight values.

Records in **red text** indicate that a Minutes override was added but that row is no longer valid due to underlying data issues (for example, if a schedule effective date is modified after the student has been given a minutes override). These rows will show “0” for the calculated minute columns.

Start Date	End Date	Student ID	Student Name	Course Department	Course ID	Course Name	State Course	Teacher	Total Planned	Potential	Actual	Weight	Potential Override	Actual Override	Weight Override
08/01/21	08/05/22	27741	Adams, Elizabeth K	English	0001710LP02	0001011	0100002	Cooperated Name	7992	7992	7148	1.00			
08/01/21	08/05/22	28148	Allen, Brian	English	0001710LP02	0001011	0100002	Cooperated Name	7992	7992	7992	1.00			
08/01/21	08/05/22	28015	Allen, Laura K	English	0001710LP02	0001011	0100002	Cooperated Name	0	0	0	1.00	7992	7992	0.50
08/01/21	08/05/22	2791	Allen, William K	English	0001710LP02	0001011	0100002	Cooperated Name	7992	7992	7992	1.00			

Definitions:

- Total Planned:** This field is the number of minutes that the course has met (or planned to meet) for the school year. This is based on the number of ‘sessions’ a course/section has met and the minutes – derived from one of the three options described below. The sessions will use all weekdays that are associated with a semester and are not set to ‘Students Off’ in the **Maintenance > School Year > Calendar** area.
- Potential:** This field is based on the Total Planned Class time with the following exceptions:
 - The minutes calculation will start with the Relationship Start Date and proceed to the Relationship End Date. When a date range is selected, calculations will only include minutes within that date range.
 - When a date range is selected, this calculation will only include minutes within that date range.

- **Actual:** This field is based on the Potential Student Instructional Time but will NOT include any sessions that occur on a date for which the student has a daily absence or a period absence for the given course/section.
- **Weight:** This is a number between 0 and 1 representing the percent allocation of responsibility for instruction assigned to this teacher and student.

When in Override Mode, Edit  and Delete  buttons may appear beside rows in this list. To add or modify an override, click the Edit  button and modify the fields at the far right of the list as desired. Be sure to Save  when done to apply changes.

	Start Date	End Date	Student ID	Student Name	Course Department	Course ID	Course Name	State Course	Teacher	Total Planned	Potential	Actual	Weight	Potential Override	Actual Override	Weight Override
	09/01/21	06/30/22	2761	Adams, Elizabeth R	English	00011 (S.P.2)	00011-11	0-0000	Coastland, Kate	7992	7992	7140	1.00			
	09/01/21	06/30/22	0843	Allen, Brian	English	00011 (S.P.2)	00011-11	0-0000	Coastland, Kate	7992	7992	7992	1.00			
 Cancel	09/01/21	06/30/22	2813	Allen, Irene R	English	00011 (S.P.2)	00011-11	0-0000	Coastland, Kate	7992	7992	7992	1.00	7101		1.00
	09/01/21	06/30/22	2761	Allen, William R	English	00011 (S.P.2)	00011-11	0-0000	Coastland, Kate	7992	7992	7992	1.00			
	09/01/21	06/30/22	0874	Anderson, Maria H	English	00011 (S.P.2)	00011-11	0-0000	Coastland, Kate	7992	7992	7992	1.00			

The Delete  button clears all override values that the user has rights to override for a given row. It will only be available when an override exists. When clearing overrides for an invalid row (shown in red), that entire row will be removed from the list.

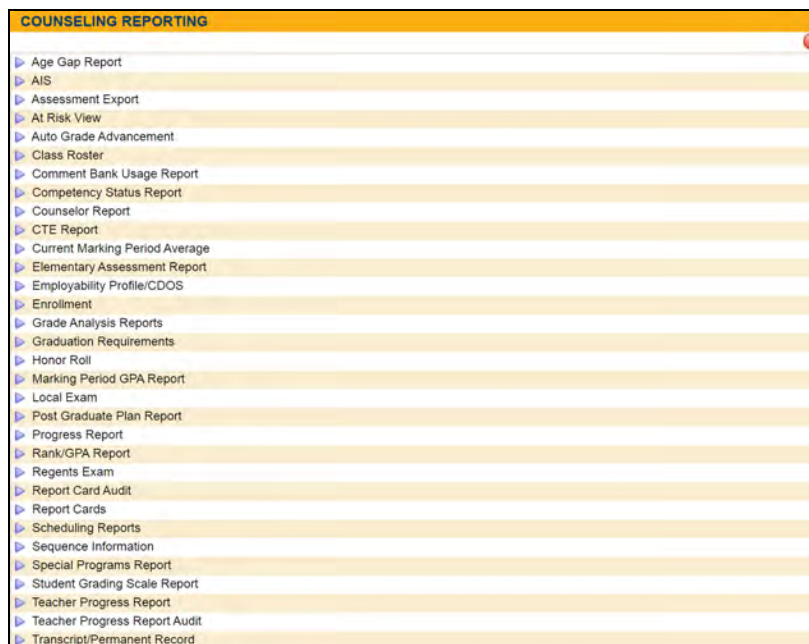
Print the report if desired. The report will respect any on-screen sort order.

Faculty Student Course Minutes Verification											6/24/2012 8:13:07PM	
Mindex HS												
Date From 7/1/2011 To 6/30/2012												
Courses in Department: English												
All Teachers:												
Start Date	End Date	Student	Department	Courses	State Courses	Faculty	Calculated Minutes			Override Minutes		Weight
							Planned	Potential	Actual	Potential	Actual	
09/06/2011	06/09/2012	Adams, Benjamin VV	English	English 11	English/Language Arts II	Thomas, Ruth	7,875	6,300	6,300			1.00
		ID: 1377		ID: 00192 (S.2-P.1)	ID: 21093	ID: 2690						
09/06/2011	06/09/2012	Adams, Benjamin VV	English	ELA 11/12 A/B	English/Language Arts II	Thomas, Ruth	3,320	2,440	2,440			1.00
		ID: 1377		ID: 00258 (S.1-P.3)	ID: 21093	ID: 2690						
09/06/2011	06/09/2012	Adams, Benjamin VV	English	ELA 11/12 A/B	English/Language Arts II	Thomas, Ruth	0	0	0	3,400	3,200	1.00
		ID: 1377		ID: 00258 (S.1-P.3)	ID: 21093	ID: 2690						
09/06/2011	06/09/2012	Adams, Betty U	English	English 11H	English/Language Arts II	Williams, Robert	1,175	5,760	5,760			1.00
		ID: 828		ID: 00054 (S.2-P.8)	ID: 21093	ID: 2096						
10/01/2011	06/09/2012	Adams, Carol	English	English 11	English/Language Arts II	Concannon, Jessica	7,900	4,920	4,920	5,300		1.00
		ID: 5		ID: 00053 (S.5-P.2)	ID: 21093	ID: 19024						

Counseling > Reports

The **Counseling > Reports** sub-module provides a number of pre-defined reports. This list includes grading reports, scheduling reports, as well as transcripts, report cards, and progress reports.

Note: Depending on district configuration, you may not see all of the reports described here.



To run a report, click once on the Select  button to the left of the report you wish to view. A report criteria pre-screen will appear.

Complete any required information (select radio buttons or choose options from drop-down lists) and click the Run Report button. The report will appear in the Report Viewer window. Print the report if needed, using the navigation buttons at the top of the report viewer.

Note: Because SchoolTool is web-based, you can have multiple browser windows open at one time. This makes it possible to generate and toggle between multiple reports and/or modules at the same time.

Age Gap Report

The Age Gap Report allows users to locate sections that include students whose age differences exceed a specified threshold. When running the report, users must first specify the report criteria from the pre-screen.

AGE GAP REPORT

Building: Mindex HS

School Level: High School

Year: 2019-2020

Threshold: 36 Months

Run Report

Options include the following:

- Building: The building for which the report will be run.
- School Level: The school level for which the report will be run.
- Year: The school year for which the report will be run.
- Threshold: Specifies the threshold, or range, for the age of students to be used. Any section that contains an age gap that exceeds this threshold on the day the report is run will be included. This value is set to 36 months by default.

After clicking Run Report, the report will open in a new window. It will display each course section that currently exceeds the specified threshold. For each of these sections, the report shows the period, course name and ID, and the semester(s), cycle day(s), and section number that violates this threshold. It also displays the youngest and oldest students in that section, their dates of birth, and their current age. Homerooms will be listed first, followed by course sections (sorted alphabetically by course name). Supplemental courses will be listed at the end of the report.

Keep in mind this information does not indicate whether multiple students are beyond the range specified by the threshold for a given section, so users may need to review the individual section rosters and/or run the report again after making any changes.

Age Gap Report					
HS : High School : 2009-2010					
Threshold: 36 months					
Period	Course	Section	Student Name	Date of Birth	Current Age
	Homeroom 103		Youngest: Butler, Barbara Oldest: Baker, Susan	05/01/1995 12/23/1990	14 yr 10 mo 19 yr 2 mo
	Homeroom 108		Youngest: Bennett, Amy Oldest: Williams, Gloria	03/20/1995 09/26/1991	14 yr 11 mo 18 yr 5 mo
	Homeroom 112		Youngest: Miller, Donna Oldest: Baker, David	11/13/1995 07/14/1991	14 yr 3 mo 18 yr 7 mo
1	English 9 (0010) Semester(s): S1, S2	Day(s): A,B	1 Youngest: Hudson, Linda Oldest: Spacely, Nathan	11/10/1995 04/06/1992	14 yr 4 mo 17 yr 11 mo
1	Geometry (0235) Semester(s): S1, S2	Day(s): A,B	1 Youngest: Lewis, Jack Oldest: White, Timothy	09/26/1995 02/02/1992	14 yr 5 mo 18 yr 1 mo
1	Health (0399) Semester(s): S2	Day(s): A,B	1 Youngest: Gonzalez, Jennifer Oldest: Williams, Gloria	11/10/1994 09/26/1991	15 yr 4 mo 18 yr 5 mo
1	Integrated Algebra (0234) Semester(s): S1, S2	Day(s): A,B	1 Youngest: Baker, Jeffrey Oldest: Green, Dorothy	10/16/1995 08/21/1992	14 yr 4 mo 17 yr 6 mo

AIS Reports

The AIS Reports generate three reports: a PIR Worksheet (this report is tied to **Maintenance > District > Building School Level Settings**). Users can enter a Date Range for the report and choose between the [Program Information Worksheet \(PIR\)](#)¹ or one of two letters ([AIS Discontinuance Notification Letter](#)² or [AIS Enrollment Notification Letter](#)³).

The following filtering elements may be used to further define the report criteria:

- All Students – This will cause all enrolled students to be tallied on the Program information Worksheet, regardless of the user's building rights. This option is not available when running the AIS Letters from this screen.
- Building and School Level – Building and School level options will allow a user to select any building for either report. If a building contains multiple school levels, the individual school level may be selected as well.
- By Student – Selecting this option will present the user with the standard Batch Selector so that these reports can be run against any group of selected students.

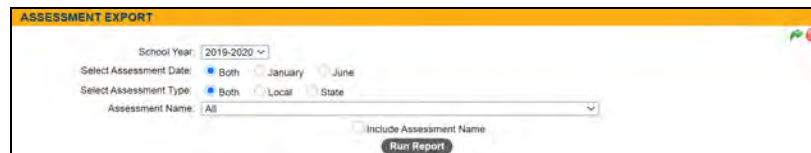
¹Sample Program Information Worksheet:

Program Information Worksheet		
	Targeted Assistance School (TAS)	School Wide Program (SWP)
A.1 AIS/Title I Buildings		
AIS/Title I Buildings	0	0
A.3 AIS/Title I Disaggregated Student Participation Summary		
Gender		
Male	0	0
Female	0	0
Total	0	0
Racial/Ethnic Groups		
White	0	0
Black or African American	0	0
Asian	0	0
American Indian or Alaska Native	0	0
Hispanic or Latino	0	0
Native Hawaiian/Other Pacific Islander	0	0
Unknown	0	0
Total	0	0
Service Groups		
Students With Disabilities	0	0
Homeless	0	0

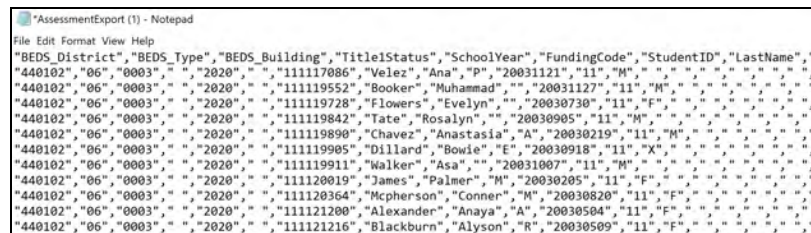
This option **will** respect the rights of the logged on user such that only data the user has access to will display on either report. See the Batch Selector User Guide for more information on using the AIS Batch Selector term.

Assessment Export

The Assessment Export allows for easy extraction of assessment information for districts that need this information to be imported into applications that create pre-printed answer sheets.

The screenshot shows a web form titled "ASSESSMENT EXPORT". It includes a "School Year" dropdown menu set to "2019-2020". Below this are two rows of radio button options: "Select Assessment Date" with options for "Both" (selected), "January", and "June"; and "Select Assessment Type" with options for "Both" (selected), "Local", and "State". There is an "Assessment Name" dropdown menu set to "All" and a checkbox for "Include Assessment Name" which is currently unchecked. A "Run Report" button is located at the bottom right of the form.

The report will be generated as a .TXT file, and is sorted based on Assessment name, teacher name, section number, and student ID.

The screenshot shows a Notepad window titled "AssessmentExport (1) - Notepad". The text inside is a comma-separated list of data fields for multiple students. The fields include "BEDS_District", "BEDS_Type", "BEDS_Building", "TitleStatus", "SchoolYear", "FundingCode", "StudentID", and "LastName". The data is sorted by assessment name, then teacher name, section number, and student ID. The text is truncated on the right side of the window.

At Risk View

The At Risk View provides users with the ability to search for students who meet certain criteria for daily absences, late arrivals, referrals (including classroom incidents), and course ineligibility (fails). This view can also be printed.

1. Select School Year, Building, and School Level.
2. Select Date (selected school year, marking period, or date range).
 - A. The following rules are used to determine whether or not a student should be included in the results list for a given time period:
 - Selected School Year: This option returns data for the last marking period of the selected school year only.
 - Marking Period: This option returns data for the selected marking period.
 - Date range: This option returns data for the latest recently ended marking period within the specified date range. If your date range specifies an end date that is in the middle of a marking period, the data for the previous marking period will be returned instead (for example, if you run this report in the middle of Marking Period 3, you'll get data for Marking Period 2 instead because Marking Period 3 hasn't ended yet).
 - B. In addition:
 - Fail counts are based on the selected time period using the rules above, regardless of lock date or publish date
 - Results only include students who had an active enrollment for that school year on the last day of the selected time period.
3. Select Students (choose whether to search all, a single grade, a single counselor, or specific students using the batch selector).
 - A. After clicking the Select Students option, the screen will refresh to show a batch selector. Select the appropriate terms to locate students (or click Cancel  to return to the main screen).

- B. Once students are selected, the radio button will show “Selected Students” (including the number of students selected). Click New Search to clear the search and find a new group of students or click Modify Search to return to the previous search criteria.

4. Specify criteria for the view by selecting a predefined value from the list or by entering criteria manually (see the section on *Saving Predefined Criteria* below for details on working with predefined values). Use the radio buttons to choose whether to use “AND” or “OR” logic to combine the Daily Absences, Late Arrivals, Referrals, and Fails filters.

Note: If a filter is left blank, that filter will be ignored.

- A. # of Daily Absences (numeric): Specify the number of daily absences for a student in the selected date range. This can be filtered further by the following options:
 - Count as Abs/In/Out (Any, Yes, No)
 - Excused (Any, Yes, No)
- B. # of Late Arrivals (numeric): Specify the number of late arrivals for a student in the selected date range. This can be filtered further by the following options:
 - Count as Abs/In/Out (Any, Yes, No)
 - Excused (Any, Yes, No)
- C. # of Referrals (numeric): Specify the number of discipline referrals for a student in the selected date range (note that this count currently

includes both referrals and classroom incidents). This can be filtered further by the following options:

- All Day Suspension (Any, Yes, No)
- SSEC (Any, Yes, No) (Note that for school years 2016-2017 and earlier, this option will be labeled "VADIR" instead of SSEC to reflect historical data)

D. # of Fails (numeric): Specify the number of courses in which the student was failing/ineligible. Note that this refers to marking period grades, not final course averages.

5. Once all filters are specified, click Search to view the results. The screen will display a list of all students matching the criteria, as well as tallies of each student's attendance, discipline, and fails data. To view the student record for a student listed here, click the Select ➤ button to go to that student's **My Home** tab.

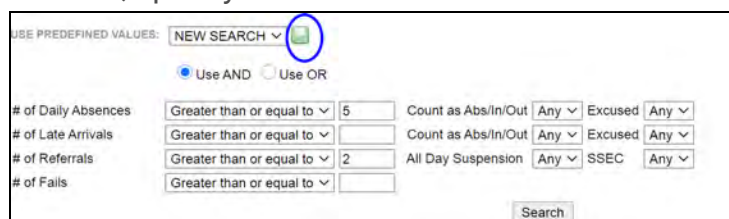
A. To print these results, click the Print button.

Student Name	Student ID	Grade	Gender	Race	Total Abs	Count Abs	Exc	Unexc	Total Late	Count Late	Exc	Unexc	Referrals	SSS	OSB	SSEC	Fails
Abbott, Amyah	111119746	11	F	White	0	0	0	0	0	0	0	0	0	0	0	0	0
Abbott, Aisa	111119827	11	M	White	2	2	0	2	0	0	0	0	0	0	0	0	0
Abbott, Grayson	111121640	9	M	White	3	3	0	3	0	0	0	0	0	0	0	0	0
Abbott, Leonel	111120935	9	X	White	0	0	0	0	0	0	0	0	0	0	0	0	0
Acosta, Juston	111128065	12	M	White	10	10	5	5	2	2	0	2	0	0	0	0	0
Aguiar, Dawson D.	111124203	9	M	Black or African American	0	0	0	0	1	1	0	1	0	0	0	0	0

Saving Predefined Criteria

Users with the appropriate permission(s) can save pre-defined filter sets, which can then be used by any user with access to this area. Pre-defined values that can be saved include any filters in the *bottom* portion of the options on the screen (school year, BSL, date ranges, and student sets are *not* included when saving filter sets).

1. To save a filter set, specify all criteria as desired and click the Save  button.



USE PREDEFINED VALUES: NEW SEARCH 

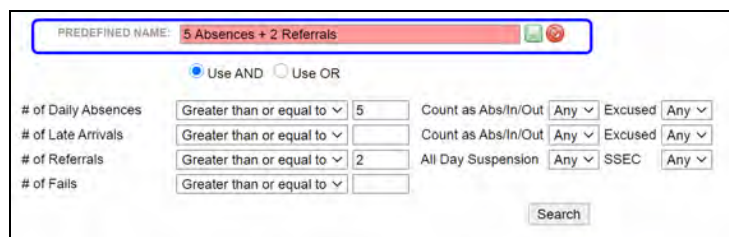
☒ Use AND ☐ Use OR

of Daily Absences: Greater than or equal to 5
 # of Late Arrivals: Greater than or equal to
 # of Referrals: Greater than or equal to 2
 # of Fails: Greater than or equal to

Count as Abs/In/Out: Any Excused: Any
 Count as Abs/In/Out: Any Excused: Any
 All Day Suspension: Any SSEC: Any

Search

2. A text box will appear. Enter a name for the saved filter set and click the Save  button.



PREDEFINED NAME: 5 Absences + 2 Referrals 

☒ Use AND ☐ Use OR

of Daily Absences: Greater than or equal to 5
 # of Late Arrivals: Greater than or equal to
 # of Referrals: Greater than or equal to 2
 # of Fails: Greater than or equal to

Count as Abs/In/Out: Any Excused: Any
 Count as Abs/In/Out: Any Excused: Any
 All Day Suspension: Any SSEC: Any

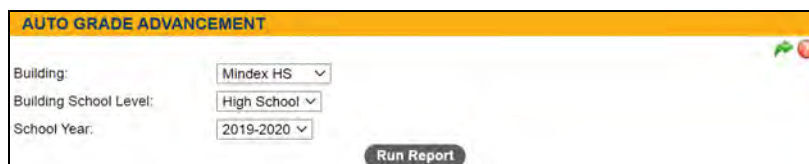
Search

3. The saved filter set will now appear in the Predefined Values list and can be used by any user with access to this area.
4. To remove a saved filter set, select it in the Predefined Values list and click the Delete  button.

Auto Grade Advancement

The Auto Grade Advancement report generates a list of all students in a particular building, school level, and school year that have advanced a grade and the reason.

Select the appropriate building, school level, and school year.

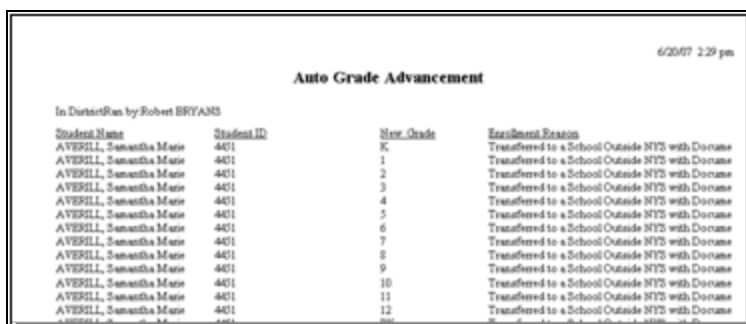


AUTO GRADE ADVANCEMENT

Building: Mindex HS
 Building School Level: High School
 School Year: 2019-2020

Run Report

Click Run Report to generate the report.



6/20/17 2:29 pm

Auto Grade Advancement

In District Run by Robert BRYANS

Student Name	Student ID	New Grade	Enrollment Reason
AVESILL, Samantha Marie	4401	K	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	1	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	2	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	3	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	4	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	5	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	6	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	7	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	8	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	9	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	10	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	11	Transferred to a School Outside NYS with Doname
AVESILL, Samantha Marie	4401	12	Transferred to a School Outside NYS with Doname

Class Roster

The Class Roster report generates a list of all students in a grade or in a homeroom, depending on selected criteria. There are five report options in this area.

CLASS ROSTER

Building: Mindex HS Grade: All

☒ Home Room Total
☐ Summary Report
☐ Grade Total
☐ Detailed Homeroom List
☐ Detailed Homeroom List for Mailings
☐ Student Directory

Run Report

Use the Class Roster report pre-screen to select the **Building** and **Grade**, and then select one radio button option for the report type you wish to generate:

- **Home Room Total** – provides a list of students with IDs and grades, and the total number of students in this homeroom.

Class Roster
High School 06/20/2007

Student ID	Name	Grade	Teacher(s)
Home Room: 100			GOODHEW, Ellen K. CEDARS, Sarah J.
270	ACHILLES, Jessica	9	
6021	ALEXANDER, Dustin J.	9	
5629	ASHLAND, Thomas M.	9	
7957	AVERILL, Christopher J.	9	
7414	BARNES, Megan R.	9	
396	BEOKE, Brian O.	9	
6982	BENTON, Matthew T.	9	
9641	BIRCH, Lauren C.	9	
5614	BURKE, Heidi	9	
101750	BURKE, Laura	9	
7144	BRENNAN, Bethanie M.	9	
6485	BUCHANAN, Ashley	9	
6032	BURKHART, Dana E.	9	
22692	CAPOSERRE, Brooke	9	
7238	CAPOSERRE, Gina R.	9	
4850	CAROW, Krista A.	9	
7107	CEDARS, Emily A.	9	
238	CLINTON, Leah K.	9	
101703	CORRA, Jake	9	
4826	CURTIS, Kenneth	9	
7108	DANGERFIELD, Zachary A.	9	
6050	ELEFANTE, Kately M.	9	
722	FULMAN, Laura	9	
Total Students in Home Room 100 : 23			

Class Roster Home Room Total with Summary Report option:

Class Roster		06/20/2007
High School		
Home Room	Student Count	
100	23	
105	1	
112	25	
114	25	
115	27	
116	29	
119	1	
120	29	
134	1	
136	2	
224	22	
226	25	
231	26	
232	20	
234	22	
235	26	
236	20	
B-4	38	
B-5	27	
C-4	22	
Not Assigned	9	

- **Grade Total** - provides a list of students with IDs and grades, and the total number of students in this grade.

Class Roster			06/20/2007
High School			
Student ID	Name	Grade	
Grade 10			
5004	SINGH, Kamini M.	10	
4443	SINGH, Malar G.	10	
5279	SINGH, Harish I.	10	
4760	SINGH, Thomas T.	10	
4397	SINGH, Tivy A.	10	
101743	TRUMP, Adnan	10	
Total Students For Grade 10 - 420			

- **Detailed Homeroom List** – provides a list with the teacher(s) name and home-room number, followed by each student sorted by last name, gender, date of birth, address, guardians and home phone. The bottom of the last page of the report displays the total number of students in this homeroom, and the gender break down.

Class List for :							HR: 102-Guidano
Name	M.F.N.	DOB	Address	Guardian(s)	Home Phone		
Alvarez, Raul A.	M	10/14/2003	1427 Central Avenue Alhambra, CA 91803	Ramiro Ochoa Marta Ochoa	(213) 648-4776		
Bailey, Malar M.	M	11/20/2003	1560 4th Street West Alhambra, CA 91803	Cara Bailey Bella Bailey	(134) 580-4108		
Brewer, Louis	N	05/07/2003	471 Green Street Alhambra, CA 91803	Augusta Brewer Dai Brewer	(281) 214-3315		
Campos, Ana F.	M	12/27/2002	2187 Main Street South Alhambra, CA 91803	Uriel Campos Kiara Griffith	(134) 710-9599		
Cobb, Kaitlyn	F	04/23/2003	379 Oak Street Alhambra, CA 91803	Greyson Cobb Kendrick Cobb	(134) 652-3171		
Dennis, Evelyn Y.	F	01/08/2003	349 Bridge Street Alhambra, CA 91803	Arianna Dennis Mylene Bannam	(134) 909-5382		

- **Detailed Homeroom List for Mailings** – provides the same lists as the Detailed Homeroom List, but breaks each guardian who receives mail onto a separate line under the student.

In the sample below, notice the gaps indicating that a student has two guardians who both receive mail. For example, student Rayne Kent, with guardians Uriel and Kiara Griffith plus Arianna Kent.

Class List for :						HR: 192-Guidance
Name	M.F.N.	Address	Guardian(s)	Home Phone		
Alvarez, Rod A	M	1427 Central Avenue	Rock Tavern, NY 12575	Kenneth Ochoa	Raul Ochoa	(215) 648-4776
Bailey, Maks M	M	1560 4th Street West	Miner Mill, NY 12577	Chris Bailey	Beir Bailey	(314) 590-4109
Brown, Lennel	X	471 Green Street	Miner Mill, NY 12577	Dan Brown	Kenneth Brown	(289) 214-3817
Campos, Asia F	M	2767 Main Street South	Miner Mill, NY 12577	Leslie Campos	Art Campos	(389) 710-9589
Cobb, Rayhan	F	379 Oak Street	Miner Mill, NY 12577	Gregory Cobb	Kenneth Cobb	(315) 999-5382
Dennis, Everett Y	F	369 Bridge Street	Miner, NY 10950	Aryon Dennis	Ethana Dennis	(365) 285-5619
Quintero, Kalynd S.	F	2361 Winding Way	Miner Mill, NY 12577	Maryann Quintero	Tasha Quintero	(212) 987-8076
Hunter, Asia M	M	154 Wadsworth Avenue	Miner Mill, NY 12575	Angelina Hunter	Maryann Hunter	(315) 815-2386
Gent, Reyna	F	522 Colonial Drive	Miner, NY 10950	Uriah Griffith	Kara Griffith	(315) 566-1376
		Address Unknown		Alison Kent		Unknown
Kerrigan, Lyndee W	F	825 Landon Street	Miner Mill, NY 12577	Maryann Kerrigan		(315) 44-7817
Larson, Rocio W	M	1025 Green Street	Miner, NY 10950	Alison Larson	Kyle Larson	(215) 311-4721
Madden, Lisa J	F	2478 Green Street	Miner, NY 10916	Rivka Madden	Wesley Woodard	(215) 174-6637
Olsen, Tisha L	F	2420 East Street	Miner, NY 10910	Kyrie Olsen	Gladys Olsen	(261) 361-3114
Perez, Haylee B	F	2314 Main Street South	Miner, NY 10910	Ashley Perez	Frederic Perez	(315) 806-6986
Pitts, Heidi F	M	1608 7th Street	Miner, NY 10916	Joan Pitts	Lauren Pitts	(315) 615-9876

- **Student Directory** – provides a listing of every student in the selected building, along with their grade, homeroom, address, phone and guardians.

High School Student Directory, 2006-2007						Home Phone
Name	Grade	HR	Address	Guardian(s)		
ACHILLE, Elizabeth L	9	120	614 GOSFORD ST	ROCHESTER, NY 12445	Frank A. Achille, Deborah Achille	555-5555
ACHILLE, Sarah	9	130	72 2nd Ave	ROCHESTER, NY 12445	Edward Achille, Susan Achille	555-5555
ACHILLE, Nicholas L	9	130	230 DARTMOUTH ST	ROCHESTER, NY 12445	Melissa Achille, John Achille	555-5555
ACHILLE, Jack A	9	146	3 CAMDEN RD	ROCHESTER, NY 12445	Jack Achille, Susan Achille	555-5555
ALEXANDER, Alexander	9	9	7 189TH AVE	ROCHESTER, NY 12445	Paul Alexander, Mary Alexander	555-5555
ALEXANDER, David F	9	180	64 PIERCE ST	ROCHESTER, NY 12445	David Alexander, David Alexander	555-5555
ALEXANDER, Jonathan V	9	9	444 Union Ave	ROCHESTER, NY 12445	Jonathan Alexander	555-5555
AGHAMP, Jose Marie L	9	226	115 PIERCE ST	ROCHESTER, NY 12445	Jose Agamp, Jose Agamp	555-5555
AGHAMP, Elizabeth F	9	9	6 COMBELL ST	ROCHESTER, NY 12445	John Agamp, Susan Agamp	555-5555
AGHAMP, Thomas M	9	100	56 COMBELL ST	ROCHESTER, NY 12445	David Agamp, Christine Agamp	555-5555
AGHAMP, Angela H	9	113	201 CAMDEN RD	ROCHESTER, NY 12445	Paul Agamp, Cheryl Agamp	555-5555
AGHAMP, John M	9	226	4811 CAMDEN RD	ROCHESTER, NY 12445	Thomas Agamp, Paul Agamp	555-5555
AGHAMP, Jeremy E	9	114	298 COMBELL ST	ROCHESTER, NY 12445	Kenneth Agamp, Susan Agamp	555-5555
AGHAMP, Christopher F	9	114	1221 CAMDEN RD	ROCHESTER, NY 12445	Bruce Agamp, Don Agamp	555-5555
AGHAMP, Donald M	9	100	183 COMBELL ST	ROCHESTER, NY 12445	Robert Agamp, Roger Agamp	555-5555
AGHAMP, David H	9	114	35 CAMDEN RD	ROCHESTER, NY 12445	Robert Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	180 PIERCE ST	ROCHESTER, NY 12445	Christine Agamp, Christine Agamp	555-5555
AGHAMP, David H	9	114	758 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	163 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	75 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	61 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	317 PIERCE ST	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	322 PIERCE ST	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	36 DARTMOUTH ST	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	3 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	1 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	4 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	45 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	212 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	118 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	283 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555
AGHAMP, David H	9	114	55 CAMDEN RD	ROCHESTER, NY 12445	David Agamp, Robert Agamp	555-5555

Comment Bank Usage Report

The Comment Bank Usage Report generates a report showing the frequency of comment usage for report cards. The last page of the report displays a tally of total number of comments used for the school year.

Use the Comment Bank Usage report pre-screen to select a **Building**, **School Level**, and school **Year**.

Comment Bank Usage

Building: Mindex HS

School Level: High School

Year: 2025-2026

Back

Help

RUN REPORT

Click **Run Report** to generate the report.

Comment Bank Usage Report High School : High School : 2006-2007			7/30/07
Comment	Times Used	% Used	
is a pleasure to have in class	5161	19.21 %	
courteous and cooperative	2112	7.86 %	
shows good effort	1836	6.83 %	
attentive/serious about studies	1775	6.61 %	
actively participates in class	1744	6.49 %	
good student-solid performance	1085	4.04 %	
lower range of this grade	1021	3.80 %	
shows excellent effort	981	3.65 %	
upper range of this grade	867	3.23 %	
inconsistent effort	635	2.36 %	
should participate more	628	2.34 %	
outstanding progress/achievement	508	1.89 %	
doing excellent work	455	1.69 %	
responsible	452	1.68 %	
continued satisfactory achievement	442	1.64 %	
see report sent with student	423	1.57 %	
frequent absences hinder work	364	1.35 %	
demonstrates satisfactory effort	352	1.31 %	
conscientious attitude	338	1.26 %	
does not do homework regularly	334	1.24 %	
written report to follow	302	1.12 %	
does not do all homework	288	1.07 %	
tries hard-needs reinforcement	286	1.06 %	
shows excellent achievement	258	0.96 %	
inadequate performance on tests	254	0.95 %	

Competency Status Report

The Competency Status Report generates a report all competencies added by the school and shows which students have met the requirements for graduation. This report will only display information if competencies have been set up and are in use.

Use the batch selector on the pre-screen to locate a group of students for whom you will review competency achievement.

COMPETENCY STATUS REPORT


SAVED SEARCHES:

ADD SEARCH CRITERIA:

☐ Random

☐ Use "AND" for like terms

When you click continue, the report will appear. Notice the competency names at the top of the grid, followed by notes for whether each student has met or not met the competency. This report sample is incomplete, indicating that competencies are not in wide use throughout this district.

Competency Status Report						
Page 1 of 64						
	Student ID	Reading	Math	Introduction to Sci	English	Advanced English
AREDA, CARLEIGH	003380					
ACHILLE, ADAM	003044					
ACHILLE, BRITT	002833					
ACHILLE, BRITNEY	004633	Has Met	Has Met	Has Met	Has Met	Has Met
ACHILLE, DANIELLE	000126					
ACHILLE, EMILIE	004363	Has Met	Has Met	Has Met	Has Met	Has Met
ACHILLE, PHOENIX	003943					
ACHILLE, MATTHEW	004126					
ACHILLE, MICHAEL	004476	Has Met	Has Met	Has Met	Has Met	Has Met
ACHILLE, PAMELA	003449					
ACHILLE, REBECCA	004307	Has Met	Has Met	Has Met	Has Met	Has Met
ACHILLE, ROBERT	004306	Has Met	Has Met	Has Met	Has Met	Has Met

Counselor Report

The Counselor Report gives a list of all students currently assigned to each guidance counselor. Use the batch selector to locate a group of students. When you generate the report, the students will appear in lists according to their designated counselor.

COUNSELOR REPORT

SAVED SEARCHES: NEW SEARCH

ADD SEARCH CRITERIA: SELECT CRITERIA

☐ Random

☐ Use "AND" for like terms

Search

When you click continue, the report will appear. The first page of this sample shows all students currently assigned to guidance counselor Lisa Averill.

Counselor Report			
06/20/2007			
AVERILL, Lisa			
StudentID	Student	Grade	Homeroom
7474	SENNIS, Cody	11	240
4442	ELUES, Harry	11	240
4545	ELUES, Joseph	11	240
4127	ELUES, Kyle	11	240
4577	ELUES, Parker	11	240
6922	ELUES, Zachary	11	240
5778	CAPOSERRE, Bryan	11	238
4592	CAPOSERRE, Grant	11	238
4363	CAPOSERRE, Joshua	11	238
4261	CAPOSERRE, Lisa	11	238
3926	CAPOSERRE, Michael	11	238
4520	CAPOSERRE, Nichole	11	238

Current Marking Period Average Report

The Current Marking Period Average Report allows users to generate reports based on students' grade book averages (based on assignment grades) for the current marking period. The report is sorted alphabetically by student. The report also includes a column that indicates students' overall averages based on assignment grades for each course.

Users might use this report to get a snapshot of students' performance for each course in the current marking period. For example, to see which students who are close to failing one or more classes, they may run the report for only those students with a current average between 60 and 70.

Note: Students who have not received any assignment scores will not be included in the report.

1. To begin, locate the student(s) for whom you wish to run the report using the batch selector. Select those students using the checkboxes and click **Continue**.

☒	Name	Student ID	Address	Phone	Age	Grade	Home Room
☒	Bailey, David C	33870	3 Ginnie Terrace	H (555) 486 2211	13	8	10
☒	Bailey, Maria V	39417	9 Jasmine Street	H (555) 509-3175	13	8	10
☒	Bailey, Paul R	35993	3 Brock Avenue	H (555) 500 6820	13	8	67

2. On the report pre-screen, specify the range for averages you wish to return. For example, you might wish to limit the results to students whose current marking period averages are between 90-100, or only those whose current marking period averages are below a 67. To view all students, simply leave both range fields blank. Click the **Run Report** button to generate the report.

My Home

AVERAGES BETWEEN:

AND

RUN REPORT

[Back](#)

3. A new window will open with the report, which displays students in alphabetically per course and shows only the selected students who meet the grade

range criteria for the currently active marking period.

Current Marking Period Average Report						
Student	Grade	Course			Cur MP Avg	Cur Overall Avg
Adams, Theresa M (19139)	11	English 11	Per: 5	S: 5	90	95
Adams, William M (19744)	11	English 11	Per: 5	S: 5	87	87
Anderson, Eugene T (19582)	11	English 11	Per: 5	S: 5	85	86
Anderson, Mary R (19258)	11	English 11	Per: 5	S: 5	91	92
Appleberry, Steven J (21044)	11	English 11	Per: 5	S: 5	78	80
Baker, Danny O (19190)	11	English 11	Per: 5	S: 5	67	67
Bennett, Leonard J (19182)	11	English 11	Per: 5	S: 5	93	92
Brose, Mary E (19200)	11	English 11	Per: 5	S: 5	52	25
Clark, Roger M (20442)	10	Algebra 1	Per: 2	S: 6	94	94
Evans, Marie P (19445)	11	English 11	Per: 3	S: 3	87	91
Flores, Steven C (20114)	11	English 11	Per: 3	S: 3	91	93
Freeman, Michael L (19263)	11	English 11	Per: 3	S: 3	92	94
Gonzo, Gladys E (20106)	11	English 11	Per: 3	S: 3	94	95

CTE Report

The CTE Report allows districts to generate a simple headcount report or a roster for each CTE course. This report is most often used for BOCES billing and data verification.

CTE REPORT

MASTER SCHEDULE:
Mindex HS
High School
2019-2020

REPORT:
☒ Headcount
☐ Roster

ENROLLED ON:
5/28/2020

☒ Show only students in courses marked as CTE

Run Report

1. Begin by selecting a master schedule; then choose a report (Headcount or Roster). Specify a date for which to run the report (the report will reflect all in-district enrollments active as of the selected date). The reports are limited to only those students assigned to courses designated as “CTE” in the Course Catalog; to run the reports for all students, simply uncheck the option.
2. If the Headcount report option is selected, the report will display a grid with the total number of students, by home district, that are enrolled in each course.

CTE Headcount Report									
Students enrolled on: 01/23/2014									
CTE courses only: Yes									
	District 1	District 2	District 3	District 4	District 5	District 6	District 7	District 8	Total
All (1000)	1	1	4	1	2	4	1	2	17
ELA Grade 02 (1002)	0	0	2	0	0	2	0	0	4
ELA Kindergarten (10001)	0	0	2	0	0	2	0	0	4
English Foundations	2	2	5	2	4	5	2	4	29

3. If the Roster report option is selected, the report will display a detailed roster

for each course. The report is grouped by home district.

CTE Roster Report					
Students enrolled on: 01/23/2014			Mindex HS - High School 2013-2014		
CTE courses only: Yes			1/23/2014		
District 1					
	<u>Student Name</u>	<u>Grade</u>	<u>DOB</u>	<u>Student ID</u>	<u>Home District ID</u>
Production Systems (00143) (S1)	Lopez, Daniel N	10	9/24/98	769	769
Career/Financial Mgmt (00124) (S1)	Nichols, Laura M	10	7/10/97	81	
	Taylor, Mary C	10	10/26/98	1294	
	Lopez, Barbara A	10	11/3/98	3050	
	Hall, Christopher G	10	1/16/98	761	
	Taylor, Julie K	10	8/19/98	753	
	Jackson, Donna N	10	10/28/98	99	
	Moore, Elizabeth M	10	8/6/98	747	
Desktop Publishing (00129) (S1)	Green, Benjamin M	10	1/29/98	767	
	Simpson, Kathy M	10	1/21/98	19385	
	Nelson, Elizabeth M	12	3/21/95	278	
	Richardson, Michelle L	10	2/5/98	26580	
	Hernandez, Michelle R	10	9/25/97	91	

Elementary Assessment Report

The Elementary Assessment Report generates a list of students and their scores for all 3-8 testing records.

Use the pre-screen to choose which students you wish to include and define sorting options:

- Search By: All Students, Per Home Room, Per Grade, or By Student (using the Batch Selector).
- Sort By: Student (default), Home Room, Counselor, Grade, or Zip Code.

ELEMENTARY ASSESSMENT REPORT

Search By:

☒ All Students
 ☐ Per Home Room
 ☐ Per Grade
 ☐ By Student

Sort By:

☒ Student
 ☐ Home Room
 ☐ Counselor
 ☐ Grade
 ☐ Zip Code

Run Report

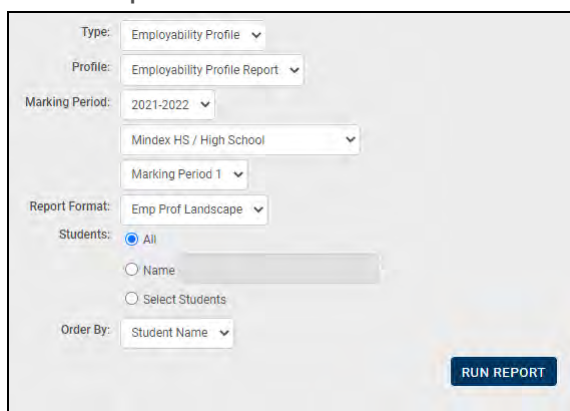
The report will print a separate page for each student.

3-8 Assessment Report				
Student ID: 60005	Name: Mula, Chantae	Grade: 4	Home Room: 104	07/23/2017
School Year	Assessment	Performance Level	Raw Score	Scale Score
2006-2017	Grade 4 ELA	1	83.00	150.00

Employability Profile/CDOS

The Employability Profile and CDOS reports allow generate a summary of a student's activity for CTE and CDOS students. An Employability Profile or CDOS profile can be associated with one or more courses and teachers can submit descriptors and/or comments for each student. These reports show a comprehensive view of the student's evaluations and may also include relevant CTE coursework hours, work-based hours, and/or industry-based assessments.

1. Use the pre-screen to define the options for the report and click the Run Report button to generate the report.



The screenshot shows a web form for generating a report. It includes several dropdown menus and radio buttons. The 'Type' dropdown is set to 'Employability Profile'. The 'Profile' dropdown is set to 'Employability Profile Report'. The 'Marking Period' dropdown is set to '2021-2022'. Below it, there are two more dropdowns: 'Minix HS / High School' and 'Marking Period 1'. The 'Report Format' dropdown is set to 'Emp Prof Landscape'. Under the 'Students' section, the 'All' radio button is selected. There are also options for 'Name' and 'Select Students'. The 'Order By' dropdown is set to 'Student Name'. A blue 'RUN REPORT' button is located at the bottom right of the form.

- A. Select the type of report you wish to run (Employability Profile or CDOS).
- B. Select a profile from the drop-down (this list will include all available profiles of the Type selected in the previous step; for teachers, the list will be limited to profiles that are tied to that teacher's courses).
- C. Select the appropriate timeframe for the report:
 - i. For Employability Profile reports, select a Marking Period using the drop-downs provided.
 - ii. For CDOS reports, select a Year.
- D. Select the desired report format.
- E. Select the students for whom you wish to generate the report (all students, a single student, or a group of students selected by using the Class List or the batch selector):
 - i. To select a group of students, click the Select Students option. The screen will refresh to show the teacher's class list and/or the batch selector. Select the appropriate students and click Continue (or click Cancel  to return to the main screen).

Saved Searches: NEW SEARCH
 Add Search Criteria: SELECT CRITERIA
☐ Random
☐ Use "AND" for like terms
 SEARCH

- ii. Once students are selected, the radio option will show “Selected Students” (including the number of students selected). Click New Search to clear the search and find a new group of students or click Modify Search to return to the previous search criteria.

Students: ☐ All
☐ Name
☒ 8 Selected Students
 NEW SEARCH MODIFY SEARCH

- F. Choose the order in which you wish to generate the reports (either by student name or by home district) and click the Run Report button.

Sample Report Employability Profile - Portrait Layout:



EMPLOYABILITY PROFILE

Emp Prof
SchoolTool / Mindex
250 Alexander Street, Rochester, NY 14607
585-424-3590

Student: Turner, Patrick (19740)
Academic Year: 2019-2020
Home District:

Performance Indicators

4 - Demonstrates Grade Level Skills with Mastery
3 - Demonstrates Grade Level Skills Independently
2 - Demonstrates Grade Level Skills with Support
1 - Not Demonstrating Grade Level Skills at this Point
NA - Not Assessed At This Time

21st Century Skills

Communication Skills _____

Professionalism _____

Responsibility _____

Planning/Organizing _____

Performance _____

Problem Solving _____

Teamwork _____

Creative Thinking _____

Independent Work _____

Time Management _____

Technology Skills _____

Currency and Money Management _____

Interviewing Skills _____

Resume _____

Competencies

Understands and adheres to OSHA regulations/EPA rules _____

Knows basic manicure and pedicure procedures _____

Knows basic procedure for nail enhancements _____

Demonstrates basic sectioning _____

Knows basic procedure for hair cutting _____

Knows wave pattern formation _____

Understands basic blow drying and hair styling _____

Demonstrates basic men's cutting technique _____

Performs basic scalp treatment and massage _____

Performs highlighting techniques _____

Applies semi-permanent/permanent color _____

Follows basic procedures for permanent weaving _____

Understands hair extensions and wig care _____

CTE Coursework	Year	Comments	# of Hours
Communications (XCC)	2019-2020		20.00
Total # of CTE Coursework Hours			20.00

Work-Based Learning Experiences	Year	Comments	# of Hours
Internship / Cosmetology Associates	2019-2020		5.00
Work-Based Learning / A Cut Above	2019-2020		4.00
Work-Based Learning / HairWorld - East Ave	2019-2020	Notes about this location	2.00
Total # of Work-Based Learning Experiences Hours			11.00
Final Total # of Hours			31.00

03/10/20 01:44 pm

Page 1 of 2

Sample Report Employability Profile - Landscape Layout:



EMPLOYABILITY PROFILE
Emp Prof
SchoolTool / Mindex
250 Alexander Street, Rochester, NY 14607
585-424-3590

Student: Turner, Patrick (19740)
Academic Year: 2019-2020
Home District:

Performance Indicators

4 - Demonstrates Skills with Mastery
3 - Demonstrates Skills Independently
2 - Demonstrates Skills with Support

1 - Not Demonstrating Skills at this Point
NA - Not Assessed At This Time

PERFORMANCE SKILLS	PERFORMANCE EXPECTATIONS	SCORE
21st Century Skills	Communication Skills	
	Professionalism	
	Responsibility	
	Planning/Organizing	
	Performance	
	Problem Solving	
	Teamwork	
	Creative Thinking	
	Independent Work	
	Time Management	
	Technology Skills	
	Finance and Money Management	
	Interpreting Skills	
	Risk-taking	
Competencies	Understands and adheres to OSHA regulations/EPA rules	
	Knows basic measure and procedure procedures	
	Knows basic procedure for nail enhancements	
	Demonstrates basic sectioning	
	Knows basic procedure for hair cutting	
	Knows wave pattern formation	

03/10/20 01:41 pm

PERFORMANCE SKILLS	PERFORMANCE EXPECTATIONS	SCORE
Competencies (Cont'd)	Understands basic blow drying and hair styling	
	Demonstrates basic men's cutting technique	
	Performs basic scalp treatment and massage	
	Performs highlighting techniques	
	Applies semi-permanent/permanent color	
	Follows basic procedures for permanent waving	
	Understands hair extensions and wig care	

CTE Coursework	Year	Comments	# of Hours
Communications (XCC)	2019-2020		20.00
Total # of CTE Coursework Hours			20.00

Work-Based Learning Experiences	Year	Comments	# of Hours
Internship / Cosmetology Associates	2019-2020		5.00
Work-Based Learning / A Cut Above	2019-2020		4.00
Work-Based Learning / HairWorld - East Ave	2019-2020	Notes about this location	2.00
Total # of Work-Based Learning Experiences Hours			11.00
Final Total # of Hours			31.00

Industry-Based Assessments	Year	Score
PrintED SkillsUSA - Graphic Communications	2019-2020	P

03/10/20 01:41 pm Page 2 of 2 Turner, Patrick (19740)

Sample CDOS Report:



**EVIDENCE OF ATTAINMENT OF THE COMMENCEMENT LEVEL
CAREER DEVELOPMENT AND OCCUPATIONAL STUDIES (CDOS) LEARNING STANDARDS
CDOS**

STUDENT: Turner, Patrick **STUDENT ID:** 10740
GUIDANCE COUNSELOR: Lopez, Patricia

PERFORMANCE INDICATORS	9TH GRADE EVIDENCE	10TH GRADE EVIDENCE	11TH GRADE EVIDENCE	12TH GRADE EVIDENCE	5th & 6th YEARS EVIDENCE
1. Career Development					
Completes the development of a career plan that would permit eventual entry into a career option of their choosing	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		
Applies decision making skills in the selection of a career option of strong personal interest	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		
Analyzes skills and abilities required in a career option and relate them to their own skills and abilities	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		
2. Integrated Learning					
Demonstrate the integration and application of academic and occupational skills in their school learning, work, and personal lives	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		
Uses academic knowledge and skills in an occupational context, and demonstrates application of these skills by using a variety of communication techniques (e.g. sign language, pictures, videos, reports, and technology)	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		

PERFORMANCE INDICATORS	9TH GRADE EVIDENCE	10TH GRADE EVIDENCE	11TH GRADE EVIDENCE	12TH GRADE EVIDENCE	5th & 6th YEARS EVIDENCE
Managing Information: Uses technology to acquire, organize and communicates information, by entering, modifying, retrieving, and storing data	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		
Managing Resources: Allocates resources to complete a task	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		
Systems: Demonstrates an understanding of the relationship between the performance of a system and the goals, resources, and functions of an organization	Sample comment for 9th grade section on CDOS Report	Sample comment for 10th grade section on CDOS Report	Sample comment for 11th grade section on CDOS Report		

CTE Coursework	Year	Comments	# of Hours
Communications (XCC)	2019-2020		20.00
Exploring Early Childhood Education	2019-2020		20.00
Total # of CTE Coursework Hours			40.00

Work-Based Learning Experiences	Year	Comments	# of Hours
Internship / Target	2019-2020		5.00
Work-Based Learning / CVS	2019-2020	Notes about this location	2.00
Work-Based Learning / Rite Aid	2019-2020		8.00
Work-Based Learning / Wegmans	2019-2020		4.00
Total # of Work-Based Learning Experiences Hours			19.00
Final Total # of Hours			59.00

Industry-Based Assessments	Year	Score
PrintED SkillsUSA - Graphic Communications	2019-2020	P

Enrollment

The Enrollment report generates a list of grades within each building and the number of students that are enrolled for each grade for the specified date, broken down by gender. The pre-screen for this report is a simple date field.

ENROLLMENT REPORT

Run Report

When you click Run Report, the report automatically appears for every building in the district. Use the Preview pane to select a specific building, or use the Report Viewer navigation buttons to page through the report.

Enrollment					11/10/2021
Mindex City High School : 2020-2021 (11/10/2021)					
Grade	Male	Female	Non Binary	Total	
High School					
9	193	168	0	361	
10	155	138	0	293	
11	171	158	2	331	
12	175	153	0	328	
GED	1	0	0	1	
US	0	0	0	0	
High School Total:	695	617	2	1,314	

Grade Analysis Report

The Grade Analysis Report allows users to generate two different reports – one with student names and one without. Each report presents a list of course marks, by marking period, along with exam scores and averages, per course.

Use the report pre-screen to select the **Building**, **School Level**, school **Year**, and **Marking Period**. Then select the report from the drop-down list.

GRADE ANALYSIS REPORT

Building: Mindex HS
School Level: High School
Year: 2019-2020

Marking Period: Quarter 1

Course Marks Analysis (with Names)

Run Report

Sample report **with** names:

Course Marks Analysis Report										6/20/07 3:37 pm
High School : High School : 2005-2006										
(Art)FOUND IN MEDIA ARTS										
571										
Student Name	QT1	QT2	QT3	QT4	RCT	Local	Rgt	Average	Teacher	
ACHILLES, Danielle M	97	94	76	50	0	63		63	GEBS, Stacey	
ACHILLES, Ian J	100	84	81	68	54	77		77	GEBS, Stacey	
ASHLAND, Carolyn	78	70	55	65	70	68		68	BRYANS, Stephen	
ASHLAND, Louise	96	90	88	92	88	91		91	BRYANS, Stephen	
AVERILL, Ashley M	88	91	97	94	93	93		93	CURTIS, Christopher	
AVERILL, Derek A	95	91	93	90	98	93		93	CURTIS, Melissa	
AVERILL, Eric C	93	87	83	77	69	82		82	CAPOSERRE, Billie	
AVERILL, Margaret	93	88	97	93	89	92		92	GEBS, Stacey	
AVERILL, Shane B	87	82	65	73	48	71		71	CAPOSERRE, Billie	
BAHNS, Justin M	97	91	97	98	59	88		88	GEBS, Stacey	
BECK, Chelsea L	95	97	96	92	91	94		94	CURTIS, Christopher	
BECK, Eric R	94	91	87	58	65	79		79	CAPOSERRE, Billie	
BECK, Joshua E	97	85	90	96	81	90		90	GEBS, Stacey	
BECK, Rikki L	67	87	95	50	0	60		60	GEBS, Stacey	
BENTON, Ashley	98	92	100	95	90	95		95	CAPOSERRE, Billie	
BRYANS, Cody S	97	97	91	89	95	94		94	BRYANS, Stephen	
BUCKINGHAM, Andrew M	85	82	93	94	74	86		86	GEBS, Stacey	
BUCKINGHAM, John E	78	92	95	91	90	89		89	CURTIS, Christopher	
BUCKINGHAM, Joseph J	69	3	64	73	74	57		57	CAPOSERRE, Billie	
BUCKINGHAM, Joseph W	97	96	94	89	89	93		93	CAPOSERRE, Billie	
BUCKINGHAM, Kyle J	76	86	90	99	88	88		88	BRYANS, Stephen	

Sample report **without** names:

Course Marks Analysis Report								
High School: High School: 2005-2006								
5/25/2007 5:28 am								
(A)FOUND IN MEDIA ARTS								
571								
Student ID	QT1	QT2	QT3	QT4	RCT	Local	Reg	Average Teacher
10112	86	86	86	95		95		86
20355	71	72	58	93		75		71
2090	81	83	85	73		88		74
4259	77	78	91	45		65		73
4312	100	99	100	100		100		100
4230	84	84	85	50		85		86
4280	88	73	86	50		91		75
4284	97	88	84	78		70		83
4402	92	91	51	13		60		51
4408	95	96	99	95		95		96
4412	99	91	99	100		90		91
4424	90	90	89	86		87		86
4437	97	95	99	100		94		95
4480	88	91	87	94		93		93
4580	77	84	89	95		100		89
4584	69	3	60	73		74		57
4585	95	91	95	90		96		93

Graduation Requirements

The Graduation Requirements report allows users to generate a list of each selected student's graduation requirements, with visual indicators on which requirements have been met or not met. To generate a report for graduation requirements, use the pre-screen to select the students and specify additional options.

- Select students to include in the report using the radio buttons (choose whether to run the report based on the following options: By Cohort Year, By Class Of, By Counselor, or By Student).
- Specify additional options for the report using the Options checkboxes (Show Summary, Show Detail, Show Current Program Services, and Show Signature Lines).

GRADUATION REQUIREMENTS

☒ By cohort year: 2019-2020
 ☐ By class of:
 ☐ By counselor:
 ☐ By student:

Options
☒ Show Summary
 ☒ Show Detail
 ☐ Show Current Program Services
 ☒ Show Signature Lines

Run Report

[Prior Graduation Requirements Report](#)

Note: Use the “Prior Graduation Requirements Report” link at the bottom of the screen to access the previously existing report for the legacy Graduation Requirements feature.

Once options are set appropriately, click the Run Report button to generate the report.

Mindex City CSD
Graduation Requirements Worksheet

01/04/2011

Name: Adams, Amy		Diploma: Regents Advanced	
Student ID: 3596		Counselor: Murray, Deborah	
Cohort: 2007-2009		Home/room: 104(Milroy)	
Grad Date: 2010-2011			

Course Area	Required	Completed	Expected
ELA	4.00	3.00	4.00
Social Studies	4.00	0.00	0.00
Mathematics	4.00	0.00	0.00
Science	4.00	0.00	0.00
Health	0.50	0.00	0.00
Lang Other than English	1.00	0.00	0.00
Sequence Credits, Elect	3.50	0.00	0.00
Arts/Music	2.00	0.00	0.00
Technology	2.00	0.00	0.00
Total	25.00	3.00	9.00

Assessment Area	Required	Completed	Expected
Comprehensive English	1.00	1.00	1.00
Global Hist & Geo	1.00	1.00	1.00
US Hist & Gov	1.00	1.00	1.00
TOTAL	3.00	3.00	3.00

Courses	Grade	Year	Course	Mark	Credits
ELA	9	2007-2008	00049 English 9	87	1.00
	10	2008-2009	00051 English 10	86	1.00
	11	2009-2010	00052 English 11	89	1.00
	12	2010-2011	00055 English 12		1.00 scheduled

Assessments	Grade	Year	Course	Mark	Credits
Comprehensive English	11	06/16/2010	English Regents	87	1.00
Global Hist & Geo	10	05/15/2009	Global History Regents	85	1.00
US Hist & Gov	11	05/16/2010	U.S. History Regents	92	1.00

Prior Graduation Requirements Report

The Graduation Requirements report is a simple list reflecting the required subjects and corresponding number of units of each required for graduation with each specific diploma type. This report will only display information according to what has been set up in the Graduation Requirements sub-module.

Note: If requirements have not been defined, the report will be blank.

Use the report pre-screen to select the school **Year** for which you will review graduation requirements.

GRADUATION REQUIREMENTS

Year: 2019-2020
➡
⚠

Run Report

Click Run Report to generate the report.

Graduation Requirements	
Requirement	Units
English:	
English	4.00
Health	1.00
Social Studies	1.00

Honor Roll

The Honor Roll report generates a list of all students that have met school or district-defined criteria for each “roll”. The report lists students and includes their grade, score and honor level.

Use the Honor Reports pre-screen to select the **Building**, **School Level**, school **Year**, **Marking Period**, **Honor Roll Status**, and **Report Format**.

The screenshot shows the 'HONOR REPORTS' pre-screen form. It includes dropdown menus for Building (Mindex HS), School Level (High School), Year (2019-2020), Marking Period (Quarter 1), Honor Roll Status (All), and Report Format (Honor Roll Report By Average). A 'Run Report' button is at the bottom.

This is the Honor Roll Report by Average for Honor Roll. Students are sorted by their averages, from highest to lowest.

The screenshot shows the 'HONOR REPORT' table with columns for Student, Grade, Score, and Honor Level. The data is sorted by Score from highest to lowest.

Student	Grade	Score	Honor Level
CURTIS, Sarah Jane	12	99	Highest Honors
CAROW, Jacob J	12	99	Highest Honors
DANGERFIELD, Amy Elizabeth	12	99	Highest Honors
CLAUDIA, Benjamin J	11	98	Highest Honors
BLOOMFIELD, Jenna Louise	10	98	Highest Honors
RAYMOND, Elizabeth Ann	9	98	Highest Honors
PECK, Ashley	9	98	Highest Honors
RICHMOND, Allen	12	98	Highest Honors
EAST, Teresa Clare	12	98	Highest Honors
OBBS, Katherine N.	9	97	Highest Honors
SIDNEY, Meghan A	12	97	Highest Honors

Local Exam

The Local Exam report provides a breakdown of all metrics for all students who completed local assessments. This report mimics the Regents Exam report, but only reflects numbers based on district-specific, local (non-state) exams. This report will display score ranges, by gender for all general education students and all special education students.

Use the Local Exam report pre-screen to select the **Building**, **School Level** and school **Year** and choose report options.

The screenshot shows the 'LOCAL EXAM' pre-screen form. It includes dropdown menus for Building (Mindex HS), School Level (High School), and Year (2019-2020). Below these is a 'CUSTOMIZE REPORT' section with radio buttons for 'Show All Local Courses', 'Only for Department' (set to AIS), and 'Only for Course' (set to Analysis of Public Policy (College) (00595)). A 'Run Report' button is at the bottom.

- **Show All Local Courses** – displays information for every local exam.
- **Only for Department** – displays information for local exams from all courses in the selected department.
- **Only for Course** – displays information for local exams from all sections of the selected course.

Local Exam Report																				11/10/2021 4:50 pm						
Mindex City High School : 2016-2017																										
AVIATION 1																										
General Education Students												Special Education Students														
	0-54			55-64			65-84			85-100				0-54			55-64			65-84			85-100			
	M	F	X	M	F	X	M	F	X	M	F	X	Total GE	M	F	X	M	F	X	M	F	X	M	F	X	Total SE
# of students	0	0	0	0	0	0	2	0	0	1	1	0	4	0	0	0	0	0	0	0	0	0	0	0	0	0
% of OE or SE	0%	0%	0%	0%	0%	0%	50%	0%	0%	25%	25%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
# of students	0			0			2			2			4	0			0			0			0			0
% of OE or SE	0%			0%			50%			50%			100%	0%			0%			0%			0%			0%
# of students	0			0			4			4			4	0			0			0			0			0
% of OE or SE	0%			0%			100%			100%			100%	0%			0%			0%			0%			0%
% of all students	0%			0%			100%			100%			100%	0%			0%			0%			0%			0%

General Education # Failed

0

General Education # Passed

4

Special Education # Failed

0

Special Education # Passed

0

Total # Failed

0

% Failed

0%

Total # Passed

4

% Passed

100%

The Marking Period GPA Report is available to users with the appropriate permissions from the **Counseling > Reports** sub-module. This report allows users to run a report showing students' averages for each marking period as well as their cumulative GPA for the selected school year.

MARKING PERIOD GPA REPORT

Building:

Mindex HS

School Level:

High School

Year:

2019-2020

Marking Period:

Quarter 1

Report Format:

Marking Period GPA Report (4MP)

Average Grade Range:

-

All Marking Periods

Overall GPA:

☒ Simple Average of Marking Periods
 ☐ Final Vertical Average

Order By:

Student Name

Run Report

Counseling Module User Guide
SchoolTool Version 23.2

1. **Building and School Level:** These drop-downs allow the user to specify the building/school level for which the report will be run
2. **Year:** This drop-down specifies the school year for which the report will be run. This will be set to the current school year by default.
3. **Marking Period:** This drop-down specifies the marking period for which data will be returned. This provides a “snapshot” of the data for the specified time period.
4. **Report Format:** This drop-down is used to determine which report format will be used if multiple formats are available.

Note: If the Report Format shows more marking periods than have been included in the report (for example, running the 4 Marking Period report format for only Marking Period 1), only the selected marking period data will be displayed,

5. **Average Grade Range:** These numeric fields allow the user to further narrow the results by specifying the grade range to be shown on the report.
 - A. The drop-down for the Average Grade Range is used to indicate which marking periods should be included when using the grade range.
Users may select from the following options:
 - All Marking Periods (the default)
 - Overall Average
 - Any One Marking Period
6. **Overall GPA:** These radio buttons allow the user to choose which calculation type to use for the “GPA” column on the report. The “Simple Average of Marking Periods” option uses the average of the values for each marking period used in the report. The “Final Vertical Average” option uses the student’s final vertical average calculation for the selected school year as determined based on the settings in **Maintenance > Grading**.
7. **Order By:** This drop-down determines the order in which data is displayed on the report. Users may choose from the following options:
 - Student Name (the default)
 - Grade Level
 - Overall GPA

Once the pre-screen options have been set appropriately, click the Run button to generate the report. The report will open in a new window.

Marking Period GPA Report								
HS : High School : 2008-2009								
StudentID	Last Name	First Name	Grade	M1	M2	M3	M4	GPA
3396	Adams	Amy	10	89.83	89.83	94.00		91.22
3663	Beerford	Michael	10	81.83	86.33	79.50		83.22
3733	Davis	Deborah	10	73.50	94.00	94.00		87.17
3540	Lopez	Douglas	11	90.00	88.43	90.00		90.10
3676	Morris	Shawn	11	85.00	79.00	79.71		81.24
3523	Fury	Robert	11	84.33	76.67	82.33		81.11
19228	Richardson	Janet	10	93.43	93.71	93.71		94.95
19223	Rodriguez	Patricia	10	84.83	96.33	96.00		95.72
613	Shaw	Terrence	9	96.00	95.00	98.00		95.00
531	Thomas	Amanda	9	85.50	85.33	79.00		83.28
644	Thomas	Anthony	9	85.33	77.17	87.00		83.17
2848	Walker	Joyce	9	85.67	76.83	77.67		80.04
2757	White	Freddie	10	85.00	85.50	82.67		84.39
3521	Williams	Joyce	11	88.33	89.83	91.17		89.82

Post Graduate Plan Report

Users with the appropriate permission can now generate a Post Graduate Plan report from within **Counseling > Reports**. This report shows a summary with counts, percentages, and over all totals of the number of each type of plan recorded for a selected group of students. This report can also be set to generate a detail section in addition to the summary, which will include a listing of all students from the selected group who have a post graduation plan recorded.

POST GRADUATE PLAN REPORT

Search by: ☐ Student ☒ Class of 2019-2020

☐ Show detail section

Sort detail section by:

Student Name
Student ID
Plan

Run Report

Use the pre-screen to specify options for the report:

- Search By: By Student (this uses the batch selector to run the report for a specific group of students) or Per Class Of (selecting a value from this school year drop-down will cause the report to be run for all students whose enrollments include them in that class year).
- Show detail section (checkbox): Determines whether or not the student detail section appears on the report in addition to the summary section.
- If the “Show detail section” option is selected, the user has the option to sort the

detail section by Student Name, Student ID, or Plan type.

Post Graduate Plan Report			02/11/2011	
Summary	Number of Students	Percentage of Students		
Attend 4-year college in NYS	97	46.6 %		
Attend 2-year college in NYS	0	0.0 %		
Attend other postsecondary school in NYS	0	0.0 %		
Attend 4-year college outside NYS	0	0.0 %		
Attend 2-year college outside NYS	0	0.0 %		
Attend other postsecondary school outside NYS	0	0.0 %		
Seek employment	0	0.0 %		
Enlist in the military	0	0.0 %		
Other plan	0	0.0 %		
Adult Services (Disabled Students Only)	0	0.0 %		
Unknown	0	0.0 %		
No plan recorded	111	53.4 %		
Total Number of Students		208		
Student Detail				
Student Name	Student ID	Class Of	Plan	Updated
Adams, Amy L.	3595	2010-2011	Attend 4-year college in NYS	02/07/2011
Andrews, Charles S	3813	2010-2011	Attend 4-year college in NYS	02/09/2011
Barnes, Elizabeth E	3819	2010-2011	Attend 4-year college in NYS	02/07/2011

Progress Report

Use the Progress Report to generate progress reports for each student. You can generate progress reports for specific marking periods and school years. Depending on your district customizations, you may also have a variety of reports to select from. For example, progress reports for grades 6 through 8 may be different from those for grades 9 through 12. Use the batch selector to locate a student or a group of students.

1. After clicking Continue, the Progress Report pre-screen appears.

2. Select the **School Level**, school **Year**, and **Marking Period**. The **Progress Report Interval** will automatically change when the marking period changes (i.e., marking period Quarter 1 results in PR1). Ignore the Report Card Type radio buttons, but do select the appropriate guardians who will receive progress reports via the mail. Then select the report format from the drop-down list.
3. When you click Run Report, the report will appear. The first page of this report shows the first student in the list (if you are generating reports for multiple students). Use the Preview pane to select an individual student (if you are generating progress reports for multiple students), or use the navigation buttons to move through each page.

Progress Report						
Mindex MS				02/27/2020		
Student No.	Student Name	Homeroom	Grade	Phone	Quarter	Counselor
21854	Adams, Aaron W		07	(555) 433-9008	Interim 4	Martinez
Parent or Guardian : Mrs. Rebecca Adams 394 Blackjack Placeant Road Rochester, NY 12345						
SUBJECT: BAND 7 CURRENT GRADE IS: 98 Willing to ask for extra help.				TEACHER: Richardson		
SUBJECT: BOYS PE 7 CURRENT GRADE IS: 100 Hard worker. An absolute pleasure to have in class.				TEACHER: Williams		
SUBJECT: ENGINEERING 7 CURRENT GRADE IS: 100 Completes most required assignments. More studying at home can only help. Vey bright and cooperative.				TEACHER: Warf		

Note: This image represents a generic progress report which comes standard with SchoolTool. If your district uses a customized report, the format will appear in the drop-down list in the report sub screen.

Rank/GPA Report

The Rank/GPA Report generates a list of students and their completed and in-progress ranks and GPAs. For both rank and GPA calculations, the "Completed" section includes only completed courses (any course that has a final grade will be included). The "In-Progress" section, on the other hand, includes completed courses as well as any submitted Marking Period grades for current courses.

Use the pre-screen to select the students you wish to include on the report and specify report options.

RANK/GPA REPORT

☐ Show stored locked values

Sort By:
☒ Weighted Rank
☐ Unweighted Rank
☐ Student Name

Show:
☒ Student Name Only
☐ Student Name and ID
☐ Student ID Only

Select Students

New Search

1. Click on the New Search option to select students. Use the batch selector to locate students (or click Cancel to return to the main screen).

RANK/GPA REPORT

☐ Show stored locked values

Sort By:
☒ Weighted Rank
☐ Unweighted Rank
☐ Student Name

Show:
☒ Student Name Only
☐ Student Name and ID
☐ Student ID Only

Select Students

New Search

2. After selecting students, you will be returned to the pre-screen where you will see the number of selected students.

RANK/GPA REPORT

☐ Show stored locked values

Sort By:

- ☒ Weighted Rank
- ☐ Unweighted Rank
- ☐ Student Name

Show:

- ☒ Student Name Only
- ☐ Student Name and ID
- ☐ Student ID Only

138 Selected Students

New Search Modify Search

Run Report

- Use the prompts on the right side of the screen to set display options for the report.
 - Use the **Show stored locked values** option to choose whether or not to use the locked values that were stored in **Maintenance > Grading > Lock Rank and GPA**.
 - Choose whether to sort by weighted rank, unweighted rank, or by student name
 - Specify how students should appear on the report (you may show names, student IDs, or both)

RANK/GPA REPORT

☐ Show stored locked values

Sort By:

- ☒ Weighted Rank
- ☐ Unweighted Rank
- ☐ Student Name

Show:

- ☒ Student Name Only
- ☐ Student Name and ID
- ☐ Student ID Only

138 Selected Students

New Search Modify Search

Run Report

- Once you have selected the desired options, click Run Report to generate the report.

Rank/GPA Report
Data District : 2006-2007

Student Name	Class Of	Completed			In Progress		
		WCFA	WRank	UCFA	WCFA	WRank	UCFA
FAYMOND, Elizabeth	2006-2009	100.603	1	99	100.332	1	99
PECK, Abby	2006-2009	100.324	2	99	99.678	2	98
CURTIS, Kate	2006-2009	99.254	3	97	98.810	4	97
FAYMOND, Meghan	2006-2009	99.081	4	97	98.989	3	97
HAYWARD, Herika	2006-2009	98.812	5	97	98.717	5	97
GOBIS, Katherine	2006-2009	98.508	6	97	98.508	6	97
DARFELD, Ceryln	2006-2009	98.298	7	97	98.180	7	97
GOBIS, Mark	2006-2009	97.800	8	97	97.555	8	97
DARFELD, Sara	2006-2009	97.377	9	96	97.221	10	96
CARLOW, Abraham	2006-2009	97.282	10	96	97.377	9	96
DAVOGA, Stephanie	2006-2009	96.728	11	95	96.733	11	96
ELIZANTE, Rebecca	2006-2009	96.589	12	95	96.598	12	95
O'Connor, Kevin	2006-2009	96.362	13	95	95.874	16	94
EDNEY, Emily	2006-2009	96.347	14	95	96.389	15	95

Regents Exam

The Regents Exam report provides a breakdown of all metrics for all students who completed New York State Regents assessments. This report mimics the Local Exam report, but only reflects numbers based on New York State exams. This report will display score ranges, by gender for all general education students and all special education students, for each selected course.

- Use the Regents Exam report pre-screen to select the **Building, School Level** and school **Year** and specify additional report options.

REGENTS EXAM

Building: School Level: Year:

CUSTOMIZE REPORT

☒ Show All Regents Courses

☐ Only for Department:

☐ Only for Course:

☐ Only for Exam:

Start Date: End Date:

Run Report

- Under the Customize Report heading, select the appropriate radio button option and specify a date range:
 - Show All Regents Courses** – displays information for every state exam.
 - Only for Department** – displays information for state exams from all courses in the selected department.
 - Only for Course** – displays information for state exams from all sections of the selected course.
 - Only for Exam** – displays information for a specific exam.
- This is a sample of the full Show All Regents Courses report. Use the Preview pane to view the results for one course, or use the Report Viewer Navigation buttons to move forward and back through the pages of the report. Here we see page 1, which displays percentages for the A.P. U.S. History course.

Regents Exam Report

Mindex City High School : 2018-2019

A.P.U.S. HISTORY

11/10/21 4:51 pm

	General Education Students												Special Education Students												Total SE										
	0-54				55-64				65-84				85-100				0-54				55-64					65-84				85-100					
	M	F	X		M	F	X		M	F	X		M	F	X		M	F	X		M	F	X			M	F	X		M	F	X			
# of students	0	0	0	0	0	0	0	0	1	3	0	0	21	33	0	0	58	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1
% of OE or SE	0%	0%	0%	0%	0%	0%	0%	0%	2%	5%	0%	0%	36%	57%	0%	0%	100	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	100%		
# of students	0	0	0	0	0	0	0	0	0	4	0	0	54	54	0	0	58	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	1		
% of OE or SE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.90%	93.10%	0.00%	0.00%	100%	100%	0.00%	0.00%	100%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	100%	0.00%	100%		
# of students	0	0	0	0	0	0	0	0	0	58	0	0	58	58	0	0	58	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	1		
% of OE or SE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	100.00%	0.00%	0.00%	100%	100%	0.00%	0.00%	100%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	100%	0.00%	100%		
% of all students	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	98.31%	98.31%	0.00%	0.00%	98.31%	98.31%	0.00%	0.00%	98.31%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.69%	1.69%	0.00%	1.69%		

Report Card Audit

The Report Card Audit report is used to check which teachers have not yet completed their grading tasks. The report displays a list of all courses (by section and period) and their respective teachers. The No Comments and No Grades columns indicate which teachers have not completed their grading or comments.

Use the Report Card Audit sub screen to select the **Building**, **School Level**, school **Year** and **Marking Period** you are auditing.

REPORT CARD AUDIT

Building: School Level: Year:

Marking Period:

Run Report

Click the Run Report button to generate the report.

Teacher Report Card Audit						
High School: High School: 2006-2007: Marking Period 1						
Teacher Name	Course Name	Section Number	Period	Students	Missing Comments	Missing Grades
AVERILL	READING LAB	3	2	5	1	5
AVERILL	READING LAB	4	2	6	6	6
AVERILL	READING LAB	5	3	5	5	5
AVERILL	READING LAB	6	3	5	5	5
AVERILL	READING LAB	7	8	4	4	4
AVERILL	READING LAB	8	8	6	6	6
AVERILL	READING LAB	9	8	5	5	5
AVERILL	READING LAB	10	9	4	4	4
AVERILL	STRUCTURED STUDY GOOLDEN	1	1	1	1	1
AVERILL	STRUCTURED STUDY GOOLDEN	2	2	3	2	2
AVERILL	STRUCTURED STUDY GOOLDEN	3	3	1	1	1
AVERILL	STRUCTURED STUDY GOOLDEN	4	4	3	3	3
AVERILL	STRUCTURED STUDY GOOLDEN	5	5	1	1	1
AVERILL	STRUCTURED STUDY GOOLDEN	6	6	1	1	1
AVERILL	STRUCTURED STUDY GOOLDEN	7	7	2	2	2
AVERILL	STRUCTURED STUDY GOOLDEN	8	8	1	1	1
AVERILL	STRUCTURED STUDY GOOLDEN	4	4	1	1	1
AVERILL	SYMPHONIC ORCHESTRA	1	1	38	88	38
AVERILL	WORLD LIT. FRONTIS	6	3	19	19	19
AVONDALE	HUMAN PHYSIOLOGY 2	1	1	23	23	23

Report Cards

Use the Report Cards report to generate report card for each student. You can generate report cards for specific marking periods and school years. Depending on your district customizations, you may also have a variety of reports to select from. For example, report cards for grades 6 through 8 may be different from those for grades 9 through 12.

1. Use the batch selector to locate a student or a group of students. After selecting students, the Report Card pre-screen will appear.

2. Select the **School Level**, school **Year**, and **Marking Period**. Select the appropriate **Report Card Type** radio buttons (either Traditional (secondary) or Descriptive (elementary)). Then select the appropriate guardians who will receive report cards via the mail.
3. At this point, you can also enter an optional **Memo** (up to 255 characters) which will appear on all report cards. To use the Memo, type the information in the Memo box, use the spell check icon to check verify spelling, and then click the update button to save the memo. When you are finished setting up the options, select the report card format from the drop-down list and click Run Report.

- When you click Run Report, the report will appear. The first page of this report shows the first student in the list (if you are generating reports for multiple students). Use the Preview pane to select an individual student (if you are generating progress reports for multiple students), or use the navigation buttons to move through each page.

This image represents a traditional report card for Quarter 4.

Student Report Card														
High School - High School 2005-2006														
STUDENT NAME		STUDENT NO.	TELEPHONE	GRADE	COUNSELOR	HOME ROOM	PERIOD	ENDING						
ACHILLES, Michael D		4476	555-5555	11	BRYANS	124	08/01/2006							
PARENT OR GUARDIAN														
MEMO														
Mr. Barbara Achilles 180 CORNWELL ST ROCHESTER, NY 12245														
SUMMER SCHOOL: SEE COUNSELOR TO REGISTER CENTRAL 30 DAY 8-331 BOW CLASS W.S. MATH ONLY FREE REGISTRATION EXAMS ONLY 1-331 20														
		QUARTER		1	2	3	4	TOTAL						
		ABSENCES		1	3	0	0	4						
		LATENESS		0	1	0	0	1						
SUBJECT	TEACHER	QTR 1	QTR 2	QTR 3	QTR 4	QTR 5	QTR 6	QTR 7	QTR 8	QTR 9	QTR 10	QTR 11	QTR 12	QTR 13
ENGLISH 10 HONORS	BRYANS	92	90	90	90	90	90	90	90	90	90	90	90	90
GLOBAL ST. 10 HONORS	SHAW	96	92	90	90	90	90	90	90	90	90	90	90	90
ENGLISH 10 HONORS	SHAW	97	92	90	90	90	90	90	90	90	90	90	90	90
MATH 11-FALL	SHAW	95	92	90	90	90	90	90	90	90	90	90	90	90
PEMBROKE	SHAW	95	92	90	90	90	90	90	90	90	90	90	90	90
MATH 10-SPRING	SHAW	95	92	90	90	90	90	90	90	90	90	90	90	90
PEMBROKE	SHAW	95	92	90	90	90	90	90	90	90	90	90	90	90
SPANISH 10 HONORS	SHAW	96	92	90	90	90	90	90	90	90	90	90	90	90
BUCCHONIA	SHAW	96	92	90	90	90	90	90	90	90	90	90	90	90
DIGITAL ELECTRONICS	SHAW	96	92	90	90	90	90	90	90	90	90	90	90	90
OVERALL	SHAW	100	97	97	97	97	97	97	97	97	97	97	97	97
PE 9 Boys Fall	SHAW	100	97	97	97	97	97	97	97	97	97	97	97	97
PE 9 Boys Spring	SHAW	100	97	97	97	97	97	97	97	97	97	97	97	97
LYONS	SHAW	100	97	97	97	97	97	97	97	97	97	97	97	97
VOL SERV SP	SHAW	100	97	97	97	97	97	97	97	97	97	97	97	97
OVERALL EDUCATION	SHAW	100	97	97	97	97	97	97	97	97	97	97	97	97

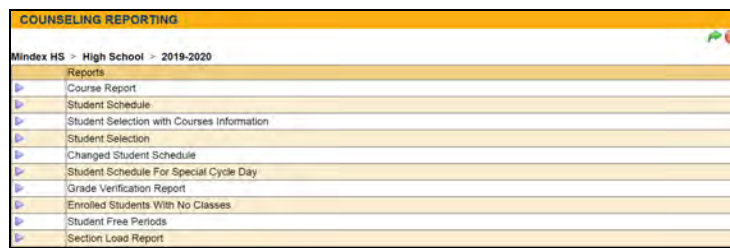
Note: This image represents the generic report card format which comes standard with SchoolTool. If your district uses a customized report, the format will appear in the drop-down list in the report sub screen.

Scheduling Reports

The Scheduling Reports option gives guidance counselors access to a set of ten (10) reports from the Scheduling module. These reports allow guidance counselors to quickly and easily verify course selections, print schedules, find students who are enrolled but don't have classes, and locate student free periods, among other things.

- Select [Scheduling Reports](#). A list of buildings will appear on the Counseling Reporting tab. (If you only have access to one building, skip this step).
- Select [a building](#), then the active school year. The list of Scheduling Reports

will appear.



Course Report

The Course Report is similar to a class roster. It shows the individual students in each section of a course, along with their gender, grade, counselor and date of birth.

1. The Course Reports report will initially prompt for the type of report to create:
 - **All** to report on all sections of all courses
 - **Teacher** to report on all of a specific teacher's courses or all teachers within a department's courses
 - **Course** to report on only a specific course, or all courses within a department
2. Additional Report Options allow the user to decide how the information will display in the report:
 - **Landscape** prints as many courses as can fit on a landscape-format page, scrolling the courses across two columns, as necessary. This is a paper-saving report, utilizing a smaller text size to fit more on a single page.
 - **Portrait** prints as many courses as can fit on a portrait-format page, scrolling courses across multiple pages, as necessary. The text size in this report is slightly larger and thus easier to read.
 - **Page breaks after each section** allow the user to conserve paper by printing multiple courses per page (when the box is unchecked) or print roster-style reports with one course per page (when the box is checked).
 - **Hide student details** allows the user to generate this report with course information only (all individual student rows will be hidden).

A screenshot of a web application interface titled "COURSE REPORTS". Below the title bar, it shows a breadcrumb trail: "Mindex HS > High School > 2019-2020". The interface is divided into two main sections. The top section contains three radio buttons for report type: "All" (selected), "Teacher", and "Course". To the right of "Teacher" and "Course" are dropdown menus, both currently showing "AIS". To the right of these is another dropdown menu showing "ALL". The bottom section is titled "Report Options:" and contains four checkboxes: "Landscape" (selected), "Portrait", "Page breaks after each section" (unchecked), and "Hide student details" (unchecked). At the bottom center of the form is a button labeled "Run Report".

Sample of the default Landscape format with student details visible:

Course List										2/23/06 3:40:41 PM
High School : High School : 2005-2006										
077	REMEDIAL ENGLISH	ASHLAND, William								
Period: 8	Section: 1	Room: 104								
Student ID	Student Name	Gender	Grade	Counselor	DOB	Needs				
3662	CEDARS, Nancy	M	12	ASHERILL	05/18/1989					
3740	CEDARS, Lisa M	F	12	BRAYANS	04/07/1988					
3525	MEDICAL, James L	M	12	BERKSHIRE	05/11/1989					
Course Total: 3	Male: 2	Female: 1	Grade: [12]=3							
077	REMEDIAL ENGLISH	ASHLAND, William								
Period: 8	Section: 2	Room: 104								
Student ID	Student Name	Gender	Grade	Counselor	DOB	Needs				
3638	ROCKBROOK, Nancy	M	12	ASHERILL	05/28/1989					
3450	ROCK, Ruge	M	12	BRAYANS	05/10/1989					
Course Total: 2	Male: 2	Female: 0	Grade: [12]=2							
MD-015 ENGLISH 9 REGENTS	ASHLAND, William									
Period: 7	Section: 3	Room: 104								
Student ID	Student Name	Gender	Grade	Counselor	DOB	Needs				
4605	AYDELL, Adam M	F	9	ASHERILL	02/11/1991					
4302	AYDELL, Adam M	M	9	ASHERILL	03/18/1991					
4600	BAKERS, David C	F	9	ASHERILL	07/02/1991					
5225	BECK, Joshua R	M	9	ASHERILL	06/11/1991					
4611	BEY, Nicholas C	M	10	ASHERILL	04/26/1990					
6213	ROCKBROOK, Robert L	F	9	ASHERILL	04/02/1991					
MD-017 ENGLISH 9 HONORS	ASHLAND, William									
Period: 9	Section: 1	Room: 104								
Student ID	Student Name	Gender	Grade	Counselor	DOB	Needs				
4624	AYDELL, David T	M	9	ASHERILL	04/10/1991					
4768	AYDELL, Margaret	F	9	ASHERILL	02/20/1991					
6204	AYDELL, Susan	M	9	ASHERILL	04/10/1991					
6537	BAKERS, Philip A	M	9	ASHERILL	06/28/1991					
4772	BEDFORD, David C	F	9	ASHERILL	04/23/1991					
4376	BEDFORD, Jonathan	F	9	ASHERILL	12/07/1990					
4810	BRAYAN, Gaby F	M	9	ASHERILL	10/05/1991					
5817	ROCKBROOK, Joseph W	M	9	ASHERILL	02/07/1991					
4623	ROCKBROOK, Joseph W	M	9	ASHERILL	08/05/1991					
4658	CARROLL, Abraham L	M	9	ASHERILL	08/24/1991					
4622	CUTTS, Ryan J	F	9	ASHERILL	02/21/1991					
6169	ELKAPANTE, Chelsea N	F	9	ELEFANTE	10/06/1991					

Sample Portrait format with student details hidden:

Course List										5/23/2019 2:38:34PM
Mindex HS : High School : 2017-2018										
00053	English 11									
Period: 1	Section: 3	Days: A,B	Teacher(s): Adams, Kimberly							
			Sem: S1, S2	Room: 145						
Course Total: 19	Male: 8	Female: 11	Grade: [11]=19							
00110	Spanish 2									
Period: 2	Section: 1	Days: A,B	Teacher(s): Adams, Kimberly							
			Sem: S1, S2	Room: 100						
Course Total: 18	Male: 11	Female: 7	Grade: [9]=16 [10]=1 [11]=1							
00110	Spanish 2									
Period: 3	Section: 2	Days: A,B	Teacher(s): Adams, Kimberly							
			Sem: S1, S2	Room: 100						
Course Total: 14	Male: 5	Female: 9	Grade: [9]=11 [10]=1 [11]=2							
00111	Spanish 3									
Period: 4	Section: 1	Days: A,B	Teacher(s): Adams, Kimberly							
			Sem: S1, S2	Room: 100						
Course Total: 16	Male: 6	Female: 10	Grade: [10]=16							
00111	Spanish 3									
Period: 9	Section: 2	Days: A,B	Teacher(s): Adams, Kimberly							
			Sem: S1, S2	Room: 100						
Course Total: 18	Male: 8	Female: 10	Grade: [10]=18							
00111	Spanish 3									
Period: 8	Section: 3	Days: A,B	Teacher(s): Adams, Kimberly							
			Sem: S1, S2	Room: 100						
Course Total: 19	Male: 11	Female: 8	Grade: [10]=17 [11]=2							

Here is a sample of the Portrait format, with larger font size:

Course List										7/3/07 2:23:38 PM
High School : High School : 2006-2007										
03200	ENGLISH 9 B									
Period: 2	Section: 1	Days: 1,2,3,4,5	Teacher(s): Anders, Susan							
			Sem: F, S	Room: 317						
Student ID	Student Name	Gender	Grade	Counselor	DOB	Team	Needs			
30329	Baily, Lisa	F	9	Ramos	06/18/1991					
51689	Bonner, Jordan	M	9	Smith	02/24/1992		504			
64773	Bonner, Max L	M	9	Lei	02/17/1992					
51502	Deifer, Erin M	F	9	Robison	02/17/1992					
49976	Hall, Lillian	F	9	Lei	03/06/1992					
63468	Hoffman, Junyi	M	9	Smith	11/19/1992					
64805	Howarter, Luis A	M	9	Smith	08/15/1992					
53177	Lambert, Alexander	M	9	Smith	12/05/1991					
49466	Martinez, Ellen	F	9	More	09/03/1991					
54710	Mitchell, Robin	F	9	Ramos	02/15/1991					
66273	Moore, Priscilla F	F	9	Lei	06/01/1991					
53053	Roffiguer, Paul J	M	9	Ramos	10/14/1992					
51673	Rollins, Andrew	M	9	Robison	08/12/1991					
53954	Romero, Raymond C	M	9	Yellow	11/16/1992					
49406	Smith, Julianne	F	9	Ramos	04/17/1992					
63531	Taylor, Lonna R	F	9	More	06/06/1991					
54677	Thomas, Andeep	F	9	Robison	07/18/1992					
63393	Tompson, Amos	M	9	Lei	12/21/1991		504			
51990	Vail, Hannah	F	9	Robison	02/20/1992					
63171	Whitehead, David R	M	9	More	04/09/1992					
54109	Whitehead, Sarah	F	9	More	11/21/1991					
Course Total: 21	Male: 10	Female: 11	Grade: [9]=21							

Student Schedule

Use these reports to review a student's schedule after a schedule run has been performed.

1. To begin, use the Report Format dropdown to select the desired report you wish to run.
2. Choose whether you want to print current schedules or pending schedules. When this option is set to "Current Schedule," all student schedules will be generated using the current schedule and will show the current date in the "Effective Date" field. When it is set to "Pending Schedule," the report will be generated using pending schedules (and will show the corresponding pending schedule date in the "Effective Date" field) as appropriate (note that students who do not have a pending schedule will still be included, but reports for those students will display the current schedule instead).
3. Choose which students you'd like to include by selecting a **Search By** option (All Students, Per Home Room, Per Grade or By Student).
4. Use the **Sort By** (Student, Home Room, Counselor, Grade or Zip Code) radio options to specify the sort order for the resulting report.

Student Schedule Report

Mindex HS > High School > 2021-2022

Report Format: 000-Grid Student Schedule-Landscape Print: ☒ Current Schedule ☐ Pending Schedule

Search By:

☒ All Students
☐ Per Home Room
☐ Per Grade
☐ By Student

Sort By:

☒ Student ☐ Home Room ☐ Counselor ☐ Grade ☐ Zip Code ☐ Home District

RUN REPORT

Note: The options presented in the Report Format drop-down list come from the reports set up by and for the district. For example, your district may have options for each different school level, if multiple school levels are present in the same building. Other districts may have reports for each marking period instead of just each semester. More information on setting up these reports is available in the Maintenance User Guide and in the *Maintenance – Application – Report Format* documentation.

- Standard Schedule Report: Displays a full-year schedule for all selected students. You will see the student names appear in the Preview pane of the Crystal Viewer window at the left.

- Fall Semester Schedule, Spring Schedule Report (or Other): Displays a fall-only or spring-only (or other marking-period or building-level-only) schedule for all selected students.
- Missing Course Selections: Displays schedules for only those students who have one or more selections missing from their schedule.
- Grid Schedule RS: Uses Reporting Services to provide a Student Schedule Report with several configurable display options.

Student Schedule							
Mindex HS : High School : 2021-2022					07/13/2022		
Effective as of 07/13/2022							
Student ID	Student Name	Counselor	Gender	Grade	Homeroom	DOB	
27741	Adams, Elizabeth R 67 Kennedy Lane Rochester, NY 12345	Garcia	F	11	(143)	07/18/2005	
			Team	Phone	Locker		
				(555) 485-7309	273 (39-17-7)		
Course ID	Seet	Semesters	Course Name	Room	Period	Days Met	Teacher
00682	1	FA	AP U.S. HISTORY	143	1	B	Simmons
00072	1	FA, SP	AP U.S. HISTORY	143	1	G	Simmons
00325	4	SP	LIFEGUARDING	176	1	B	Rogers
00303	1	FA, SP	WIND ENSEMBLE	112	2	B	Williams
00017	2	FA, SP	ENGLISH 11E	64	2	G	Phillips
00196	2	FA, SP	AP BIOLOGY	204	3	B	Smith
00686	2	FA	AP BIOLOGY	204	3	G	Smith
00143	2	FA, SP	CALCULUS PREP	216	4	B	Ortiz
00229	2	FA, SP	ELEMENTARY ITALIAN I	87	4	G	Hyphen

Note: Some of the items on these reports can be turned on or off with prompts in the Maintenance area. These options include: Locker, Locker Combination, Counselor name, Building Information, Student Information, Address, and Homeroom Teacher Name. Some reports also allow the user to turn these options on or off from within the report itself. Refer to the [Maintenance > Application > Report Format](#) documentation for more information.

Student Selection with Courses Information

The Student Course Selection with Courses Information report uses a simple or advanced search to find a student; the report then lists all selections just for that student. This can be used to review with guidance counselors to ensure students are meeting the minimum requirements for graduation.

Details on the report include the student ID, student name and address, gender, grade, date of birth and home phone, along with all selections. Selections include course #, course name, cycle days and semesters, total number of available sections, and alternate periods when the course is offered.

Note: This report does not have a pre-screen. If your search yields a single student, the report will open automatically for that student. If your search yields a list, the report will open for a single student after you have selected a student from the list. There is no way to generate this report for multiple students at a time.

Student Course Selection With Course Information						5/16/05 3:18:00 PM
High School : High School : 2004-2005						
Student ID	Name & Address	Sex	Grade	DOB	Phone	
4214	HIBBIT, STEPHEN	M	10	01/31/1989	555-5555	
	ROCHESTER, NY 12345					
Course #	Course Name	Cycle-Days	Sem	# Sections	Available Periods	
027	ENGLISH 10 HONORS	A,B	F5	5	3 (30/25) 4 (30/25) 5 (27/25) 7 (14/25) 8 (25/25)	
127	GLOBAL ST. 10 HONORS	A,B	F5	4	5 (17/25) 6 (15/25) 8 (16/25) 9 (31/25)	
225	LIVING ENVIRON REG	A,B	F5	14	1 (28/25) 2 (29/25) 2 (26/25) 3 (27/25) 4 (26/25) 4 (26/25) 6 (28/25) 6 (28/25) 7 (31/25) 7 (26/25) 8 (26/25) 8 (26/25) 9 (29/25) 9 (27/25)	
348	MATH B2 H -FALL	A,B	F	2	2 (34/30) 7 (17/30)	
356	MATH B3 H-SPRING	A,B	S	2	2 (34/30) 7 (16/30)	
428	SPANISH YR 2 HONORS	A,B	F5	2	7 (20/25) 9 (17/25)	
555	TV PRODUCTION 1	A,B	F	2	2 (14/17) 7 (17/17)	
556	TV PRODUCTION 2	A,B	S	2	2 (21/17) 7 (18/17)	
630	CONCERT BAND	A,B	F5	1	3 (74/100)	
722	PE 10/11/12 FALL	B	F	19	1 (40/34) 2 (42/34) 2 (41/34) 3 (36/34) 3 (35/34) 3 (35/34) 3 (36/34) 4 (48/34) 5 (29/34) 5 (29/34) 6 (25/34) 6 (28/34) 6 (00/1) 7 (47/34) 7 (45/34) 8 (45/34) 8 (44/34) 9 (36/34) 4 (26/30)	
722	PE 10/11/12 FALL	A	F	20	1 (43/34) 2 (42/34) 3 (40/34) 3 (38/34) 4 (46/34) 5 (27/34) 5 (34/34) 6 (23/34) 6 (45/34) 6 (17/34) 6 (14/34) 7 (42/34) 7 (43/34) 8 (45/34) 8 (47/34) 9 (28/34) 9 (32/34) 2 (42/34) 7 (26/30) 3 (27/30)	
723	PE 10/11/12 SPRING	A	S	17	1 (40/34) 2 (51/34) 3 (40/34) 3 (41/34) 4 (49/34) 5 (27/34) 5 (31/34) 6 (16/34) 6 (15/34) 6 (18/34) 6 (18/34) 7 (43/34) 7 (48/34) 8 (44/34) 8 (44/34) 9 (33/34) 9 (36/34)	
723	PE 10/11/12 SPRING	B	S	19	1 (40/34) 2 (51/34) 2 (44/34) 3 (32/34) 3 (31/34) 3 (33/34) 3 (33/34) 4 (49/34) 5 (27/34) 5 (28/34) 6 (21/34) 6 (22/34) 6 (15/34) 7 (40/34) 7 (42/34) 8 (44/34) 8 (41/34) 9 (34/34) 7 (27/34)	

Note: The **Available Periods** column displays all periods where this course is available, as well as current headcounts for each period. For example, for English 10 Honors, there are 5 sections, and the first one in period 3 currently has 30 students scheduled into it, even though the max head count is 25.

Student Selection

The Student Selection report, also referred to as the Course Selections per Student report (when accessed from the Scheduling module), can be generated for all students, a single student, a single grade or a homeroom. Details on the report include student demographic data, as well as a listing of each course selected, its priority, its credits, and a total number of credits selected overall. This can be used to send home to parents before the schedule is set, for their approval.

There is a prescreen for this report that provides the ability to print **All Students**, or a single **Homeroom**, **Grade**, or **Student**.

In addition, users may Sort By the following options: alphabetically by **Student** last name, numerically by **Homeroom** number, alphabetically by **Counselor** last name, numerically by **Grade** or numerically by **Zip Code**.

STUDENT COURSE SELECTION REPORT

Mindex HS > High School > 2019-2020

Search By:

- ☒ All Students
- ☐ Per Home Room
- ☐ Per Grade
- ☐ By Student

Sort By:

- ☒ Student
- ☐ Home Room
- ☐ Counselor
- ☐ Grade
- ☐ Zip Code

Run Report

After specifying pre-screen options, click Run Report to generate the report.

Student Course Selections					
High School - High School / 2006-2007					
11/30/2007					
Student ID	Name & Address	Sex	Grade	DOB	Phone
5638	ACHILLES, Elizabeth L. 614 OXFORD ST ROCHESTER, NY 12345	F	9	10/27/1992	555-5555
Course #	Course Name	Priority	Credits		
015	ENGLISH 9 REGENTS	High	1.00		
065	STUDIO IN ART	High	1.00		
115	GLOBAL ST. 9 REGENTS	High	1.00		
217	EARTH SCIENCE HONORS	High	1.00		
346	MATH A3 H-FALL	High	0.50		
354	MATH B1 H-SPRING	High	0.50		
427	FRENCH YEAR 2 HONORS	High	1.00		
640	CONCERT ORCHESTRA	High	1.00		
706	PE GIRLS 9/10 FALL	High	0.25		
707	PE GIRLS 9/10 SPRING	High	0.25		
			7.50		

Changed Student Schedule

The Changed Student Schedule report shows a list of students whose schedules were changed during the specified date range. The report displays the date that schedule was changed, that student's details, and the schedule details.

CHANGED SCHEDULE

Mindex HS > High School > 2019-2020

5/28/2020 To 5/28/2020

☒ All Students
☐ Per Home Room
☐ Per Grade

All Off - Grid

Run Report

To generate the report, select a date range, a grouping option for students (All, per Home Room, or per Grade), and a report format, then click the Run Report button.

Changed Date: 12/18/2008						
Student ID	Student Name	Grade	Grade	Home Room	DOB	
43055	Fordell, Arthur C.	M	11	300	09/03/1999	
					Locker	3475
Course ID	Sec.	Semester	Course Name	Room	Period	Days Met
03900	1	F, S	AP ENGLISH LITER/COMP	100	3	1,2,4,5,6
41100	3	F, S	CHEMISTRY LAB	302	1,2	5
41600	1	F, S	CHORALE	212	2	2,6
32900	3	F, S	GEOMETRY	370	3	1,2,3,4,5,6
05100	1	F	THE SHORT STORY	312	4	1,2,3,4,6
60200	1	F	MUSIC THEORY/COMP	117	6	5
60200	1	S	MUSIC THEORY/COMP	117	6	2,3,4,5,6
32100	3	F, S	ACADEMIC STUDY HALL	5	5	1,2,3,4,5,6
42000	5	F, S	CHEMISTRY	370	6	1,2,4,5,6
10000	8	F, S	SOCIAL STUDIES 10	126	7	1,2,3,5,6
11300	3	F	MARKETTING	241	8	2,3,4,5,6
15000	6	S	HEALTH	150	9	2,3,4,5,6

Student Schedule for Special Cycle Day

The Student Schedule for Special Cycle Day is a special report designed for districts using special cycle days. The report may be run for all students, per homeroom, per

grade, or for an individual student.

This report uses the following pre-screen:

STUDENT SCHEDULE REPORT

Mindex HS > High School > 2019-2020

Report Format: All Off - Grid

Special Cycle Day: 1st Day of School

Search By:

- ☒ All Students
- ☐ Per Home Room
- ☐ Per Grade
- ☐ By Student

Sort By:

- ☒ Student
- ☐ Home Room
- ☐ Counselor
- ☐ Grade
- ☐ Zip Code

Run Report

Grade Verification Report

The Grade Verification Report is used by Counselors to review teachers' marking period grade submissions. The report can be run for all teachers and all courses, for a specific department, for an individual course, or for an individual teacher. The report shows a summary of submitted grades and the student breakdown for that course by gender and grade.

GRADE VERIFICATION REPORT

Mindex HS > High School > 2019-2020

Marking Period: Quarter 1

☒ All

☐ Teacher

☐ Course

Grade: AIS

Course: AIS

Run Report

To run this report, select a marking period, select the appropriate teacher or course filters, and click Run Report. Averages and transcript credits earned display in parentheses while in progress.

Grade Verification Report

Mindex HS : High School : 2012-2013

Student Name	Section: 1	Period: 1	Q1	Q2	Q3	Q4	Q5	Q6	Credit	Med	Term	ECT	Local	Rpt	Average	Comments
Allen, Joshua M E73			25	31					(1.00)						(1.00)	Makes class frequently - in danger of failing
Bailey, Margaret M J179			90	80					(1.00)						(1.00)	Good effort - keep up the good work!
Baker, Donna M 103			82	80					(1.00)						(1.00)	Pleasure to have in class - participate more!
Edwards, Michael D 479			55	72					(1.00)						(1.00)	Pleasure to have in class - great student!
Hernandez, Michelle R 91			90	88					(1.00)						(1.00)	Great work - excellent participation!
Howard, Nick J 2209			78	77					(1.00)						(1.00)	Good work effort, many positive studies!

Enrolled Students with No Classes

This report provides counselors with a list of all students who are currently enrolled but are not scheduled for any classes. This report does not have a pre-screen, and generates automatically upon selection.

Enrolled Students With No Classes				
High School: High School - 2008-2009			05/13/2009	
Student ID	Student Name	Grade	Counselor	Home Room
63251	Allen, LeBrea	9	Lee, Paul	251
53275	Budy, Alexander	10	Ramos, Patrice	171
66909	Hall, Timothy M	10	Lee, Paul	251
48874	Hall, Vincent	9		

Student Free Periods

The Student Free Periods report returns a list of all students that do not have anything scheduled for some portion of the day. A study hall or lunch is not considered a free period. Students on this list are missing something from their schedule (this may be a study hall) which should be addressed.

The pre-screen for this report provides options that control the way data is returned in this report.

STUDENT FREE PERIODS

Mindex HS > High School > 2019-2020

Report Format: ☒ Detail ☐ Aggregate

Semester: ALL Cycle Day: All

☒ Only show students with free periods

Search By:
☒ All Students
☐ By Student

Run Report

Options available on this pre-screen are as follows:

- **Report Format:** Determines which format you want to use for the report. See the examples below for more information.
 - Detail Report displays the actual number of cycle days free for each period for each individual student. This report shows data in a single table, listing the number of cycle days each student has for each period on an individual student basis. Totals are shown at the bottom of each column (or, if the report spans multiple pages, totals appear on the last page). The report data is listed alphabetically by individual students.
 - Aggregate Report displays a summary version of the information. This report shows a separate grid for each cycle day for all grades, cycle days, and building school levels. The format is very similar to the Seats Per Period Per Grade report, but this Aggregate Report counts free students. Totals are displayed at the bottom of each column. The Class Size is shown in the last column of each table.
- **Semester:** This drop-down list is used to specify whether you want to view data from one or all semesters.

- **Cycle Day:** This drop-down list is used to specify whether you want to view data for one or all cycle days.
- **Only show students with free periods:** This checkbox is only available when the Detail report format is selected, and is used to narrow the list of students to only show those with free periods in the selected semester(s) and/or cycle day(s).
- Search By:
 - Selecting the "All Students" option will return all students who meet the specified criteria.
 - Selecting the "By Student" option allows you to limit the report data by using the Batch Selector to locate one or more student, based on your specified search criteria.

Detail Report Format:

5/28/2020

Student Free Period Report

Mindex HS : High School : 2019-2020

Semester: Semester 1

	1	2	Lunch1	3A	3-1	3-2	Lunch2	3B	Lunch3	Adv	4
Adams, Aaron W	6	6	6	6	6	6	6	6	6	6	6
Adams, Barbara E	6	3								6	6
Adams, Benjamin J	6	6	5	5	5		5			6	6
Adams, Betty M	6	1	4	4	3		3	1	1	6	6
Adams, Diane A	3	3	3	3	3		3				3
Adams, Jennifer E	6	3									3
Adams, Linda E		2	6	6	6		6				6
Adams, Michael A	6	6	6	6	6	6	6	6	6		6
Adams, Michelle M	6	3	2	2	2		2				
Adams, Richard M		3	3	3	3		3				6
Adams, Sallie N	6	3									6
Allen, Barbara C	6	6	6	6	6	6	6	6	6		6
Anderson, Eugene B	3										3

Aggregate Report Format:

5/28/2020

Student Free Period Report
Mindex HS : High School : 2019-2020

Semester: Semester 1

Day: A

Grade	Period											
	1	2	Lunch1	3A	3-1	3-2	Lunch2	3B	Lunch3	Adv	4	Size
09	34	55	7	7	7	49	52	49	49	4	54	139
10	73	84	30	30	30	25	54	25	25	2	65	134
11	81	74	72	72	72	46	74	46	47	1	78	136
12	81	71	84	84	84	9	86	9	10	39	99	138
14	0	0	0	0	0	0	0	0	0	0	0	0
Total	269	284	193	193	193	129	266	129	131	46	296	547

Day: B

Grade	Period											
	1	2	Lunch1	3A	3-1	3-2	Lunch2	3B	Lunch3	Adv	4	Size
09	46	52	4	4	4	51	51	51	51	4	51	139
10	68	65	36	36	36	9	44	9	9	2	53	134
11	80	83	74	74	74	47	76	47	47	1	76	136
12	86	66	49	49	47	14	49	16	16	39	91	138
14	0	0	0	0	0	0	0	0	0	0	0	0
Total	280	266	163	163	161	121	220	123	123	46	271	547

Section Load Report

This report shows all sections of each course with details such as the period the section is delivered in, the faculty who instructs the section, the team assigned to that section (if one), the semesters and cycle days when the course meets, the room where it meets

and the current status (closed or null which is open). Additionally, the following totals are included in this report:

- Max: maximum head count for the section
- Total: number of students currently in the section
- Total boys (M) and girls (F) in the section
- Needs: total special-needs students (denoted by the student having a Needs-designated program service record) in the section

Users can print or export this report, or use the tree to navigate to a particular course. Use the details here to understand the number of students who requested the course, the number who got into the course and the number who didn't. This is helpful in balancing sections and clearing up bottlenecks in scheduling.

For example, for Course # 00053 English 11 (below), there were 118 total selections for that course (1st number in parentheses), but 138 seats are actually occupied for this course (2nd number in parentheses; this will include any students taking the course twice, or students who have been manually scheduled for the course). This resulted 3 students who selected the course but did not get at least one section of that course (in the 3rd parentheses).

Section Load Report										
MindexHS - High School - 2011-2012										
00053 : English 11 (118) : (138) : (3)										
Section	Period	Faculty Name	Team	Semesters	Days	Max	Total	M	F	Status
1	3	Nelson		S1,S2	B	10 (10)	8	4	4	144
2	4	Nelson		S1,S2	A	10 (10)	11	5	6	144
3	4	Nelson		S1,S2	B	10 (10)	10	5	5	144
4	8	Nelson		S1,S2	A	10 (10)	3	4	1	144
5	8	Martin		S1,S2	A	10 (10)	8	5	3	141
6	8	Martin		S1,S2	B	10 (10)	6	3	3	141
7	9	Martin		S1,S2	B	10 (10)	8	5	3	141
8	2	Nelson		S1,S2	A	10 (10)	12	5	7	144
9	2	Nelson		S1,S2	B	10 (10)	9	8	1	144
10	8	Nelson		S1,S2	A	10 (10)	11	6	5	144

This report automatically appears when selected. There is no pre-screen.

Note: Courses such as labs may display with 0 requests but a large number placed. This usually indicates that the lab was linked to a lecture course and students were placed into the sections based on requests for the lecture.

Note: Study halls and lunches will often display as though each period and section is duplicated, tripled or quadrupled, etc, based on the number of cycle day and semester combinations possible. This is to allow the greatest scheduling flexibility in giving a student only what they need or have room for.

Sequence Information

The Sequence Information report is a simple list reflecting the courses which make up each sequence. Use this report as a check when building sequences in the Sequence Information sub-module. This report has no pre-screen options; click the Run Report button to generate it.

Note: If sequence information has not been defined, the report will be blank.

Sample report:

Sequence Information		06/21/2007
Art	Ceramics 1 Ceramics 2 Drawing and Painting Studio Art	
Business	Accounting I Accounting II BA/BCA Entrepreneur Intro to Oec Marketing	
Technology	3D CAD Animation Arch Drawing CAD Engineering Design	

Special Programs Report

The Special Programs Report area allows districts to generate reports showing all students receiving Special Programs and any associated costs. These reports are most often used for BOCES billing and data verification; therefore, students are grouped by home district.

SPECIAL PROGRAMS REPORT

REPORT TYPE: ☒ Prorated ☐ Prorated (4 Weeks Max) ☐ Projected ☐ Projected (No Values)

STUDENTS: ☒ All ☐ Grades K-12 ☐ Pre School-Age ☐ Select Students

DATE RANGE: 5/28/2020 to 5/28/2020

HOME DISTRICT: ANY

Run Report

To generate the reports, select a report type, date range and choose a home district (dates must be within the same school year). Select students as appropriate. The reports will display a list of all special programs assigned to students during that date range, grouped by home district and broken down by program and student.

- Report Type:
 - Prorated: Calculations are based on the number of weeks between the Start Date and End Date for the Billing Year as defined in **Maintenance > Counseling > Special Programs > Yearly Detail**. Any exception weeks that have been defined for that year are excluded from these calculations. This report only calculates values based on the enrollment date range selected on the pre-screen.

Special Programs Prorated Report					
Student Enrollment 02/03/2014 through 02/28/2014					
District: Mindex District 2	Entry / Exit	FTE / En. FTE	Prog / # Weeks	Faculty	Total / Cost
12:1:1					
Black, Sharon (10/20/97)	01/01/14 - 02/01/14	1.000 / 0.445			\$1,103.62
4259 / Home District ID: 4259					
Counseling class	01/01/14 - 02/01/14	1.000 / 0.445			\$0.00
				1 total for Black, Sharon	\$1,103.62
Davis, William (6/20/95)	01/01/14 - 02/01/14	1.000 / 0.445			\$1,103.62
1420 / Home District ID: None					
				Total for Davis, William	\$1,103.62
No Program					
Butler, Margaret (11/25/99)	02/01/14 - 02/01/14	1.000 / 0.445			\$0.00
4311 / Home District ID: None					
Counseling class					
				Total for Butler, Margaret	\$0.00
				Total for No Program	\$0.00
Total for Mindex District 2:					\$2,207.24

- **Prorated (4 Weeks Max):** This report is similar to the Prorated report, but it bills at a four-week maximum per month, and includes exception weeks.

Special Programs Prorated Report					
Student Enrollment 07/01/2017 through 06/22/2018					
District: No District	Entry / Exit	FTE / En. FTE	Prog / # Weeks	Faculty	Total / Cost
Occupational Therapy					
Hall, Barry (6/18/60)	7/31/17 - 7/31/17	1.000 / 0.042		Williams, Charles	\$208.33
7025 / Home District ID: None					
				Total for Occupational Therapy:	\$208.33
Total for No District:					\$208.33

- **Projected:** This report calculates the entire year's costs for each program. As with the Prorated report type, calculations are based on the number of weeks between the Start Date and End Date for the Billing Year as defined in Maintenance, less any exception weeks. This report, however, calculates costs for the whole school year, rather than for a specific date range.

Special Programs Projected Report					
Student Enrollment 02/03/2014 through 02/28/2014					
District: Mindex District 2	Entry / Exit	FTE / En. FTE	Prog / # Weeks	Faculty	Total / Cost
12:1:1					
Black, Sharon (10/20/97)	01/01/14 - 02/01/14	1.000 / 0.415			\$11,538.18
4259 / Home District ID: 4259					
Counseling class	01/01/14 - 02/01/14	1.000 / 0.415			\$77.19
				Total for Black, Sharon	\$11,615.37
Davis, William (6/20/95)	01/01/14 - 02/01/14	1.000 / 0.415			\$11,538.18
1420 / Home District ID: None					
				Total for Davis, William	\$11,538.18
No Program					
Butler, Margaret (11/25/99)	7/31/17 - 8/31/17	1.000 / 0.750			\$44.00
4311 / Home District ID: None					
Counseling class					\$44.00
				Total for Butler, Margaret	\$44.00
				Total for No Program	\$44.00
Total for Mindex District 2:					\$27,141.63

- **Projected (No Values):** This report functions nearly identically to the Projected report, except this report does not display any financial data.

Special Programs Projected Report					
Student Enrollment 02/03/2014 through 02/28/2014					
District: Mindex District 2	Entry / Exit	FTE / En. FTE	Prog / # Weeks	Faculty	Total / Cost
12:1:1					
Black, Sharon (10/20/97)	01/01/14 - 02/01/14	1.000 / 0.415			
4259 / Home District ID: 4259					
Counseling class	01/01/14 - 02/01/14	1.000 / 0.415			
Davis, William (6/20/95)	01/01/14 - 02/01/14	1.000 / 0.415			
1420 / Home District ID: None					
No Program					
Butler, Margaret (11/25/99)	7/31/17 - 8/31/17	1.000 / 0.750			
4311 / Home District ID: None					
Counseling class					

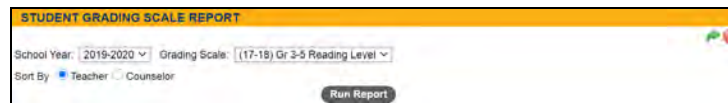
- **Student Options:**
 - These options allow users to determine which students should be included when running the report. Options include All, Grades K-12 only (this also includes ungraded elementary (UGE) and ungraded secondary (UGS) students), Pre School-Age (this includes students who have enrollments but are

not yet in Kindergarten), and an option to Select Students using the batch selector.

Student Grading Scale Report

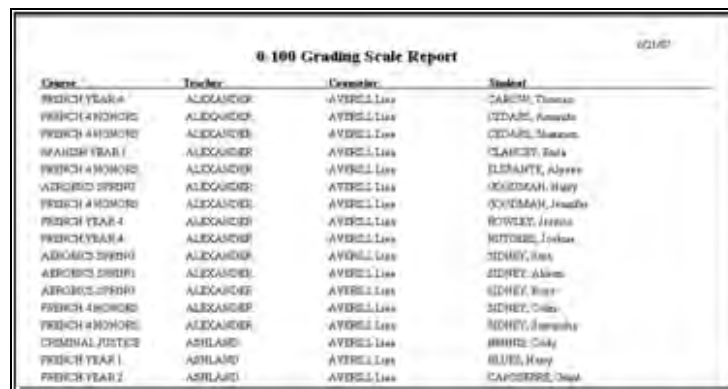
The Student Grading Scale Report displays the different grading scales used either by teacher or counselor. This report utilizes the Batch Selector to locate a group of students.

1. Use the Batch Selector to select your group of students. After selecting students, you will be presented with the report pre-screen.



The screenshot shows a form titled "STUDENT GRADING SCALE REPORT". It includes a "School Year" dropdown set to "2019-2020", a "Grading Scale" dropdown set to "(17-18) Gr 3-5 Reading Level", and a "Sort By" section with radio buttons for "Teacher" (selected) and "Counselor". A "Run Report" button is at the bottom right.

2. Select the school year and grading scale from the drop-down lists on the pre-screen. Select the appropriate radio button to run the report by Teacher or Counselor and click Run Report. In our example, we will select Counselor.
3. The report will generate, displaying the Course, Teacher, Counselor, and Student.



The screenshot shows a table titled "0-100 Grading Scale Report". The table has four columns: Course, Teacher, Counselor, and Student. It lists various French courses (e.g., FRENCH YEAR 1, FRENCH 4 HONORS) and their corresponding teachers (e.g., ALEXANDER, ASHLAND) and counselors (e.g., AVERELL, LEE).

Course	Teacher	Counselor	Student
FRENCH YEAR 1	ALEXANDER	AVERELL	CARSON, Thomas
FRENCH 4 HONORS	ALEXANDER	AVERELL	CEADRE, Amanda
FRENCH 4 HONORS	ALEXANDER	AVERELL	CEADRE, Matthew
FRENCH YEAR 1	ALEXANDER	AVERELL	CLARKE, Tobi
FRENCH 4 HONORS	ALEXANDER	AVERELL	DELAUNY, Alyssa
AFRICAN HISTORY	ALEXANDER	AVERELL	DELMAN, Holly
FRENCH 4 HONORS	ALEXANDER	AVERELL	DELMAN, Jennifer
FRENCH YEAR 4	ALEXANDER	AVERELL	DEWEY, James
FRENCH YEAR 4	ALEXANDER	AVERELL	DEWEY, Joshua
AFRICAN HISTORY	ALEXANDER	AVERELL	DEWEY, Lisa
AFRICAN HISTORY	ALEXANDER	AVERELL	DEWEY, Adam
AFRICAN HISTORY	ALEXANDER	AVERELL	DEWEY, Ryan
FRENCH 4 HONORS	ALEXANDER	AVERELL	DEWEY, Colin
FRENCH 4 HONORS	ALEXANDER	AVERELL	DEWEY, Benjamin
CRIMINAL JUSTICE	ASHLAND	AVERELL	DEWEY, Cody
FRENCH YEAR 1	ASHLAND	AVERELL	DEWEY, Holly
FRENCH YEAR 2	ASHLAND	AVERELL	DEWEY, David

Teacher Progress Report

The Teacher Progress Report displays all progress report comments, per course (subject), per student, which teachers have added. This report functions like a verification report to make sure all students have received comments, and to double check which comments have been added.

1. Use the Teacher Progress Report pre-screen to select the **Building, School Level, school Year, and Marking Period**. The **Progress Report Interval** will automatically change when the marking period changes (i.e., marking period Quarter 1 results in PR1). Then, select the appropriate radio button for the report:

- All – generates all progress report comments for all teachers and all students
- Teacher – generates progress reports for a specific teacher or all teachers in a specific department.
- Course – generates progress reports for a specific section or all sections of a course.

2. When you click Run Report, the report will appear.

Teacher Progress Report Audit

The Teacher Progress Report Audit is used to check which teachers have not yet completed their progress reporting tasks. The report displays a list of all courses (by section and period) and their respective teachers. The No Comments column indicates which teachers have not completed their comments for this progress report interval.

Use the Teacher Progress Report Audit pre-screen to select the **Building**, **School Level**, school **Year**, and **Marking Period**. The **Progress Report Interval** will automatically change when the marking period changes (i.e., marking period Quarter 1 results in PR1).

Here is a sample of page 1 of the Teacher Progress Report Audit report for progress report interval 2.

Teacher Progress Audit					
High School: High School 2006-2007: Q2					
Teacher Name	Course Name	Section Number	Period	Students	Missing Comments
ALEXANDER	AEROBICS SPRING	1	9	0	
ALEXANDER	FRENCH 4 HONORS	1	5	21	21
ALEXANDER	FRENCH 4 HONORS	2	6	20	20
ALEXANDER	FRENCH YEAR 4	1	5	26	26
ALEXANDER	LIFE GUARD TRAIN FALL	1	7	5	5
ALEXANDER	PE GIRLS 9/10 FALL	1	7	27	27
ALEXANDER	PE GIRLS 9/10 FALL	3	2	30	30
ALEXANDER	PE GIRLS 9/10 FALL	5	5	23	23
ALEXANDER	PE GIRLS 9/10 FALL	7	4	34	24
ALEXANDER	PE GIRLS 9/10 FALL	9	8	29	29
ALEXANDER	PE GIRLS 9/10 FALL	10	8	29	29
ALEXANDER	PE GIRLS 9/10 FALL	12	4	23	23
ALEXANDER	PE GIRLS 9/10 FALL	13	5	26	26
ALEXANDER	PE GIRLS 9/10 FALL	15	2	30	30

Transcript/Permanent Record

The Transcript/Permanent Record report generates individual or batch transcripts or permanent record reports, based on selected criteria.

Use the batch selector to locate a student or a group of students.

After selecting students, the Transcript/Permanent Record Report pre-screen appears with a drop-down list. Select the appropriate report format from the list.

TRANSCRIPT/PERMANENT RECORD REPORT

Select report format

Completed Course Audit Report

Run Report

Click Run Report to generate the report. Keep in mind that districts have a number of options available for transcript display, so your district's transcripts may look very different from the sample below.

Mindex High School
123 Main Street
Rochester, NY 90210

Mindex City High School
Transcript

OFFICIAL DOCUMENT
Valid Only if Signed
ACT/CEEB: 111111

05/28/2020

NAME: Adams, Barbara E	D.O.B: 01/29/2002	UNWEIGHTED GPA: 92.61
ADDRESS: 474 Mocalister Street	COUNSELOR: Susan Sanchez	WEIGHTED RANK: 19
CITY/STATE/ZIP: Rochester, NY 12345	ENTERED	CLASS SIZE: 0
PARENT/GUARDIAN: Miller, Joseph	WITHDREW	TRANSFERRED
	GRADUATION	DIPLOMA

SAT I Scores: Math Reading Writing ACT Scores: Reading: English: Math: Science: Composite: Writing:

YEAR ENDING JUNE : 2016							YEAR ENDING JUNE : 2019						
SUBJECT	WGHT	LOCAL	AP	RCT	REGENTS	GRADE CREDIT	SUBJECT	WGHT	LOCAL	AP	RCT	REGENTS	GRADE CREDIT
Algebra I Honors CC	*				83	88 1.00	English 12 (MindexCC 103)	*	91				96 1.00
Acc Art						100 1.00	U.S. History CCC		99			96 1.00	
Accelerated Spanish 8		88				98 1.00	PE 9-12 CCC					94 0.50	
Regents Common Core Examination in Algebra I					83	-	Digital Media I		90			95 3.50	
							AP Statistics (MindexCC)	*	81			77 1.00	
ABSENT	9	LATE	0	TOTAL CREDITS	3.00		Regents U.S. History and Government					96 -	
							ABSENT	12	LATE	1	TOTAL CREDITS	7.00	
YEAR ENDING JUNE : 2017							YEAR ENDING JUNE : 2020						
SUBJECT	WGHT	LOCAL	AP	RCT	REGENTS	GRADE CREDIT	SUBJECT	WGHT	LOCAL	AP	RCT	REGENTS	GRADE CREDIT
English 9		98				95 1.00	Economics						-
Glob Hist & Geog I		84				89 1.00	Part In Govt						-
Spanish II		90				93 1.00	Student Assistant						-
Health		87				95 0.50	ABSENT	0	LATE	0	TOTAL CREDITS	0.00	
P.E. 9-12						98 0.50							
Living Envir Honors 9	*				93	92 1.00							
Geometry Honors CC	*				83	87 1.00							
Regents Common Core Examination in Geometry					83	-							
Regents Living Environment					93	-							
ABSENT	13	LATE	1	TOTAL CREDITS	6.00								
YEAR ENDING JUNE : 2018													
SUBJECT	WGHT	LOCAL	AP	RCT	REGENTS	GRADE CREDIT							
English 10		99				99 1.00							
Glob Hist & Geog II						90 1.00							
Chemistry Honors	*					81 1.00							
Spanish III		86				96 1.00							
P.E. 9-12						100 0.50							
Honors Algebra II	*					76 1.00							
Regents Common Core Examination in Algebra II					76	-							
Regents Common Core Examination in English Language Arts					99	-							

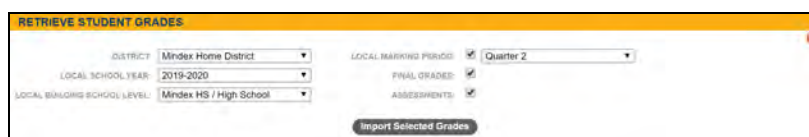
Authorized Signature _____ Date May 28, 2020

Transcript Notations

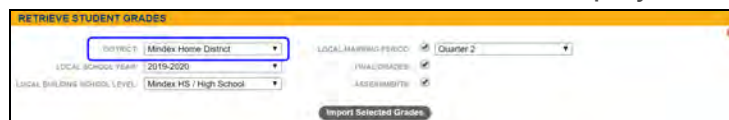
AUD = Audit E = Excellent P = Pass F = Fail W/P = Withdraw Passing W/F = Withdraw Failing ABS = Absent EX = Exempt UNS = Unscorable
MED = Medically Excused R = Regents Level/College Prep AP = Advanced Placement * = Weighted In Rank for Difficulty

Counseling > Retrieve Student Grades

The **Counseling > Retrieve Student Grades** area allows districts to retrieve and import students' course grades from another SchoolTool district. This allows a component district to import a student's grades from BOCES. After grades have been imported, this data can be updated and managed as the component district sees fit.



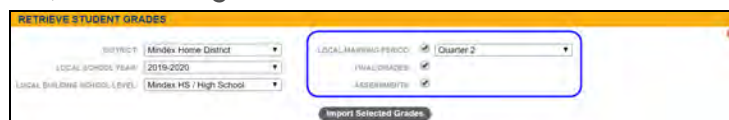
1. To begin, select a home district from which to retrieve grades. Only home districts that are tied to a district connection will be displayed here.



2. Select the destination (school year and building/school level).
 - A. The school years available here are based on years that have courses that have a Shared Course Code defined.



3. Decide which grades to import (marking period grades, finals, and/or assessments). When data already exists for the selected marking period, finals and/or assessments, the existing data will not be overwritten.



- A. Marking Period Grades: This marking periods grades or grade notes and comments. If this option is checked, you must also select a marking period from the local (receiving) district into which you wish to import.

Notes:

- The marking period ranks must be the same in both locations for grades to be imported. Any marking period that does not have an equivalent rank in the other district cannot be imported. For example, if a course is scheduled as a full year course (marking periods 1, 2, 3, and 4) in the source location, but only scheduled as a half year course (marking periods 1 and 2) in the

receiving district, only the grades for marking periods 1 and 2 can be imported.

For marking periods to be transferred, the following requirements must be met:

- Marking period grades can only be imported when both locations have the same number of marking periods.
- Marking period grades can only be imported after the publish date for a given marking period at the source location has passed.
- Marking periods grades can only be imported into marking periods that are unlocked at the receiving district.

B. Final Grades: This includes grades or grade notes.

C. Assessments: This includes assessment scores or assessment flags (Absent, Unscorable, or Exempt), assessment notes, and the language.

- If the assessment is tied to a date, that will also be included, as long as both locations have the same assessment (and associated scheduled dates, if they exist in the source district) defined in **Counseling > Assessments**.

4. Click Preview button. A list of students in that course and their associated grade data will be displayed.

RETRIEVE STUDENT GRADES

DISTRICT: Mindex Home District

LOCAL SCHOOL YEAR: 2019-2020

LOCAL BUILDING SCHOOL LEVEL: Mindex HS / High School

LOCAL MARKING PERIOD: Quarter 2

FINAL GRADES: ☒

ASSESSMENTS: ☒

Import Selected Grades

Student	Course	Grade	Final	Assessment
Turner, Patrick Richard (12391)	AP World History(00612)	94	94	
Turner, Patrick Richard (12391)	Communications (XCC)(00919)	NG	S	
Turner, Patrick Richard (12391)	English 11(00005)	89	92	Midterm: 91 Regents Common Core Examination in English Language Arts: 92
Smith, Michael Allen (18254)	Communications (XCC)(00919)	NG	U	
Smith, Michael Allen (18254)	Spanish III	74		Regents Comprehensive Spanish: 82
Jones, Kevin B (13561)	Communications (XCC)(00919)	NG	S	
Jones, Kevin B (13561)	Principles of Design	91	87	Midterm: 85 Local Final: 80

5. Data may not show if:

- The selected marking period rank does not have a corresponding marking period in the source district.
- The selected marking period at the receiving (destination) district are locked.
- The corresponding marking period at the source district is not past the publish date.
- Courses do not have a corresponding Shared Course Code defined at one of the locations.
- Sharing of course grades is not enabled in the district connection at the source district.

- Assessments do not match the assessments at the receiving district.
- Assessments are not configured in the course catalog at the receiving district.
- Grade data does not exist at the source district.
- Grade data already exists at the receiving district.
- Home district records do not match.
- Comments exceed the maximum character count defined by the receiving district.

6. Use the checkboxes to select the rows to import and click Import Grades.

RETRIEVE STUDENT GRADES

DISTRICT: LOCAL MARKING PERIOD: ☒ Quarter 2

LOCAL SCHOOL YEAR: FINAL GRADES: ☒

LOCAL BUILDING SCHOOL LEVEL: ASSESSMENTS: ☒

Import Selected Grades

Student	Course	Grade	Final	Assessment
Turner, Patrick Richard (12391)	AP World History(00612)	94	94	
Turner, Patrick Richard (12391)	Communications (XCC)(00919)	NG	S	
Turner, Patrick Richard (12391)	English 11(00005)	89	92	Midterm: 91 Regents Common Core Examination in English Language Arts: 92
Smith, Michael Allen (16254)	Communications (XCC)(00919)	NG	U	
Smith, Michael Allen (16254)	Spanish III	74		Regents Comprehensive Spanish: 82
Jones, Kevin B (13561)	Communications (XCC)(00919)	NG	S	
Jones, Kevin B (13561)	Principles of Design	91	87	Midterm: 85 Local Final: 90

7. When the import operation is complete, the screen will refresh to show the results, including a list of any error messages.

RETRIEVE STUDENT GRADES

Import Results:

NUMBER PROCESSED GRADE RECORDS: **2**

FAILED IMPORTS AND REASONS: **1**

Student	Course	Messages
Turner, Patrick Richard (12391)	Communications (XCC)(00919)	Student is not scheduled for this course

Counseling > RTI View

The **Counseling > RTI View** sub-module allows users to review, add, or edit student RTI (Response to Intervention) records.

The screenshot shows the 'RTI VIEW' interface. At the top, there are search filters: BUILDING (Mindex HS), SCHOOL LEVEL (High School), DATES (5/29/2020 to 5/29/2020), LEVEL (ANY), TYPE (ANY), TIMELINE (ANY), and FACULTY (ALL). A 'Search' button is located below these filters. To the right, under 'STUDENT:', there are radio buttons for 'All', 'Name', and 'Select Students'. Below the filters, it says 'Found 26 Records'. A table displays the results with columns: Student, Start Date, End Date, Level, Faculty, and Type. The table lists 8 students, including Adams, Jennifer (19510), Black, Jeremy (22604), Brown, Anthony (21142), Cook, Jennifer (20243), Cox, William (25207), Crawford, Carolyn (20909), Davis, Gladys (21087), and Edwards, Nancy (22964).

Student	Start Date	End Date	Level	Faculty	Type
Adams, Jennifer (19510)	10/2/2017		Tier II	Martinez, Patricia	RTI
Black, Jeremy (22604)	5/1/2019		Tier II	Martinez, Patricia	RTI
Brown, Anthony (21142)	10/2/2017		Tier III	Anderson, Christine	RTI
Cook, Jennifer (20243)	1/8/2018		Tier II	Hernandez, Jessica	
Cox, William (25207)	10/30/2017		Tier III	Hernandez, Jessica	RTI
Crawford, Carolyn (20909)	10/2/2017		Tier II	Martinez, Patricia	
Davis, Gladys (21087)	10/2/2017		Tier III	Martinez, Patricia	RTI
Edwards, Nancy (22964)	10/2/2017		Tier III	Martinez, Patricia	RTI

To begin, use the filters at the top of the screen to specify search criteria.

1. Select the desired building and school level for the students you wish to include.
2. Specify a date or date range, RTI Level, Type, Timeline, or Faculty to narrow the search results based on RTI records.
3. Choose the students for whom you wish to review RTI data (choose whether to search all, a single grade, a single counselor, or specific students using the batch selector).
 - A. When a user clicks the Select Students option, the screen will refresh to show a batch selector. Select the appropriate terms to locate students (or click Cancel to return to the main screen).

This screenshot shows the 'RTI VIEW' interface with the 'Select Students' option chosen. A blue box highlights the 'Batch Selector' area, which includes a 'SAVED SEARCHES' dropdown (set to 'NEW SEARCH'), an 'ADD SEARCH CRITERIA' dropdown (set to 'SELECT CRITERIA'), and checkboxes for 'Random' and 'Use "AND" for like terms'. A 'Search' button is at the bottom of this section.

- B. Once students are selected, the radio button will show "Selected Students" (including the number of students selected). Click New Search to clear the search and find a new group of students or click Modify Search to return to the previous search criteria.

This screenshot shows the 'Selected Students' interface. It features a radio button labeled 'Selected Students' with a count of '9'. Below it are two buttons: 'New Search' and 'Modify Search'.

- Click the **Search** button to update the list at the bottom of the screen.

Student	Start Date	End Date	Level	Faculty	Type
Adams, Jennifer (19510)	10/2/2017		Tier II	Martinez, Patricia	RTI
Jenkins, Joseph (25640)	9/11/2017		Tier II	Hernandez, Jessica	RTI
Taylor, Edward (20126)	9/11/2017		Tier II	Hernandez, Jessica	RTI

- Click the RTI Summary Report icon to view a summary that lists all students and their RTI records (this report does not include intervention details). Click the RTI Detail Report icon to view a report detailing all student RTI records, including the overall RTI description and intervention details for each record (this report shows all RTI records and associated interventions, with a page break between each student).
- To create a new RTI record, click the Add button in the upper right corner (or click Edit to modify an existing RTI record).

- If desired, add one or more interventions at the bottom of the record by clicking the Add button, entering the appropriate information, and clicking the Update to apply the changes.

Date	Faculty	Intervention	Effect Type	Description
5/29/2020	Account Test	Ass Reading	Partially Successful	
10/2/2017	Martinez, Patricia	Counseling		2 x monthly individual

- Click the Save button in the upper right corner to save the RTI record and return to the main RTI screen.

Date	Faculty	Intervention	Effect Type	Description
5/29/2020	Account Test	Ass Reading	Partially Successful	
10/2/2017	Martinez, Patricia	Counseling		2 x monthly individual

Counseling > Sequence Information

The Sequence Information sub-module is where guidance counselors and/or administrators can create subject majors. These sequences contain all courses which a student can take in order to achieve this sequence. Examples might be Business or Technology. Use this sub-module as a maintenance and reference area, where sequences can be created, edited and reviewed.

SEQUENCE INFORMATION		
  		Sequence
		Art
		Business
		Music
		Technology

Add a New Sequence

1. From within the Counseling module, select the **Sequence Information** sub-module from the menu at the left. The Sequence Information tab will open with two action buttons: Add  (to add a new sequence) and Done  (to go to Counseling Search).

SEQUENCE INFORMATION	
  	Sequence

2. Click once on the green Add  button in the upper left corner of the tab. A **Sequence** field will appear.

SEQUENCE INFORMATION	
  	Sequence:

3. Enter the name of the sequence in the required free-text field.
4. Click once on the Save  button. The screen will refresh with the sequence name in read-only mode.

SEQUENCE INFORMATION	
  	Sequence: Art
	Courses

5. To add the courses for the sequence, click once on the green Add  button below the sequence name.
6. A new blank row will appear.

SEQUENCE INFORMATION	
  	Sequence: Art
	Courses
  	

7. Enter the name of the course in the required free-text field.

- Click once on the Update  button. The screen will refresh with the course name in read-only mode.
- Repeat steps 1 through 6 for each course in this sequence until you have finished.

SEQUENCE INFORMATION		
Sequence: Art		
+		
		Courses
		Drawing 1
		Intro to Painting
		Ceramics

Edit Existing Sequence Information

- From within the Counseling module, select the **Sequence Information** sub-module from the menu at the left. The Sequence Information tab will open and any existing sequences will display.

SEQUENCE INFORMATION		
+  		
		Sequence
		Art
		Business
		Music
		Technology

- Click once on the Details  button to the left of the sequence you wish to review. A list of courses which comprise the sequence will appear.

SEQUENCE INFORMATION		
+  		
Sequence: Art		
+		
		Courses
		Drawing 1
		Intro to Painting
		Ceramics

- To **edit the name of the sequence**, click once on the Edit  button above the Sequence name. The tab will refresh with the name in a required, editable field.
- Update the name by typing directly into the field.

SEQUENCE INFORMATION		
+  		
Sequence: Art		
Courses		
Drawing 1		
Intro to Painting		
Ceramics		

- Click once on the Save  button. The screen will refresh with the name in read-only mode.
- To **edit the name of a course** in the sequence, click once on the Edit  button to the left of the course name row. The screen will refresh with the course name in a required, editable field.

SEQUENCE INFORMATION		
+  		
Sequence: Art		
+		
		Courses
		Drawing 1
		Intro to Painting
		Ceramics

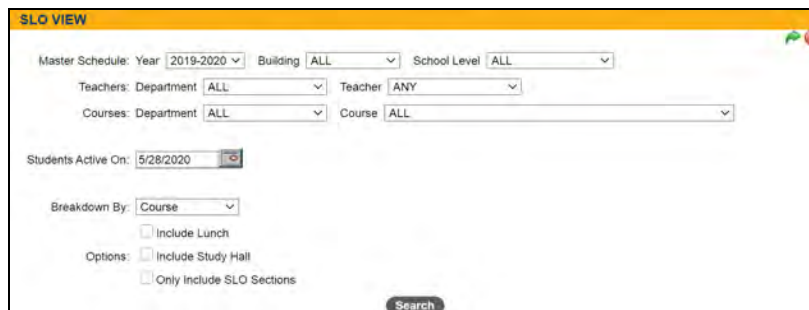
7. Update the name by typing directly into the field.
8. Click once on the Update  button. The screen will refresh with the course name in read-only mode.
9. To **add an additional course to the sequence**, click once on the green Add  button below the sequence name. A new blank row will appear.

SEQUENCE INFORMATION		
Sequence: Art		
		
		Courses
		Drawing 1
		Intro to Painting
		Ceramics
		

10. Enter the name of the course in the required free-text field.
11. Click once on the Update  button. The screen will refresh with the course name in read-only mode.
12. To **remove** a course from this sequence, click once on the red Remove  button to the left of the course row. A confirmation message will appear. Click OK to confirm this action. The screen will refresh and the course no longer appears in the list.

Counseling > SLO View

The SLO View sub-module allows users to retrieve information about courses for SLO (student learning objective) targets. It also allows users to manage which course sections have been assigned an active SLO. Finally, users with the appropriate permissions can view and/or submit SLO scores for students in those active SLO sections.

The screenshot shows the 'SLO VIEW' interface with various search filters. At the top, there's a title bar 'SLO VIEW' with a small icon. Below it, the 'Master Schedule' section includes dropdowns for 'Year' (2019-2020), 'Building' (ALL), and 'School Level' (ALL). The 'Teachers' section has dropdowns for 'Department' (ALL) and 'Teacher' (ANY). The 'Courses' section has dropdowns for 'Department' (ALL) and 'Course' (ALL). A 'Students Active On' date field is set to 5/28/2020. The 'Breakdown By' dropdown is set to 'Course'. There are three checkboxes under 'Options': 'Include Lunch' (unchecked), 'Include Study Hall' (unchecked), and 'Only Include SLO Sections' (unchecked). A 'Search' button is at the bottom right.

To review SLO data:

1. Specify Master Schedule criteria: Select the School Year, Building, and School Level for the master schedule you wish to analyze. These selections determine which teachers may be selected.

Note: The results will include all teachers who are assigned to at least one course in the selected master schedule, even if the teacher is not in the selected building school level. For example, when selecting middle school, results will include high school teachers who teach an 8th grade Earth Science course in the middle school.

2. Specify Teacher criteria: Select the department and, if applicable, the individual faculty member. These are the teachers that will be displayed on the report. The report will show all courses taught by that teacher, regardless of which master schedule was selected, as long as that teacher is assigned to at least one section in that master schedule.
3. Specify Course criteria: Select the department and, if applicable, the individual course for which you wish to review data.
4. Select a date for which you wish to run the report. This allows users to obtain an accurate snapshot of student SLO tallies for any date and is set to the current date by default.
5. Specify additional report options:
 - Breakdown By: Select Teacher, Course, or Course Section to specify the level of detail for your analysis. Selecting Course Section allows users

with permission to edit SLO status to activate an SLO for a given section.

- Include Lunch: If checked, the results will include courses designated as “Lunch” to which the selected teachers are assigned.
- Include Study Hall: If checked, the results will include courses designated as “Study Hall” to which the selected teachers are assigned.
- Only include SLO Sections: If checked, only courses designated as “Has SLO” will be returned.

6. Click the Search button to generate the results list.

SLO VIEW

Master Schedule: Year **2019-2020** Building **ALL** School Level **ALL**

Teachers: Department **ALL** Teacher **ANY**

Courses: Department **ALL** Course **ALL**

Students Active On: **5/28/2020**

Breakdown By: **Course**

Options: ☐ Include Lunch
☐ Include Study Hall
☐ Only Include SLO Sections

Search

Found 471 Records

Teacher	Course	Course ID	Department	# Students	# Pre	# Target	# Post	# Met	% Met	Avg % Growth
Adams, Deborah	English 11	00005	English	10	10	10	10	7	70	33
Allen, Amanda	12.1:1	01049	Special Ed	2	2	2	2	1	50	23
Allen, Amanda	Lifeskills	00234	Special Ed	12	24	24	24	16	133	30
Allen, Amanda	LS English	00137	Special Ed	6	6	6	6	3	50	26
Allen, Amanda	LS Math	00135	Special Ed	7	7	7	7	4	57	32
Allen, Amanda	LS Science	00119	Special Ed	6	6	6	6	4	67	36

The results list shows teacher, course name, course ID, and department. For each teacher/course combination, the list also shows the number of students in that course, the number of students with pre-score, target, or post-score values, the number and percentage of students who met their targets, and the average growth of those students.

When the breaking down by Course Section, the list also includes the section number and semester in the Course ID column, and a column indicating whether or not each section has an SLO currently active.

SLO VIEW

Master Schedule: Year **2019-2020** Building **ALL** School Level **ALL**

Teachers: Department **ALL** Teacher **ANY**

Courses: Department **ALL** Course **ALL**

Students Active On: **5/28/2020**

Breakdown By: **Course Section**

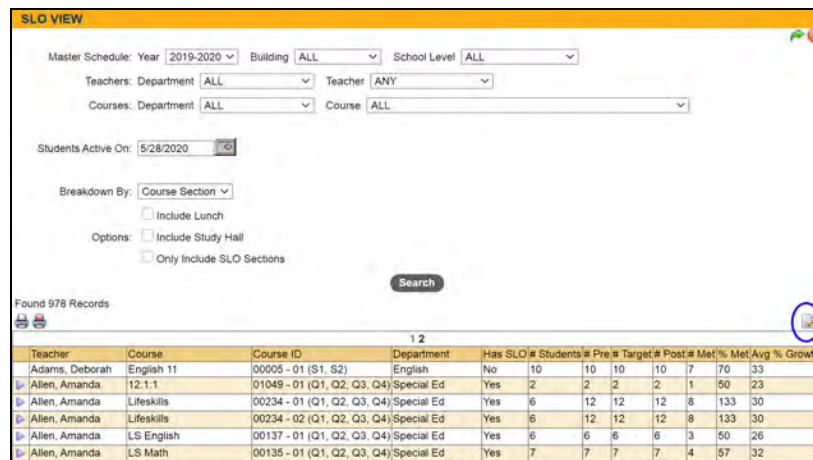
Options: ☐ Include Lunch
☐ Include Study Hall
☐ Only Include SLO Sections

Search

Found 978 Records

Teacher	Course	Course ID	Department	Has SLO	# Students	# Pre	# Target	# Post	# Met	% Met	Avg % Growth
Adams, Deborah	English 11	00005 - 01 (S1, S2)	English	No	10	10	10	10	7	70	33
Allen, Amanda	12.1:1	01049 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	2	2	2	2	1	50	23
Allen, Amanda	Lifeskills	00234 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30
Allen, Amanda	Lifeskills	00234 - 02 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30
Allen, Amanda	LS English	00137 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	6	6	6	3	50	26
Allen, Amanda	LS Math	00135 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	7	7	7	7	4	57	32

When the Breakdown option is set to Course Section, an Edit  button appears for users with appropriate permissions when the Section Breakdown is displayed to allow users to activate an SLO for a given teacher/course section.



SLO VIEW

Master Schedule: Year 2019-2020 Building ALL School Level ALL

Teachers: Department ALL Teacher ANY

Courses: Department ALL Course ALL

Students Active On: 5/28/2020

Breakdown By: Course Section

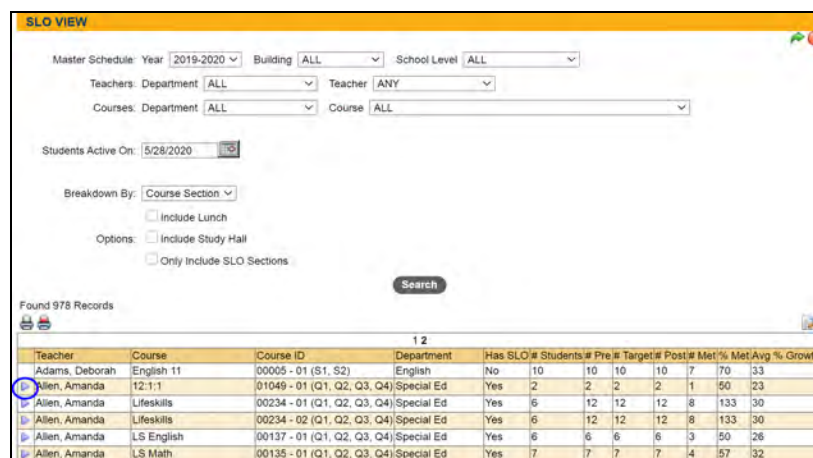
Options: ☐ Include Lunch ☐ Include Study Hall ☐ Only Include SLO Sections

Search

Found 978 Records

Teacher	Course	Course ID	Department	Has SLO	# Students	Pre	Target	Post	Met	% Met	Avg %	Growth
Adams, Deborah	English 11	00005 - 01 (S1, S2)	English	No	10	10	10	10	7	70	33	
Allen, Amanda	12.1:1	01049 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	2	2	2	2	1	50	23	
Allen, Amanda	Lifeskills	00234 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30	
Allen, Amanda	Lifeskills	00234 - 02 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30	
Allen, Amanda	LS English	00137 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	6	6	6	3	50	26	
Allen, Amanda	LS Math	00135 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	7	7	7	7	4	57	32	

In addition, the Course Section breakdown option allows users to click on the Enter Grades  button to submit SLO scores for the appropriate section.



SLO VIEW

Master Schedule: Year 2019-2020 Building ALL School Level ALL

Teachers: Department ALL Teacher ANY

Courses: Department ALL Course ALL

Students Active On: 5/28/2020

Breakdown By: Course Section

Options: ☐ Include Lunch ☐ Include Study Hall ☐ Only Include SLO Sections

Search

Found 978 Records

Teacher	Course	Course ID	Department	Has SLO	# Students	Pre	Target	Post	Met	% Met	Avg %	Growth
Adams, Deborah	English 11	00005 - 01 (S1, S2)	English	No	10	10	10	10	7	70	33	
Allen, Amanda	12.1:1	01049 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	2	2	2	2	1	50	23	
Allen, Amanda	Lifeskills	00234 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30	
Allen, Amanda	Lifeskills	00234 - 02 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30	
Allen, Amanda	LS English	00137 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	6	6	6	3	50	26	
Allen, Amanda	LS Math	00135 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	7	7	7	7	4	57	32	

To print a list of results, click the Results  report button. This report will display the columns shown in the results list and will respect any selected filter criteria.

8/15/2014 8:53 am

Student Learning Objectives (SLO) View

School Year: 2013-2014
Building: ALL
Faculty Department: ALL
Course Department: ALL
Include Lunches: No

Students on 8/15/2014
School Level: ALL
Faculty: ANY
Course: ALL
Include Study Halls: No

Course Section Breakdown

Teacher	Course Name	Course ID	Department	Student	Pre	Target	Post	Met	% Met	Avg %	Growth
Adams, Kimberly	French 3	00116-02 (S1, S2)	Foreign Language	14	0	0	0	0	0	0	
Adams, Kimberly	Spanish 2	00110-02 (S1, S2)	Foreign Language	13	0	0	0	0	0	0	
Adams, Kimberly	Spanish 2	00110-05 (S1, S2)	Foreign Language	14	0	0	0	0	0	0	

Click the print the Course Analysis Report  button to print the list of courses for each teacher (including the section breakdown, if that option is selected). This report provides information about the courses taught by one or more teachers, the total

number of students and sections taught by each teacher, and the SLO target (a number of students, which is defined as 50% of the teacher's population plus one student).

The report includes a detailed list of all courses taught by the selected teacher(s), including the number of students in that course, the number of sections, and the percentage that course represents out of the teacher's total population.

12/18/2013 11:07 am

Student Learning Objectives (SLO) Course Section Analysis

School Year: 2013-2014	Students on 12/19/2013
Building: ALL	School Level: ALL
Faculty Department: ALL	Faculty: All
Course Department: ALL	Course: All
Include Lunches: No	Include Study Halls: No

Course	Students	Sections	Population %
Kimberly Adams (Foreign Language)			
Spanish 3 00111	28	2	90.3
Total Students: 31			
Spanish 2 00110	3	3	9.7
Total Sections: 5			
SLO Target: 50% +1 = 16			

Course	Students	Sections	Population %
Sallie Adams (English)			
English 11 00053	30	2	36.8
Total Students: 98			
English 10H 00052	30	2	30.6
Total Sections: 5			
SLO Target: 50% +1 = 50			
Honors English 12 00056	30	1	30.6

Course	Students	Sections	Population %
Lawrence Bailey (Physical Education)			
PE Gr 11/12 00164	225	8	81.6
Total Students: 275			
PE Gr 9/10 00163	50	2	18.2
Total Sections: 11			
SLO Target: 50% +1 = 138			

If breaking down by course section, the report will also show a breakdown for each course, listing the section number, semesters, period, and number of students for each section of that course.

12/19/2013 3:13 pm

Student Learning Objectives (SLO) Course Section Analysis					
School Year: 2013-2014			Students on 12/19/2013		
Building: ALL			School Level: ALL		
Faculty Department: ALL			Faculty: All		
Course Department: ALL			Course: All		
Include Lunches: No			Include Study Halls: No		
Kimberly Adams (Foreign Language)					
Course		Students	Sections	Population %	Breakdown
Spanish 3	00111	28	2	90.3	Section 2, Period 6, 10 Students Section 1, Period 8, 9 Students
Total Students: 31					
Spanish 2	00110	3	3	9.7	Section 1, Period 4, 1 Students Section 2, Period 3, 1 Students Section 4, Period 1, 1 Students
Total Sections: 5					
SLO Target: 50% +1 = 16					
Sallie Adams (English)					
Course		Students	Sections	Population %	Breakdown
English 11	00053	38	2	38.8	Section 3, Period 8, 23 Students Section 5, Period 1, 15 Students
Total Students: 98					
English 10H	00052	30	2	30.6	Section 2, Period 3, 20 Students Section 1, Period 4, 10 Students
Total Sections: 5					
SLO Target: 50% +1 = 50					
Honors English 12	00056	30	1	30.6	Section 1, Period 6, 30 Students

Activating SLOs for Course Sections

To activate or inactivate an SLO for a teacher/course section, specify your search criteria, select "Course Section" in the "Breakdown By" drop-down, and click Search.

SLO VIEW

Master Schedule: Year: 2019-2020 Building: ALL School Level: ALL

Teachers: Department: ALL Teacher: ANY

Courses: Department: ALL Course: ALL

Students Active On: 5/28/2020

Breakdown By: Course Section

Options: ☐ Include Lunch ☐ Include Study Hall ☐ Only Include SLO Sections

Search

Found 978 Records

Teacher	Course	Course ID	Department	Has SLO	# Students	# Pre	# Target	# Post	Met %	Met/Avg %	Growth
Adams, Deborah	English 11	00005 - 01 (S1, S2)	English	No	10	10	10	10	7	70	33
Allen, Amanda	12.1.1	01049 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	2	2	2	2	1	50	23
Allen, Amanda	Lifeskills	00234 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30
Allen, Amanda	Lifeskills	00234 - 02 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	12	12	12	8	133	30
Allen, Amanda	LS English	00137 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	6	6	6	6	3	50	26
Allen, Amanda	LS Math	00135 - 01 (Q1, Q2, Q3, Q4)	Special Ed	Yes	7	7	7	7	4	57	32

Click the Edit  button to edit SLO status using the checkboxes in the “Has SLO” column.

Teacher	Course	Course ID	Department	Has SLO	# Students	# Pre	# Target	# Post	Met %	Met/Avg %	Growth
Adams, Deborah	English 11	00005 - 01 (S1, S2)	English	☐	10	10	10	10	7	70	33
Allen, Amanda	12.1.1	01049 - 01 (Q1, Q2, Q3, Q4)	Special Ed	☒	2	2	2	2	1	50	23
Allen, Amanda	Lifeskills	00234 - 01 (Q1, Q2, Q3, Q4)	Special Ed	☒	6	12	12	12	8	133	30
Allen, Amanda	Lifeskills	00234 - 02 (Q1, Q2, Q3, Q4)	Special Ed	☒	6	12	12	12	8	133	30
Allen, Amanda	LS English	00137 - 01 (Q1, Q2, Q3, Q4)	Special Ed	☐	6	6	6	6	3	50	26
Allen, Amanda	LS Math	00135 - 01 (Q1, Q2, Q3, Q4)	Special Ed	☐	7	7	7	7	4	57	32

Enter SLO Grades

To submit scores, click the Enter Grades  button for the appropriate section.

2012-2013 > English 10H (00052):2 > Adams, Sallie

Student	Student ID	Pre Score	Target Score	Post Score
Adams, Gerald	1375	42	71	
Barnes, Pamela	816	46	73	
Cox, Brian	4061	35	67.5	
Garcia, Barbara	2875	52	76	
Green, Barbara	806	47	73.5	
Jones, John	51	43	71.5	
Lopez, Kelly	826	46	73	
Martinez, Katherine	21024	43	71.5	
Miller, Judy	804	38	69	
Miller, Susan	4045	39	69.5	
Moore, Linda	18170	39	69.5	
Perry, Ruth	773	37	68.5	
Smith, Dorothy	344	47	73.5	
Turner, John	2866	36	68	
Walker, Carol	536	42	71	
Williams, Karen	739	38	69	
Williams, Paul	774	34	67	
Williams, Phyllis	159	51	75.5	
Wright, Jennifer	808	40	70	

Click Edit  in the appropriate column to enter grades.

2012-2013 > English 10H (00052):2 > Adams, Sallie

Student	Student ID	Pre Score	Target Score	Post Score
Adams, Gerald	1375	42	71	
Barnes, Pamela	816	46	73	
Cox, Brian	4061	35	67.5	
Garcia, Barbara	2875	52	76	
Green, Barbara	806	47	73.5	
Jones, John	51	43	71.5	
Lopez, Kelly	826	46	73	
Martinez, Katherine	21024	43	71.5	
Miller, Judy	804	38	69	
Miller, Susan	4045	39	69.5	
Moore, Linda	18170	39	69.5	
Perry, Ruth	773	37	68.5	
Smith, Dorothy	344	47	73.5	
Turner, John	2866	36	68	
Walker, Carol	536	42	71	
Williams, Karen	739	38	69	
Williams, Paul	774	34	67	
Williams, Phyllis	159	51	75.5	
Wright, Jennifer	808	40	70	

Click Save  to submit the grades or click Cancel  to return without saving. When you are done entering grades, click the Done  button to return to the SLO View list.

Counseling > Unlock Marking Periods

The Unlock Marking Period sub-module allows districts to unlock a single course section for marking period grading. Unlock requests become effective immediately after they are submitted and allow the marking period to remain unlocked only until the expiration date/time has been reached. When a section is unlocked, it will be unlocked for all faculty members assigned to that section in the master schedule.

The Unlock Marking Period screen shows a list of all unlock requests, including those that have already expired. To view a list of all unlock requests, use the filters at the top of the screen.

UNLOCK MARKING PERIODS

SCHOOL YEAR: 2019-2020
 BUILDING SCHOOL LEVEL: Mindex HS High School
 MARKING PERIOD: Q1
 CURRENTLY UNLOCKED: ALL
 Search

	Building School Level	MP	Requested By	Unlocked By	Requested Date	Expiration Date
	Mindex HS/High School	Q1	Carter, William	Woolton, Jerry	6/1/2020 1:44 PM	6/1/2020 2:40 PM
	Mindex HS/High School	Q1	Hubbard, Evelyn	Woolton, Jerry	5/7/2020 5:43 PM	5/7/2020 6:43 PM

To add a new unlock request, click the Add button to the upper right of the grid. Select the appropriate faculty member and marking period to unlock and specify an expiration date/time. Once added, the unlock request will be added to the list on this screen.

	Building School Level	MP	Requested By	Unlocked By	Requested Date	Expiration Date
	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:03 PM	11/14/2017 4:00 PM
	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:00 PM	11/14/2017 4:00 PM
	Mindex MS/Middle School	Q1	Mitchell, Donald	Woolton, Jerry	11/14/2017 3:04 PM	11/14/2017 3:05 PM

Click on the More Information button to view detailed information about a specific unlock request, including the sections that were unlocked by that operation and any notes that were entered.

	Building School Level	MP	Requested By	Unlocked By	Requested Date	Expiration Date
	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:03 PM	11/14/2017 4:00 PM
	Course	SN	Period	Days	Teachers	
	English 12	3	2	A,B	Patterson/Coleman/Woolton	
	English 12	2	3	A,B	Johnson/Woolton	
	English 12	1	5	A,B	Williams/Coleman/Woolton	
Note: Jerry needs 1 more hour to submit his ENG 12 grades						

To remove an unlock request, click the Delete button for the appropriate row. You will be prompted to confirm this action. Click **Yes** to continue or click **No** to return without deleting the request.

Delete Unlock Request

You are about to delete an unlock request that unlocked 3 sections for marking period M1 until 11/14/2017 4:00 PM. Continue?

To filter the list based on the values in one or more column, simply click on the Filter  icon for the desired column(s). Filters will be remembered for each user and will be re-applied the next time you access this screen.

	Building School Level 	MP 	Requested By 	Unlocked By 	Requested Date 	Expiration Date 
 	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:03 PM	11/14/2017 4:00 PM
 	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:00 PM	11/14/2017 4:00 PM
 	Mindex MS/Middle School	Q1	Mitchell, Donald	Woolton, Jerry	11/14/2017 3:04 PM	11/14/2017 3:05 PM

Enter the desired text in the field that appears (the rows will automatically filter as you type). Close the filter field by pressing Enter or by clicking outside the filter field.

	Building School Level 	MP 	Requested By 	Unlocked By 	Requested Date 	Expiration Date 
			Woolton			
 	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:03 PM	11/14/2017 4:00 PM
 	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:00 PM	11/14/2017 4:00 PM

The Filter button will change to the Active Filter  icon to indicate when a filter is active. To remove a filter, simply click on the Active Filter  icon and delete the text in that field. Press Enter or click outside the filter field to update the results.

	Building School Level 	MP 	Requested By 	Unlocked By 	Requested Date 	Expiration Date 
 	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:03 PM	11/14/2017 4:00 PM
 	Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:00 PM	11/14/2017 4:00 PM

Users also have the ability to print a list of unlock requests. The report will respect any on-screen selections as well as any grid filters.

Unlock Marking Period Requests 						
Date: 11/14/2017						
2016-2017, All Building School Levels, All Marking Periods, Both Locked and Unlocked						
Building School Level	MP	Requested By	Unlocked By	Requested Date	Expiration Date	
Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:03 PM	11/14/2017 4:00 PM	
Mindex HS/High School	M1	Woolton, Jerry	Woolton, Jerry	11/14/2017 3:00 PM	11/14/2017 4:00 PM	
Mindex MS/Middle School	Q1	Mitchell, Donald	Woolton, Jerry	11/14/2017 3:04 PM	11/14/2017 3:05 PM	

Add a New Unlock Request

To add a new Unlock Request, click the Add button on the **Counseling > Unlock Marking Period** screen. The screen will refresh to display filters, allowing you to select a marking period to unlock and then locate the faculty member for whom you wish to unlock one or more sections.

Note: Marking periods can only be unlocked for the *current* school year.

The screenshot shows the 'UNLOCK MARKING PERIODS' form with the following fields:

- SCHOOL YEAR: 2019-2020
- BUILDING SCHOOL LEVEL: Mindex HS (dropdown) | High School (dropdown)
- MARKING PERIOD: Q1
- CURRENTLY UNLOCKED: ALL
- Search button

Once you have selected a marking period and faculty member, his or her course sections will be displayed in a list. Set the expiration date for the unlock and add a note if desired. Use the checkboxes to select the section(s) to be unlocked. Please note that unlocking a section will unlock it for any teachers who are assigned to that section in the Master Schedule.

The screenshot shows the 'UNLOCK MARKING PERIODS' form with the following fields:

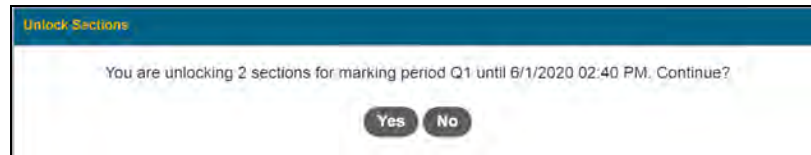
- SCHOOL YEAR: 2019-2020
- BUILDING SCHOOL LEVEL: Mindex HS (dropdown) | High School (dropdown)
- MARKING PERIOD: Q1
- DEPARTMENT: English
- FACULTY: Carter, William
- EXPIRATION DATE: 6/1/2020 | 02 | 40 | PM
- NOTES: Jessica needs 1 more hour to submit English 10 grades
- Table of course sections:

Course	SN	Period	Days	Teachers	Status
☐ English 11	1	1	B,D,F	Woolton/Carter/Adams	
☐ English 11 Honors	1	2	A,C,E	Carter/Woolton	
☒ English 10	6	3-1	B,D,F	Carter	
☒ English 10	5	4	A,C,E	Carter	
☐ English 11	4	4	B,D,F	Carter/Jackson/Woolton	
☐ Advisory 10	7	Adv	A,B,C,D,E,F	Carter	
☐ Advisory Mentor	2	Adv		Carter	

Unlock Sections button

Click the **Unlock Sections** button when you are ready to proceed with the unlock. You will be prompted to confirm the action. Click **Yes** if you wish to complete the unlock

process and return to the main Unlock Marking Periods screen, or click **No** to make additional changes before unlocking.



Once the operation is completed, you will be returned to the main Unlock Marking Periods screen and the unlock request will be added to the list of unlocks. Teachers will be able to submit grades for the unlocked marking period until the expiration date/time is reached.

Counseling > User Defined Assessments

The **Counseling > User Defined Assessments** sub-module allows users to batch add, edit, or remove records for user defined assessments for a selected group of students.

For each of the batch areas, the process is the same:

1. Navigate to the **Counseling > User Defined Assessments** sub-module.
2. Select the appropriate task (Batch Add, Batch Edit, or Batch Remove).
3. Use the Batch Selector to locate a group of students for whom this action is to be performed.
4. Select a user defined assessment from the drop-down and configure the options on the screen appropriately.

Note: If a student has multiple user defined assessment records meeting the specified criteria, *all* of those records will be impacted by the batch operation.

BATCH USER DEFINED ASSESSMENTS			
▶ Batch Add User Defined Assessments ▶ Batch Edit User Defined Assessments ▶ Batch Remove User Defined Assessments			
Show jobs from previous: 1 Month ▼			
Description	Status	Start Time	End Time
Batch Add User Defined Assessments	Completed	5/28/2020 2:24:20 PM	5/28/2020 2:24:20 PM
▶ Show Results			
Batch Add User Defined Assessments	Completed	5/28/2020 2:29:25 PM	5/28/2020 2:29:25 PM
▶ Show Results			
Batch Add User Defined Assessments	Completed	5/29/2020 9:56:04 AM	5/29/2020 9:56:04 AM
▶ Show Results			
Batch Edit User Defined Assessments	Completed	5/29/2020 10:32:26 AM	5/29/2020 10:32:26 AM
▶ Show Results			
Batch Edit User Defined Assessments	Completed	5/29/2020 10:34:37 AM	5/29/2020 10:34:37 AM
▶ Show Results			
Batch Remove User Defined Assessments	Completed	5/29/2020 10:45:54 AM	5/29/2020 10:45:54 AM
▶ Show Results			

The User Defined Assessments sub-module also contains a job object history that allows users to review previously run jobs for a selected timeframe. These jobs are also logged in the **Maintenance > Application > Job Object History** log.

If a user has access to the **Counseling > User Defined Assessments** sub-module but does not have rights to edit any user defined assessments (or if no user defined assessments have been defined), the following message will be displayed instead.

BATCH USER DEFINED ASSESSMENTS	
You have permission to enter this submodule but do not have edit rights to any User Defined Assessments.	

Batch Add User Defined Assessments

The Batch Add User Defined Assessments area allows users to add an identical record to each of the selected students in a single operation.

To use this feature, follow the steps outlined above and select the appropriate user defined assessment from the drop-down list. Fill in all fields as needed (pink fields are required) and click the Add  button to add this record for each selected student.

Note: If a user already has a record matching these details, the original record will not be modified and a duplicate record will be created for that student.

After the user clicks the Add  button, the Batch Add job will run and a new user defined assessment record will be added for all selected students. When the job is complete, use the Show/Hide  button to review the results, including any error messages.

Description	Status	Start Time	End Time
Batch Add User Defined Assessments	Completed	6/1/2020 2:02:57 PM	6/1/2020 2:02:58 PM

 Hide Results

Batch Add User Defined Assessment: Fountas & Pinnell Benchmark
Student 25 of 25 (100%) Success = 25 Failures = 0

Batch Edit User Defined Assessments

The Batch Edit User Defined Assessments allows users to make the same change to a group of students.

The top section is used to define which records will be modified for the selected students. Enter the criteria in the appropriate fields to update records matching those fields (only records from within the selected set of students will be modified). If a student has multiple user defined assessment records meeting the specified criteria, *all* of those records will be impacted by the batch edit operation.

The bottom section is used to define the changes to be made to each record. To make changes, use the checkboxes to select one or more fields. Enter the new text or value in

the field(s), or leave the field blank to clear the field when the records are updated. Only those fields that are checked will be modified.

Note: To clear a field, the checkbox *must* be checked and no value should be entered.

BATCH EDIT USER DEFINED ASSESSMENTS

Dibels (Sept) ▼

Find records that match the following

School Year: 2019-2020 ▼

CL S (Grading Scale: 0-143):	From		To	
LNF (Grading Scale: 0-110):	From		To	
PSF (Grading Scale: 0-80):	From		To	
WWR (Grading Scale: 0-50):	From		To	
Errors (Grading Scale: 0-600):	From		To	
Retell (Grading Scale: 0-94):	From		To	
Retell Quality (Grading Scale: 1-4):	From		To	
Words Correct (Grading Scale: 0-600):	From		To	
Composite Score (Grading Scale: 0-600):	From		To	

Modify the selected fields

☐ School Year: 2019-2020 ▼

☐ CL S (Grading Scale: 0-143):	
☐ LNF (Grading Scale: 0-110):	
☐ PSF (Grading Scale: 0-80):	
☐ WWR (Grading Scale: 0-50):	
☐ Errors (Grading Scale: 0-600):	
☐ Retell (Grading Scale: 0-94):	
☐ Retell Quality (Grading Scale: 1-4):	
☐ Words Correct (Grading Scale: 0-600):	
☐ Composite Score (Grading Scale: 0-600):	

To preview the results of this batch operation, click the Check button in the upper right corner. A job will run at the bottom of the screen which will display the results of the operation, including any error messages when complete. Running the Check operation will not make any changes to records; users must still click the Save button to apply any changes.

Click the Save button to apply these changes. The Batch Edit job will run and modifications will be made to each record matching the specified criteria for all selected students. When the job is complete, use the Show/Hide button to display the results, including any error messages. An error message will be returned for any student who does not have a matching record.

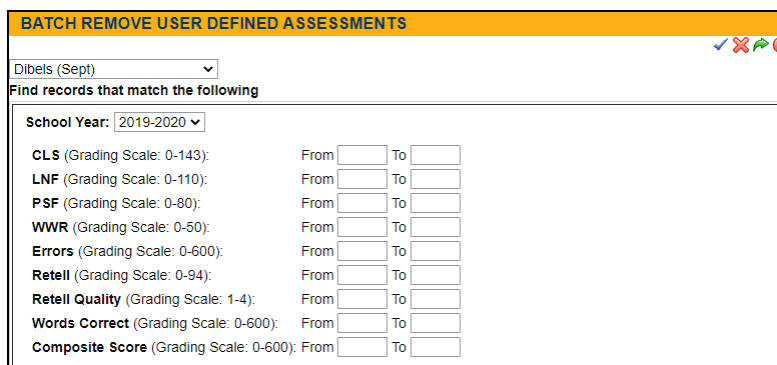
Description	Status	Start Time	End Time
Batch Edit User Defined Assessments	Completed	5/29/2020 10:32:26 AM	5/29/2020 10:32:26 AM
Hide Results Batch Edit User Defined Assessment Validation: Dibels (Sept) Student 6 of 6 (100%) Success = 6 Failures = 0			

Batch Remove User Defined Assessments

The Batch Remove User Defined Assessments allows users to remove records from a group of students. After selecting the appropriate students, choose the user defined assessment from the drop-down menu.

Enter the criteria in the appropriate fields to remove records matching those fields (only records from within the selected set of students will be removed).

Note: This operation will permanently remove any matching records. If a student has multiple user defined assessment records meeting the specified criteria, *all* of those records will be removed.



To preview the results of this batch operation, click the Check  button in the upper right corner. A job will run at the bottom of the screen which will display the results of the operation, including any error messages when complete. Running the Check operation will not make any changes to records; users must still click the Remove  button to remove the records.

Click the Remove  button to complete the operation. The Batch Remove job will run and any records matching the specified criteria for the selected students will be permanently removed. When the job is complete, use the Show/Hide  button to display the results, including any error messages. An error message will be returned for any student who does not have a matching record.

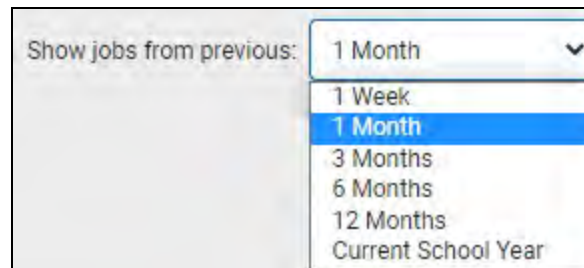
Description	Status	Start Time	End Time
Batch Remove User Defined Assessments	Completed	5/29/2020 10:45:54 AM	5/29/2020 10:45:54 AM
 Hide Results			
Batch Remove User Defined Assessment Validation: Dibels (Sept)			
Student 6 of 6 (100%) Success = 6 Failures = 0			

Reviewing the Job Object History

On the main **Counseling > User Defined Assessments** sub-module screen, users can view job history for batch actions performed from within this sub-module. The list of job objects is displayed at the bottom of the User Defined Assessments screen and contains information about all jobs performed here. The list shows the job Description, Status, Start Time and Finish Times for each job.

BATCH USER DEFINED ASSESSMENTS			
▶ Batch Add User Defined Assessments ▶ Batch Edit User Defined Assessments ▶ Batch Remove User Defined Assessments			
Show jobs from previous: 1 Month ▼			
Description	Status	Start Time	End Time
Batch Add User Defined Assessments	Completed	5/28/2020 2:24:20 PM	5/28/2020 2:24:20 PM
⬇ Show Results			
Batch Add User Defined Assessments	Completed	5/28/2020 2:29:25 PM	5/28/2020 2:29:25 PM
⬇ Show Results			
Batch Add User Defined Assessments	Completed	5/29/2020 9:56:04 AM	5/29/2020 9:56:04 AM
⬇ Show Results			
Batch Edit User Defined Assessments	Completed	5/29/2020 10:32:26 AM	5/29/2020 10:32:26 AM
⬇ Show Results			
Batch Edit User Defined Assessments	Completed	5/29/2020 10:34:37 AM	5/29/2020 10:34:37 AM
⬇ Show Results			
Batch Remove User Defined Assessments	Completed	5/29/2020 10:45:54 AM	5/29/2020 10:45:54 AM
⬇ Show Results			

By default, the list shows all jobs from the past month, but it may be filtered to show jobs from a longer or shorter date range. Users may select their desired timeframe from the drop-down menu at the top of the Job Object History list:



Users may choose to view additional details about each job by clicking on the Show Results ⬇ button below each job description.

Description	Status	Start Time	End Time
Batch Add User Defined Assessments	Completed	5/28/2020 2:24:20 PM	5/28/2020 2:24:20 PM
⬇ Show Results			

The details are specific to each particular job, and will show you how many students were included in that job and of those, how were processed (indicated as a percentage). This percentage does *not* mean that information was changed in each of those records; rather, it is an indicator of how many individual records were processed during that job.

Batch Edit User Defined Assessments	Completed	5/29/2020 10:32:26 AM	5/29/2020 10:32:26 AM
⬆ Hide Results Batch Edit User Defined Assessment Validation: Dibels (Sept) Student 6 of 6 (100%) Success = 6 Failures = 0			

The results will also show the number of successes and failures. An error message will be displayed for any failures that occurred during that process.

To hide these details, click the Hide Results ⬆ button.

Note: Job Object History is managed through the Maintenance module. Items may appear to be removed from this list as they are archived from within Maintenance.

Counseling Appendix – Program Services

Program services have a number of general rules that are followed. Each program service may have its own set of fields that are detailed in the appropriate program service section of this appendix.

- **Overlapping:** Most program services have a program service (such as Disability) and a program service **type** (such as Autism). As a rule, overlapping of identical program services (same program service **and** type) is not allowed. **Exceptions to this are noted.**
- **Dependencies:** Some program services require another specific program service be added first (a Section 504 Safety Net, for instance, cannot be added to a student that does not have a Section 504 program service already). **These dependencies are noted.**

The following program service records are described in this appendix:

- AIS (Academic Intervention Services)
- Alternate Assessment Program (dependent on Disability)
- CIP
- Disability
- Exempt LEP/ELL (dependent on LEP/ELL)
- IEP (overlap allowed)
- Funding
- Level of Integration (dependent on Disability, no overlap allowed even at Type level)
- LEP/ELL
- Other
- Section 504
- Section 504 Safety Net (dependent on Section 504)
- Special Programs
- Test Modifications

AIS

AIS records can be created that overlap other AIS records of the same type. This is different from most other program services (except IEP).

AIS Records contain the following fields:

1. **Start** (required, date field): The start date for the program service record. This field is required.

2. **End** (radio buttons, date field): The end date for the program service record. If the record is still active, this should be set to "Current;" if the program service has ended a date should be entered here. When ending an AIS program service, an exit reason is required.
3. **Provider** (radio buttons, drop-downs): The provider for this program service. Select an in-district provider by selecting the top radio button and choosing a Building and School Level, or select the lower radio button and choose a provider from the provider drop-down.
4. **Entry Reason** (drop-down): The entry reason for the program service. "N/A" is always the top item in the list, and is selected by default. The drop-down is populated based on the reasons configured in Maintenance.
5. **Exit Reason** (drop-down): The exit reason for the program service record, used when a program service record is ended. This field is only available when a value is entered in the "End Date" field. The drop-down is populated based on exit reasons defined in Maintenance.
6. **Service or Monitor** (radio buttons): Indicates whether the student is receiving a service or being monitored. The values here are used by the PIR report. This field is set to "Service" by default.
7. **Service Type** (required, radio buttons, drop-downs): Two mutually exclusive dropdowns, one for "Academic" and one for "Support" that are controlled by radio buttons. All items are global – they apply to all school levels in the system. Each option is required to be tied to one of the AIS service types used in the PIR report.

Note: Setting the Service Type to "Academic" will cause the AIS  icon to appear on the student's record in the Alerts area. If the Service Type is set to "Support" the icon will not display.

- A. **Academic** drop-down contains the following Service Types (as defined in Maintenance):
 - i. ELA
 - ii. Math
 - iii. Social Studies
 - iv. Science
- B. **Support** drop-down contains the following Service Types (as defined in Maintenance):
 - i. Guidance Counseling
 - ii. Psychological Services
 - iii. Social Worker Services
 - iv. Health, Dental, and Eye
 - v. Other Services

8. **Intervention Type** (drop-down): Optional drop-down containing the various intervention types as defined in Maintenance
9. **Frequency/Intensity** (drop-down): Optional drop-down containing the options for frequency/intensity types as defined in Maintenance
10. **Teacher** (drop-downs): List of all teachers in the system with filters for Building, School Level, and Department to assist in narrowing down selection
11. **Not funded by Title 1 funds** (checkbox): This should be checked when the faculty member providing this program service is not funded by Title 1 funds.
12. **Comments** (free-text): A multi-line text box allows users to add details about the service, which may run for an entire school year or more.

The screenshot shows a web-based form for entering an AIS record. At the top left is a dropdown menu labeled 'AIS'. Below it are 'Start' and 'End' date fields. The 'End' field has a 'Current' radio button selected. The 'Provider' field is set to 'Mindex HS' and 'High School'. Below these are 'Entry Reason' and 'Exit Reason' dropdowns, both set to 'N/A'. The 'Service or Monitor' section has 'Service' selected. The 'Service Type' section has 'Academic' selected, with a red 'SELECT ONE' button next to it. Below this is another 'SELECT ONE' button. The 'Intervention Type' and 'Frequency/Intensity' dropdowns are both set to 'N/A'. The 'Teacher' section has three dropdowns: 'Building' (Mindex HS), 'School Level' (ALL), and 'Department' (ALL). Below these is another 'SELECT ONE' button. At the bottom is a large text box labeled 'Comments:'. In the top right corner, there are 'Help' and 'Cancel' links.

Entry screen for an AIS record

Alternate Assessment Program

The Alternate Assessment Program is used for students who receive services as part of the NYSAA program. When alternate assessments are administered for these students, that exam score is used for NYS data warehouse reporting. This program service works in conjunction with the Disability program service. A student must have a Disability program service before users can add an Alternative Assessment Program record.

Entry screen for an Alternate Assessment Program record

CIP

CIP (Classification of Instructional Programs) program services are used for students attending NYS qualifying vocational-technical classes (e.g., cosmetology, welding, etc.). These programs are determined by the state and are maintained in **Maintenance > Census > CIP Programs**. CIP records work in conjunction with diploma types and a technical endorsement exam reported to the NYS data warehouse.

Entry screen for a CIP record

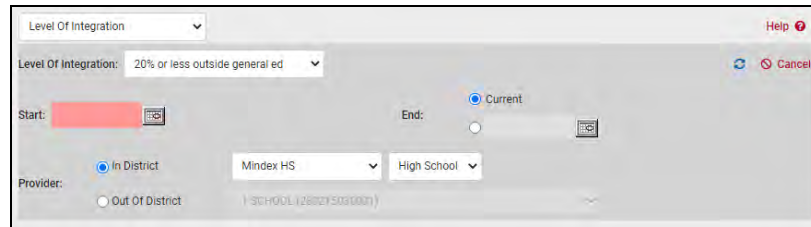
Disability

The Disability program service may be used when a student is classified as “Disabled” according to NYS definitions of qualifying handicaps. Districts may use this program service type to drive the IEP Direct viewer feature or in conjunction with the “needs” feature of SchoolTool.

Entry screen for a Disability record

Level of Integration

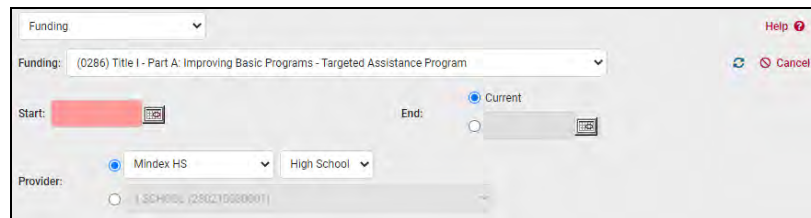
The Level of Integration program service is used in conjunction with Disability records; a student must have a Disability program service before a Level of Integration record may be added. Level of Integration records indicate how much time (typically a percentage value) the student is serviced for that disability. If a district records a disability in SchoolTool for the purpose of NYS reporting then they also maintain the level of integration for that disability.

The screenshot shows the 'Level of Integration' entry form. At the top, there is a dropdown menu labeled 'Level Of Integration' with the selected value '20% or less outside general ed'. Below this, there are fields for 'Start' and 'End' dates, each with a calendar icon. The 'End' field has a radio button labeled 'Current' which is selected. Under the 'Provider' section, there are two radio buttons: 'In District' (selected) and 'Out Of District'. To the right of these are two dropdown menus: 'Minix HS' and 'High School'. At the bottom, there is a text field containing the school ID '13CH001 (28021030001)'. In the top right corner, there are links for 'Help', a refresh icon, and a 'Cancel' button.

Entry screen for a Level of Integration record

Funding

The Funding program service may be used to indicate when a student receives program services that are tied to programs receiving funding for instruction (e.g., Federal Title monies, NCLB programs, etc.).

The screenshot shows the 'Funding' entry form. At the top, there is a dropdown menu labeled 'Funding' with the selected value '(0286) Title I - Part A: Improving Basic Programs - Targeted Assistance Program'. Below this, there are fields for 'Start' and 'End' dates, each with a calendar icon. The 'End' field has a radio button labeled 'Current' which is selected. Under the 'Provider' section, there are two radio buttons: 'Minix HS' (selected) and 'High School'. To the right of these are two dropdown menus: 'Minix HS' and 'High School'. At the bottom, there is a text field containing the school ID '13CH001 (28021030001)'. In the top right corner, there are links for 'Help', a refresh icon, and a 'Cancel' button.

Entry screen for a Funding record

IEP

The IEP, or Individualized Education Program, program service is used to indicate that a student has an IEP. Detailed information about that student's IEP may be available through the district's special ed software (such as IEP Direct or Cleartrack).

Entry screen for an IEP record

LEP/ELL

The LEP/ELL program service is used for students who are not English-proficient. Students must qualify for an LEP/ELL program using a state language proficiency exam.

- Eligibility: Indicates that the student is determined to be eligible for LEP/ELL programs; a record for this option must be selected before a program-specific record may be created.
 - When creating an Eligibility record, use the Service Level dropdown to select the appropriate value (Full, Partial, or None)
- Program: Once a student has been qualified for an ELL (English Language Learner) program, typically either a Bilingual Program or a freestanding ESL program, this radio button should be used to indicate the program for which the student is receiving services.

Note: A single Eligibility record must exist for the duration of all individual LEP/ELL Program-specific records.

Entry screen for an LEP/ELL record

Exempt LEP/ELL

Exempt LEP/ELL program service records are used in conjunction with LEP/ELL records; a student must have an LEP/ELL record before an Exempt program service record may be added.

Entry screen for an Exempt LEP/ELL record

Other

Other program service records may be used at a district's discretion and may be tied to NYS export codes, such as subject-specific summer school or free/reduced lunch programs. Some program services may have additional fields. Refer to the NYS SIRS Manual for more information on these program services.

Entry screen for an Other record

Section 504 Safety Net

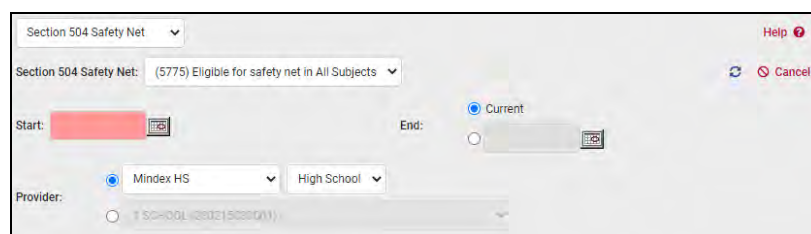
In order to add a Section 504 Safety Net record, the student must already have a current Section 504 program service record set up. To add a Section 504 Safety Net, select the appropriate option from the Safety Net drop-down and specify a Start Date, End Date, and Provider.

Available Section 504 Safety Net types include the following:

- Eligible for safety net – graduation requirement in English
- Eligible for safety net in Math
- Eligible for safety net in Global History & Geography
- Eligible for safety net in US History & Government
- Eligible for safety net in Science
- Eligible for safety net in All Subjects

A student may have multiple Safety Net records with overlapping dates, as long as the records are different Safety Net types. For example, a student may have 3 *different* subject-specific Safety Nets, such as Math, English, and Science, at the same time. Subject-specific safety net records may also overlap with the “All Subjects” type.

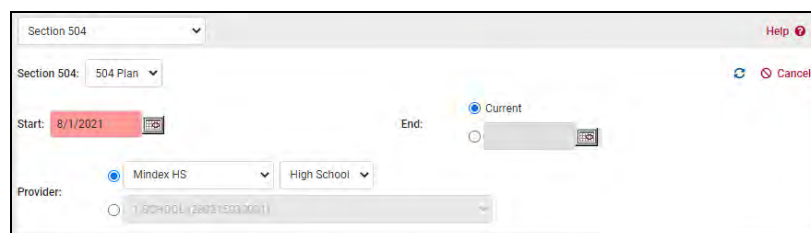
A student *may not* have more than one of the *same* type for overlapping dates. If a user attempts to add a conflicting safety net record, a message will appear to indicate the conflict and the record cannot be added until the dates are changed.



Entry screen for a Section 504 Safety Net record

Section 504

Section 504 program services are used for students who are classified as eligible for Section 504 services and accommodations, such as students with medical needs, learning disabilities, and/or emotional or behavioral disabilities. Students with a Section 504 program service record may also have a Disability record; they may also have a Section 504 Safety Net for eligibility in one or more subjects.



Entry screen for a Section 504 record

Special Programs

Special programs are used for students receiving services that are associated with a specific cost. These programs are defined in Maintenance and are typically used for BOCES billing purposes. Special Programs may include yearly (e.g., 12:1:1 or 1:1 Aide programs) or weekly (e.g., speech therapy or counseling) services. Each Special Program is defined as either a Program or a Related Service.

Entry screen for a Special Program record

1. Select a school year, then choose a Special Program from the drop-down (the list is dependent on the school year selected; only Special Programs that have a school year defined will appear in the list for that year). Specify a start date (and end date, if appropriate). If the Special Program is defined as a Related Service, an option will appear to tie that record to a Program. The “Tie to Program” drop-down will include any Program types that exist for that student. Select the Program to which you want to tie the Related Service (date ranges for Related Services must be within the range of the associated Program record).

Note: This option is not available when batch adding program services records in the Census module.

2. Enter a Frequency or FTE as appropriate.
 - A. If the Special Program is billed *weekly*, enter a Frequency to indicate the number of times per week that the student receives these services.
 - B. If it is billed *yearly*, enter a value for the Full Time Equivalent (FTE).
3. Specify whether the student is receiving group or individual service. Select a provider. If appropriate, choose a faculty responsible for administering or overseeing the service (this field is optional).

Test Modification

If a student's IEP document (from special ed software) says the student can utilize testing modifications for an exam, then the district ensures the modification is available should the student need it (e.g., someone reads the exam to the student, the student is allotted extra time; the student needs a Braille exam, etc.).

Note: The proper place to note the test modifications that a student has actually utilized is when an exam score is submitted (either by a teacher or counselor). When an exam

score is submitted as taken “with modifications,” this information is reported to NYS data warehouse along with the exam score.

The screenshot shows a web-based form for entering a test modification record. The form is organized into several sections:

- Test Modification:** A dropdown menu at the top left, currently showing "Test Modification".
- Start/End:** Fields for "Start:" and "End:" with time selection icons. The "End:" field has a radio button labeled "Current" which is selected.
- Provider:** A dropdown menu showing "Mindex HS" and "High School". Below it is a text input field containing "1.SCHEDULE (280E1309000)".
- Flexible Scheduling:** A section with checkboxes for "Extended Time", "Several Sessions During the Day", and "Other: Specify". The "Extended Time" checkbox is selected, and there are radio buttons for "1.5X", "2.0X", and "Other".
- Flexible Setting:** A section with checkboxes for "Individually in Separate Location", "Small Group in Separate Location", and "Other: Specify".
- Revised Test Format:** A section with a text input field.
- Revised Test Directions:** A section with checkboxes for "Read Directions to Student", "Simplify Language in Directions", "Provide Additional Examples", and "Other: Specify".

At the top right, there are links for "Help" and "Cancel".

Entry screen for a Test Modification record

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