Chancery SMS 7.6.0

School Administration Manual

PEARSON

Chancery SMS 7.6.0 School Administration Manual

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By web: *Pearson PowerSource* (https://powersource.pearsonschoolsystems.com).

For customer service, telephone 800-999-9931.

See also Chancery SMS online Help (on any page, click **Help**).

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Preface

This document is a reference for the user of a school's Chancery SMS® system, including the following types of people:

- *School Administrator*: Maintains the Chancery SMS system for one or more schools in the same district. This involves such tasks as scheduling courses and classes, configuring grading, enrolling students, assigning teachers, validating addresses, tracking immunizations, adjusting student information, and assembling student information for various administrative purposes. A School Administrator may do this work for more than one school. Typical School Administrators hold such positions as school IT manager, vice-principal, office data specialist. See also *Base roles* [p. 190].
- *School user*: Uses the Chancery SMS system in one school. This involves such tasks as taking attendance, entering grades, and reviewing student information. Typical school users hold such positions as teacher, office secretary, vice-principal, counselor, nurse, clerk and office assistant.

Note: This document may describe some tasks, processes, and features that are not available to your role [p. 12].

Note: To view documentation for a District Administrator, sign in [p. 10] to Chancery SMS as a district-level role and re-open eDocs [p. 6].

What's new in Chancery SMS 7.6.0

This section describes new capabilities in Chancery SMS 7.6.0.

Grading

School administrators can enter a student's grades for a grading period that occurred before the student was scheduled into the class [p. 75].

Log on

There is a new logon page in Chancery SMS 7.6 [p. 10]. This page functions in the same manner as the previous logon page but is named "Sign in".

Permanent Record

For cumulative GPA definitions with included/excluded courses where a historical course is subsequently manually added, the new historical course is automatically included in the calculation regardless of the case in the course number.

For the Academic Planner set up and its student credit calculations, each course number is still considered unique.

Scheduling

- On the Master Schedule and Class Setup pages, school administrators can schedule more than three teachers into a class, indicate what role each teacher played in the classroom, and view a history of teachers assigned to the class. For further information, refer to the *Chancery SMS 7.6.0 Managing Teacher Class Assignments Technical Bulletin,* available in the Chancery SMS 7.6.0 eDocs Addenda.
- Withdrawn students are no longer included in the Homeroom count.
- The Classes and Homerooms pages display the number of active students in the class. For details, refer to the *Chancery SMS 7.6.0 Release Notes*.

Student Behavior

On the Student Behavior page users can search the **Student Number** field, located in the “Most Frequent” category in the Basic and Detail search page [p. 77]. The search operators are: “Contains”, “Starts with”, “Ends with” and “Equals”.

Getting help with using Chancery SMS

If in the course of your work, you need information on some aspect of the system, you can get that information quickly. You can get detailed information on Chancery SMS in general or access to a user support web site.

To get information on the page currently displayed:

1. On the page, click the **Help** menu.
2. Click **Dynamic Help**. The relevant page in the *Chancery SMS 7.6.0 eDocs* appears in your web browser.

To get information on Chancery SMS in general:

1. On any page, click the **Help** menu.
2. Click **Contents**. *Chancery SMS 7.6.0 eDocs* appears in your web browser.
   - ⓘ You can find specific information using the table of contents or index, or by text search.
   - ⓘ Some documents require the use of Adobe Acrobat Reader (http://get.adobe.com/reader).

To view the user support site:

1. On any page, click the **Help** menu.
2. Click **Support Website...**. The PowerSource Login page opens in your web browser.
   - ⓘ For access to *Pearson PowerSource* (https://powersource.pearsonschoolsystems.com), you must have a User ID and Password issued by your organization. The User ID determines the services to which you have access.

Getting technical help

For assistance with technical aspects of a district's Chancery SMS system, such as installation, upgrading, and data management, consult the personnel assigned by the district or your school to the task of troubleshooting or training. Also, the district or your school may provide a user support web site or printed reference materials.

As a further source of assistance, Pearson offers several user support options, which are available by subscription (that is, to personnel within an organization that has a support agreement with Pearson in place). Options include access to a technical support engineer and access to Pearson's user support site: *Pearson PowerSource* (https://powersource.pearsonschoolsystems.com). PowerSource contains information and services such as a knowledge base, user forums, technical bulletins, downloads, documentation for older Chancery SMS versions, and tracking of support incidents set up by support technicians.

To consult a support technical support engineer:

Telephone 800-688-9939.

- Telephone service is available Monday to Friday, between 5 am and 5 pm Pacific Time.
- Or email psstechsupp@pearson.com
- Or send a fax to 800-446-5650.

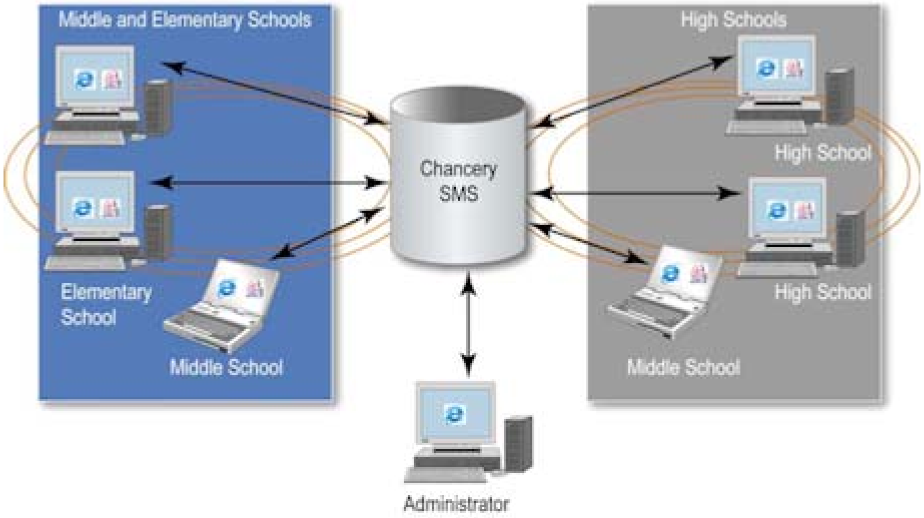
1 Introduction

Chancery SMS is a software tool for managing student and staff information and activities in a school district and its schools. A typical Chancery SMS system is used for a large public urban district with many schools, both elementary and secondary, serving grades in the K through 12 range.

About Chancery SMS

A Chancery SMS system operates from one or more servers running in a central location. Users connect to the system using a web browser [p. 29] on a personal computer, which connects through a local network, a wide-area network (WAN), or the Internet [Figure 1].

FIGURE 1: Access to a Chancery SMS system


Middle and Elementary Schools
High Schools
Chancery SMS
High School
Elementary School
Middle School
High School
Middle School
Administrator

A typical Chancery SMS system is large and used by many different people for different purposes. For reasons of security and system integrity, each person's access to the system is limited to the information and tools that person needs to do his or her job. For example, a School Secretary can view student information for one school and enter attendance figures, whereas a District Administrator can view all students in the district, register new students, and define how the system automatically assigns student numbers.

A default Chancery SMS system has a set of standard pages and data (also known as *core pages* and *core data*). In general, this document describes such a system. Whereas the actual system on which you work may be subject to modifications. Such customization [p. 215] is undertaken by technicians and District Administrators to meet the requirements of a particular district and its schools. The Chancery SMS *cTools* feature enables customizers to modify standard pages and add new pages. Also, once a system is in operation, a District Administrator may have some ability to modify the system, such as by adding choices to fields via setup lists, adding new pages, and linking such pages to the control bar.

A Chancery SMS system can also operate in conjunction with other systems, such as the following:

- *PowerTeacher*™: Pearson's web-based gradebook that enables teachers to record student grades without being connected to the Chancery SMS system. These grades are periodically synchronized with the Chancery SMS system.
- *ParentCONNECTxp*™: Pearson's web service that enables a student's parent to view school-based information about that student [p. 131].

Getting started

You get access to Chancery SMS using a web browser such as Internet Explorer® or Safari® to sign in [p. 10] to a web page set up for use across your district. Each web browser *page* gives you access to information that is stored in a central location on the network.

Signing in

To work with Chancery SMS, you must first sign in to your district's system. For this purpose you need:

- A *User ID*

  The User ID matches a user account [p. 185] and determines the role(s) [p. 12] to which you have access. A User ID is provided by the system's administrator. On some systems, the ID's prefix is a domain name and the ID matches your domain login ID.
- A *Password*

  This is provided by the system's administrator for use with a User ID. It is case-sensitive. On some systems, the password is identical to the domain login ID. The user can change his or her own password [Figure 3].
- The web address of the district's Chancery SMS system.

  Also known as a *URL*, this address is provided by the system's administrator [see *System maintenance & setup, p. 199*]. An example is "http://DistrictServer/ChancerySMS/User/Login.aspx".

To sign in to Chancery SMS:

1. On your computing device, open a web browser.
2. In the browser's **Address** field [Figure 2], enter the web address of your district's Chancery SMS system.

   ⓘ Once you have entered the address in the web browser, consider adding it to your list of favorites so that you can return to it without typing.

3 Press the `Enter` key. The Chancery SMS Sign In page opens [Figure 3].

   ⓘ This page displays the version number of the Chancery SMS system software [Figure 3].

4 Enter a **User ID**.

   ⓘ The User ID field is not sensitive to case.

5 Enter a **Password**.

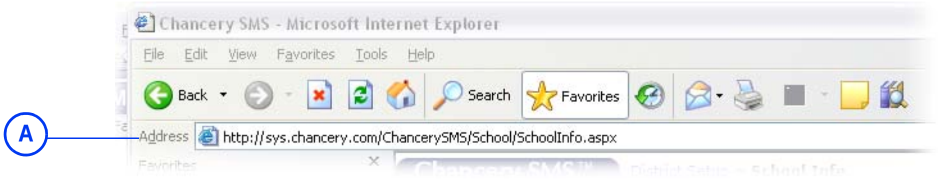
   ⓘ The Password field is sensitive to case.

6 Click Sign In. The *home page* appears [p. 14].

   ⓘ If your user account has more than one role and you have not yet chosen a default role [p. 189], the Choose Role dialog appears. Select the default role that you would like to enter automatically each time you sign in.

   ⓘ You can switch roles while staying logged on [p. 12].

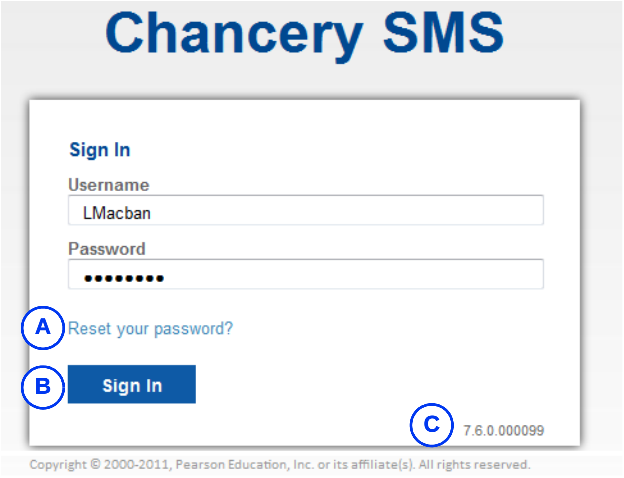
FIGURE 2: Web browser: Address field



http://sys.chancery.com/ChancerySMS/School/SchoolInfo.aspx

A **Address**: Provided by the system administrator.

FIGURE 3: Sign In page



Username: LMacban

Password: ••••••••

Reset your password?

7.6.0.000099

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A **Reset your password?**: Click to change the password. If you forget your password, contact a system administrator who can change it for you. The password must contain at least one special character.

B **Sign In**: Click or press Enter to sign in.

C Version number

Logging off

When you sign in to a Chancery SMS system, you start a work *session*. Chancery SMS continues your session until you log off or until you do not interact with Chancery SMS for a certain period of time (typically about 20 minutes), in which case Chancery SMS logs you off automatically. This is called a *session timeout*.**Note:** If your session times out, any changes that you had not saved may be lost.

To log off from Chancery SMS:

In the Chancery SMS task bar [Figure 5], click Log Off. The Sign In page appears.

ⓘ Or click the web browser's close button [Figure 4]

FIGURE 4: Web browser: Close

A Close button

Understanding your role

Your User ID determines the information and tools to which you have access. Each User ID is associated with one user account [p. 185]. A user account is associated with one or more roles [p. 186], such as a Teacher, District Health Professional, or a School Administrator. Each role has a scope, typically one school or district-wide [p. 186]. Each role also has a standard set of permissions, which control a role's access to specific types of information and to actions, such as changing information or configuring how it is stored [*Role permissions, p. 189*]. Finally, each role is derived from one of a few base roles [p. 190], which are controlled by a District Administrator.

Switching between roles

Your User ID may give you access to more than one role [p. 186]. Once you have logged on, you may have to switch to another role in order to accomplish a particular task. For example, in a District Administrator-type role you enroll a new student in the district and then change to a School Administrator-type role to assign that student to classes in a particular school. Any customization you undertake for your home page, such as quick links [p. 17] or reports [p. 98], are stored with the role in which they are created.

To choose another role:

1. On the Home page's [p. 14] **Actions** menu, click **Switch Role**. A list of roles appears. Your current role is indicated.
2. Click a role.
3. Click OK.

Your default role

When you sign in with a user account [p. 185] that has more than one role, Chancery SMS logs you on with the *default role* [p. 189]. You can change this default role for future sign-ins.

To set your default role:

1 On the Home page’s [p. 14] **Actions** menu, click **Change Default Role...**. A list of roles appears. The default role is indicated as “Current”.
2 Choose a role.
3 Click OK.

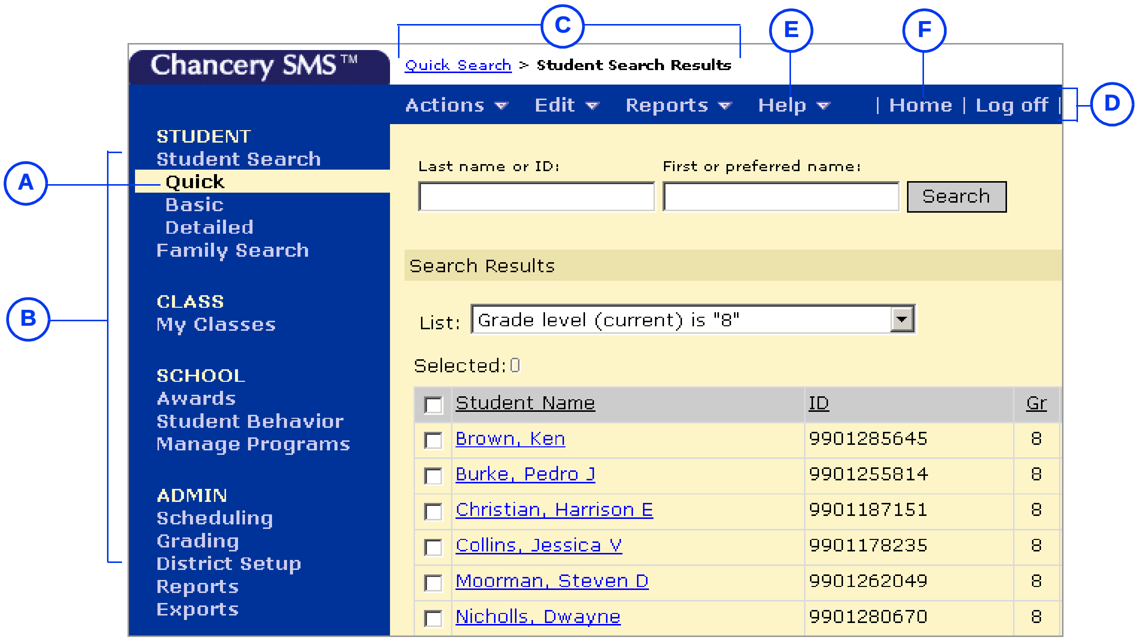
Working with Chancery SMS

Since you work with Chancery SMS in a web browser, most of the controls you use to move around the system [p. 13] are standard to many web applications and sites.

Moving around the system

In a Chancery SMS system, the general procedure is to click on a link in the *control bar*, such as Awards, which opens the main *page* of that system area. The actions available to you (which are specific to that area) appear on the *task bar*. Above the task bar, the *page path* indicates the page on which you are working and its location in the hierarchy of pages [Figure 5].

FIGURE 5: Page controls


C
E
F
D
A
B
Chancery SMS™
Quick Search > Student Search Results
Actions
Edit
Reports
Help
| Home | Log off |
STUDENT
Student Search
Quick
Basic
Detailed
Family Search
CLASS
My Classes
SCHOOL
Awards
Student Behavior
Manage Programs
ADMIN
Scheduling
Grading
District Setup
Reports
Exports
Last name or ID:
First or preferred name:
Search
Search Results

List: Grade level (current) is "8"

Selected: 0

☐	Student Name	ID	Gr
☐	Brown, Ken	9901285645	8
☐	Burke, Pedro J	9901255814	8
☐	Christian, Harrison E	9901187151	8
☐	Collins, Jessica V	9901178235	8
☐	Moorman, Steven D	9901262049	8
☐	Nicholls, Dwayne	9901280670	8

A Current area: The area of the system currently displayed is indicated in the control bar.

B *Control bar*: This menu displays the main areas of the system. The content varies according to the current user role [*Understanding your role, p. 12*].

C *Page path*: This path (also know as *bread crumbs*) names the page displayed and indicates its location in the system relative to other pages. It indicates this by means of a path or hierarchical listing. The other pages in the path are displayed as links on which you can click. **Note:** To go back to the previously viewed page, we recommend that you click that page’s name in the page path rather than use the browser’s Back button.

D *Task bar*: Contains menus specific to the page displayed, such as **Actions**, **Edit**, and **Reports**. The contents of these menus are also specific to the page (in other words, the contents of the Actions menu varies from page to page). The **Help** menu always appears, as does the link to the system's home page and **Log off**. The task bar may also display an alert [Figure 23].

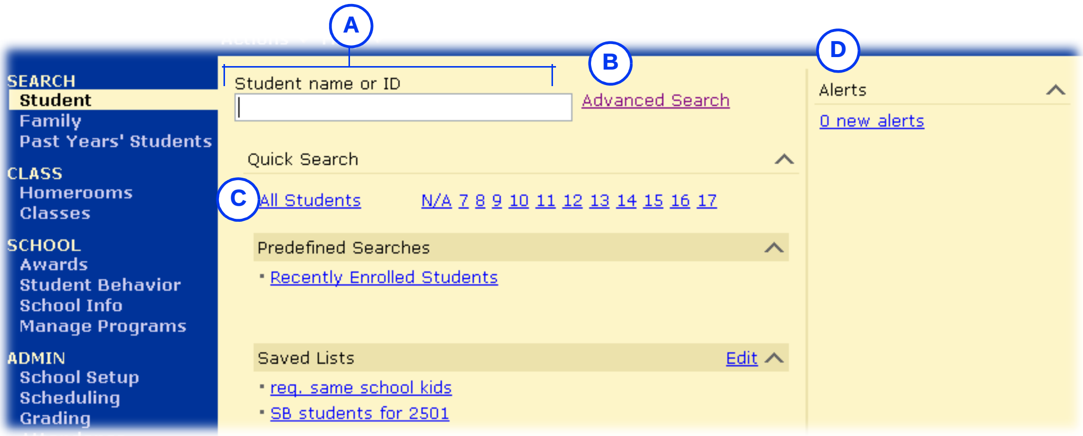
E **Help** menu: This menu gives you access to several sources of information on Chancery SMS, including information specific to the page currently displayed [p. 6].

F **Home**: Displays your role's home page [p. 14].

Home page

When you first sign in to your system [p. 10], when you switch your role [p. 12], or when you click **Home** on the task bar, your system's *home page* appears. The home page differs according to role [p. 186]. For most roles, the home page is the Quick Search page [Figure 6]. For a Teacher role, the home page is the My Classes page [p. 15].

FIGURE 6: Quick Search page example


A
B
C
D
SEARCH
Student
Family
Past Years' Students
CLASS
Homerooms
Classes
SCHOOL
Awards
Student Behavior
School Info
Manage Programs
ADMIN
School Setup
Scheduling
Grading
Student name or ID
Advanced Search
Alerts
0 new alerts
Quick Search
All Students
N/A 7 8 9 10 11 12 13 14 15 16 17
Predefined Searches
Recently Enrolled Students
Saved Lists
Edit
req. same school kids
SB students for 2501

A **Student name or ID** [p. 36]: A search of students based on students' last name, first name, or ID number.

B **Advanced Search** [p. 38]

C **Quick Search** [p. 36]: A few predefined searches, typically of all students and students by grade level. **All Students** displays all the students that your role [p. 12] has permission to view. **My Students** displays all the students to which a Counselor is a assigned.

D **Alerts** [p. 30], which monitor the system for specific information and conditions relevant to your role.

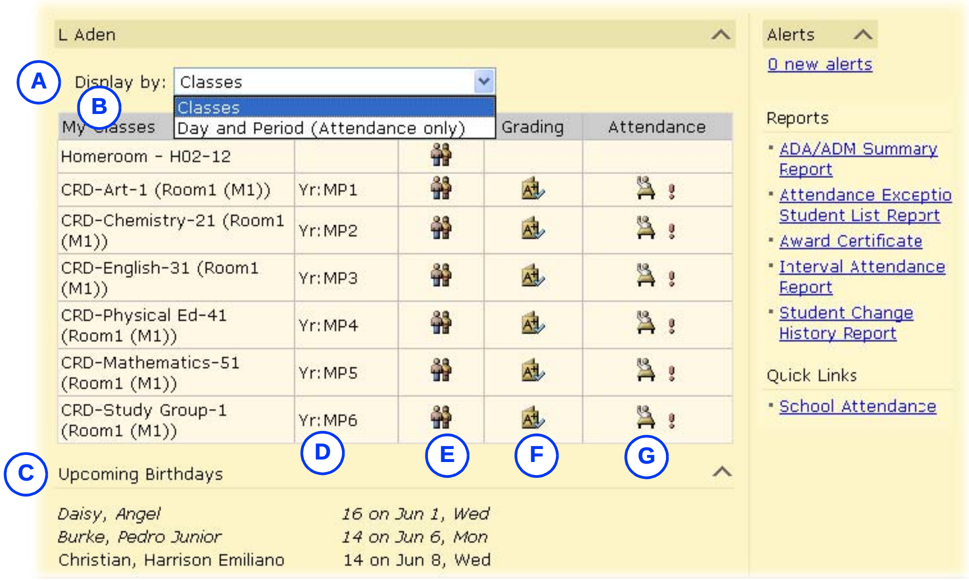
A home page may also display some of the following:

- One or more **Predefined Searches** [Figure 28], each of which enable you to run a system-defined search on the information currently in the system.
- One or more **Saved Lists** [p. 43], each of which contain the saved results of a previously run search. Any new lists you save automatically appear in this list.
- One or more **Reports**, which assemble certain kinds of information from the system. Of the reports available to you in the system, you can add your choice to the home page [p. 98]. If you have not done so, then the Reports section is not displayed.
- One or more **Quick Links** [p. 17], which provide shortcuts to other pages. You can choose up to ten quick links to display on the home page [p. 18]. If you have not added any quick links, then the Quick Links section is not displayed.
- One or more **Scheduled Events**, including scheduled **Reports** [p. 99] and exports.

My Classes home page

If your role [p. 12] is that of a Teacher, when you log in, the home page [p. 14] that appears is the *My Classes* page [Figure 7]. This page gives you direct access to all classes assigned to you and the students in those classes. The My Classes page for an elementary school Teacher differs slightly from that of a secondary.

FIGURE 7: My Classes home page



L Aden

Display by: Classes

Classes
Day and Period (Attendance only)

My Classes			Grading	Attendance
Homeroom - H02-12				
CRD-Art-1 (Room1 (M1))	Yr:MP1			!
CRD-Chemistry-21 (Room1 (M1))	Yr:MP2			!
CRD-English-31 (Room1 (M1))	Yr:MP3			!
CRD-Physical Ed-41 (Room1 (M1))	Yr:MP4			!
CRD-Mathematics-51 (Room1 (M1))	Yr:MP5			!
CRD-Study Group-1 (Room1 (M1))	Yr:MP6			!

Upcoming Birthdays

Daisy, Angel	*16 on Jun 1, Wed*
Burke, Pedro Junior	*14 on Jun 6, Mon*
Christian, Harrison Emiliano	14 on Jun 8, Wed

Alerts

0 new alerts

Reports

- ADA/ADM Summary Report
- Attendance Exceptio Student List Report
- Award Certificate
- Interval Attendance Report
- Student Change History Report

Quick Links

- School Attendance

A **Display by**: Enables you to list the classes by period and day [Figure 9]. This is particularly useful for attendance taking [p. 67]. A secondary Teacher can also view classes by term and meeting pattern.

B **My Classes**: Appended to the class name is the room number and the homeroom number (in round brackets) or class number [in square brackets].

C **Upcoming Birthdays**: Displays the names of students in the Teacher's homerooms and classes whose birthday is within # days of today's date. Where a name is in italics, that student's birthday has passed.

D **Meeting pattern**: The class's meeting pattern; for example, Monday, Wednesday, Friday at 9 a.m.

E **Roster**: Click the icon to view a roster of students in the class [p. 15].

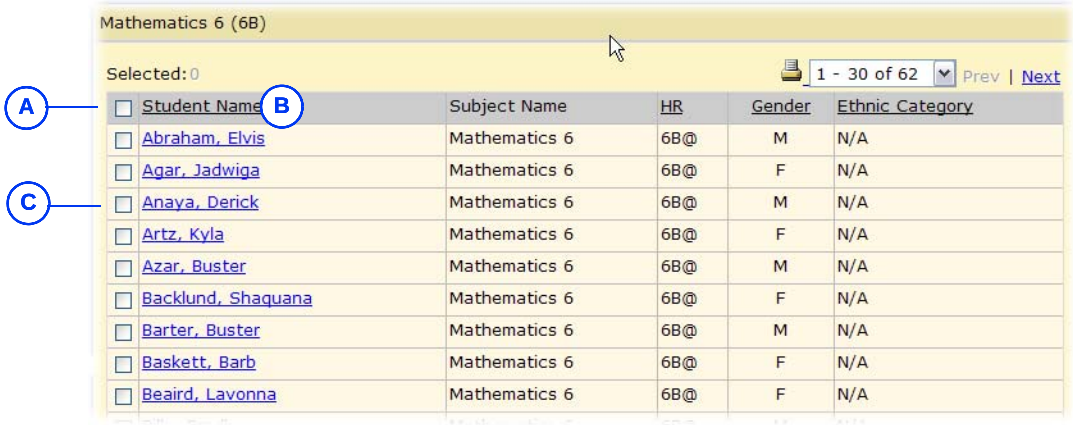
F **Grading**: Click the icon to enter grades.

G **Attendance**: Click the icon to take attendance [p. 67]. "!" indicates that attendance has not been taken for the current attendance period. If supplementary attendance is set up for this class [p. 144], an attendance icon appears.

Class roster

When you open a roster page [Figure 7], Chancery SMS displays a list of students scheduled to attend that class or homeroom. What you can do with this roster depends on your role; for example, a School Administrator can use the roster for scheduling (add a student, transfer a student, drop a student, and so on) a School Secretary can record a behavior incident [p. 80] for one or more students (in the Actions menu, click Add Behavior Incident), a Teacher or School Administrator can save the roster as a list [p. 43] (in the Actions menu, click Save to List...).

FIGURE 8: Class Roster page



Mathematics 6 (6B)

Selected: 0 | 1 - 30 of 62 | Prev | Next

☐	Student Name	Subject Name	HR	Gender	Ethnic Category
☐	Abraham, Elvis	Mathematics 6	6B@	M	N/A
☐	Agar, Jadwiga	Mathematics 6	6B@	F	N/A
☐	Anaya, Derick	Mathematics 6	6B@	M	N/A
☐	Artz, Kyla	Mathematics 6	6B@	F	N/A
☐	Azar, Buster	Mathematics 6	6B@	M	N/A
☐	Backlund, Shaquana	Mathematics 6	6B@	F	N/A
☐	Barter, Buster	Mathematics 6	6B@	M	N/A
☐	Baskett, Barb	Mathematics 6	6B@	F	N/A
☐	Beaird, Lavonna	Mathematics 6	6B@	F	N/A

A Columns: The School Administrator can adjust the columns displayed [p. 22].

B **Student Name**: Click a name to view the student's record.

C Student: The School Administrator can filter the list according to a student's status: active, incoming, or withdrawn: from the Edit menu, select Include Incoming Students or Include Withdrawn Students (Current Year).

Class and homeroom lists

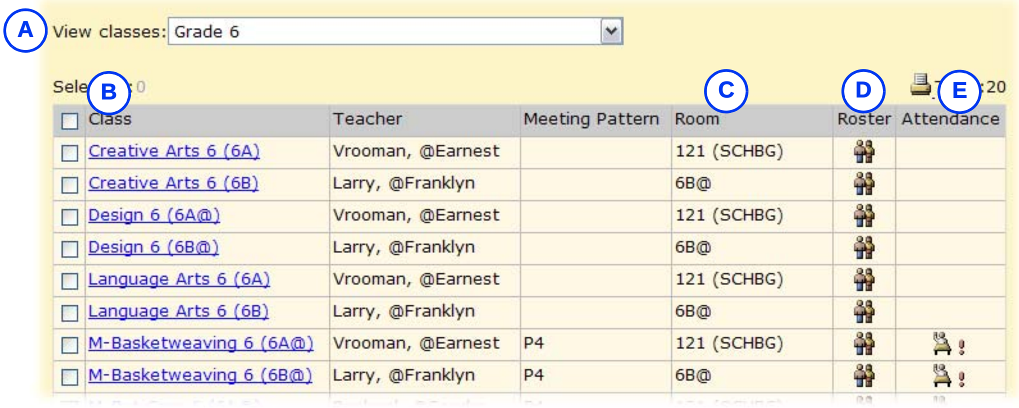
For the role [p. 12] of a School Administrator, Chancery SMS displays all classes on a Classes page [Figure 9], which is similar in function to *My Classes* page [Figure 7], and all homerooms on a Homerooms page.

You can do this if your role is:
School Administrator

To view the school's classes:

On the home, in the control bar under **CLASS**, click **Classes**. The Classes page appears [Figure 9].

FIGURE 9: Classes page



View classes: Grade 6

☐	Class	Teacher	Meeting Pattern	Room	Roster	Attendance
☐	Creative Arts 6 (6A)	Vrooman, @Earnest		121 (SCHBG)	👥	
☐	Creative Arts 6 (6B)	Larry, @Franklyn		6B@	👥	
☐	Design 6 (6A@)	Vrooman, @Earnest		121 (SCHBG)	👥	
☐	Design 6 (6B@)	Larry, @Franklyn		6B@	👥	
☐	Language Arts 6 (6A)	Vrooman, @Earnest		121 (SCHBG)	👥	
☐	Language Arts 6 (6B)	Larry, @Franklyn		6B@	👥	
☐	M-Basketweaving 6 (6A@)	Vrooman, @Earnest	P4	121 (SCHBG)	👥	👤 !
☐	M-Basketweaving 6 (6B@)	Larry, @Franklyn	P4	6B@	👥	👤 !

A **View Classes**: Filters the list of classes by grade level.

B **Class**: Appended to the class name is the homeroom number (in round brackets) or class number [in square brackets].

C **Room**: The number of the room to which the class is assigned. The building name is appended in brackets.

D **Roster**: Click the icon to view a roster of students in the class [p. 15].

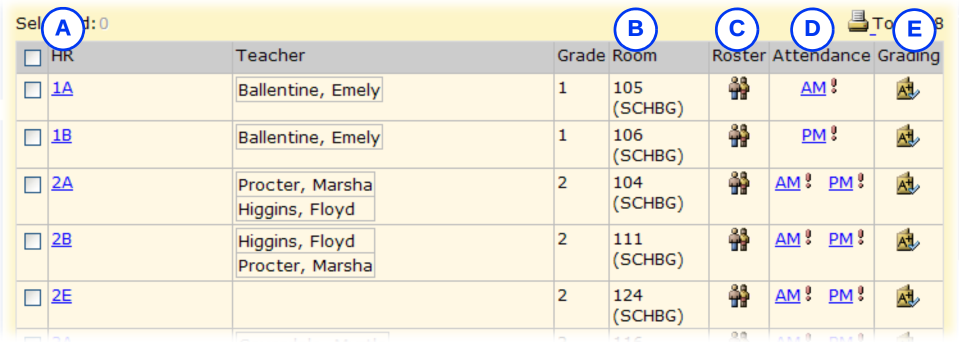
E **Attendance**: Click the icon to take attendance [p. 67]. "!" indicates that attendance has not been taken for the current attendance period. If supplementary attendance is set up for this class [p. 144], an attendance icon appears.

You can do this if your role is:
School Administrator

To view the school’s homerooms:

On the home, in the control bar under **CLASS**, click **Homerooms**. The Homerooms page appears [Figure 10].

FIGURE 10: Homerooms page



☐ HR	Teacher	Grade	Room	Roster	Attendance	Grading
☐ 1A	Ballentine, Emely	1	105 (SCHBG)		AM !	
☐ 1B	Ballentine, Emely	1	106 (SCHBG)		PM !	
☐ 2A	Procter, Marsha Higgins, Floyd	2	104 (SCHBG)		AM ! PM !	
☐ 2B	Higgins, Floyd Procter, Marsha	2	111 (SCHBG)		AM ! PM !	
☐ 2E		2	124 (SCHBG)		AM ! PM !	

A **HR**: Click a homeroom name to view a roster of students in the class [p. 15].

B **Room**: The number of the room to which the class is assigned. The building name is appended in brackets.

C **Roster**: Click the icon to view a roster of students in the class [p. 15].

D **Attendance**: Click the icon to take attendance [p. 67]. “!” indicates that attendance has not been taken for the current attendance period. If supplementary attendance is set up for this class [p. 144], an attendance icon appears.

E **Grading**: Click the icon to enter grades.

Moving between pages

Since your system operates across a network and handles large amounts of information, on occasion Chancery SMS may take a noticeable amount of time to arrange or process information in preparation for display. In these circumstances, we recommend that you refrain from clicking buttons or links repeatedly—this does not speed the process.

To help you assess a potential delay, Chancery SMS may display an icon or cursor that denotes a delay, such as an hour glass. The web browser’s *Status Bar* may also provide useful information. To display the Status Bar, in the web browser’s **View** menu click **Status Bar**.

Quick links to other pages

For a page that you use frequently, or just want to recall, you have the option of bypassing normal navigation through your Chancery SMS system by creating a shortcut, or *quick link*, to that page.

You can create as many quick links as you need and name each as you see fit. Quick links you have created are available to your role [p. 12] from the **Actions** menu on most pages, or on the home page [p. 14].

To use a quick link:

1 On a page, in the **Actions** menu click **Quick Links**. A submenu appears.
2 Click a quick link in the submenu. That page appears.

You can do this if your role is:
Secretary
Teacher
School Administrator

To create a quick link:

1 On a page, in the **Actions** menu click **Quick Links**. A submenu appears.
2 Click **Quick Link this Page…**. A dialog appears.
3 For **Quick link name**, type a unique name for the link.

4 Click OK. Chancery SMS adds the quick link to the **Actions** menu on most pages and to the Quick Links section of the home page [p. 14].

- ⓘ A quick link does not appear in the Actions menu of the page to which it is a shortcut.

Displaying quick links on the home page

You can control the quick links [p. 17] displayed in the Quick Links section of your home page [Figure 6] [Figure 7]. You can also rename the quick links displayed and delete any of those you have created. Such customization is specific to the user account and role [p. 12] in which you are working when you create it; in other words, Chancery SMS preserves the customized home page and displays it when your user account is logged on and (if that account has more than one role available) that particular role is chosen.

You can do this if your role is:
Secretary
Teacher
School Administrator

To add a quick link to your home page:

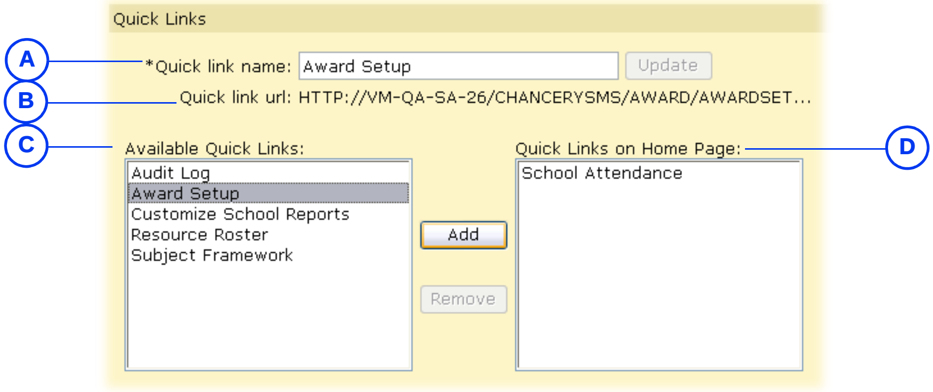
1 On the home page, in the **Actions** menu click **Customize Home Page...**. The Customize Home Page page appears.

2 In the **Quick Links** panel [Figure 11], in the **Available Quick Links** list, select the link and click Add. The link appears in the **Quick Links on Home Page** list.

- ⓘ To rename the quick link, select it and enter a new **Quick link name**.
- ⓘ To delete a quick link that you have created, select the link in the **Quick Links on Home Page** list and click Remove. Chancery SMS deletes it when you click OK.
- ⓘ To remove a quick link from the home page, select the link in the **Quick Links on Home Page** list and click Remove.

3 Click OK.

FIGURE 11: Customize Home Page page: Quick Links



*Quick link name: Award Setup

Quick link url: HTTP://VM-QA-SA-26/CHANCERYSMS/AWARD/AWARDSET...

A **Quick link name**: Enables you to name or rename a quick link selected under Quick Links on the home page.

B **Quick link url**: Displays the URL of a quick link selected under Available Quick Links.

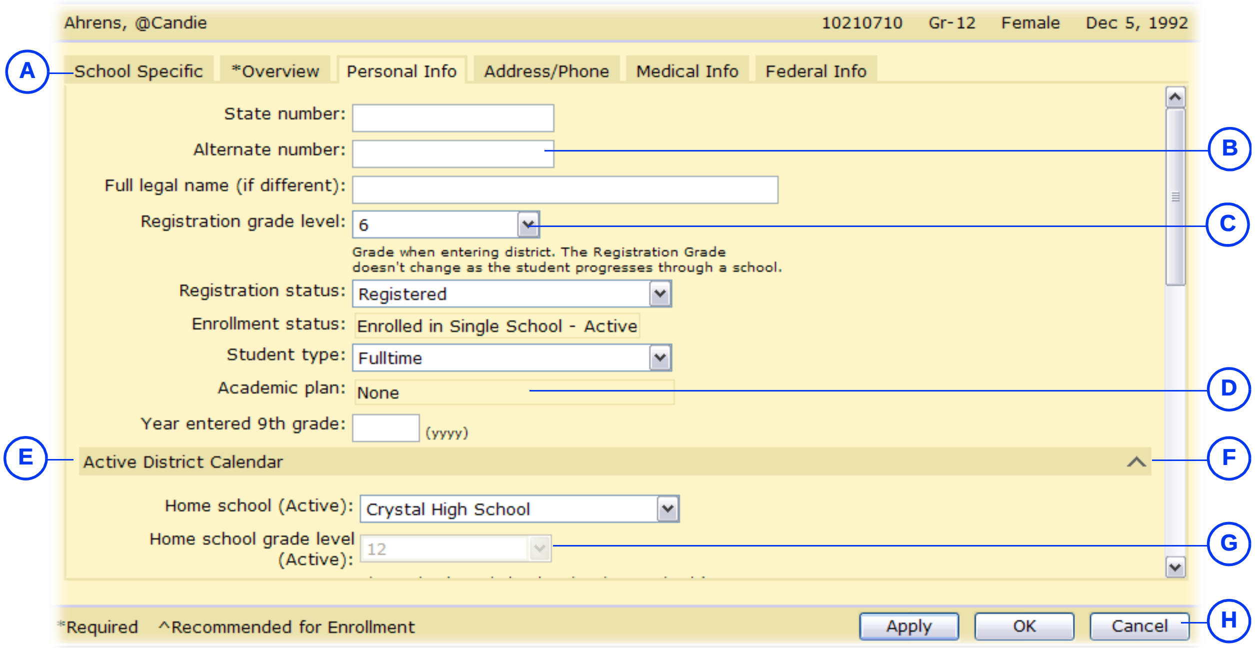
C **Available Quick Links**: A list of quick links you have created [p. 17].

D **Quick Links on Home Page**: If this list is empty, the Quick Links section is not displayed on the home page.

Working on a page

On a typical Chancery SMS page, you also work with information using web-standard elements such as *fields*, *check boxes*, *lists*, *grids*, *icons*, *buttons*, and *links* [Figure 12] [Figure 13]. Some pages organize the contents into several collapsible *panels*. On many pages, it is important to save your changes before moving on to another page.

FIGURE 12:Page elements



Ahrens, @Candie 10210710 Gr-12 Female Dec 5, 1992

State number:

Alternate number:

Full legal name (if different):

Registration grade level: 6

Grade when entering district. The Registration Grade doesn't change as the student progresses through a school.

Registration status: Registered

Enrollment status: Enrolled in Single School - Active

Student type: Fulltime

Academic plan: None

Year entered 9th grade: (yyyy)

Active District Calendar

Home school (Active): Crystal High School

Home school grade level (Active): 12

*Required ^Recommended for Enrollment

A *Tab*: Organizes information into layers. Click the tab to view its information. Your access to a tab may be restricted by your role. Changes made on a tab are saved only when you save the page [p. 20].

B *Field*: An area into which you can type information. The type of field (text, numeric, or date) determines the amount or kind of information you can enter. In this manual, a field name is indicated by **bold** text.

C *List*: Contains several items from which to choose.

D *System-set field*: An area in which Chancery SMS displays information derived from elsewhere.

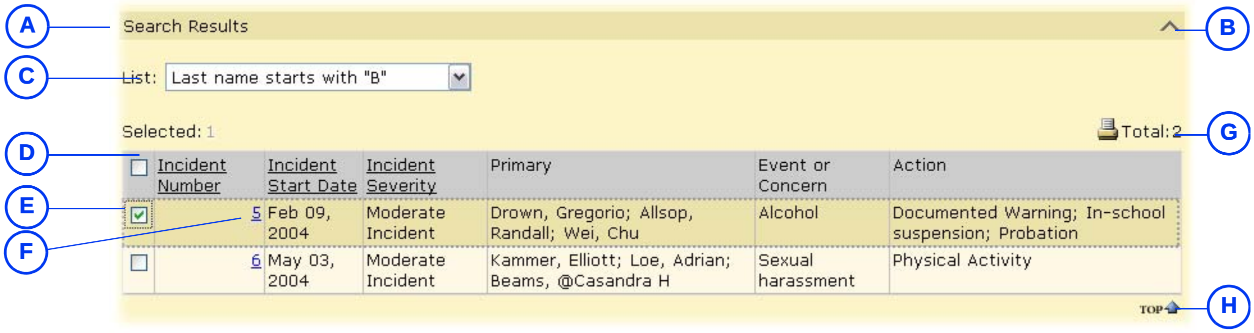
E *Panel*: Organizes information on a long page into collapsible sections.

F Panel arrow: Click to collapse or expand the section.

G *Context field*: An area you have access to only in specific circumstances, such as a setting in another field on this page.

H *Button*: Acts on the page, panel, or tab in which it is located. In this manual, a button label is indicated by bold underlined text.

FIGURE 13:Other page elements



Search Results

List: Last name starts with "B"

Selected: 1

Total: 2

☐	Incident Number	Incident Start Date	Incident Severity	Primary	Event or Concern	Action
☑	5	Feb 09, 2004	Moderate Incident	Drown, Gregorio; Allsop, Randall; Wei, Chu	Alcohol	Documented Warning; In-school suspension; Probation
☐	6	May 03, 2004	Moderate Incident	Kammer, Elliott; Loe, Adrian; Beams, @Casandra H	Sexual harassment	Physical Activity

A *Panel*: Organizes information on a long page into collapsible sections.

B Panel arrow: Click to collapse or expand the panel.

C *List*: Contains several items from which to choose.

D *Grid*: A list of records, the information from which is organized into columns [see *Working with a grid of information, p. 20]*.

E *Check box*: In this case, a check selects the record.

F *Link*: Clicking this takes you to the relevant information.

G **Total**: The total number of records (on all pages, if the records are displayed on several pages).

H **Top**: On a long page, clicking this scrolls the view to the top of the page.

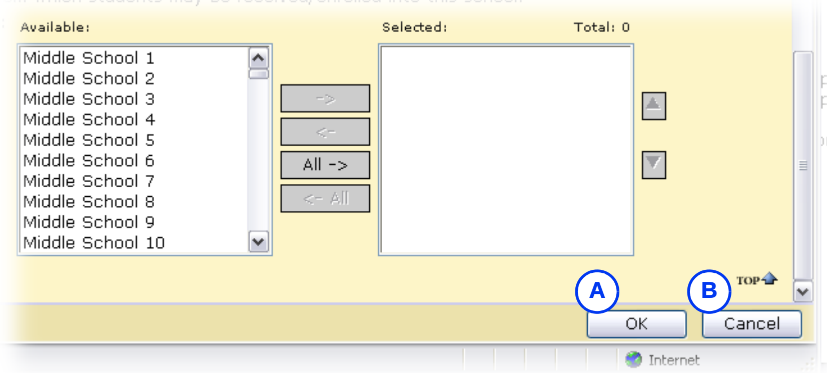
Saving information on a page

When you make changes to information on a page and you want that information to be saved to the system, you must deliberately save the information before moving on to another page. To save the information on a page, click the page's Save or OK button [Figure 14].

When you click the Save or OK button, Chancery SMS saves all changes made on that page, including changes made in panels and tabs [Figure 12] that may no longer be visible, and closes the page. On a page with an Apply button, when you click the Apply button Chancery SMS saves all changes made on that page and keeps the page open.

Some pages contain fields for which you are required to enter information before saving the page. A required field is indicated by an asterisk (*) in its label. If, when you save a page, any required fields are incomplete, Chancery SMS displays a message to that effect. If the incomplete field is within a tab, Chancery SMS displays that tab, or the first tab of several containing an incomplete field.

FIGURE 14: Saving information on a page



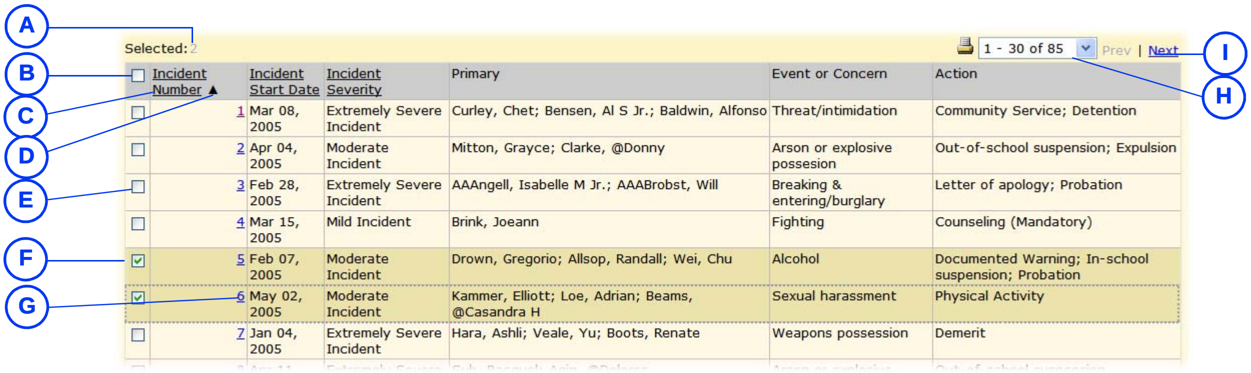
A OK: Saves any changes to information made on this page. **Note:** This button appears on a page only if it is possible to change information on that page.

B Cancel: Discards any changes made on this page.

Working with a grid of information

Some pages display information in the format of *grid*. Each line of the grid contains a separate *record*, that is, an interrelated set of information. The grid's *columns* display selected types of information common to every record. **Note**: A grid of student search results differs [p. 44].

FIGURE 15: Grid elements



Selected: 2

1 - 30 of 85 Prev | Next

	Incident Number ▲	Incident Start Date	Incident Severity	Primary	Event or Concern	Action
☐	1	Mar 08, 2005	Extremely Severe Incident	Curley, Chet; Bensen, Al S Jr.; Baldwin, Alfonso	Threat/intimidation	Community Service; Detention
☐	2	Apr 04, 2005	Moderate Incident	Mitton, Grayce; Clarke, @Donny	Arson or explosive possesion	Out-of-school suspension; Expulsion
☐	3	Feb 28, 2005	Extremely Severe Incident	AAAngell, Isabelle M Jr.; AAABrobst, Will	Breaking & entering/burglary	Letter of apology; Probation
☐	4	Mar 15, 2005	Mild Incident	Brink, Joeann	Fighting	Counseling (Mandatory)
☑	5	Feb 07, 2005	Moderate Incident	Drown, Gregorio; Allsop, Randall; Wei, Chu	Alcohol	Documented Warning; In-school suspension; Probation
☑	6	May 02, 2005	Moderate Incident	Kammer, Elliott; Loe, Adrian; Beams, @Casandra H	Sexual harassment	Physical Activity
☐	7	Jan 04, 2005	Extremely Severe Incident	Hara, Ashli; Veale, Yu; Boots, Renate	Weapons possession	Demerit

A Number of records currently selected in this grid

B Select all check box: Enables you to select or deselect all the records in the grid at once, even if the grid spans more than one page. You can also select all records by choosing **Select All** from the **Edit** menu.

C Column label: Displays the type of information displayed in this column for each record. If the label is underlined, you can use it to sort the records [*Sorting records, p. 21*].

D Sort indicator: An ▲ arrow indicates that this row is sorted in ascending order. An ▼ arrow indicates descending order.

E Record selection check box: Enables you to select or deselect a record. You can select one or more records at once.

F A selected record: Each row consists of one record.

G Record hyperlink: Enables you to open the record.

H **Prev**/**Next**: Where a grid spans more than one page, displays the previous or next set of records from this grid.

I Records display: Where a grid spans more than one page, this enables you to see the total number of records in the grid and to choose the set to display.

Sorting records

In general, when Chancery SMS generates a grid of records, it lists the records in order from top to bottom according to the first column on the left in ascending order; for example, by Student Name from A to Z. **Note**: For some grid types, such as student search results [p. 44], you have the option of applying a preconfigured *grid view* that sets the column sorting [p. 23].

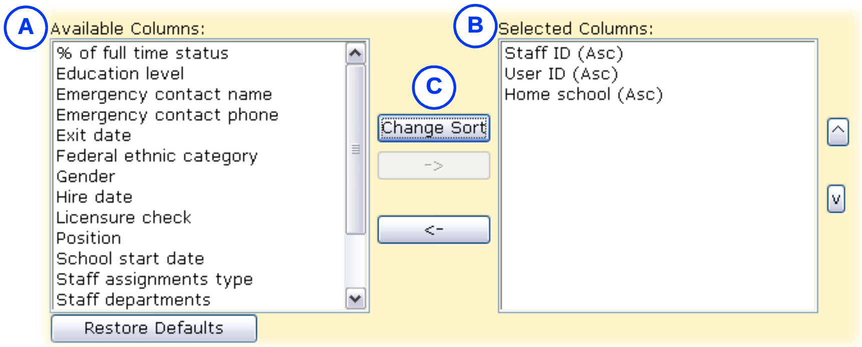
You can change the sorting by one or more columns, in ascending or descending order. For example, you might want to sort a list of staff in ascending order by name, then by gender. Your sorting persists only as long as the grid is displayed; that is, when Chancery SMS generates a new grid, it uses its default grid view sorting or the grid view you last applied [p. 23]. **Note:** You can sort on a field that is not displayed as a column.

To sort the columns in a grid of records:

1. With a grid of records displayed (for example, a set of staff search results), from the **Edit** menu, click **Sort…**. The Sort page appears [Figure 16].
2. Adjust the columns for the purpose of sorting.
   - To remove a field from display, double-click it under **Selected Columns**. Chancery SMS moves it to **Available Columns**.
   - To remove a field from display, double-click it under **Selected Columns**. Chancery SMS moves it to **Available Columns**.
3. Adjust the order of sorting priority:
   - To move a field up, click it to select it and click the up arrow button.

   - To move a field down, click it to select it and click the down arrow button.
4. Click OK.
   - To return to Chancery SMS's default column sorting, click Restore Defaults.

FIGURE 16: Staff record default column sorting


A
B
C
Available Columns:
% of full time status
Education level
Emergency contact name
Emergency contact phone
Exit date
Federal ethnic category
Gender
Hire date
Licensure check
Position
School start date
Staff assignments type
Staff departments
Restore Defaults
Change Sort
->
<-
Selected Columns:
Staff ID (Asc)
User ID (Asc)
Home school (Asc)
^
v

A **Selected Columns** are those on which Chancery SMS sorts the grid. The vertical order corresponds to sort order.

B **Available Columns** are the fields from which you can choose to sort.

C **Change Sort**: Toggles the selected column's sorting scheme between ascending ("Asc") to descending ("Desc").

To sort the grid according to a column:

1. On a grid, click an underlined column label [Figure 15]. The grid's records are sorted in ascending order and an ▲ (up) arrow appears beside the label.
   - To sort in descending order, click the column label again. An ▼ (down) arrow appears.
   - Where the grid spans several pages, clicking a column label on any page has the same effect.

To sort a grid by more than one column:

1. On a page with a grid displayed, from the **Edit** menu, click **Sort...**. The Sort page appears.
2. For **Sort rows by**, select the first column on which to sort.
   - **Note:** You can sort on a field that is not displayed as a column.
3. Set up three more fields on which to sort.
   - The vertical order corresponds to the sort order.
4. Set each chosen field to **Ascending** or **Descending**.
5. Click OK.

Adjusting the columns displayed

On a grid of records, the columns displayed reflect only some of the fields available for each record. You can change which columns are displayed and the left-to-right order in which they are presented. Your changes take effect on all grids of records that Chancery SMS subsequently generates. For some grid types however, such as student search results [p. 44], you have the option of applying a preconfigured *grid view* that sets the columns displayed [p. 23].

To adjust the columns displayed in a grid

1. On the page’s **Edit** menu click **Choose Columns...**. The Choose Columns page appears.
2. Move the field names that you want displayed to the **Available Columns** list.
   - ⓘ To move a field from one list to the other, double-click its name, or click to select it and then click the `<-` or `->` arrow.
3. In the **Available Columns** list, adjust the vertical order of the fields. This is the order in which the columns are displayed left to right.
   - ⓘ To return the columns to Chancery SMS’s original arrangement, click Restore Defaults.
4. Click OK. The grid appears with the columns configured accordingly.

Pre-configured views of a grid of information

Rather than adjusting the display of a grid of information each time you view it, you can apply a pre-configured *grid view*. A grid view defines the columns displayed and the initial sorting of the information that appears in those columns. A grid view applies to a particular type of Chancery SMS page, such as student search results [p. 44]. Thus, each time you view that type of page, you can choose the grid view to apply (should more than one be available). Once you have chosen a grid view for a page type, Chancery SMS applies that same grid view to that page type thereafter until you make another choice.

The grid view that you choose to apply can be a *personal grid view*, which is particular to each user, or a *global grid view*, which is set up by an administrator for the use of others.

To apply a grid view to a grid:

On the page that contains the grid, for **View** [Figure 35], select a grid view.

- ⓘ “(P)” indicates a personal grid view, as in “(P) Students by First Name and Grade”.
- ⓘ “(G)” indicates a global grid view.
- ⓘ Chancery SMS displays the **View** field (that is, a list of available grid views) only on pages to which you can apply a grid view.

The user can set up a grid view and save it for later use, or publish it immediately for the benefit of other users. A school-level user can set up a personal grid view for his or her own use. A School Administrator can set up a personal grid view or a global grid view of school-level information for the use of other school users. A District Administrator can set up a global grid view for the use of all district users or a personal grid view of district-level information. Once a user has set up a personal grid view, it is available only to the login ID [p. 10] in which it was created.

You can do this if your role is:
School Administrator
District Administrator

To set up a grid view:

1. On the home page, in the control bar under **ADMIN**, click **User Settings**. The User Settings page appears, which displays a list of grid views available to you [Figure 17].
2. Under **Grid Views**, select a **Feature Area** [Figure 17].
3. In the **Actions** menu, click **Add Grid View > Personal View**. The Personal Grid View page appears, which displays a list of pages for the selected feature area.
   - ⓘ To set up a global grid view, click **Add Grid View > Global View**.
   - ⓘ To adjust a grid view, select the grid view and in the **Actions** menu, click **Edit Grid View**.
   - ⓘ To delete a grid view, in the **Actions** menu, click **Delete Grid View**.

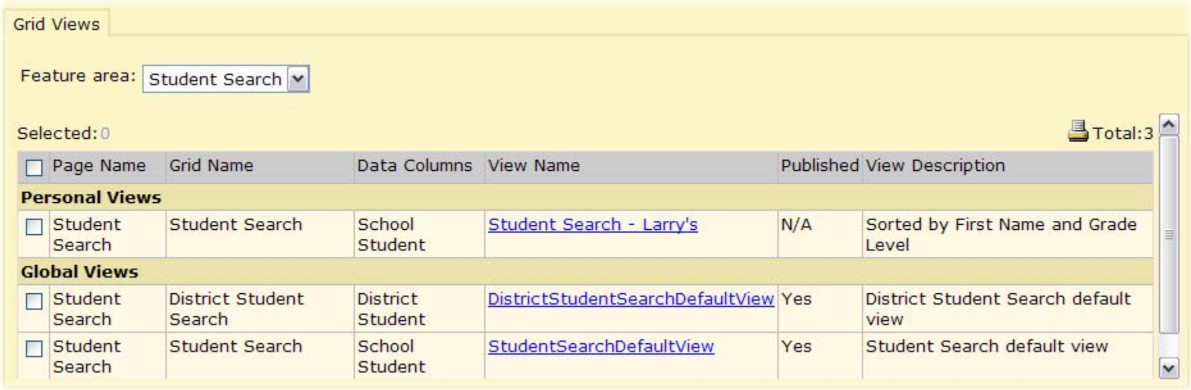
4. Type a **View name**.
5. Type a **View description**.
6. In the list of pages, select the **Page Name/Grid Name** combination to which you want the personal grid view to apply.
   - ⓘ The pages available depend on the logged in user.
7. For a global grid view, set **View options**:
   - ⓘ **Publish**: Chancery SMS saves the view and make it available for use.
   - ⓘ **Unpublish**: Chancery SMS saves the view but does not make it available for use.
8. Click Continue.
9. Under **Define Columns**, set the columns to be displayed [see *Adjusting the columns displayed, p. 22*].
   - ⓘ To use the set of columns displayed in an existing grid view, click **select** (located in the sentence “You may select an...”), choose the grid view in the Copy Grid View popup page.
10. Under **Define Sorting**, set the sort order of the columns to be displayed [see *Sorting records, p. 21*].
11. Click OK. The new personal grid view appears in the list.

Instead of going to User Settings, the user can adjust a grid view, or save it as a new view, when working with a grid of search results.

To set up a grid view from a grid:

1. On the page that contains the grid, beside **View**, click the edit grid view icon [Figure 35]. The Modify Grid View dialog appears.
2. For **View name**, adjust the name as necessary.
   - ⓘ Chancery SMS enters the name of the current view. If you save this grid view without changing the name, Chancery SMS asks if you would like to overwrite the existing grid view of this name.
3. Under **Define Columns**, set the columns to be displayed [see *Adjusting the columns displayed, p. 22*].
   - ⓘ For **Category**, select a relevant schema. This appears only if more than one schema is available. For column categories, Chancery SMS indicates an extension schema by the prefix <Extension name.field name> and a child schema by the prefix (+).
4. Under **Define Sorting**, set the sort order of the columns to be displayed [see *Sorting records, p. 21*].
5. Click Save.

FIGURE 17: Grid views



Feature area: Student Search

Selected: 0

Total:3

☐ Page Name	Grid Name	Data Columns	View Name	Published	View Description
Personal Views					
☐ Student Search	Student Search	School Student	Student Search - Larry's	N/A	Sorted by First Name and Grade Level
Global Views					
☐ Student Search	District Student Search	District Student	DistrictStudentSearchDefaultView	Yes	District Student Search default view
☐ Student Search	Student Search	School Student	StudentSearchDefaultView	Yes	Student Search default view

A **Page Name**: Indicates the grid type to which the grid view applies. In Chancery SMS 7.6.0, you can set up a grid view for the following grid types: Student Search.

B **Grid Name**: A District Administrator can set up a personal view only for District Student Search.

C **View Name**: Click to adjust the grid view.

D **Published**: "Yes" indicates that the grid view is "published" and thus available to users. "N/A" indicates that it is saved but "unpublished" and thus not available.

TABLE 1: Permissions pertaining to grid views

To	You need this permission	Set to	
Create a global grid view	**User Settings > Global Grid View**	Delete	

Printing a grid

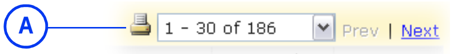
You can print any grid in its entirety in a tabular format with a custom title and comments appended. This is particularly useful for grids that span more than one page. To print a grid, Chancery SMS first generates a PDF (the Adobe® Acrobat® file format) which you can then send to a printer.

To print a list of items that spans several pages:

1. On the Chancery SMS page, near the top of the grid, click the Print icon [Figure 18]. The Grid Print Options page opens.
2. Set report details, which include:
   - **Report Name**: This appears as a header at the top of each page of the report [Figure 19].
   - **Include school/district name**
   - **Expand to show all content**: The report displays all cell content for cTools fields (such as collection, memo, and child collection).
   - **Comments**: These appear on the last page of the report under the heading "Comments".
3. Set options, which include:
   - **Report Format**: For printing, ensure that Report Format is set to **Adobe Acrobat (.pdf)**, which is the default choice.
   - **Print format**: Select **Portrait** orientation (tall and narrow) or **Landscape** (short and wide)
   - **Page size**: Select **Letter** or **Legal** (taller than letter).
4. Click Print. The Grid Print Options page is replaced by a printout in PDF format.
5. On the PDF tool bar, click the Print icon [Figure 19].

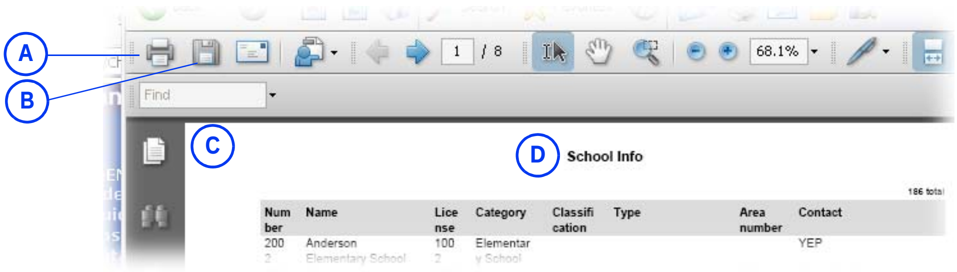
- To save the print version of the report (that is, the PDF file), click the Save icon [Figure 19].

FIGURE 18: Grid print icon



A Print icon: Enables you to print the entire grid or export its information to a specific data format [p. 26].

FIGURE 19: Sample grid printout in PDF format in a popup page



Number	Name	License	Category	Classification	Type	Area number	Contact
2002	Anderson Elementary School	1002	Elementary School				YEP

A Print icon

B Save icon: Saves a copy of the PDF for future use.

C Printout

D Report Name

Exporting information from a grid

As an alternative to generating a printout for a grid, you can export the information from the grid into a format usable in other applications.

To export information from a grid:

1 On the Chancery SMS page, near the top of the grid, click the Print icon [Figure 18]. The Grid Print Options page opens.

2 In the **Output Options** panel, for **Report Format**, click a suitable data format. Options include:

- **Crystal Reports (*.rpt)**, for which the file extension is ".rpt".
- **Microsoft Excel (*.xls)**
- **Microsoft Word (*.doc)**
- **Rich Text (*.rtf)**
- **Comma-separated values (*.csv)**
- **Tab-separated values (*.tsv)**
- **Plain text (*.txt)**

3 Click Print. A File Download dialog appears.

4 Click Save. A Save As dialog appears.

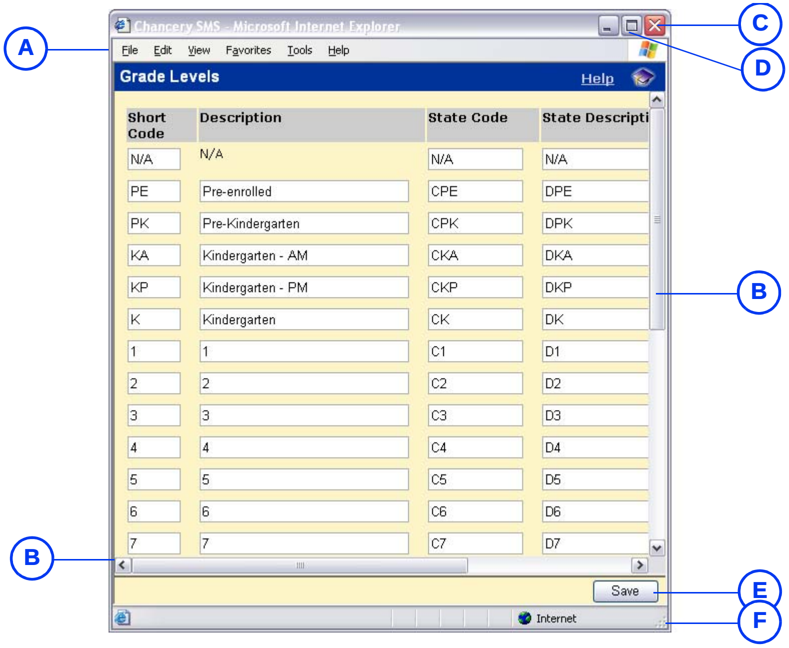
5 Set the **File name** and the location to which the file is to be saved.

6 Click Save. Chancery SMS saves the file to the location specified.

Specialized pages

On occasion, Chancery SMS opens a specialized *popup page* in a new browser window [Figure 20], which is usually smaller than the main page. When you have finished working with the information on a popup page, use the Save or Close button to close the page and ensure that your work is saved.

FIGURE 20: Popup page


A
Chancery SMS - Microsoft Internet Explorer
File Edit View Favorites Tools Help
C
D
Grade Levels
Help
B
B
Save
E
Internet
F

Short Code	Description	State Code	State Descripti
N/A	N/A	N/A	N/A
PE	Pre-enrolled	CPE	DPE
PK	Pre-Kindergarten	CPK	DPK
KA	Kindergarten - AM	CKA	DKA
KP	Kindergarten - PM	CKP	DKP
K	Kindergarten	CK	DK
1	1	C1	D1
2	2	C2	D2
3	3	C3	D3
4	4	C4	D4
5	5	C5	D5
6	6	C6	D6
7	7	C7	D7

A *Popup page*: This appears as a separate browser window.

B Scroll bars: Vertical or horizontal scroll bars appear where the page extends beyond the size of the browser window. **Note:** When you use the `Tab` key to move the selection [p. 27] the page scrolls automatically.

C Close button: This cancels your changes and closes the popup page.

D Maximize button: This enlarges the page to fit the entire screen. On most screens, this is large enough to ensure that all information on the popup page is visible and to remove the need for scroll bars.

E Save button: A typical popup page has a button that saves your changes to the information on this page and closes the page.

F Resize handle: Click, hold and drag this spot (or any of the window's borders) to enlarge or shrink the size of the window.

Note: It is possible to continue working with the main page while a popup page is open. However, if in the course of your work you open the same popup page, a new version of the popup page replaces the old and any unsaved work on the old popup page is lost. Thus, it is prudent to complete work on a popup page and close it before proceeding to other work in a Chancery SMS system.

Printing a page

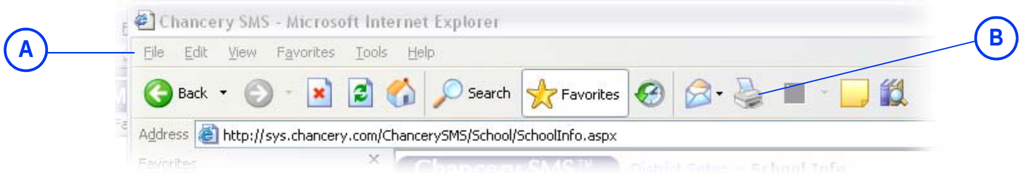
You can print any page. To print the contents of a grid, refer to Working with a grid of information [p. 20].

To print an entire page:

Click the web browser's Print icon [Figure 21].

ⓘ Or from the web browser's **File** menu click **Print**.

FIGURE 21: Sample web browser controls


A
B
Chancery SMS - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Search
Favorites
Address
http://sys.chancery.com/ChancerySMS/School/SchoolInfo.aspx

A **File** menu

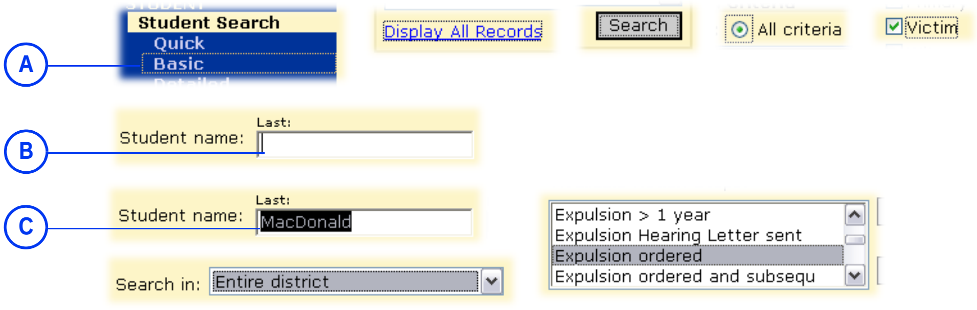
B Print icon

Keyboard control

Typically, you work with Chancery SMS using a mouse-driven pointer while using the keyboard to change information in a field. However, some system users, such as those who enter a lot of information or conduct the same task repeatedly, prefer to use the keyboard as much as possible. These users can make use of the keyboard shortcuts built into the web browser [Table 2].

One of the most useful keys is `Tab`, which enables you to shift the selection through a page's elements until the desired element is selected [Figure 22].

FIGURE 22: Selection examples


A
B
C
Student Search
Quick
Basic
Display All Records
Search
All criteria
Victim
Student name:
Last:
Student name:
Last:
MacDonald
Search in:
Entire district
Expulsion > 1 year
Expulsion Hearing Letter sent
Expulsion ordered
Expulsion ordered and subsequ

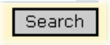
A A rectangle indicates the selection

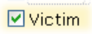
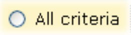
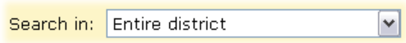
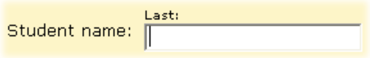
B A cursor indicates the selection

C Highlighting indicates the selection.

On the page, the selection typically appears first in the top left, on the topmost control bar choice, such as **Quick Search** [Figure 5] or in the first field [Figure 22]. From this position, the selection moves each time you press the `Tab` key, typically down the page and to the right. Press `Shift` + `Tab` to move the selection back. For instructions on how to work with the selected control, refer to Table 2 [p. 28].

TABLE 2: Keyboard shortcuts

Task with example	Keyboard shortcut
Click a control Home | Log Off	1 Press `Tab` or `Shift` + `Tab` to cycle through buttons and fields until the button is selected. 2 Press `Enter`.
Click a link Display All Records	1 Press `Tab` or `Shift` + `Tab` to cycle through buttons and fields until the button is selected. 2 Press `Enter`.
Click a button  Search	1 Press `Tab` or `Shift` + `Tab` to cycle through buttons and fields until the button is selected. 2 Press `Enter`.

Task with example	Keyboard shortcut
Select a check box 	1 Press `Tab` until the check box label is selected. 2 Press the `Space` bar. 3 Press `Tab` to set the choice and move on.
Click an option 	1 Press `Tab` until the first option in the set is selected. 2 Press the up or down arrow to select another option. 3 Press `Tab` to set the choice and move on.
Select an item from a list 	1 With the field selected, cycle through the choices by pressing the up or down arrow. - Press `Page Down` to go to the end of the list, `Page Up` to the top. - Press the first letter of a choice to select it. Where more than one choice share the same first letter, press that letter again to cycle through the choices. 2 Press `Tab` to set the choice and move to the next field.
Type in a field 	1 Cycle through buttons and fields by pressing `Tab` or `Shift + Tab` until the cursor appears in the field. - If the field contains text, all of it is selected. 2 Type. 3 Press `Tab` to set the text and move on.

Optimizing your web browser

You work with Chancery SMS using a web browser such as Internet Explorer (on a Microsoft Windows®-based computer) or Safari™(on an Apple® Macintosh® computer). We recommend that you adjust your chosen web browser's settings to optimize Chancery SMS operation and to protect the confidentiality of the student information.

To optimize the web browser:

Ensure that the following settings are in effect (to get access to these settings in Internet Explorer, in the **Tools** menu click **Internet Options...**):

- Accept cookies automatically (on by default)
- Enable active scripting (on by default)
- Do not automatically store web pages on your hard drive. A stored web page, which contains confidential information, may be accessible to other users of your computer. (From the Internet Explorer **Tools** menu select **Options**, then under **Browsing History** click **Settings**, and set "Check for Newer Versions of Stored Pages" to **Automatically**.)
- All AutoComplete options are off. If you allow the browser to remember the text you have typed into fields such as Password and Grade, other users of your computer may get access to that information. For this reason, Chancery SMS does not support AutoComplete. (From the Internet Explorer **Tools** menu select **Options**, then under **Security** click **Advanced**, and deselect "Use Inline Autocomplete".)
- Restrict the use of web browser tool bar extensions and popup blockers. These interfere with the operation of Chancery SMS. The

Yahoo tool bar is one of the more problematic. (From the Internet Explorer **Tools** menu select **Options**, then under **Security** click **Trusted Sites**, then click Sites, and for “Add this Web site to the zone” enter the Chancery SMS system’s URL, and click Add. Deselect “Require server verification (https:)”.)

Alerts

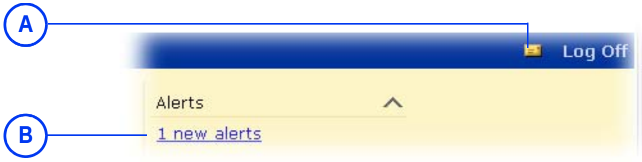
Chancery SMS can automatically monitor information and conditions in the system for changes that are relevant to your role [p. 12]. When a relevant change occurs, Chancery SMS alerts you to it; for example, when working as a Teacher, you could be notified when another system user records that one of your students will be absent on a future date, or when working as an administrator you could be notified when a time-consuming report is complete, or when an unusual attendance pattern occurs [p. 155]. Chancery SMS alerts you only to those conditions to which you have subscribed [p. 31]. A District Administrator sets up alerting parameters [p. 196].

Chancery SMS generates an *alert* [Figure 23] for you when information matches criteria defined in an *alert definition*. Chancery SMS checks all alert definitions every five minutes. (Alert definitions [p. 32] are assigned to roles by an administrator or technician.)

Chancery SMS alerts you by displaying:

- An alert icon on the task bar [Figure 23]
- An alert link on the home page [p. 14] under **Alerts** [Figure 23]
- (Optional) An alert message sent to your mobile phone [Figure 26].

FIGURE 23: Alert indicators in Chancery SMS



A Alert icon: Click to view a list of all alerts [p. 30].

B Alert link: Click to view a list of all alerts [p. 30].

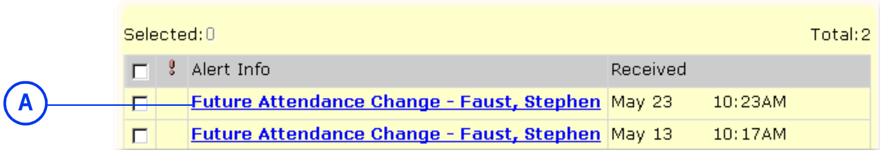
Viewing an alert

Chancery SMS maintains an alert for 30 days or until you delete the alert. You can view the details of an alert at any time and delete it if necessary.

To view an alert:

1. Click the alert icon (typically found on the home page) [Figure 23]. The Alert List page appears [Figure 24].
2. In the **Alert Info** column, click the alert’s name. The Open Alert page appears [Figure 25].
    - ⓘ Or select one or more alerts and in the **Actions** menu click **Open Alert**.
    - ⓘ To delete an alert, select the alert and in the **Actions** menu click **Delete Alert**.

FIGURE 24: Alert List page

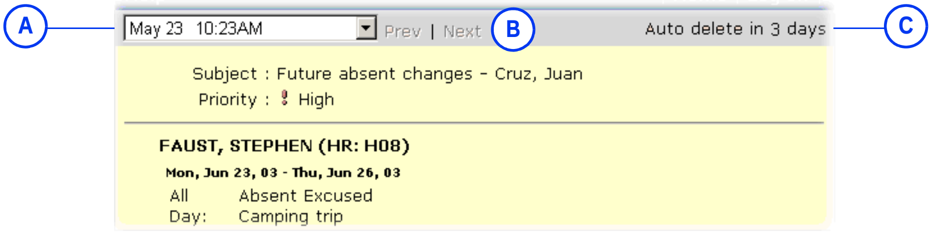


Selected:0 Total:2

☐	!	Alert Info	Received	
☐		**Future Attendance Change - Faust, Stephen**	May 23	10:23AM
☐		Future Attendance Change - Faust, Stephen	May 13	10:17AM

A Alert: Chancery SMS displays in bold type alerts you have not viewed.

FIGURE 25: Open Alert page



Subject : Future absent changes - Cruz, Juan
Priority : ! High

FAUST, STEPHEN (HR: H08)
Mon, Jun 23, 03 - Thu, Jun 26, 03
All Day: Absent Excused
Camping trip

A Date: If you selected more than one alert to view at a time, select the date of an alert to view.

B **Prev|Next**: If you selected more than one alert to view at a time, click these to cycle through the selected alerts.

C **Auto delete**: Indicates how soon Chancery SMS will delete the alert. 30 days is the maximum.

When you have noticed and investigated an alert, you can remove it from display.

To remove an alert from display:

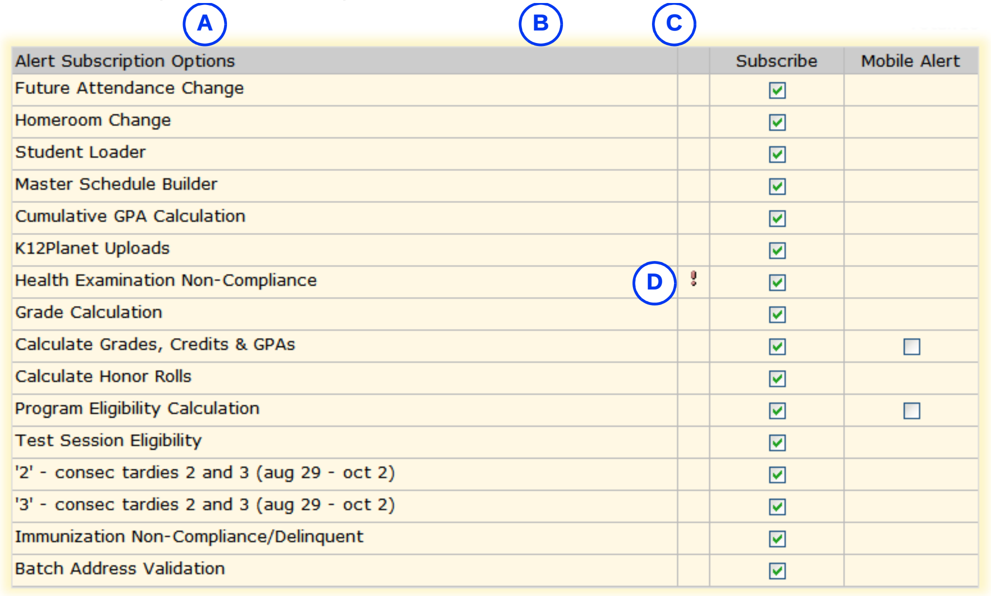
1. On the Alert List page, select one or more alerts.
2. In the **Actions** menu click **Delete Alert**.

Subscribing to alerts

Chancery SMS alerts you only to alert definitions [p. 32] to which you have subscribed. When you first start working with a system, you are automatically subscribed to all alert definitions available to your role. Thereafter, you control the definitions to which you subscribe [Figure 26].

Some roles [p. 12] are subject to *standard alerts*, that is, alert definitions to which all users with a particular role are automatically subscribed; for example, a homeroom Teacher will receive a Future Absent Attendance Alert when a change is made to the future attendance of a student in his or her homeroom. Chancery SMS alerts each user who is assigned to the appropriate role, provide that role is active, the user's account is active, and within the user account that role is also set to active [p. 186].

FIGURE 26: Sample alert subscriptions



Alert Subscription Options		Subscribe	Mobile Alert
Future Attendance Change		☑	
Homeroom Change		☑	
Student Loader		☑	
Master Schedule Builder		☑	
Cumulative GPA Calculation		☑	
K12Planet Uploads		☑	
Health Examination Non-Compliance	!	☑	
Grade Calculation		☑	
Calculate Grades, Credits & GPAs		☑	☐
Calculate Honor Rolls		☑	
Program Eligibility Calculation		☑	☐
Test Session Eligibility		☑	
'2' - consec tardies 2 and 3 (aug 29 - oct 2)		☑	
'3' - consec tardies 2 and 3 (aug 29 - oct 2)		☑	
Immunization Non-Compliance/Delinquent		☑	
Batch Address Validation		☑	

A **Alert Subscription Options**: Alert definitions available to you.

B **Subscribe**: Enables you to subscribe or unsubscribe to an alert definition. Some subscriptions are standard, that is, automatically assigned to your role.

C **Mobile Alert**: Gives you the option of subscribing to an alert on your mobile phone in addition to the alerts received through the regular subscription. This option is available only on some alert definitions. When you receive the text alert, the sender name on your mobile device appears as "[Districtname]@Chancery.SMS.com".

D **!**: Indicates that this alert is high priority.

To subscribe to an alert definition:

1 On the home page's **Action** menu, click **Change Alert Subscription...**. The **Change Alert Subscription** page appears and displays a list of available alerts [Figure 26].

2 In the **Subscribe** column, select the check box for each alert to which you want to subscribe.

ⓘ If a check box is available in the **Mobile Alert** column, select the check box of each alert for which you want to receive an alert in the form of a text message to your mobile phone.

3 Click OK.

Or

On the Alert List page, in the **Actions** menu click **Change Alert Subscription...**.

TABLE 3: Permissions pertaining to alerts

To	You need this permission	Set to	
Change an alert	**School Setup > Alert Setup**	Delete	

Alert definitions

An *alert definition* specifies the information and conditions in the system that Chancery SMS monitors for changes. When a relevant change occurs, the system sends an *alert* to users who are subscribed to that alert definition.

Several alert definitions are provided with a Chancery SMS system. These alert definitions are assigned to user roles [p. 12], such as School Administrator [Table 4] . An administrator can adjust an alert definition, for example to have Chancery SMS send it to school staff. Any user associated with the role [p. 12] is automatically subscribed to the alert definition (however, for some alerts, the user has the option of unsubscribing [p. 31]).

TABLE 4: School administrator alerts

Alert	Options	Reference
Batch Address Validation		Student Demographics: Address/Phone [p. 56]
Calculate Grades, Credits & GPAs	Mobile	
Calculate Honor Rolls		
Cumulative GPA Calculation		
Daily Attendance Code Calculation Failure		Calculating daily attendance codes [p. 125]
Future Attendance Change		Student record: Attendance [p. 61]
Grade Calculation		
Health Examination Non-Compliance		
Homeroom Change		
Immunization Non-Compliance/Delinquent		
Master Schedule Builder		
Program Eligibility Calculation	Mobile	Programs [p. 76]
Student Loader		
Test Session Eligibility		
User Account Locked	Mobile, High priority	User accounts [p. 185]

You can do this if your role is:
School Administrator

To adjust an alert definition:

1. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **School**, click **Alerts**. The Alerts page appears
   - The Alerts page displays all alerts, active or not.
3. Click the alert definition. The Edit Alert page opens.
4. Enter or change information, which includes:
   - **This Alert is**: The default is **On**. When set to **Off**, the alert does not generate active alerts [Figure 23].
   - **Alert is HIGH Priority**: Check to have Chancery SMS display a high priority indicator ("!") wherever this alert appears.
   - **Alert Name**
   - **Description**: An explanation of the alert that Chancery SMS displays with its name where space permits.
   - **Alert Message**: Chancery SMS appends this message to any alert. This message is included in a mobile alert (an SMS text message).
5. Click OK.

2 Student management

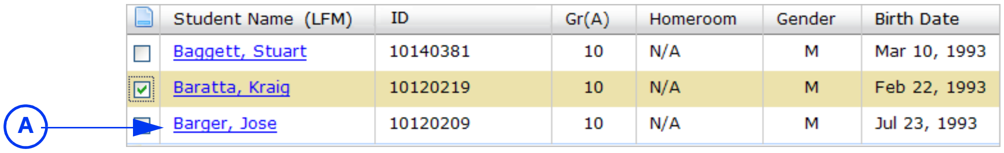
In general, a District or School Administrator sets up student records for use by school staff. A School Administrator can view a student record and maintain the information therein. Once a student is enrolled at a school, staff at that school (such as School Secretaries, Teachers, School Administrators, and School Health professionals) can view that student's record and add and change some information, such as grades and attendance. For changes to class and homeroom assignments, refer to the *Chancery SMS Scheduling Guide*.

These capabilities vary, subject to roles [p. 12] and the permissions [p. 189] of individual users; for example, a typical Teacher can view students in his or her classes and homerooms, a School Administrator all students in the school, and a District Administrator all students in the system.

Viewing student information

You can view information on a student through his or her student record [p. 50]. In general, wherever you can see a student's name, you can view that student's record by clicking the name, which is linked to the relevant record.

FIGURE 27: Student link examples



	Student Name (LFM)	ID	Gr(A)	Homeroom	Gender	Birth Date
☐	Baggett, Stuart	10140381	10	N/A	M	Mar 10, 1993
☑	Baratta, Kraig	10120219	10	N/A	M	Feb 22, 1993
☐	Barger, Jose	10120209	10	N/A	M	Jul 23, 1993

A Student name: Click to view a student's record. **Note:** A student name in italics indicates an inactive student [p. 49].

You can do this if your role is:
Teacher
School Administrator

To quickly view all students (for which you have permission):

On the home page [p. 14], click **All Students**. A complete list of student records (to which your role has access) for the school appears [Figure 27].

- ⓘ If your role is Teacher, the link you click is **My Students** and Chancery SMS displays a list of records for your students only.
- ⓘ The Quick Search page serves as the home page for all roles except that of Teacher. To view the Quick Search page as a Teacher: on the home page, in the control bar under **SEARCH**, click **Student**.

ⓘ Chancery SMS displays the first 1000 student records. If the system holds more than 1000 student records, search for particular student records using basic [p. 38] or detailed criteria [p. 40].

ⓘ Or reuse a previously specified search by selecting it from the **List** box.

ⓘ If the Quick Search page is not your home page, open it as follows: On the home page, in the control bar under **SEARCH**, click **Student**. The Quick Search page appears.

Among the other means through which you can locate a student record are:

- Searching for students [p. 36]
- A family [p. 47]
- A class or homeroom roster [p. 15] [p. 15]
- A grading list [p. 15]
- An attendance list [p. 15]
- A list of award recipients [p. 65]
- A list of program participants [p. 76]

Searching for students

In circumstances where you want to view a particular student or a specific subset of all students, Chancery SMS offers several types of searches:

- Quick student search [p. 36]
- Advanced student search [p. 38]
- Families search [p. 47]
- Recent and saved searches [p. 42]
- Search of inactive students from past years [p. 49]

In general, a search generates a list of students that your role [p. 12] has permission to view. After you conduct a successful search you can save the search criteria for future use *[Recent and saved searches, p. 42]* or save the results as a list that you can re-use when necessary [see *Saved student lists, p. 43*].

Quick student search

The quick student search enables you to quickly search for students by last name, first name, or ID number. You can search for a particular student or a list of students that matches your criteria. You also have the option of viewing all students for which your role [p. 12] has permission and viewing students by grade.

To conduct a quick student search:

1. On the home page [p. 14], for **Student name or ID**, enter the first few characters of a student's last name, first name, or ID number. Chancery SMS displays a list of up to 10 potential matches [Figure 29].

   ⓘ The Quick Search page serves as the home page for all roles except that of Teacher. To view the Quick Search page as a Teacher: on the home page, in the control bar under **SEARCH**, click **Student**.

   ⓘ The potential matches change as you enter more characters.

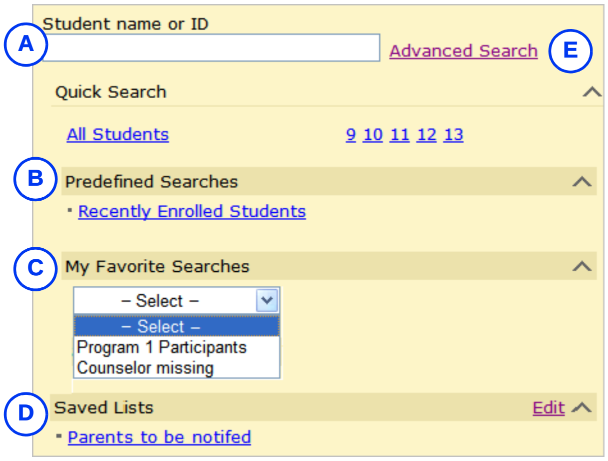
   ⓘ In the list of potential matches, those matching the last name are listed first, followed by those matching the ID number, then those matching the first name.

- ⓘ To search specifically for a first and last name combination, enter all or part of the last name followed by a comma and then all or part of the first name. For example, entering “Beni,Ada” would generate a match for “Benito, Adam”.
- ⓘ Quotation marks (“) have no effect.
- ⓘ If you paste text into the box using the mouse (right-click in the box and choose Paste from the menu), press the `Enter` key to have Chancery SMS display the potential matches. If you paste text into the box using `Ctrl+v`, Chancery SMS displays potential matches immediately.
- ⓘ Or click **All Students** [Figure 28] to view all the students in the school.
- ⓘ Or click a grade level [Figure 28] to view all the students in a particular Grade.

2 Select a potential match using the cursor or the arrow keys and then press `Enter`. That Edit Student Demographics page for the selected student’s record appears [p. 50].

- ⓘ Or, select **More records, go to search results page...** [Figure 29] (or press the `Enter` key) to see a list of students for which the last name or ID number contain the characters typed. In the **Search Results** panel, Chancery SMS displays a list of students that match your search criteria.
  - In the **Advanced Student Search** panel, Chancery SMS displays relevant detailed search criteria [p. 40].
  - You can changed the sorting of these results or adjust the columns displayed [p. 44].

FIGURE 28: Quick Search page


Student name or ID
A
Advanced Search
E
Quick Search
All Students
9 10 11 12 13
B
Predefined Searches
Recently Enrolled Students
C
My Favorite Searches
– Select –
– Select –
Program 1 Participants
Counselor missing
D
Saved Lists
Edit
Parents to be notifed

A **Student name or ID**: You can search by the first few characters of a student’s first name, last name, or ID number. For example, entering “bry” generates results that includes students with the last name of “Bryson” and the first name “Bryan” [Figure 29]

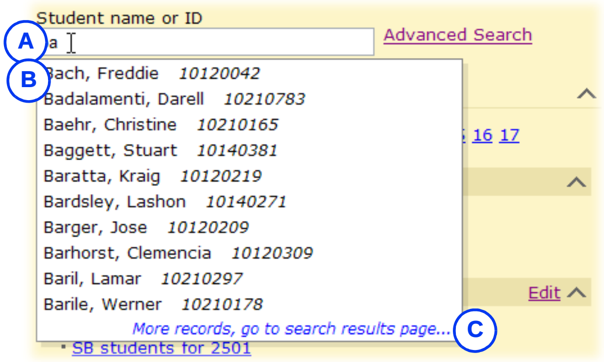
B **Pre-defined Searches**: Searches for which the criteria are fixed. Click a search to generate current results, which Chancery SMS displays on the Advanced Search page [p. 38].

C **My Favorite Searches:** Saved favorite searches from the Student Search page **[p. 42]**. To run a favorite search, select it from the list.

D **Saved Lists**: The results of previously conducted searches. You can change the contents of these lists [p. 43].

E **Advanced Search**: Click to search using other, or more detailed, criteria [p. 38].

FIGURE 29: Student name or ID potential matches


Student name or ID
a
Advanced Search
A
B
Bach, Freddie 10120042
Badalamenti, Darell 10210783
Baehr, Christine 10210165
Baggett, Stuart 10140381
Baratta, Kraig 10120219
Bardsley, Lashon 10140271
Barger, Jose 10120209
Barhorst, Clemencia 10120309
Baril, Lamar 10210297
Barile, Werner 10210178
More records, go to search results page...
C
16 17
Edit
SB students for 2501

A	Characters for which Chancery SMS is searching.
B	List of up to 10 potential matches
C	**More records, go to search results page...**: Appears if Chancery SMS finds more than 10 potential matches. Clicking this Generates a list of all students for which the last name or ID number match the character search string.

Advanced student search

You can search for a specific set of students based on the information stored in many of the fields found in a student record, such as Age, Birth date, Gender, names, telephone numbers, geocodes, Ethnic Category, grade level, Student Number, and SSN/SIN. To perform an advanced student search you configure search criteria and then run the search. You also have the option of viewing all students for which your role [p. 12] has permission.

To set up and run a search for student records using basic criteria:

1 On the home page [p. 14], click **Advanced Search**. The Advanced Student Search page appears.

- ⓘ The Quick Search page serves as the home page for all roles except that of Teacher. As a Teacher, to view the Quick Search page: on the home page, in the control bar under **SEARCH**, click **Student**.

2 Under the **Basic** tab, Chancery SMS displays a default search setup. This consists of the following three search criteria [Figure 30]:

- ⓘ First criterion:
  “Last name starts with *Enter a value...*”.
- ⓘ Second criterion:
  “Student number starts with *Enter a value...*”.
- ⓘ Third criterion:
  “SchoolStudent saved lists equals *Enter a value...*”.

3 Configure each search criterion as follows:

- ⓘ If you do not enter a value for a criterion, Chancery SMS ignores that criterion when you run the search.

a Enter the value to find: click “*Enter a value...*”, type a value, and click OK.

- For text fields, the case of the search value does not matter; for example, “lancaster” finds “Lancaster”.
- Spaces are relevant; for example, “delos santos” will not find “de los santos”.
- You can enter a maximum of 100 characters in a text field, 25 in a numeric, and 10 in a date field.

- **b** [Optional] Change the operator: click “Operator: starts with” and click an item in the list.
  - The field on which you are searching determines which operators are available. Typical operators include: contains, starts with, ends with, equals, does not equal, is empty, is not empty, is in list.
  - The operator “is in list” enables you to enter several values at once (separate each with a comma).
- **c** [Optional] Change the field name: click “Field:...” and click an item in the list.
  - Only a limited set of fields are available here. More fields are available in a Detail search [p. 40].

4 [Optional] Add another search criterion:

- **a** Click Add. A new search criterion appears as follows [Figure 30]: “Select a field... Operator... Enter a value...”.
- **b** Click each part of the criterion to configure it.

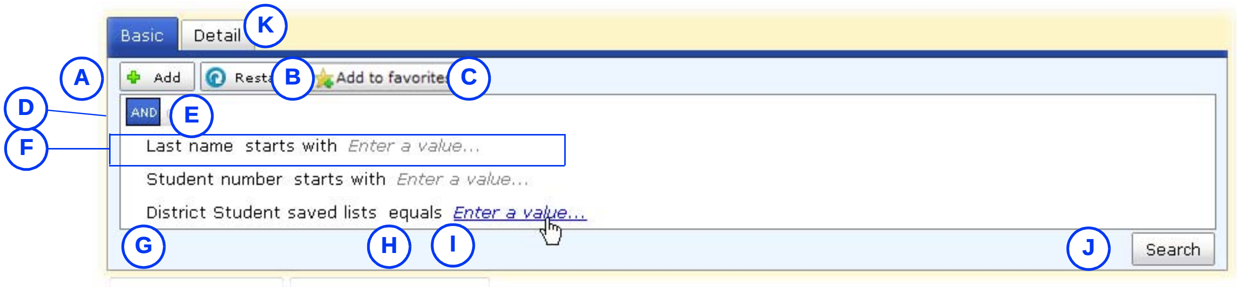
5 [Optional] Click OR to set the search to find records that match *any* of the criteria [Figure 30].

- ⓘ AND sets the search to find records that match *all* of the criteria.

6 Click Search. Chancery SMS runs the search and displays matching student records (if any) under **Search Results**.

- ⓘ You can changed the sorting of these results or adjust the columns displayed [p. 44].
- ⓘ Chancery SMS saves the search criteria. Should you want to conduct this same search again, click Most recent searches **[p. 42]**.
- ⓘ When you run a recent or favorite search, Chancery SMS displays the criteria under **Basic**.
- ⓘ To save the search criteria, click Add to favorites **[p. 42]**.

FIGURE 30: Basic student search: default criteria


Basic
Detail
K
A
Add
Resta
B
Add to favorites
C
D
AND
E
F
Last name starts with Enter a value...
Student number starts with Enter a value...
District Student saved lists equals Enter a value...
G
H
I
J
Search

A Add: Adds a new unconfigured search criterion. Use the AND/OR buttons to set the nature of the new criterion.

B Restart: Resets the search criteria to one incomplete search criterion as follows: “Select a field... Operator... Enter a value...” [Figure 31].

C Add to favorites: Saves the search criteria you have configured **[p. 42]**.

D AND: Sets the search to find students who match *all* of the criteria in the list. In general, this generates fewer results.

E OR: Sets the search to find students who match *any* of the criteria in the list. In general, this generates more results.

F Criterion

G Field: Click it to choose a field.

H Operator: Click it to choose an operator.

I Value: Click it to enter a value.

J Search: Runs the search using the criteria as you have configured them.

K **Detail**: Enables you to build a search using a larger range and combination of fields, including custom fields [p. 40].

To display all student records in a school:

1. On the home page, in the control bar under **SEARCH**, click **Student**. The Quick Search page appears.
2. Click **Advanced Search**. The Advanced Student Search page appears.
3. Under the **Basic** tab, click Display All Records.

Detailed student search

Using a detailed student search, you can search by one or more fields (including custom fields), typically a combination of commonly used information such as Name or Grade and unusual criteria such as Disability or Graduation Date. This search involves building a set of criteria, which can be grouped and organized logically using and/or statements. The tools enable you to build complex queries [Figure 32].

Chancery SMS remembers your 10 most recent searches so that you can re-run them if you wish **[p. 42]**. Or, you can save any search for re-use as a *favorite search* under a name of your choice. You also have the option of viewing all students for which your role [p. 12] has permission.

To conduct a search for student records using detailed criteria:

1. On the home page [p. 14], click **Advanced Search**. The Advanced Student Search page appears.
   - ⓘ The Quick Search page serves as the home page for all roles except that of Teacher. As a Teacher, to view the Quick Search page: on the home page, in the control bar under **SEARCH**, click **Student**.
2. Click the **Detail** tab. Chancery SMS displays a default search setup. This consists of one incomplete search criterion as follows [Figure 31]:
   "*Select a field... Operator... Enter a value...*".
3. Under **Detail**, configure the first search criterion [Figure 31]:
   - a Set the field on which to search: click "*Select a field...*" and click an field name in the list.
     - Since the system contains many fields on which you can search, they are organized into sets. Choose a set from the **Category** list.
   - b Set the operator: click "*Operator...*" and click an operator in the list.
     - The field on which you are searching determines which operators are available. Typical operators include: contains, starts with, ends with, equals, does not equal, is empty, is not empty.
     - For the field "Student number" (also known as "Student ID"), the operator "is in the list" enables you to enter as the value a list of one or more student numbers. Separate each number with a comma (that is, comma delimited) and leave out spaces. The list can contain up to 250 characters.
   - c Enter the value to find: click "*Enter a value...*" and type a value.
     - For text fields, the case of the search value does not matter; for example, "lancaster" finds "Lancaster".
     - Spaces are relevant; for example, "delos santos" will not find "de los santos".
     - You can enter a maximum of 100 characters in a text field, 25 in a numeric, and 10 in a date field.
     - Use "%" to search for group of unknown characters; for example, "starts with S%h" finds "Smither" and "Soh".
     - Use "_" to search for an unknown character; for example, "starts with S_r" finds "Street" and "Serafin".

- Use [ ] to search for a character that is normally a “wildcard” character (for example, “%” is a wildcard character that searches for an unknown group of characters); for example, “[_]r” finds “John_Sr.”, “[%]” finds “95%”.

4 [Optional] Add another criterion: click Add and configure the new criterion.

   ⓘ Chancery SMS displays the new criterion as: “*Select a field... Operator... Enter a value*”.

5 [Optional] Logically arrange your completed criteria [Figure 32]:

   ⓘ To group two or more criteria, select each criterion and click Group.

   ⓘ To ungroup the criteria in a group, click the group’s icon.

   ⓘ To remove a criterion, click it to select it and click Delete.

   ⓘ To set a criterion or group to be an alternative to the others, click OR above the criterion.

   ⓘ To add a criterion or group to the others, click AND above the criterion.

6 Click Search. Chancery SMS displays matching student records (if any) under **Search Results**.

   ⓘ You can change the sorting of these results or adjust the columns displayed [p. 44].

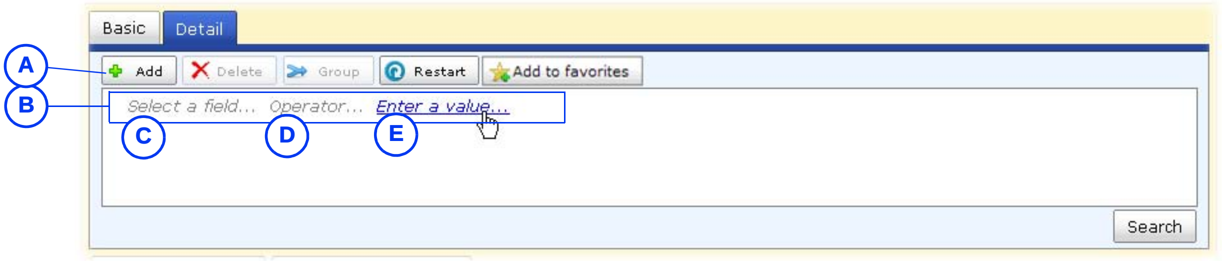
   ⓘ Chancery SMS saves the search criteria. Should you want to conduct this same search again, click Most recent searches **[p. 42]**.

   ⓘ When you run a recent or favorite search, Chancery SMS displays the criteria under **Detail**.

   ⓘ Chancery SMS may rationalize or re-organize your search criteria slightly (for example, make a group) when you run the search.

   ⓘ To save the search criteria, click Add to favorites **[p. 42]**.

FIGURE 31: Detail student search: default criteria



A Add: Adds a new unconfigured search criterion. Use the AND/OR buttons to set the nature of the new criterion.

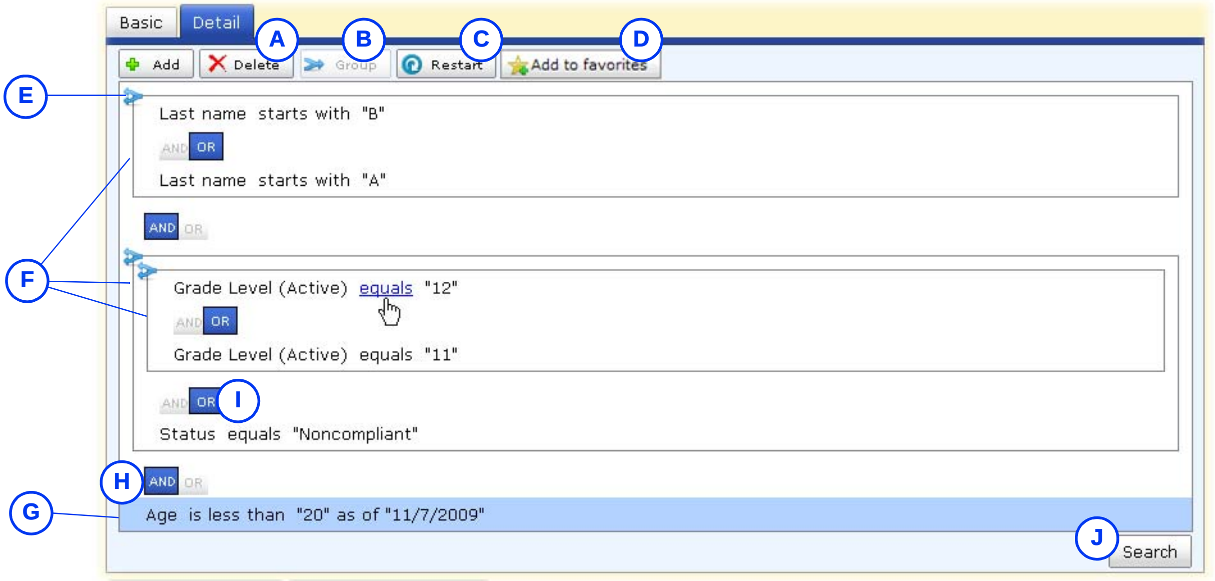
B Criterion: To select the criterion, click to the left of the field name.

C Field: Click it to choose a field.

D Operator: Click it to choose an operator.

E Value: Click it to enter a value.

FIGURE 32: Detail student search: sample criteria



Last name starts with "B"
OR
Last name starts with "A"
AND
Grade Level (Active) equals "12"
OR
Grade Level (Active) equals "11"
OR
Status equals "Noncompliant"
AND
Age is less than "20" as of "11/7/2009"

A Delete: Deletes the selected criterion.
B Group: Groups two or more selected criteria into a separate group.
C Restart: Resets the search criteria to the default setup (displayed).
D Add to favorites: Saves the search criteria you have configured [p. 42].
E Group icon: Click this to ungroup the criteria in the group.
F Group: Each group or criteria is separated from others by AND or OR.
G Criterion (selected): To deselect a criterion, click to the left of the field name.
H AND: Adds the criteria below it to the other search criteria. In other words, this sets Chancery SMS to find records that match *all* the criteria separated by AND. This generates fewer results than selecting OR.
I OR: Sets the criteria below it to be an alternative to the other criteria. In other words, this sets Chancery SMS to find records that match *any* the criteria separated by OR. This generates more results than selecting AND.
J Search: Runs the search using the criteria as you have configured them.

Recent and saved searches

Chancery SMS remembers your 10 most recent searches so that you can re-run them if you wish. Or, you can save any search criteria for re-use as a *favorite search* under a name of your choice. This enables you to run the search again on the information currently in the system to generate fresh results. You can save up to 50 favorites; these are available on the Student Search page only to the User ID in which you saved them.

To re-run a recent search:

1. On the Student Search page [Figure 30], click Most recent searches. Chancery SMS displays a list of the 10 most recent searches.
2. Select a search. Chancery SMS conducts the search and displays the results.

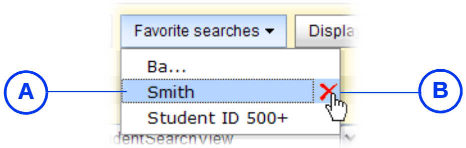
To save search criteria for re-use:

1. On the Student Search page, click Add to favorites. The Add Favorite Search dialog appears.
2. Type a **Name** and click OK. Chancery SMS saves the search criteria.

   ⓘ To run the search, click Favorite searches and select the name from the list.

- To delete a favorite search, click Favorite searches and click the delete icon beside its name in the list [p. 43].

FIGURE 33: Favorite searches



A	Saved search	**B**	Delete icon: Deletes the saved search.

Saved student lists

Once you have conducted a search and generated a resulting list of students, you can save some or all of these results as a *saved list* (which appears on the Quick Search page [Figure 28]) or replace an existing saved list. You can delete a saved list (which has no effect the student records therein).

A saved list is a static list of students. The list only changes if you make changes to it, regardless of your original search criteria or changes to information on students in the list. For example, if you search for Grade 7 students and save the results in a list, the students remain in that list the next year even though they may have moved on to Grade 8.

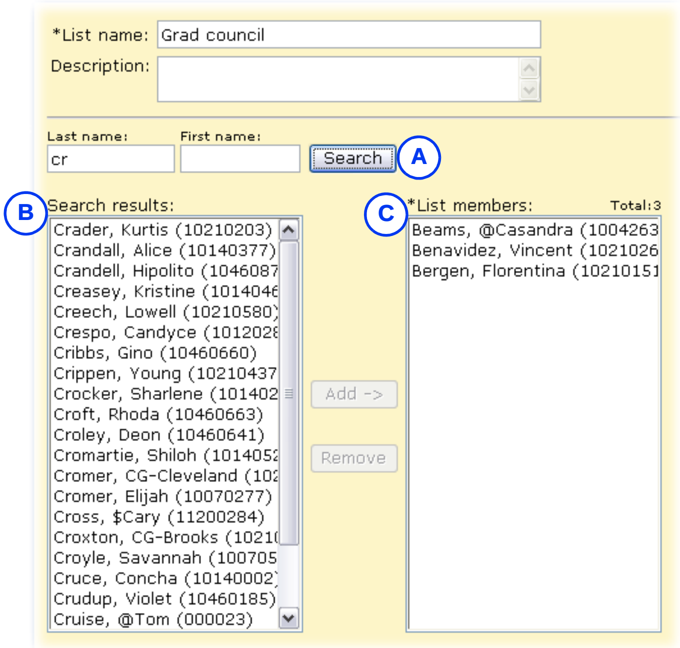
To create a saved list:

1. Conduct a student search.
2. Select one or more students.
3. In the **Actions** menu click **Save to list...**. The Save To List page appears.
4. Click **Create New List** and type a name and description.
    - To replace an existing saved list, click **Add to Existing List** and select the list.
    - Chancery SMS may not display inactive students [p. 49] in the saved list. To view all student types in the list, edit the list and view **List members** [Figure 34] or report on the list [p. 46].
5. Click OK.

To change the contents of a saved list:

1. On the **Quick Search** page [Figure 28], in the **Saved Lists** panel, click **Edit**. The Saved List page appears.
2. Select a saved list.
3. In the **Actions** menu click **Edit Saved List...**. The Edit Saved List page appears [Figure 34].
    - Or click the saved list's name.
    - To delete a saved list, in the **Actions** menu click **Delete Saved List...**.
4. Adjust options, which include:
    - **List name**
    - **Description**
    - **List members**: The students in the saved list. You can remove students or add students from the Search results list [Figure 34]. This list is complete—it shows all students in the list, including withdrawn and graduated.
5. Click OK.

Figure 34: Edit Saved List page



*List name: Grad council
Description:
Last name: cr
First name:

Search results:
Crader, Kurtis (10210203)
Crandall, Alice (10140377)
Crandell, Hipolito (1046087
Creasey, Kristine (1014046
Creech, Lowell (10210580)
Crespo, Candyce (1012028
Cribbs, Gino (10460660)
Crippen, Young (10210437
Crocker, Sharlene (101402
Croft, Rhoda (10460663)
Croley, Deon (10460641)
Cromartie, Shiloh (1014052
Cromer, CG-Cleveland (102
Cromer, Elijah (10070277)
Cross, $Cary (11200284)
Croxton, CG-Brooks (10210
Croyle, Savannah (100705
Cruce, Concha (10140002)
Crudup, Violet (10460185)
Cruise, @Tom (000023)

*List members: Total:3
Beams, @Casandra (1004263
Benavidez, Vincent (1021026
Bergen, Florentina (10210151

A Search: Enables you to search for students to add based on Last and/or First name. The results are displayed in Search results.

B **Search results**: Add one or more of these students to the saved list. To add a student, search for the student, select the name from **Search results**, and click Add.

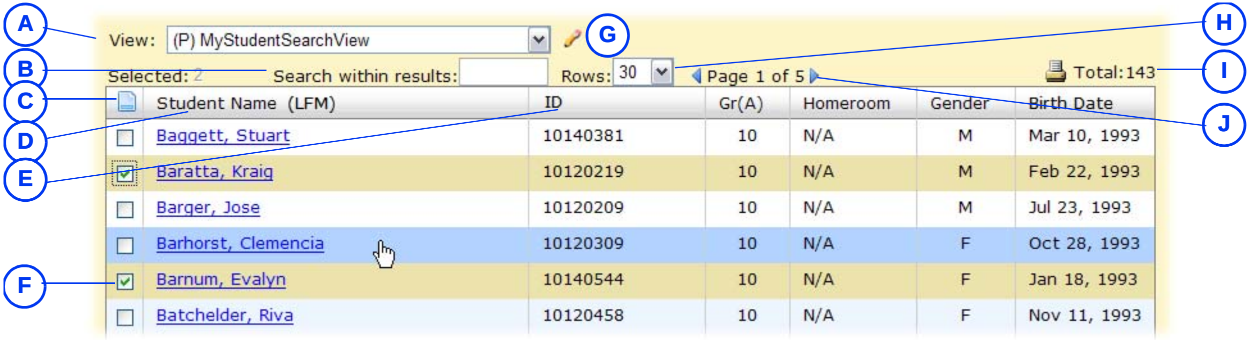
C **List members**: The students in the saved list. To remove a student, select the student and click Remove.

Adjusting the student search results display

A successful search of student records generates a list of results. Chancery SMS displays the results on one or more pages. There is no limit to the number of results Chancery SMS can display, however you can only select [Figure 35] up to 1000 at a time.

By default, Chancery SMS displays several columns of information, starting with Student Name [Figure 35]. Chancery SMS sorts the list of student records by Student Name, a sorting you can change [p. 46]. You can change the columns displayed and how they are sorted by choosing a pre-configured *grid view* [p. 23]. You can filter the results according to a student's status: active, incoming, or withdrawn [Figure 36].

Figure 35: Student record search results: Default columns and sorting



View: (P) MyStudentSearchView
Selected: 2 Search within results:
Rows: 30 Page 1 of 5 Total:143

	Student Name (LFM)	ID	Gr(A)	Homeroom	Gender	Birth Date
☐	Baggett, Stuart	10140381	10	N/A	M	Mar 10, 1993
☑	Baratta, Kraig	10120219	10	N/A	M	Feb 22, 1993
☐	Barger, Jose	10120209	10	N/A	M	Jul 23, 1993
☐	Barhorst, Clemencia	10120309	10	N/A	F	Oct 28, 1993
☑	Barnum, Evalyn	10140544	10	N/A	F	Jan 18, 1993
☐	Batchelder, Riva	10120458	10	N/A	F	Nov 11, 1993

A **View**: Enables you to change to a pre configured grid view [p. 23].

B **Search within results**: Enables you to filter the list of results [p. 45].

C Select all/Deselect all: Enables you to select all records on the page. You can select up to 1000 at once, across all pages. You can filter the results by your selection [p. 45].

D **Student Name**: Chancery SMS sorts the list of student records by the values in this column in ascending order. You can adjust the column sorting [p. 46].

E Column: Displays information from a student record field, in this case **Student Number**. The default columns are shown. Click a column to sort the list on the contents of that column [p. 46].

F Select/deselect a record: Enables you to select a record. Press Shift before you click to select several consecutive records. You can make selections on different pages of the search results—Chancery SMS retains your selection while paging.

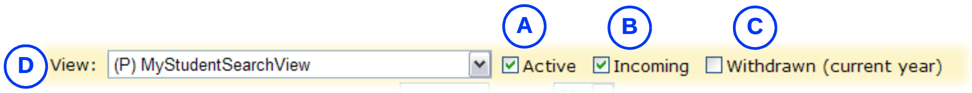
G Edit grid view icon: Enables you to configure the grid view [p. 23] and save it.

H **Rows**: Enables you to change the number of rows that Chancery SMS displays on each page of results.

I **Total**: The total number of records in this search result (on all pages, if displayed on more than one page). You can filter the results according to student status [Figure 36].

J **Page # of #**: Indicates the number of pages of records (which varies according to the number of Rows). Click the right arrow to display the next page, the left arrow to display the previous. To specify a particular page, click the current page number, type the page number you want, and press `Enter`.

FIGURE 36: Student status filter



View: (P) MyStudentSearchView ☑ Active ☑ Incoming ☐ Withdrawn (current year)

A **Active**: When checked, indicates that the search results exclude inactive students [p. 49].

B **Incoming**: When checked, indicates that the search results include only students coming to the school or scheduled to join a class or homeroom at a future date [p. 49].

C **Withdrawn (current year)**: When checked, indicates that the search results include students who have withdrawn this year from the school in which they were enrolled or from a class or homeroom [p. 49].

D **View**: The current grid view [p. 23]

Filtering student search results

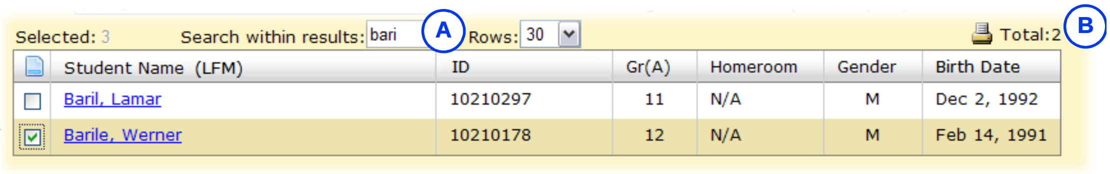
You can temporarily shorten the search results list by having Chancery SMS display only those records that match certain criteria or by specifically selecting records. Filtering the list in this way is particularly useful for creating a saved list [p. 43].

To filter search results by search criteria:

For **Search within results**, type text and press the Enter key (or wait two seconds) [Figure 37]. Chancery SMS shortens the list by displaying only those records where the last name or first name starts with the characters typed or the student ID contains them.

ⓘ To clear the filter, delete the text from **Search within results**.

FIGURE 37: Search results filtered by criteria



Selected: 3 Search within results: bari Rows: 30 Total:2

	Student Name (LFM)	ID	Gr(A)	Homeroom	Gender	Birth Date
☐	Baril, Lamar	10210297	11	N/A	M	Dec 2, 1992
☑	Barile, Werner	10210178	12	N/A	M	Feb 14, 1991

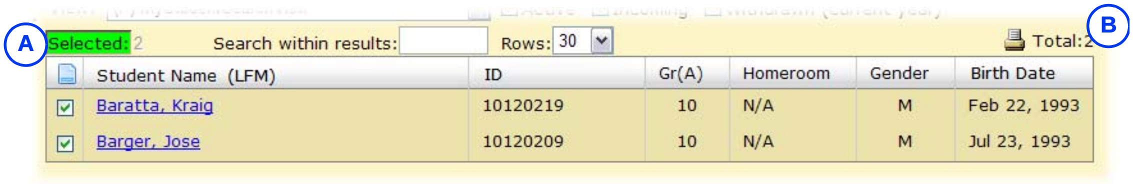
A **Search within results**: Chancery SMS filters the list according to the text typed.

B **Total**: Indicates the number of records in the filtered list.

To display only selected search results:

1. Select one or more records using the check box.
2. Click on the label **Selected** [Figure 38]. Chancery SMS shortens the list by displaying only the selected records, and displays **Selected** in green.
   - To clear the filter, click **Selected**.

FIGURE 38: Search results filtered by selection



Selected: 2 Search within results: Rows: 30 Total:2

☐	Student Name (LFM)	ID	Gr(A)	Homeroom	Gender	Birth Date
☑	Baratta, Kraig	10120219	10	N/A	M	Feb 22, 1993
☑	Barger, Jose	10120209	10	N/A	M	Jul 23, 1993

A **Selected**: Enables you to display only the selected records, or to clear the filter.

Sorting the student search results display

A successful search of student records generates a list of results. By default, Chancery SMS sorts the list by Student Name [Figure 35]. You can sort by the contents of any other column, in ascending or descending order. Sorting by more than one column involves changing the grid view [p. 23].

To sort student search results by one column:

On the Student Search Results page (or on the Student Search page under **Search Results**), click the column name. Chancery SMS sorts the list according to the contents of that column, in ascending order.

- An up arrow ▲ indicates the column on which the list is sorted in ascending order [Figure 35].
- To sort the column in descending order click its name again. A down arrow ▼ indicates descending order.

Reporting on student search results

Once a successful search of student records has generated a list of results, you have the option of running a report on some or all of those students. The reports available depend on your role.

To report on student search results:

1. On the Student Search Results page (or on the Advanced Student Search page under **Search Results**), select the students on whom you wish to report.
2. In the **Reports** menu, click the desired report. Typical choices include:
   - Report Card [p. 224]
   - Progress Report [p. 224]
   - Student Transcript by Subject Area [p. 230]
   - Student Transcript by Year [p. 231]
   - Student Schedule Matrix [p. 258] [p. 259]
   - Student Schedule [p. 257] [p. 257]
3. The Report Options popup page appears. For information on completing the report, refer to Running a report [p. 96].
   - Chancery SMS set the report's Filters to report only on the selected students.
   - Where a report has elementary and secondary versions (such as for Student Schedule), Chancery SMS automatically uses the report appropriate to your role.

Families search

A search for a *family* [p. 60] generates a list of families and the students within each.

To search for a family:

1 On the home page, in the control bar under **SEARCH**, click **Family**. The Family Search page appears.

2 Click the **Basic** tab.

   ⓘ Click **Detail** to conduct a detailed family search [p. 48].

3 Under **Search by**, for the first criterion [Figure 39]:

   a Select the field on which to search.

   - By default, the criteria are “Last name”, “Family name”, and “Family number”.

   b Select an operator.

   c Type the value to find.

   - Case is not relevant; spaces are.

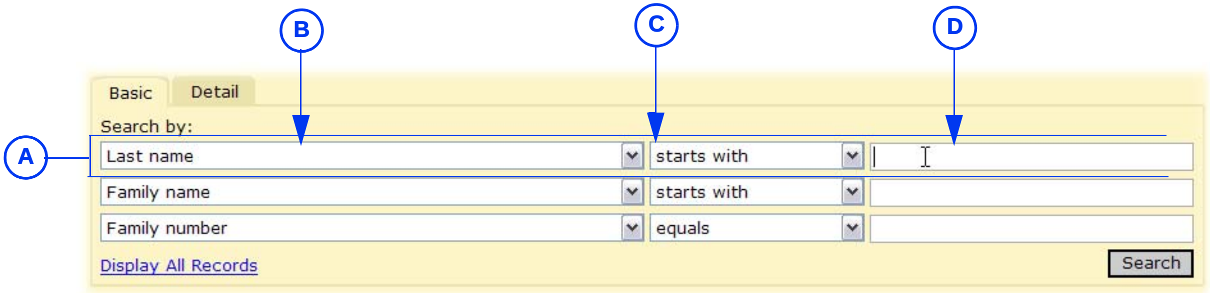
4 Configure up to two more criteria.

5 Click Search. Chancery SMS displays matching family records (if any) in the **Search Results** panel.

   ⓘ Chancery SMS saves the search criteria. Should you want to conduct this same search again, select it in the **List** box.

   ⓘ You can changed the sorting of these results or adjust the columns displayed.

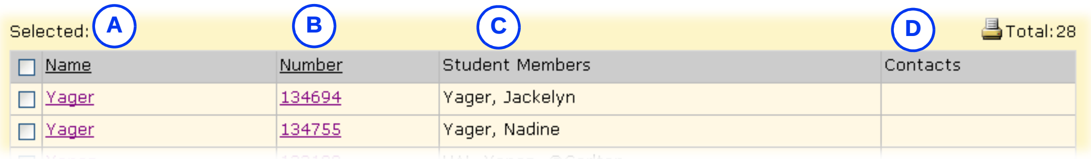
FIGURE 39: Family basic search



Last name starts with
Family name starts with
Family number equals

A Criterion
B Field
C Operator
D Value

FIGURE 40: Family search results



☐ Name	Number	Student Members	Contacts
☐ Yager	134694	Yager, Jackelyn	
☐ Yager	134755	Yager, Nadine	

A **Name**: The family’s name. Click to view the students in this family.

B **Number**: The family’s ID number.

C **Student Members**: The students in this family. These are considered to be *siblings*.

D **Contacts**: A contact is not necessarily related or living with the student(s). A subset of a family is a *family unit* which consists of students and their associated contacts who live together [*Student record: Family, p. 60*].

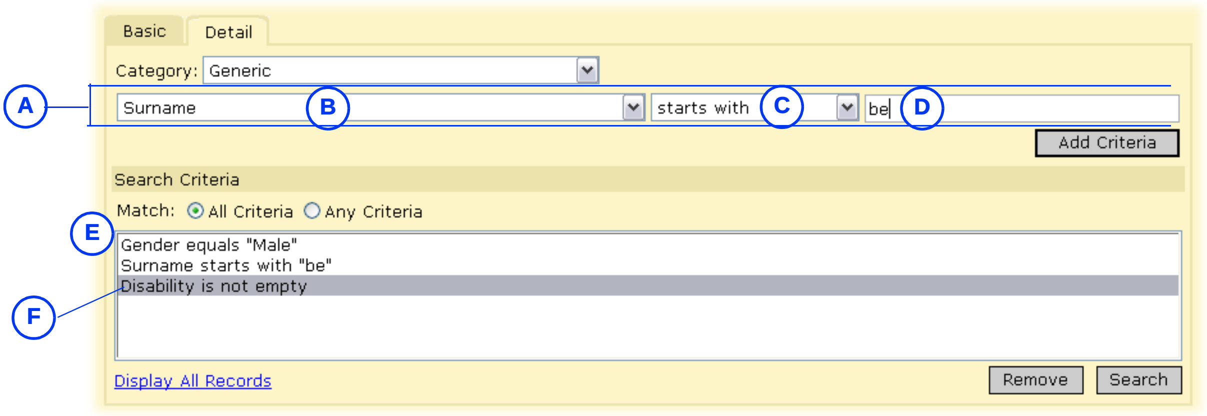
Detailed family search

Using a detailed search, you can search for a family of students by one or more fields (including custom fields). This search involves building a set of criteria.

To conduct a search for a family using detailed criteria:

1. On the home page, in the control bar under **SEARCH**, click **Family**. The Family Search page appears.
2. Click the **Detail** tab.
3. Add a criterion [Figure 41]:
   - a For **Category**, choose a set of fields. Your choice determines the fields available to search.
   - b Select the field on which to search.
   - c Select an operator.
     - The field on which you are searching determines which operators are available.
   - d Type the value to find.
     - Spaces matter; case does not.
   - e Click Add Criteria. The criterion appears under **Search Criteria**.
4. Add more criteria.
   - ⓘ To remove a criterion, click it to select it and click Remove [Figure 32].
5. Set **Match**:
   - ⓘ Select the **Any Criteria** check box to find families that match any one of the criteria in the list. This generates more results.
   - ⓘ Select the **All Criteria** check box to find families that match all of the criteria in the list. This generates fewer results.
6. Click Search. Chancery SMS displays student records for all matching families (if any) under **Search Results**.
   - ⓘ Chancery SMS saves the criteria for your most recent 10 searches. Should you want to conduct this same search again, select it from the **List** list.
   - ⓘ You can change the sorting of these results or adjust the columns displayed [p. 44].

FIGURE 41: Setting detailed family search criteria



Category: Generic

Surname | starts with | be

Search Criteria

Match: ● All Criteria ○ Any Criteria

Gender equals "Male"
Surname starts with "be"
Disability is not empty

A	Criterion
B	Field
C	Operator
D	Value
E	Search criteria
F	Selected criterion

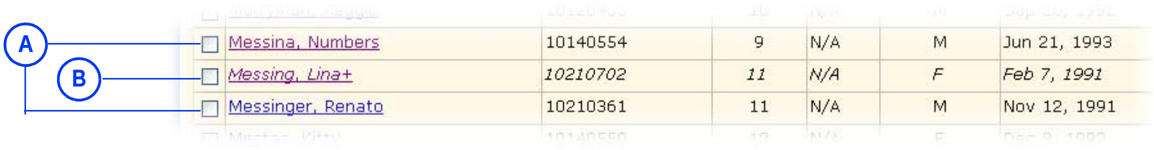
Inactive students

In general, the students you view in Chancery SMS are *active*, that is, a student is who is currently enrolled in the school with which you are working. Chancery SMS classifies a student as *inactive* if that student:

- Is *incoming*: This student is coming to the school or scheduled to join a class or homeroom at a future date. The student's enrollment status code is an entry or re-entry type [p. 62].
- Has *withdrawn*: This student has withdrawn from the school in which he or she was enrolled or from a class or homeroom. The student's enrollment status code is a withdrawal-type with no subsequent entry or re-entry type [p. 62].
- Has graduated [p. 49]

For certain purposes you may need to view both active and inactive students; for example, to schedule students into classes for the coming school year. While by default Chancery SMS displays only active students, you can set the system to display inactive students as well, both Incoming and Withdrawn types. You need only do this once since these settings persist even after you log off and on. Chancery SMS displays an inactive student's record name in gray *italics* [Figure 42].

FIGURE 42: Inactive student display



☐	Messina, Numbers	10140554	9	N/A	M	Jun 21, 1993
☐	*Messing, Lina+*	*10210702*	*11*	*N/A*	*F*	*Feb 7, 1991*
☐	Messinger, Renato	10210361	11	N/A	M	Nov 12, 1991

A Active student

B Inactive student

You can do this if your role is:
School Administrator

To set Chancery SMS to display inactive as well as active students:

On a page where a grid of students is displayed, ensure that **Incoming Students** is checked [Figure 36]. Chancery SMS adds inactive students to the grid as appropriate.

- ⓘ You can also check **Withdrawn Students (Current Year)**.
- ⓘ You can toggle the display of inactive students on and off by clicking the check box again.

Search of inactive students from past years

You can search specifically for inactive students. This search enables a secondary School Administrator at the most recent school in which a student was enrolled (and not the active enrollment) to view a student who withdrew or graduated from the school in a past year (a District Administrator sets the specific number of years in the past). The School Administrator can also make changes to the inactive student's demographic [p. 51] and historical transcript information [p. 162]. This search is particularly useful to print historical transcripts.

You can do this if your role is:
School Administrator

To search for inactive students from past years:

1. On the home page, in the control bar under **SEARCH**, click **Past Years' Students**. The Inactive Student Search (Past Years) page appears.
2. Follow the same procedure as an advanced student search [p. 38].
   - ⓘ To print a student's historical transcript [p. 162], in the search results, select the student(s) and in the **Reports** menu click **Student Transcript by Year...** or **Student Transcript by Subject Area...**.

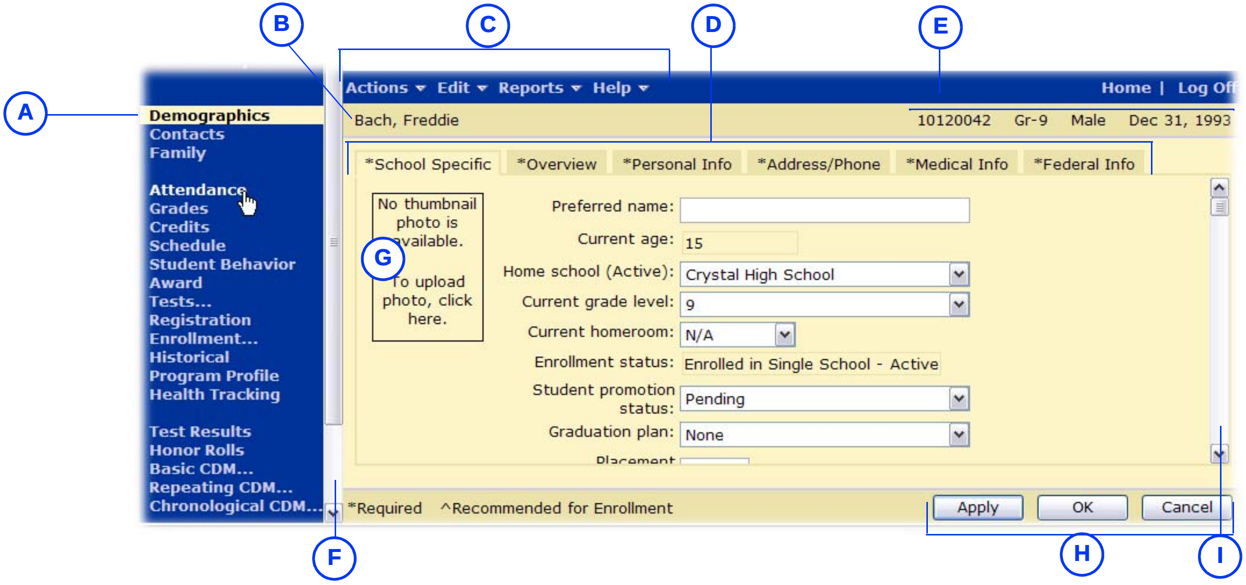
Student records

In a Chancery SMS system, each student must have a *student record*. A student record holds information such as age, grade level, contacts, medical information, attendance, grades, credits, and so on. Student records are accessible through various types of pages, or you can explicitly seek them out *[Searching for students, p. 36]*.

Given the amount of information stored in a student record, and the purposes for which it is used, Chancery SMS provides several different views of a student record [Figure 43]:

- Student record: Demographics [p. 51]
- Student record: Contacts [p. 58]
- Student record: Family [p. 60]
- Student record: Attendance [p. 61]
- Student record: Grades [p. 61]
- Student record: Credits [p. 61]
- Student record: Schedule [p. 61]
- Student record: Student Behavior [p. 62]
- Student record: Award [p. 62]
- Student record: Tests [p. 62]
- Student record: Registration [p. 62]
- Student record: Enrollment [p. 62]
- Student record: Historical [p. 63]
- Student record: Program Profile [p. 63]
- Student record: Health Tracking [p. 63]
- Student record: Test Results [p. 64]
- Student record: Honor Rolls [p. 65]

FIGURE 43: Student record example


A
B
C
D
E
F
G
H
I
Demographics
Contacts
Family
Attendance
Grades
Credits
Schedule
Student Behavior
Award
Tests...
Registration
Enrollment...
Historical
Program Profile
Health Tracking
Test Results
Honor Rolls
Basic CDM...
Repeating CDM...
Chronological CDM...
Actions
Edit
Reports
Help
Home | Log Off
*School Specific
*Overview
*Personal Info
*Address/Phone
*Medical Info
*Federal Info
No thumbnail photo is available.
To upload photo, click here.
Apply
OK
Cancel

Bach, Freddie

10120042 Gr-9 Male Dec 31, 1993

Preferred name:

Current age: 15

Home school (Active): Crystal High School

Current grade level: 9

Current homeroom: N/A

Enrollment status: Enrolled in Single School - Active

Student promotion status: Pending

Graduation plan: None

Placement

*Required ^Recommended for Enrollment

A Current view: The view of the record currently displayed is indicated in the control bar. Click a view to display it. The views available in the control Bar vary according to your system and your role [p. 12]. See also *Working on a page* [p. 19].

B Student’s name

C *Task bar*: Contains menus specific to the page displayed, such as **Actions**, **Edit**, and **Reports**. The contents of these menus are also specific to the view.

D Tabs: Organizers for fields on this page. Click a tab to view its contents.

E Student identifiers: Includes the student's number, current grade, gender, and birthdate.

F Scroll bar: Click to view all links in the control bar.

G Student photo placeholder [p. 52]

H Save buttons [see *Saving information on a page, p. 20*]

I Scroll bar: Click to view all in information on the page.

Student record: Demographics

Your main and initial view of a student record is of its demographic information [see *Viewing student information, p. 35*]. Chancery SMS displays this information on the Student Demographics page, which includes the following information organized under several tabs:

- Student Demographics: School-specific student information [p. 54]
- Student Demographics: Overview [p. 51]
- Student Demographics: Personal Info [p. 55]
- Student Demographics: Address/Phone [p. 56]
- Student Demographics: Medical Info [p. 57]
- Student Demographics: Federal Info [p. 58]

Some of the same information fields appear in more than one tab. Where you change the information in such a field, that change applies to all instances of the field. **Note**: When you switch between tabs, any changes you have made to a tab are saved.

Student Demographics: Overview

The information on this Student Demographics page [p. 51] tab contains some information that is also found on the School Specific [p. 54] and Personal Info [p. 55] tabs, as well as the following:

- **Student number**: The student's ID number [p. 194].
- **Social security #**: The student social security number.
- **State number**: The number assigned to this student by the state or province.
- **Last name**: The student's last name as it appears on a birth certificate or legal document presented at time of enrollment.
- **First name**: Displays the student's first name as it appears on a birth certificate or legal document presented at time of enrollment.
- **Middle name**: The student's middle name as it appears on a birth certificate or legal document presented at time of enrollment.
- **Generation**: The student's name suffix, such as "Jr." or "III".
- **Preferred name**: The name the student prefers to be called.
- **Gender**: The student's gender, that is, male or female.
- **Birthdate**: The student's date of birth as it appears on a birth certificate or other legal document presented at time of enrollment.
- **Current age**: The student's age in the current year. Chancery SMS calculates this based on birth date (if the birth date is changed, Chancery SMS recalculates).
- **Home school (Active)**: The school to which the student is assigned for reporting purposes for the current school year.
- **Home school grade level (Active)**: The student's current grade level (also displayed in the header at the top of the Student Demographics page).

- **Zoned school (Active)**: The default school the student is attending this year, as determined by address validation. Chancery SMS displays this field only if this system employs address validation. For detailed information, refer to the *Chancery SMS Address Validation Guide*.
- **Receives Specialized Services**: Indicates that a student is receiving specialized services. May also contain the date the student began receiving the special services.
- **Section 504 eligible**: Indicates that a student with a disability is eligible for educational services designed to meet his or her special needs.
- **Test accommodation**: Details accommodations made for the student regarding tests.

TABLE 5: Permissions pertaining to student information

To	You need this permission		Set to
Add and edit student demographic summary information	**Students > Student Overview**		Edit
Indicate the student receives special services	**Students > Receives Specialized Services**		Edit

Student photo

You can attach a photograph to a student record. For a photograph to be suitable for storage in a Chancery SMS system, the photograph file must:

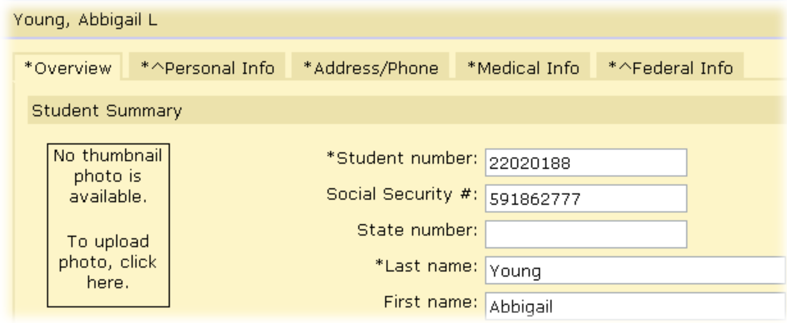
- Be saved in JPG, JPEG, or GIF format.
- Have a file name that matches the student's district ID number; for example, for a district ID number of 6016012, the file name should be "6016012.jpg" or "6016012.gif".
  - ⓘ Have dimensions no smaller than 120 x 150 pixels and no larger than 300 x 500 pixels. **Note:** While Chancery SMS adjusts any photograph to fit, the compression or stretching involved may distort the photograph.
- For photo clarity, we recommend that the file be at least 25KB in size.

You can do this if your role is:
School Administrator
District Administrator

To attach a photograph to a student record:

1. Locate and view the student record [p. 36].
2. Click the **School Specific** (school users only) or **Overview** tab.
3. Click the photo placeholder [Figure 44]. The Edit Student Photo popup dialog appears [Figure 45].
   - ⓘ If a photo is already attached to the record, click **Clear Photo** to remove the file before clicking the placeholder.
4. Click **Browse**. The Choose File dialog appears.
5. Locate and select the JPG or GIF file of the photo you want to import and click **Open**. The photo appears in the dialog [Figure 45].
   - ⓘ If the photo appears unsuitable, click **Clear Photo**.
6. Click OK. Chancery SMS attaches the photo to the student record.
   - ⓘ If the photo appears unsuitable, click the photo and click **Clear Photo**.

FIGURE 44: Student record photo placeholder



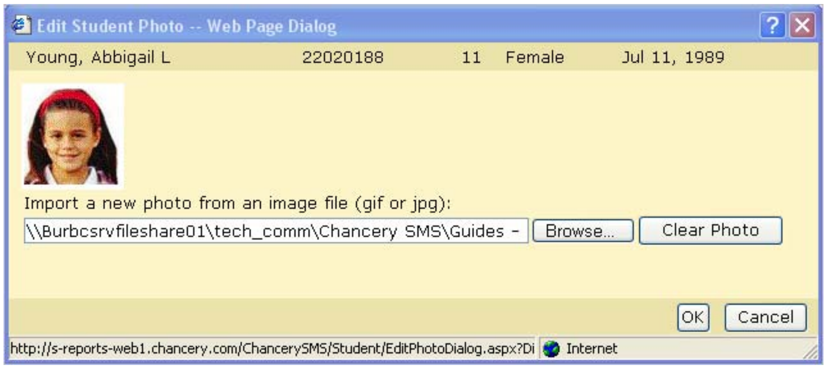
Young, Abbigail L

No thumbnail photo is available.

To upload photo, click here.

*Student number: 22020188
Social Security #: 591862777
State number:
*Last name: Young
First name: Abbigail

FIGURE 45: Edit Student Photo popup dialog



Young, Abbigail L 22020188 11 Female Jul 11, 1989

Import a new photo from an image file (gif or jpg): \\Burbcsrvfileshare01\tech_comm\Chancery SMS\Guides -

http://s-reports-web1.chancery.com/ChancerySMS/Student/EditPhotoDialog.aspx?Di

Since student photograph files are matched with students by ID number, you can attach photos to up to 200 student records at once.

You can do this if your role is:
School Administrator
District Administrator

To attach photographs to several student records at once:

1. Save the photograph files in a single zip.
   - You can save a maximum of 200 photos in each zip file.
   - Ensure that each photo's file name matches the relevant student ID number.
   - When working with a large number of photos, we recommend that your network connection be fast, that is, a LAN or T1.
2. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
   - Select **District Setup** to work with student records district-wide.
3. Under **Schools**, click **Import Student Photos**. The Import Student Photos page appears.
4. Under **Step 1**, click **Browse**. The Choose File dialog appears.
5. Locate and select the zip file of the photos you want to import and click **Open**.
6. Under **Step 2**, click **Upload Zip File**. When the file upload is complete, on the page Chancery SMS displays a message to that effect.
7. Under **Step 3**, click **Import Photos**. When Chancery SMS has finished attaching the photos to the appropriate student records, on the page it displays a message to that effect.

TABLE 6: Permissions pertaining to student photos

To	You need this permission	Set to	
Import student photos	**Students > Photos**	Delete	

Student Demographics: School-specific student information

The information on the Student Demographics page’s School Specific tab includes the following:

- **Preferred name**: The name the student prefers to be called.
- **Current age** [see *Student Demographics: Overview, p. 51]*
- **Home school (Active)** [see *Student Demographics: Overview, p. 51]*
- **Current grade level**: The student’s current grade level at the school.
- **Current homeroom**: The student’s homeroom at the school. A staff member can change it here or in the context of homeroom rosters.
- **Counselor**: The student’s assigned counselor [p. 190], depending on the calendar in use. A School Administrator can assign a School Counselor through the student’s academic plan [p. 86]. A School Administrator can assign a School Counselor to several students by selecting a list of students and in the **Actions** menu, clicking **Assign > Values**. In the Assign Values dialog, for **Assign Field**, the administrator can choose a counselor for the Active Calendar (“Counselor (A)”) or the Planning Calendar (“Counselor (P)”)—provided a Planning Calendar exists. During year-end processing [p. 208], Chancery SMS changes the counselor in the Planning Calendar to that of the Active Calendar.
- **Enrollment status** [see *Student Demographics: Personal Info, p. 55]*
- **Student promotion status**: Indicates that the student has been promoted to the next grade this year [see p. 209].
- **Academic plan** [see *Student Demographics: Personal Info, p. 55]*
- **Placement classification**: For an explanation of this field, contact your District Administrator.
- **Distance from school**: Distance in miles from the student’s home address to the School of Enrollment’s address.
- **Home address is in school’s area**: Indicates that the student’s home address meets any boundary conditions for the school, such as physical area borders.
- **Upload to parent portal**: Enables an administrator to post information for this student on a *parent portal* [p. 131] for viewing by his or her parents.
- **Lunch status**: The lunch program for which the student is eligible.
- **Permission to share lunch eligibility**: Indicates that the parent/guardian has given permission for their child’s school lunch eligibility to be shared with administrators.
- **Contact information**: Contact names and phone numbers. A contact is a person who is responsible for the student, typically one or both parents, or a guardian.
- **Legal alert**: Any legal alert associated with this student. **Note**: If a legal alert is recorded here, Chancery SMS displays a Legal Alert icon at the top of the Student Demographics page.

Table 7: Permissions pertaining to school-specific student information

To	You need this permission	Set to	
Add and edit student demographic data	**Students > Demographic Data**	Edit	
Add and edit student contacts	**Students > Contact Information**	Edit or Delete	
Add and edit school-specific student demographic information	**Students > Student School Specific**	Edit	
Add and edit the number of miles a student lives from their school	**Students > Distance from School**	Edit	
Change the student’s Home School	**Students > Modify Home School**	Yes	
Add and edit a student’s lunch status	**Students > Lunch Status Panel**	Edit	

To	You need this permission	Set to	
Enter legal alert information	**Students > Legal Alert**	Edit	
Assign a School Counselor to a student	**Students > Modify Counselor Assignment**	Yes	

Student Demographics: Personal Info

The information on this Student Demographics page [p. 51] tab contains some information that is also found on the School Specific [p. 54] and Overview tabs [p. 51], as well as the following:

- **State number** [see *Student Demographics: Overview, p. 51*]
- **Alternate number**: The student's number if this system employs an alternate numbering scheme.
- **Full legal name (if different)**: The student's full legal name if different from the Last name, First name, Middle name [p. 51].
- **Registration grade level**: The grade the student was in at the time of registration.
- **Registration status**: The status of the student's registration.
- **Enrollment status**: Indicates that the student is active in one or more schools [see also *Inactive students, p.49*].
- **Academic plan**: Requirements the student must meet in order to graduate [p. 86]. This involves the assignment of a Counselor [p. 190].
- **Student type**: Typically Indicates that a student is full time or part time. The purpose of this field may vary according to the district's setup.
- **Year entered 9th grade**: The year or date the student entered 9th grade (if applicable). Depending on your district's setup, this field displays either in year or date format.
- **Zoned school (Active)** [see *Student Demographics: Overview, p. 51*]
- **Home school (Active)** [see *Student Demographics: Overview, p. 51*]
- **Home school grade level (Active)** [see *Student Demographics: Overview, p. 51*]
- **Home school homeroom**: The student's homeroom at the student's home school. Chancery SMS displays "N/A" if the student is not enrolled in his or her home school.
- **Birth date** [see *Student Demographics: Overview, p. 51*]
- **Birth certificate on file**: Indicates that the student's birth certificate has been verified by staff. To view, import, or replace a scanned birth certificate, click **Edit Birth Certificate**.
- **Birthdate verification**: The type of legal evidence used to verify the student's birthdate.
- **Birthplace**: The city or place of birth as it appears on the student's birth certificate.
- **Birth state**: The state or province in which the student was born, as it appears on the student's birth certificate.
- **Birth country**: The country of birth as it appears on the student's birth certificate.
- **Citizenship status**: Citizenship status in country of residence, such as "Resident", "Dual-national", or "Citizen".
- **Country of citizenship**: The name of the country in which the student is a citizen.
- **Immigrant student**: Indicates if the student is an immigrant.
- **Year entered country**: The date or year (the District Administrator sets which) the student immigrated to the country.

- **Year started school**: The date or year (the District Administrator sets which) after immigration the student started school.
- **First date enrolled US school**: The date the student first enrolled in a school in North America.

Chancery SMS displays a **Planning District Calendar** panel if a district planning calendar exists [see Ch. 7, *District setup, p. 193]*. This panel hold the following fields:

- **Zoned school (Planning)** [see *Student Demographics: Overview, p. 51]*
- **Requested school**: Defaults to the zoned school determined by address validation
- **Exception reason**: If the Zoned School differs from the Requested School, this describes why the student is requesting an out-of-zone school. Chancery SMS displays this field only if this system employs address validation.
- **Next year projected grade**: The grade to which the student is expected to advance in the next year.
- **Enrollment Status**: This link enables the School Administrator to project the student's enrollment in more than one school (if the system permits a student to be enrolled in more than one school).

TABLE 8: Permissions pertaining to student personal information

To	You need this permission	Set to	
Add and edit student personal information	**Students > Student Personal Info**	Edit	
Add and edit a student's state number	**Students > State Student Number**	Edit	
Add and edit the year a student entered 9th grade	**Students > Date/Year Entered 9th Grade**	Edit	
Access other schools from **School** on the Add Status Code page	**Students > Multiple School Status Access**	Yes	
Upload electronic versions of student birth certificates	**Students > Birth Certificate**	Edit or Delete	

Student Demographics: Address/Phone

The information on this Student Demographics page [p. 51] tab includes the following:

- **Phone numbers** panel: The format in which Chancery SMS displays phone numbers depends on the administrator's choice: four-field (that is, dialing prefix, area code, number, extension) or one-field. One-field accepts the international phone number format, for example, "011+44+1224+555-4432".

  Note: When you change a student's home phone number, and that phone number is the same as that of other family member(s) [p. 60], Chancery SMS gives you the option of copying the new phone number to the other family member(s).

  Place: The location of the phone, such as home or office.

  Pref.: Where several phone numbers are available, the ranking in terms of preference.

  Listing: Indicates if the number is listed or unlisted.

  Type: The type of phone such as cellular, land line, or fax.

  Email address: The student's email address.

  Additional communication numbers: Additional communication numbers for the student.

- **Addresses** panel: The format in which Chancery SMS displays addresses depends on the administrator's choice: two-line or five-field. 5-field works with address validation.

  Physical address: The street address where the student lives at the time of reporting or the student's last known street address of residence. **Note**: When you change a student's physical address, and that address is the same as that of other family member(s) [p. 60], Chancery SMS gives you the option of copying the new address to the other family member(s)'s physical address. **Note**: Chancery SMS displays a **Geocode** field and a Validation button if the system employs address validation. For detailed information, refer to the *Chancery SMS Address Validation Guide*. **Note**: For Geocode, Chancery SMS displays only the geocode for the student's address.

  Mailing address: The address to which correspondence is sent. This may be the same or different from the Physical address. **Note**: For a student who is part of a family [p. 60], you can copy the Mailing address from a family member—click the Copy address from... button.

TABLE 9: Permissions pertaining to student address/phone information

To	You need this permission	Set to	
Add and edit student address and phone information	**Students > Student Address Phone**	Edit	

Student Demographics: Medical Info

The information on this Student Demographics page [p. 51] tab contains some information that is also found on the student's Health Profile page, as well as the following:

- **Medical number**: Depending on district policy, this may be a district-assigned medical number or a parent's medical plan number.
- **Disability**: Indicates that the student has a disability, such as hearing impaired.
- **Critical/chronic health indicator**: Indicates that the student has a chronic or potentially life-threatening condition.
- **Medical alert**: Indicates a significant medical condition, such as food allergy, asthma, or epilepsy. **Note**: If a medical alert is recorded here, Chancery SMS displays a Medical Alert icon at the top of the Student Demographics page [p. 51]. The alert does not specify the condition.
- **Medical alert contact**: The name and phone number of the school contact designated to provide health information for students.
- **Permission to**: Indicates permission to call a doctor, call an ambulance, or treat an illness or injury.
- **Doctor's name**: The name of the student's doctor.
- **Doctor's phone**: The doctor's phone number.
- **Doctor's address**: The doctor's business address.

For more information on student health records, please refer to the *Chancery SMS Health Tracking Guide*.

TABLE 10: Permissions pertaining to student medical information

To	You need this permission	Set to	
Add and edit student medical information	**Students > Student Medical Info**	Edit	
Enter medical alert information	**Students > Medical Alert**	Edit	

Student Demographics: Federal Info

The information on this Student Demographics page [p. 51] tab is required by the federal government. The tab has information that is also found on the Personal Info [p. 55] tab. Information includes the following:

- **Ethnic category**: The student's primary ethnic category.
- **Federal ethnic category**: The student's primary federal ethnic category. This is a category of ethnic identity recognized by the U.S. federal government for the purposes of census statistics and employment.
- **Federal race categories**: The student's race or races.
- **Lunch status** [see *Student Demographics: Overview, p. 51]*
- **Permission to share lunch eligibility** [see *Student Demographics: Overview, p. 51]*
- **Immigrant student** [see *Student Demographics: Personal Info, p. 55]*
- **Year entered country** [see *Student Demographics: Personal Info, p. 55]*
- **Year started school** [see *Student Demographics: Personal Info, p. 55]*
- **Immigrated from**: The country from which the student immigrated.
- **Migrant status**: Indicates that the student, or the student's parent/guardian, maintains primary employment in one or more agricultural or fishing activities on a seasonal or temporary basis.
- **First date enrolled US school** [see *Student Demographics: Personal Info, p. 55]*
- **Home language survey** panel

  Is a language other than English spoken at home?: Indicates that the student may require an English Language Learners program.

  Does the student speak a language other than English?: Indicates that the student may require an English Language Learners program.
- **Home language**: The language or dialect routinely spoken in the student's home. May differ from the student's native language.
- **Dominant language**: The language or dialect the student best understands and with which they are most comfortable.
- **Native language**: The language or dialect first learned by the student or first used by the parent/guardian with the child. Also referred to as the student's *primary language*.
- **Other language**: Notes another language or dialect, other than the dominant language, in which the student is proficient.

TABLE 11: Permissions pertaining to student Federal information

To	You need this permission		Set to
Add and edit a student's lunch status	**Students > Lunch Status Panel**		Edit
Add and edit Home Language Survey information	**Students > Home Language Survey**		Edit

Student record: Contacts

This view of a student record [p. 50] lists the *contacts* associated with the student. A contact is a person who is responsible for the student, typically one or both parents, or a guardian. A contact is a member of a student's *family* [p. 60]. A student can have many contacts, who need not be related to the student or to each other.

To view a contact's information, including his or her relationship with the student, click that contact's name. The information includes:

- **Title**: Such as "Mrs.", "Mr.", or "Dr.".
- **Last Name**: The contact's last or surname.

- **First Name**: The contact’s first name.
- **Middle Name**: The contact’s middle name, if any.
- **Relationship to Student**: Can include non-familial relationships, such as neighbor or baby-sitter.
- **Contact Position**: Indicates the order of priority for communications between the school and the contacts.
- **Lives with student**: Indicates that the contact lives with the student.
- **Has custody of student**: If the contact has custody of the student, this check box is selected.
- **Contact with student not allowed:** Indicates that the contact is not allowed communication with this student.
- **Gets mailings for student**: Specifies that the contact is to receive school mail-outs for the student.
- **Emergency**: Indicates that this contact is to be contacted in case of emergency.
- **Has permission to pick up student**: Indicates that the contact has permission to pick up the student from school.
- **Comments:** A description or explanation of contact information. Capacity is 32,000 characters.
- **Password**: The password a contact needs to be able to pick the student up from school.
- **Social Security #**: The contact’s social security number.
- **Contact Type**: The contact’s general category of relationship; for example, “Immediate Family”, “Caregiver”, or “Neighbor”.
- **Education**: The contact’s highest level of education achieved, such as college or university degree.
- **Email:** The contact’s email address.
- **Home Language**: The language or dialect routinely spoken in the contact’s home. May differ from the student’s native language.
- **Requires Translator**: Indicates that the contact requires a translator when communicating with the student’s teachers or school and district staff.
- **Phone Numbers** panel: The format in which Chancery SMS displays phone numbers depends on the administrator’s choice: four-field (that is, dialing prefix, area code, number, extension) or one-field. One-field accepts the international phone number format, for example, “011+44+1224+555-4432”.

  Place: The location of the phone, such as home or office.

  Listing: Indicates if the number is listed or unlisted.

  Type: The type of phone such as cellular, land line, or fax.

  Additional Communication Numbers: Additional communication numbers for the contact.
- **Home Address**: The contact’s physical and mailing address. **Note**: When you edit a contact for whom the **Lives with [Student name]** option is not set, you have the option of copying the student’s home address to the contact—a Copy address from... button appears.
- **Employer Name**: The name of the company where this contact is employed.
- **Employment Type**: Describes the industry in which this contact works.
- **Job Position**: The position the contact holds at his or her place of employment.
- **Employment Address**: The address of the contact’s place of employment.
- **Special Documents:** Documents on file that contain important information about the contact, such as power of attorney or foster parent.

To add a contact:

1. On a page of the student's record [Figure 43], in the control Bar click **Contacts**. The Contacts page appears.
2. In the **Actions** menu, click **Add a contact...**. The Add Contact popup page appears.
3. Add the contact information.
   - ⓘ For **Home Address**, Chancery SMS automatically copies the student's address if the **Lives with [Student name]** option is set.
4. Click OK.

Student record: Family

This view of a student record [p. 50] displays the student's *family*. In Chancery SMS, a family consists of a group of one or more related students (*siblings*) and their associated *contacts* [p. 58]. A family can hold several contacts and siblings, as well as siblings' contacts.

In a system that employs family management, Chancery SMS automatically creates a family for a student when that student registers. The criteria for determining siblings within a family differ from district to district. Typically, brothers and sisters, are considered *siblings*. However, step-brothers or sisters who live in different homes may or may not be not considered siblings in the same family.

You can do this if your role is:
School Administrator
District Administrator

To adjust a family's setup:

1. On a page of the student's record [Figure 43], in the control bar click **Family**. The Family Overview page appears.
   - ⓘ To change the information for a student in the family or a family contact, click that person's name.
2. In the title bar, click **Edit**. The Family Overview popup page appears.
   - ⓘ To add an existing student to the family, click Add Existing... in the Students panel.
   - ⓘ To add a new student to the system and to the family, click Add... in the Students panel.
   - ⓘ To remove a student from the family (where there is more than one student), click Remove in the Students panel.
   - ⓘ To add a contact, click Add... in the Contacts panel.
   - ⓘ To delete a contact, click Delete... in the Contacts panel.
   - ⓘ To adjust student-contact relationships, click Edit Relationships in the Contacts panel.
3. Click Save.

You can do this if your role is:
School Administrator
District Administrator

To add a family:

1. On the home page, in the control bar click **Family Search**. The Family Search page appears.
2. In the **Actions** menu, select **Add Family...**. The Family Identification popup page appears.
   - ⓘ To delete a family, select it and in the **Actions** menu select **Delete Family**.
3. Type a **Family Name** and click Continue.

Family information includes:

- **Family number**: The family number, which Chancery SMS generates.

- **Family name**: The family's last or surname.
- **Family units**: If the family has siblings who live with different family members, the households in which they live.
- **Lives with**: The contact with whom the student lives.
- **Additional contacts** [see *Student record: Contacts, p. 58*]
- **Students**: Family members who are students in the same district. Information includes contacts associated with these students.

Note: When you change a family member's home phone number, and that phone number is the same as that of other family member(s), Chancery SMS gives you the option of copying the new phone number to the other family member(s).

Student record: Attendance

The Student Attendance view of a student record displays the student's attendance record [see *Taking attendance, p. 67*]. **Note**: This view is not available to a District Administrator.

Student record: Grades

The Student Grades view of a student record displays the student's grades [see *Assigning grades, p. 72*]. **Note**: This view is not available to a District Administrator.

Student record: Credits

The Student Credits view of a student record displays the credits the student has received, including the associated grade item, grade, potential credits, credits earned, an override indicator, and override reason, if applicable. For detailed information, refer to the *Chancery SMS Grading Setup Guide*. **Note**: This view is available only for a secondary school. Also, it is not available to a District Administrator.

Student record: Schedule

The Student Schedule view of a student record displays the classes for which a student is scheduled for a term or the year. The information displayed includes:

- **Term**: The term in which the class occurs, for example, "S1" for semester 1 or "FYT" for Full-Year Term. An asterisk (*) indicates that the student left the class before the end of the term.
- **Meeting Pattern**: The meeting pattern into which the class is scheduled.
- **Class Name**: Click this to view the student roster [p. 15].
- **Teacher** [*School staff, p. 172*]
- **Room** [*Facility setup, p. 159*]
- **Details**: Click an icon in this column to view further details about the class.

Note: This view is not available to a District Administrator.

Student record: Student Behavior

This page of a student record displays behavior incidents associated with the student [see *Behavior, p. 76*]. **Note**: This view is not available to a District Administrator.

Student record: Award

This page of a student record lists all the awards the student has received, including the date on which the award was presented [see *Awards, p. 65*]. **Note**: This view is not available to a District Administrator.

Student record: Tests

The All Tests for Student view of a student record displays a list of the student's tests. Chancery SMS displays this page only if the system employs legacy test functionality.

Student record: Registration

For information on this Register in District view of a student record, refer to Registration [p. 115].

Student record: Enrollment

This page of a student record displays the student's enrollment [p. 118] history, that is, each district school in which the student is or was enrolled. A School Administrator records enrollment. You can view detailed information on each enrollment by clicking in the **Status Code** column. This information includes:

- **Home school**: The school to which a student is assigned for reporting purposes. Typically, a student is also enrolled in this school. Depending on a system's settings, the system may determine this school, or your choice may be limited to your own school. Also, if this school is not your school, you may not be able to change it.
- **Date**: The date on which the enrollment status code begins.
- **Status code**: Entry or withdrawal status. **Note**: A student who has not met immunization requirements may be provisionally enrolled.
- **Grade**: The student's grade at the time of enrollment in the home school.
- **Zoned school**: On a system that employs address validation, the school in the student's designated zone according to his or her home address. Chancery SMS displays this school after you have set the Date and Grade and clicked Update [see *Student Demographics: Overview, p. 51*].
- **School of enrollment:** The school the student attends. In some circumstances, this school can differ from the Home School; for example, a student may attend her home school in the morning for traditional instruction and attend a different school (her school of enrollment) in the afternoon for vocational training. Note: If you choose a school that has controlled enrollment, Chancery SMS presents fields that enable you to specify the program [p. 76].
- **Exception reason**: Describes why the School of Enrollment differs from the Zoned School, that is, why the student is enrolling in an out-of-zone school.

Important: Enrolling a student in an out-of-zone school may require the approval of a District Administrator. In this case, when you click OK, Chancery SMS does not save the enrollment information and prompts you to send an approval request. If pre approval has been granted (that is, an address exception set up), Chancery SMS completes the enrollment when you click OK.

- **Instr. service period of service**: The type of service being provided to the student at the school.
- **English language background**
- **Program**: Where a school employs one or more programs to control enrollment, this is the controlled enrollment program in which the student has been offered a position.
- **Session**: Where a school employs one or more programs to control enrollment, this is the controlled enrollment program session in which the student has been offered a position.
- **Queue**: Where a district employs one or more programs to control enrollment, this is the controlled enrollment program session queue in which the student is positioned.
- **Program status**: Where a district employs one or more programs to control enrollment, this is the student's status in the controlled enrollment program.
- **Program override reason**: Where a district employs one or more programs to control enrollment, this indicates the reason an ineligible student is enrolled in a program.
- **Additional override details**: Additional information to the Program Override Reason.
- **Distance from school** [see *Student Demographics: Overview, p. 51]*
- **Home address is in school's area** [see *Student Demographics: Overview, p. 51]*
- **Comment**: Comments associated with the status code.
- **Physical address** [see *Student Demographics: Address/Phone, p. 56]*

Student record: Historical

For information on this view of a student record, refer to the *Chancery SMS Grading Setup Guide*.

Student record: Program Profile

This view of a student record [p. 50] displays the programs in which the student is enrolled as well as the state of any applications the student has made to a program applied [see *Programs, p. 76]*. For detailed information, refer to the *Chancery SMS Program Management Guide*.

Student record: Health Tracking

For information, refer to the *Chancery SMS Health Tracking Guide*.

Student record: Test Results

The Student Test Results view of a student record [p. 50] displays a list of all the student's test results, including the test date, the school at which the test was taken, the student's grade level, if the test was waived, and any comments. Information includes:

- **Test date**: The date on which the test was taken.
- **School name**: The location of the test session. Choices include "Home School", "In district school", "Out of district school". If you select the "Out of district school", type the school's name in the box below the selection.
- **Grade level**: The grade level of the student on the date of the test.
- **Waived**: Indicates that the student has a waiver for the test
- **Comment**: Comments on the student's overall test results.

Note: Before you can add, edit, or view test results for students, a District Administrator must first set up the tests used in the district and add test session information.

You can do this if your role is:
School Administrator
District Administrator

To add test results for a student:

1. Locate and view the student's record [p. 36].
   - ⓘ Or, on the My Classes home page [p. 15], in the **Roster** column, click a roster. The Roster page appears [Figure 8]. In the **Student Name** column, click the student's name. The Edit Student Demographics page appears.
   - ⓘ See also *Student records* [p. 50].
2. In the control bar, click **Test Results**. The Add/Edit Student Test Results page appears.
   - ⓘ The test scores grid displays the appropriate score in the cell where each component (test, sub test, and skill) and score type (raw score, percentile, mastery score, etc.) intersect.
3. In the **Actions** menu, click **Add Test Results**.
   - ⓘ Or click a test result to change it.
   - ⓘ To delete a test result, select it and in the **Actions** menu click **Delete Test Results**.
4. Enter or change information, which includes:
   - ⓘ **Date**: The date on which the test was taken. The date defaults to today's date. If the test date is not today's date, click **Recalculate** to refresh the list of valid test sessions.
   - ⓘ **Test session**: The session in which the student took the test. The test session selected determines the test, sub tests, and skills, with the associated score types, that are captured in the Test Scores panel.
   - ⓘ **School**: The default setting is the home school. To change this, select **In district school** and select a school from the list or select **Out of district school** and type the school's name.
   - ⓘ **Exemption**: Indicates that the student has a waiver for the test.
   - ⓘ **Exemption reason**: Indicates the reason the student's test was waived.
5. On the test scores grid, enter the appropriate scores and comments by clicking in the cells.
6. Click OK.

Student record: Honor Rolls

For information on this view of a student record, refer to the *Chancery SMS Grading Setup Guide*.

Student record: Background Data

This view of a student record holds miscellaneous demographic and social service information.

Awards

A School Administrator can track *awards* the school grants to students. Examples of award types include Honor Roll, Principal's List, department award, Perfect Attendance, and Community Service. Where a school gives a standard award to students, a School Administrator can use Chancery SMS to set up the type of award [p. 171] and to record its granting [p. 65].

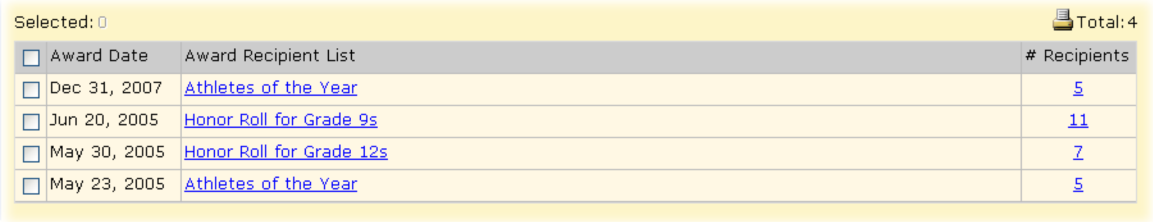
A School Administrator can view the awards a student has won by viewing his or her student record [p. 50] or by viewing the school's list of award winners.

You can do this if your role is:
Teacher
School Secretary
School Administrator

To view a school's list of award winners:

1. On the home page, in the control bar under **SCHOOL**, click **Awards**. The Awards page appears [Figure 46].
2. In the **# Recipients** column, click the number. A Recipient Roster appears.

FIGURE 46: Awards page



Selected: 0 Total: 4

☐	Award Date	Award Recipient List	# Recipients
☐	Dec 31, 2007	Athletes of the Year	5
☐	Jun 20, 2005	Honor Roll for Grade 9s	11
☐	May 30, 2005	Honor Roll for Grade 12s	7
☐	May 23, 2005	Athletes of the Year	5

Granting awards

Granting an award involves adding students to a list of recipients and printing an *award certificate* for each recipient [Figure 47]. A School Administrator can complete these tasks at different times. Typically, the administrator would decide on the *award date* at the time of printing. The administrator can create more than one list of recipients for a particular type of award (that is, more than one instance of any type of award)—each list receives an award dated according to that list's Award Date.

You can grant an award to one or more students at a time. You can grant the same award type on different award dates. **Note:** You must explicitly grant an award to a student; Chancery SMS does not automatically add recipients.

You can do this if your role is:
School Secretary
School Administrator

To add a student to a list of recipients:

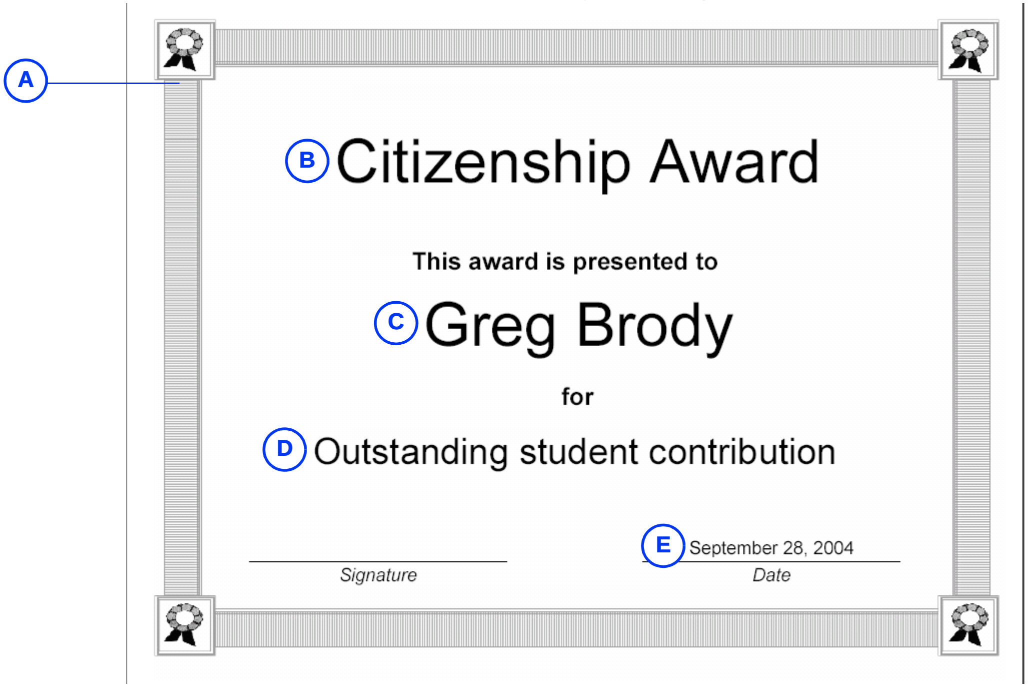
1. On the home page, in the control bar, under **SCHOOL**, click **Awards**. The Awards page appears.
   - ⓘ The most recent awards are listed first.
2. In the **Actions** menu click **Add Award Recipient List…**. The Add Award Recipient List page appears for a new award.
   - ⓘ To add recipients to an existing award, select the award and in the **Actions** menu click **Edit Award Recipient List…**.
   - ⓘ To delete an award and its list of recipients, select the award and in the **Actions** menu click **Delete Award Recipient List**.
3. Enter or change information, which includes:
   - ⓘ **Award name**: Select an award type [p. 171]. Your choice determines some of the text that appears on the award certificate [Figure 47].
   - ⓘ **Award date**: Sets the date that appears on the award certificate [Figure 47]. The date format on the certificate differs from the format used to specify the date. You can set a future date. The date on which you print the certificate has no effect on this date.
   - ⓘ **Comments**: For administrative records only.
4. Add students to the list of recipients:
   a. Enter portions of a student's **Last name** or **First name**.
   b. Click **Search**.
   c. Select a student in the **Search results** list.
   d. Click Add--> (or double-click the name). The student appears in the **List members** list.
   - ⓘ To remove a student from the list of recipients, in the **List members** list, select the student and click **Remove** (or double-click the name).
   - ⓘ To print a list of the recipients: In the **# Recipients** column, click the number for the particular award. In the **Actions** menu click **Print**.
5. Click OK.

You can do this if your role is:
School Secretary
School Administrator

To print an award certificate for each award recipient:

1. On the home page, in the control bar, under **SCHOOL**, click **Awards**. The Awards page appears.
2. In the **Reports** menu click **Award Certificate…**. The Report Options: Award Certificate popup page appears.
3. From the list of **Selected Awards Available**, select the award and click **->**. The award is listed under **Selected**.
   - ⓘ Or double-click the award.
   - ⓘ You can select more than one award for printing.
   - ⓘ To ensure that Chancery SMS does not print a border [Figure 47], clear the **Print the award certificate graphic on each page** check box.
4. Click Preview. Chancery SMS generates a Adobe Acrobat file (.pdf) containing one award certificate for each student in all the selected lists of recipients. Each student's certificate is printed on a separate page.
   - ⓘ Use the window's scroll bar to review all the pages.
5. Print some or all of the page as you see fit.
   - ⓘ For the award certificate [Figure 47], Chancery SMS provides a standard layout; the text of the award is customized according to your granting criteria. When you print the certificate, you can print it with or without a border. This enables you to print on a sheet that has a pre-printed border.

FIGURE 47: Award certificate standard layout example



Citizenship Award

This award is presented to

Greg Brody

for

Outstanding student contribution

Signature

September 28, 2004

Date

A Border

B **Award Name**: This text is set up for the particular award type [*Awards setup, p. 171*].

C **Award Recipient**: Chancery SMS sets this name for each award recipient to whom the award is granted.

D **Certificate description**: This text is set up for the particular award type [*Awards setup, p. 171*].

E **Award Date**: Chancery SMS sets this text according to the date you specify for each list of recipients.

TABLE 12: Permissions pertaining to student awards

To	You need this permission		Set to
Assign awards to students	**Students > Awards**		Delete

Taking attendance

You record attendance in the system by choosing an *attendance code* that indicates the student’s status; for example, Present, Absent Unexcused, or Tardy Unexcused. To save time, each class has a default attendance code which the staff member changes only if necessary. Typically, the default code is “Present” [Figure 48].

When the staff member needs to choose a code other than the default, he or she can select from a preset list of *school attendance codes*. A School Administrator sets up the attendance codes [p. 147]. Chancery SMS tallies attendance according to methods and schedules set up by a School Administrator [p. 150].

As a Teacher or School Administrator, you take attendance for a class or homeroom; you can also view past attendance. A School Administrator can assign attendance for a future date and change past attendance, including clearing attendance records [p. 127]. The frequency at which you take attendance depends on the attendance-taking method in use at the school: one-daily, twice-daily, or by-class [see *Setting an attendance method, p. 144*].

A class or homeroom may have a time which attendance is due to be submitted. If you are the staff member responsible and attendance is not submitted, you may receive an alert to that effect [p. 30]. **Note**: In some circumstances, system processes result in automatic attendance being assigned, such as absences for a suspended student [see *Student record: Student Behavior, p. 62*].

You can take attendance by:

- Assigning attendance on a student roster [p. 68]
- Assigning attendance to one student [p. 70]
- Assigning attendance to various students at once [p. 72]

TABLE 13: Permissions pertaining to attendance

To	You need this permission		Set to
View class attendance information	**School Setup > Classes**		View
Edit class attendance information	**School Setup > Classes**		Edit
View homeroom information	**School Setup > Homerooms**		View
Edit homeroom information	**School Setup > Homerooms**		Edit
To change an attendance code set by student behavior action steps	**Attendance > Override Student Behavior Attendance**		Yes

Assigning attendance on a student roster

You can take attendance for a roster of students on the current date by assigning an attendance code to each student. When your attendance taking is complete you submit the record for storage in the system. You can save your record for later submission should you need to update attendance, such as for a student who is late rather than absent. Chancery SMS indicates that attendance needs to be taken on the My Classes home page [p. 15].

You can do this if your role is:
Teacher
School Secretary
School Administrator

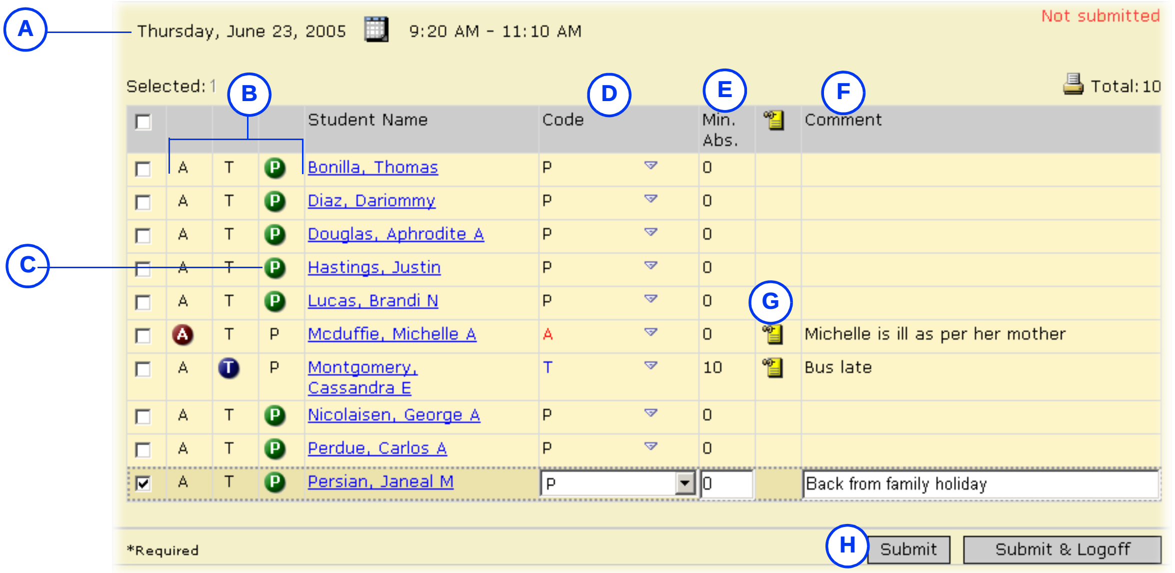
To take attendance:

1 Open an Attendance page.
   - ⓘ For example, by clicking the attendance icon on the My Classes home page [p. 15].
   - ⓘ For example, by clicking **Classes** under **CLASS** in the control bar of the home page.
   - ⓘ For example, by clicking **Homerooms** under **CLASS** in the control bar of the home page.
   - ⓘ If the school attendance method is by class, ensure that the appropriate period is displayed [Figure 48].

2 Assign an attendance code to each student whose attendance status differs from the default.
   - ⓘ If necessary, select a school attendance code [p. 147] in the **Code** column.
   - ⓘ If the school attendance method is twice-daily, select AM or PM [Figure 50].

3 Click Submit.
   - ⓘ To save your work without submitting, in the **Actions** menu click **Save**.

FIGURE 48: Attendance taking for a roster



Thursday, June 23, 2005 9:20 AM - 11:10 AM

Not submitted

Selected: 1

Total: 10

☐				Student Name	Code	Min. Abs.		Comment
☐	A	T	P	Bonilla, Thomas	P	0		
☐	A	T	P	Diaz, Dariommy	P	0		
☐	A	T	P	Douglas, Aphrodite A	P	0		
☐	A	T	P	Hastings, Justin	P	0		
☐	A	T	P	Lucas, Brandi N	P	0		
☐	A	T	P	Mcduffie, Michelle A	A	0		Michelle is ill as per her mother
☐	A	T	P	Montgomery, Cassandra E	T	10		Bus late
☐	A	T	P	Nicolaisen, George A	P	0		
☐	A	T	P	Perdue, Carlos A	P	0		
☑	A	T	P	Persian, Janeal M	P	0		Back from family holiday

*Required

A Date and time of class or homeroom: Displays a choice of AM or PM if the school attendance method is twice-daily [Figure 50]. Displays the period time, if the school attendance method is by class [Figure 51].

B Quick entry buttons: These buttons enable you to enter one of the three standard attendance types: Absent (A), Tardy (T), and Present (P). Click a code to assign it. You can change the code that is assigned to these buttons [p. 148].

C Default attendance code: In this case, all students in this class/homeroom are considered Present until you assign them another code [see also *Setting a default attendance code for a class or homeroom, p.150*]

D **Code**: Enables you to assign one of the school's attendance codes [p. 147] or one of the standard attendance codes.

E **Min. Abs.**: The number of minutes late or absent (if the school records this).

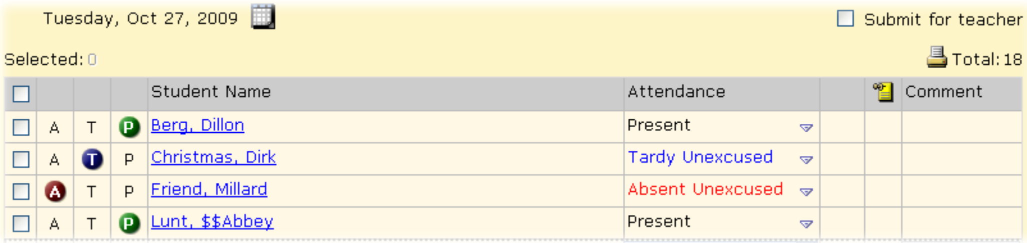
F **Comment**: Click in the column to enter a comment, or select the student.

G Comment: To view a comment, move the cursor over the note icon.

H Submit: Records this attendance record in the system.

I Submit & Logoff: Records this attendance record in the system and logs you off the system [p. 12].

FIGURE 49: Once-daily attendance taking



Tuesday, Oct 27, 2009

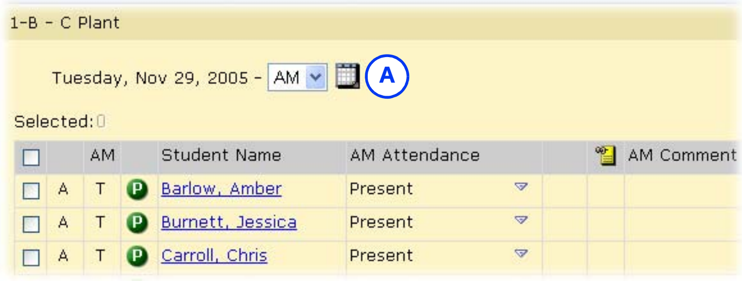
☐ Submit for teacher

Selected: 0

Total: 18

☐				Student Name	Attendance			Comment
☐	A	T	P	Berg, Dillon	Present			
☐	A	T	P	Christmas, Dirk	Tardy Unexcused			
☐	A	T	P	Friend, Millard	Absent Unexcused			
☐	A	T	P	Lunt, $$Abbey	Present			

FIGURE 50: Twice-daily attendance taking



1-B - C Plant

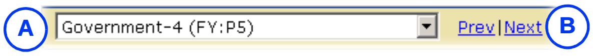
Tuesday, Nov 29, 2005 - AM

Selected: 0

☐		AM		Student Name	AM Attendance		AM Comment
☐	A	T	P	Barlow, Amber	Present		
☐	A	T	P	Burnett, Jessica	Present		
☐	A	T	P	Carroll, Chris	Present		

A Attendance period: Select "AM" or "PM".

FIGURE 51: Class attendance taking



A Class: Enables you to select a class for which to take attendance.

B **Prev | Next**: Cycles through the classes.

Assigning attendance to one student

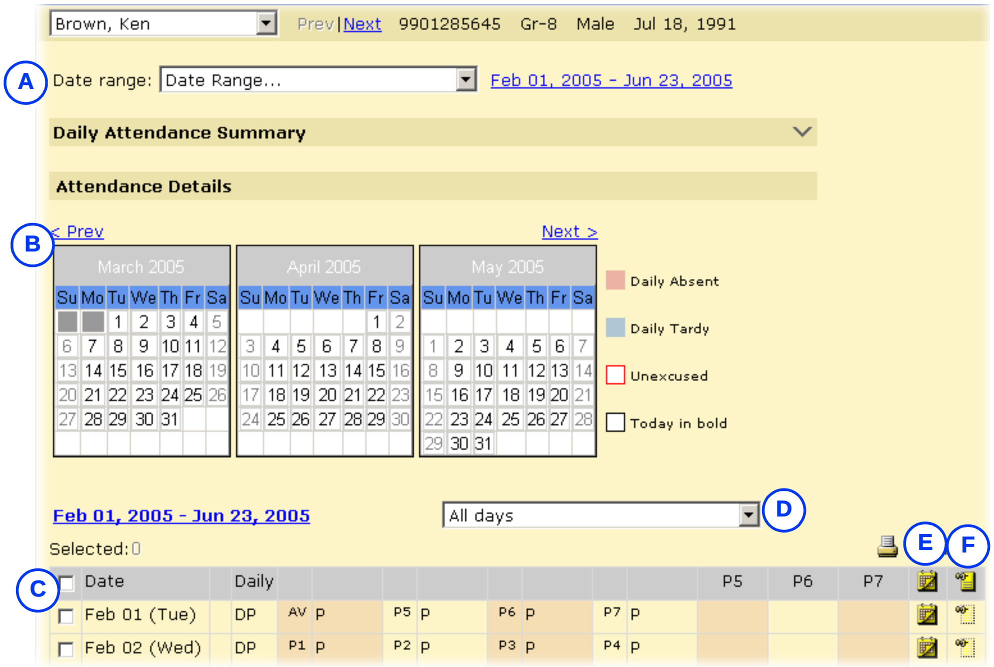
You can assign attendance to an individual student for various days and attendance periods. This method also enables you to review the student's attendance record and observe patterns.

You can do this if your role is:
Teacher
School Secretary
School Administrator

To assign attendance to a student:

1. Locate and view the student's record [p. 36].
   - ⓘ Or, on the My Classes home page [p. 15], in the **Roster** column, click a roster. The Roster page appears [Figure 8]. In the **Student Name** column, click the student's name. The Edit Student Demographics page appears.
   - ⓘ Or, at an elementary school, on the control bar under **SCHOOL**, click **Attendance**. The Attendance page appears [Figure 54]. Search for the student and select his or her record.
   - ⓘ See also *Student records* [p. 50].
2. In the control bar, click **Attendance**. The Student Attendance page appears [Figure 52].
3. Assign attendance for each attendance period for each day, as necessary: click on the table to choose a code.
   - ⓘ The number of attendance periods each day depends on the school's attendance method [p. 144].
   - ⓘ To print the student's attendance for a day, in the **Actions** menu click **Print Daily Summary**.
   - ⓘ To print the student's attendance record, in the **Actions** menu click **Print Details**.
4. Click Save.

FIGURE 52: Student Attendance page



Brown, Ken   Prev | Next   9901285645   Gr-8   Male   Jul 18, 1991

Date range: Date Range...   Feb 01, 2005 - Jun 23, 2005

Feb 01, 2005 - Jun 23, 2005   All days

Selected: 0

☐ Date	Daily					P5	P6	P7
☐ Feb 01 (Tue)	DP	AV P	P5 P	P6 P	P7 P			
☐ Feb 02 (Wed)	DP	P1 P	P2 P	P3 P	P4 P			

A **Date range**: Select the range of attendance records to be displayed.

B Calendar: Displays the months in the specified date range. Click **Prev** or **Next** to adjust the range by a month.

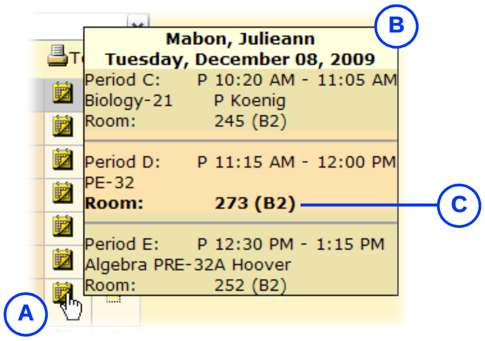
C Daily attendance grid: Displays one row for each day, one column for attendance period. For example, once-daily shows one column, by-class shows one column per period in the day (“P1”, “P2”, etc.). Chancery SMS displays today’s date in bold type and marks with an exclamation mark (!).

D Day type: Enables you to restrict the view to Exception days only [p. 141].

E Schedule: To view the student’s schedule for the day, move the cursor over the icon—a day schedule appears [Figure 53]. Available only at a school using the by-class attendance method [p. 144].

F Comment: To view a comment, move the cursor over the icon. To add a comment, click in the column.

FIGURE 53: A student’s schedule for the day



Mabon, Julieann
Tuesday, December 08, 2009

Period C: P 10:20 AM - 11:05 AM
Biology-21 P Koenig
Room: 245 (B2)

Period D: P 11:15 AM - 12:00 PM
PE-32
Room: 273 (B2)

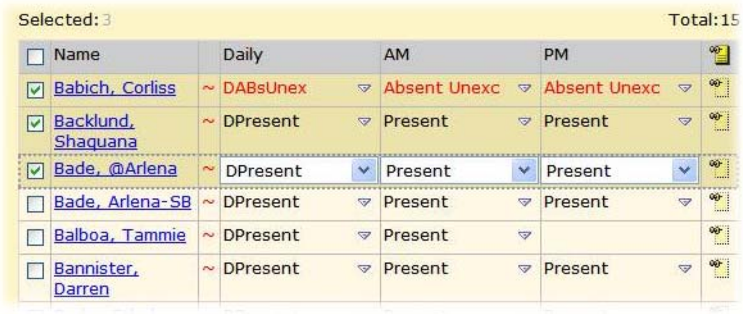
Period E: P 12:30 PM - 1:15 PM
Algebra PRE-32A Hoover
Room: 252 (B2)

A Cursor and schedule icon: The schedule remains in view as long as the cursor is over the schedule icon.

B Day schedule: Information includes periods, times, course names, and room numbers.

C Current room number: Chancery SMS displays the room number in **bold** type when it is the appropriate room for the current time on the current day.

FIGURE 54: Elementary school Attendance page example



Selected: 3 Total:15

☐ Name		Daily	AM	PM	
☑ Babich, Corliss	~	DABsUnex	Absent Unexc	Absent Unexc	
☑ Backlund, Shaquana	~	DPresent	Present	Present	
☑ Bade, @Arlena	~	DPresent	Present	Present	
☐ Bade, Arlena-SB	~	DPresent	Present	Present	
☐ Balboa, Tammie	~	DPresent	Present		
☐ Bannister, Darren	~	DPresent	Present	Present	

Assigning attendance to various students at once

In a school that employs the once-daily or twice-daily attendance method [p. 144], you can assign the same attendance code for a day to a selection of students, even students from different rosters.

You can do this if your role is:
Teacher
School Secretary
School Administrator

To assign attendance to several students at once:

1. Generate a list of students [p. 36]. Select the students. In the **Actions** menu click **Mass Attendance**. The Mass Attendance page appears.
    - Or, on a class roster [p. 15], select students and in the **Actions** menu click **Assign Attendance**.
2. Use **Start** and **End** to set the date range.
    - **Note**: A Teacher can only set this date range to the current date.
3. For **Assign**, select one of the following:
    - “Class Attendance”: Usable only in schools in which the attendance method is By-class [p. 144].
    - “Daily Attendance”
    - “Homeroom Attendance” at a school employing the twice-daily attendance method. If you make this choice, for **To** select “Full Day”, “AM”, or “PM”.
    - “Selected Periods”: Chancery SMS displays the possible periods in the **Available** column. To select one or more periods, move them from the **Available** column to the **Selected** column.
    - “All Periods”
4. Select an **Attendance code**, which will apply to all of the selected students.
5. Click OK.

Assigning grades

Staff members, such as teachers, school secretary, and the School Administrator, can assign grades to students by:

- Assigning grades on a student roster [p. 73]
- Assigning grades to one student [p. 74]

Note: The staff member can assign grades after the grading report period has passed only if the school has set up a grace period for assigning grades [*Grading setup, p. 162*].

Assigning grades on a student roster

A staff member can assign grades for the current grading report period to students on a roster by assigning a grade code to one student per subject at a time, or to several students per subject. The subjects for which staff can assign grades depends on the type of student roster; for example, for a homeroom roster, you can assign grades for all subjects.

You can do this if your role is:
Teacher
School Secretary
School Administrator

To assign grades:

1 On the Classes page (secondary school setup) [p. 15] or Homerooms page (elementary school setup) [p. 161], click the grading icon in the **Grading** column. The Grades page appears [Figure 55].

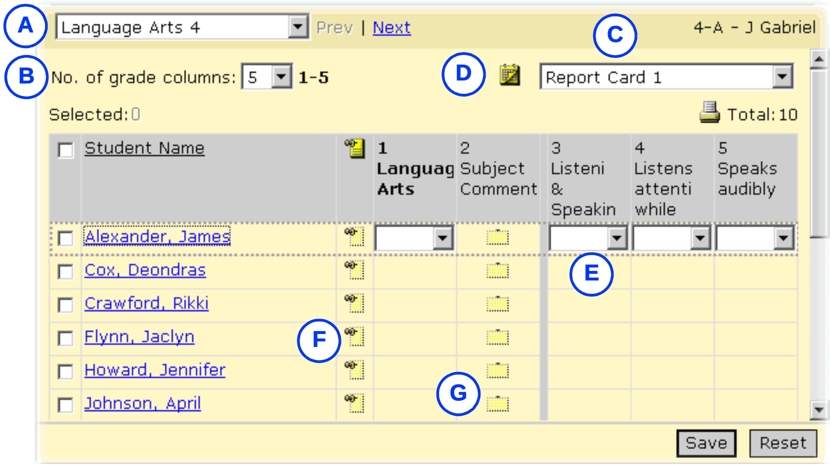
- ⓘ The Grades page initially displays the current grading period.
- ⓘ The **Legend** [Figure 56] displays the grade codes available for use on this particular Grades page.
- ⓘ You can adjust the columns displayed: in the **Edit** menu click **Choose Columns…**.

2 Assign a grade to each student for each grade item. Or assign a grade to several students at once for each grade item:

- **a** Select the students.
- **b** In the **Edit** menu click **Fill Columns…**. The Fill Columns page appears.
- **c** Enter or change Information, which includes:
  - Assigning the same grade to all students on the Grades page or only those selected
  - Overwriting existing grades, where these are recorded, or only assigning a grade where no grade is recorded.
- **d** Assign the grade.
- **e** Click OK.

3 Click Save.

FIGURE 55: Grades page



Language Arts 4

No. of grade columns: 5

Report Card 1

Selected: 0

Total: 10

☐	Student Name		1 Languag Arts	2 Subject Comment	3 Listeni & Speakin	4 Listens attenti while	5 Speaks audibly
☐	Alexander, James						
☐	Cox, Deondras						
☐	Crawford, Rikki						
☐	Flynn, Jaclyn						
☐	Howard, Jennifer						
☐	Johnson, April						

A Subject/class: Enables you to assign grades for another subject or class. You can also click **Prev** or **Next** to switch classes.

B **No. of grade columns**: This enables you to increase the page's legibility by limiting the number of columns displayed. (Where a grading period has more than one item on which each student is to be graded, each item has its own column.)

C Grading period: Enables you to assign grades for a different grading period.

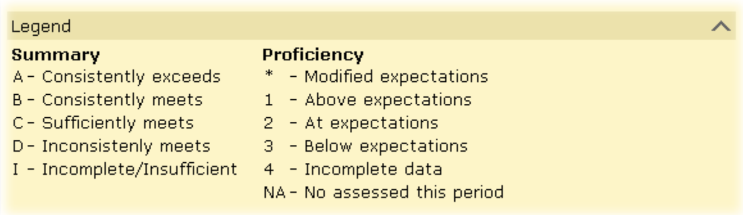
D Class tooltip: Hover your cursor over this tooltip to view teacher, term, meeting pattern, and room information for this class.

E Grade assignment: Select a grade to assign. The **Legend** [Figure 56] describes the grades available.

F Comment: To view a comment, move the cursor over the icon.

G Standard comments: Click to add standard comments; that is, grading comments that have been pre-configured.

FIGURE 56: Grade legend example



Legend

Summary	Proficiency
A - Consistently exceeds	* - Modified expectations
B - Consistently meets	1 - Above expectations
C - Sufficiently meets	2 - At expectations
D - Inconsistenly meets	3 - Below expectations
I - Incomplete/Insufficient	4 - Incomplete data
	NA - No assessed this period

Assigning grades to one student

You can assign grades to an individual student.

You can do this if your role is:
Teacher
School Secretary
School Administrator

To assign grades to a student:

1 Locate and view the student record [p. 36]. The Edit Student Demographics page appears.

2 In the control bar, click **Grades**. The Student Grades page appears [Figure 57].

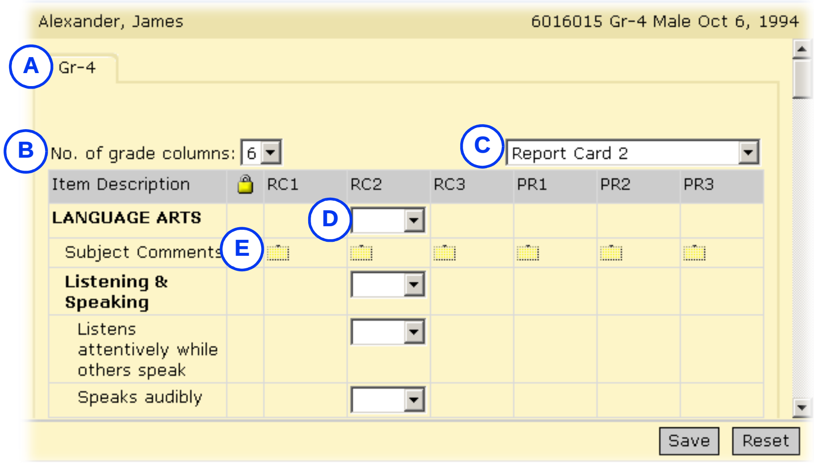
 ⓘ The Student Grades page initially displays the current grading period and the student's current grade level.

 ⓘ The **Legend** [Figure 56] displays the grade codes available for use on this particular Student Grades page.

3 Assign a grade for each grading item.

4 Click Save.

FIGURE 57: Student Grades page



Alexander, James   6016015 Gr-4 Male Oct 6, 1994

Gr-4

No. of grade columns: 6   Report Card 2

Item Description	🔒	RC1	RC2	RC3	PR1	PR2	PR3
LANGUAGE ARTS							
Subject Comments							
Listening & Speaking							
Listens attentively while others speak							
Speaks audibly							

A Grade level: More than one grade level may be available.

B **No. of grade columns**: This enables you to increase the page's legibility by limiting the number of columns displayed. (Where a grading period has more than one item on which each student is to be graded, each item has its own column.)

C Grading period: Enables you to assign grades for a different grading period.

D Grade assignment: Select a grade to assign. The **Legend** [Figure 56] describes the grades available.

E Standard comments icon: To add a pre-configured comment, click the icon.

Assigning grades to a class in a past grading period

You can enter a student’s grade for a class in a previous grading period; that is, a grading period that occurred before the student was scheduled into the class. This is useful when a student transfers in from another school or district. For information about scheduling, refer to the *Chancery SMS Scheduling Guide*.

You can do this if your role is:
School Secretary
School Administrator

To assign grades to a past grading period:

1 Locate and view the student record [p. 36]. The Edit Student Demographics page appears.
2 In the control bar, click **Schedule**. The Student Schedule page appears.
3 Click the **Backfill Grades** check box for the class.
4 In the control bar, click **Grades**. The Student Grades page appears.
5 Select the grading period and enter the grades [Figure 57].
6 Click **Save**.

Assigning pre-defined grade comments

If your school has been set up to use standard comment grading tables [p. 162], you can assign standard comments—that is, pre-configured grade comments that appear on report cards and progress reports—to students. Examples of standard comments include: “Often tardy to class”, “Attitude has improved”, “A pleasure to have in class”, “Frequently disrupts class” and so on.

You can do this if your role is:
Teacher
School Secretary
School Administrator

To assign standard comments:

1 On the Grades or Student Grades page, in the appropriate grade column, click the standard comments icon [Figure 57]. The Student Standard Comments page appears.
2 Double-click a comment to select it.
    ⓘ To select multiple comments, enter the codes in the Comment code field and click **Add**.
    ⓘ To filter comments by category, select a category from **View**.
3 Click OK.

TABLE 14: Permissions pertaining to assigning grades

To	You need this permission		Set to
Assign, edit, or delete grades	**Grading> Add Grades**		Yes
Assign grades for a student for a prior grading period	**Grading > Backfill Grades**		Yes
Change the grades of an elementary student where those grades were assigned by another user	**Grading > Edit Grades from Other Teachers**		Yes
Change the grades of a secondary student where those grades were assigned by another user	**Grading > Enter Grades for All Classes**		Yes
Change a student’s grades for a past grading period	**Grading > Modify Grades for Completed Periods**		Yes
Change a student’s grade that has been calculated by Chancery SMS	**Grading > Override Calculated Grades**		Yes

Programs

A *program* is a specialized activity or course of study that is an enhancement to or a replacement for a regular academic program and is subject to controlled enrollment. To enroll in such a program, a student must apply to it and be offered a position. A District Administrator defines the programs that are available for use in the system and assigns them to schools. A School Administrator can modify such programs for use at a school. For further information, refer to the *Chancery SMS Program Management Guide*.

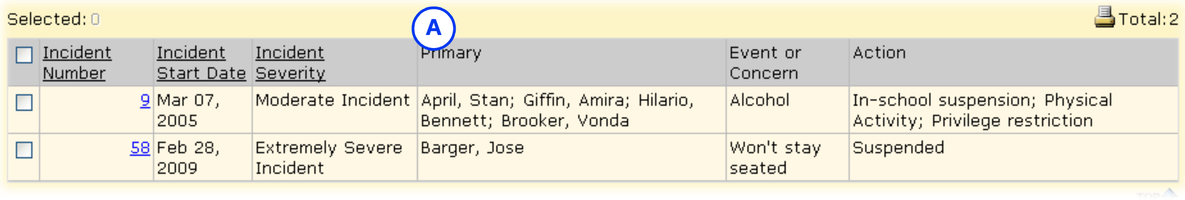
Behavior

You can record an event of unusual student behavior or circumstances of concern that merit monitoring or action on the part of school staff. The record, a *student behavior incident*, covers traditional behavioral infractions, such as bullying or abusive language, as well as non-disciplinary concerns such as poor attendance or a sudden drop in academic performance, and positive behavior such as strong academic performance.

Typically, a student behavior incident is associated with a particular student. However, one incident can also be associated with several students or no students at all until an association is possible; for example, you can record the vandalizing of lab equipment or a swarming in the playground before ascertaining who was responsible. For serious or complex incidents such as those that involve violence, you can record victims, witnesses, and the names of other people involved. These people might include students and school staff, or people outside the school, such as police, parents, drivers, or students from other schools.

When an administrator records an incident, he or she categorizes it, rates its *severity*, and describes one or more *events or concerns* [Figure 58]. Once an incident is recorded, a Teacher or District or School Administrator can add details to it and assign to each student involved one or more *actions*, such as tutoring, a suspension, or counselling. Each action is made up of one or more *action steps*, such as a letter to parents or a transfer to another class, which an administrator can tailor to each student involved [p. 85].

FIGURE 58: Student Behavior incidents



Selected: 0 Total: 2

☐	Incident Number	Incident Start Date	Incident Severity	Primary	Event or Concern	Action
☐	9	Mar 07, 2005	Moderate Incident	April, Stan; Giffin, Amira; Hilario, Bennett; Brooker, Vonda	Alcohol	In-school suspension; Physical Activity; Privilege restriction
☐	58	Feb 28, 2009	Extremely Severe Incident	Barger, Jose	Won't stay seated	Suspended

A **Primary**: The principal student involved in this incident, such as the instigator of an altercation or the student who won an award.

Note: The choices of categories, severity ratings, actions, and their associated steps are set up by a District Administrator to support district policies and procedures.

TABLE 15: Permissions pertaining to student behavior incidents

To	You need this permission	Set to	
View and edit incident records. Permission is granted according to incident category and severity level.	**Student Behavior > Discipline Category Severity High** **Student Behavior > Discipline Category Severity Medium** **Student Behavior > Discipline Category Severity Low** **Student Behavior > Non-Discipline Category Severity High** **Student Behavior > Non-Discipline Category Severity Medium** **Student Behavior > Non-Discipline Category Severity Low** **Student Behavior > Academic Category Severity High** **Student Behavior > Academic Category Severity Medium** **Student Behavior > Academic Category Severity Low** **Student Behavior > Attendance Category Severity High** **Student Behavior > Attendance Category Severity Medium** **Student Behavior > Attendance Category Severity Low** **Student Behavior > Behavior Category 1 Severity High** **Student Behavior > Behavior Category 1 Severity Medium** **Student Behavior > Behavior Category 1 Severity Low**	Edit	
View incident records for all students in the district and edit incident records at the user's school	**Student Behavior > Cross-School Student Behavior Access**	View	
View and edit incident records for all students in the district	**Student Behavior > Cross-School Student Behavior Access**	Edit	
Print the Student Behavior Summary	**Reporting > Behavior Summary Report**	View	
Change an attendance setting assigned by a student behavior action step	**Attendance > Override Student Behavior Attendance**	Yes	
Enroll a student who is assigned a student behavior action that restricts enrollment	**Student Behavior > Override Student Behavior Enrollment**	Yes	

Viewing a student behavior incident

Typically, school staff can view and edit behavior incidents owned by their school and incidents associated with students transferring into their school. School staff can assign actions only to students enrolled in their school. You can view all behavior incidents at the school or a particular student's record of such incidents. A District Administrator can view and edit behavior incidents across the system.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To view a student's student behavior incidents:

1 On the home page, in the control bar under **SCHOOL** click **Student Behavior**. The Student Behavior page appears.

2 Under **Basic**, search by the student's last name, his or her student number and/ or other criteria. Under Search Results, Chancery SMS displays a list of incidents.

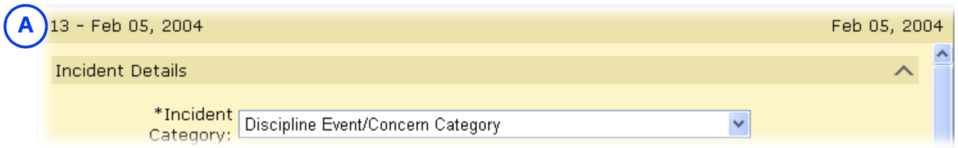
   - ⓘ Or, locate and view a student's record [p. 36]. The Student Demographics page appears. You can search for particular behavior incidents for this student using the **Student Behavior Search** on this page.
   - ⓘ Under **Basic** or **Detail**, when you search by "Referred by", Chancery SMS searches both the "Referred by" and "Referred by (other)" fields.
   - ⓘ You can adjust the columns displayed [p. 22] to include "School" and "Referred by".

3 In the **Incident Number** column, click an incident’s number. The Edit Behavior Incident page appears [Figure 60] [Figure 61] [Figure 62]. Information includes:

- **Incident category**: This category [Figure 59] determines many of the choices available for describing the incident. The categories available depend on your role [p. 12]. The category determines which roles can view the incident record [see Table 15*: Permissions pertaining to student behavior incidents]*.
- **Incident start**: The date and time the incident occurred.
- **Incident end**: The date and time the incident concluded.
- **School**: The school at which this incident was recorded.
- **Referred by**: The staff member who first described this incident.
- **Referred by (other)**: Any other person or organization that described this incident, such as the police or a passerby.
- **Overall incident severity**: The severities available depend on your role [p. 12] and are associated with the choice of Incident Category. The severity determines which roles can view the incident record [see Table 15*: Permissions pertaining to student behavior incidents]*.
- **Incident description**: Additional comments and information pertaining to the incident, to a maximum of 8000 characters.
- **Additional Incident Details**: Enables you to add details on such topics as location, weapon, and police involvement [see p. 81].
- **Persons Involved** panel: Displays a list of people associated with this incident [Figure 60]. You can add or remove students and add or remove people as primaries, witnesses, or victims [p. 80].
- **Events or concerns** displays the events or concerns at the center of this incident [Figure 61]. An incident must have at least one event or concern [see *Adding incident events or concerns, p. 82]*.
- **Actions** lays out the actions assigned to each student involved [Figure 62].

4 Click OK to close the record.

FIGURE 59: Student Behavior Incident number



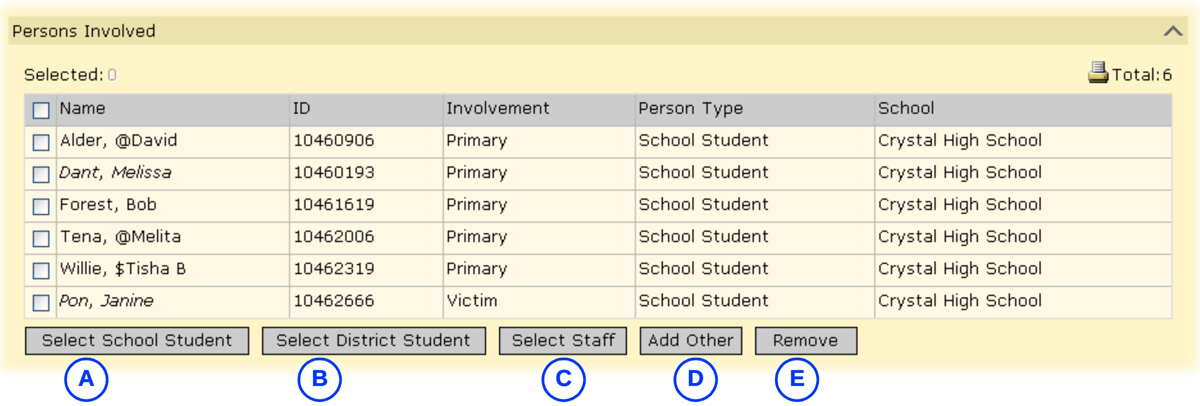
13 - Feb 05, 2004 Feb 05, 2004

Incident Details

*Incident Category: Discipline Event/Concern Category

A Incident number and the date the incident record was created.

FIGURE 60: Student Behavior Incident: Persons Involved



Persons Involved

Selected: 0 Total: 6

☐ Name	ID	Involvement	Person Type	School
☐ Alder, @David	10460906	Primary	School Student	Crystal High School
☐ *Dant, Melissa*	10460193	Primary	School Student	Crystal High School
☐ Forest, Bob	10461619	Primary	School Student	Crystal High School
☐ Tena, @Melita	10462006	Primary	School Student	Crystal High School
☐ Willie, $Tisha B	10462319	Primary	School Student	Crystal High School
☐ *Pon, Janine*	10462666	Victim	School Student	Crystal High School

A Select School Student: Enables you to add a student at the school as a primary, witness, or victim. This involves a search of student records [p. 36].

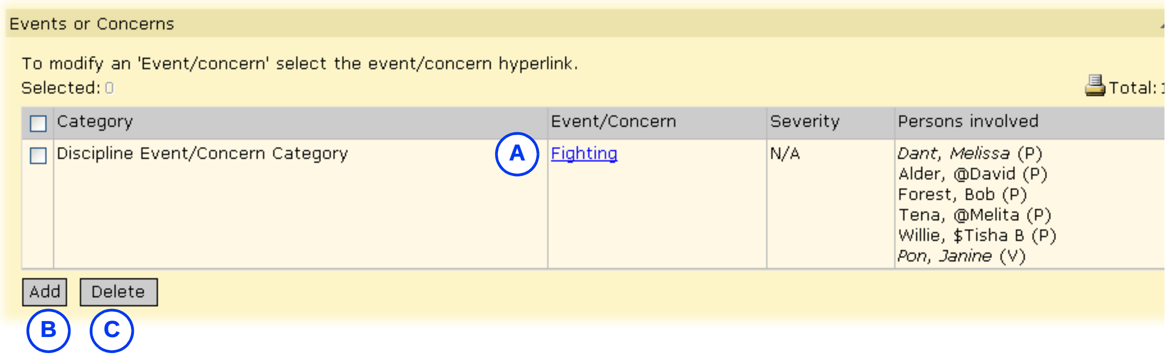
B Select District Student: Enables you to add a student in any school in the district as a primary, witness, or victim. This involves a search of student records [p. 36].

C Select Staff: Enables you to add a school staff member as a primary, witness, or victim. This involves a search of staff records [p. 173].

D Add Other: Enables you to add the name and contact information for a person as a primary, witness, or victim.

E Remove: Deletes the selected person(s) from the list of those involved.

FIGURE 61: Student Behavior Incident: Events and Concerns



Events or Concerns

To modify an 'Event/concern' select the event/concern hyperlink.

Selected: 0 Total:

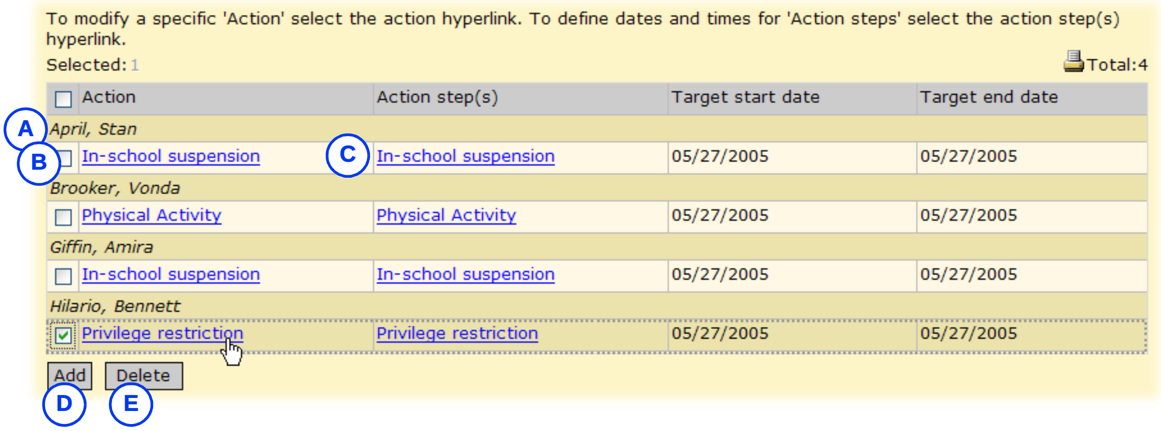
☐ Category	Event/Concern	Severity	Persons involved
☐ Discipline Event/Concern Category	Fighting	N/A	*Dant, Melissa* (P) Alder, @David (P) Forest, Bob (P) Tena, @Melita (P) Willie, $Tisha B (P) *Pon, Janine* (V)

A **Event/Concern**: Click the name to view it. **Note**: Each incident record must hold at least one event/concern.

B Add: Enables you to add an event/concern to this incident record [p. 82].

C Delete: Deletes the selected event/concern(s) from this incident record.

FIGURE 62: Student Behavior Incident: Actions



To modify a specific 'Action' select the action hyperlink. To define dates and times for 'Action steps' select the action step(s) hyperlink.

Selected: 1 Total:4

☐ Action	Action step(s)	Target start date	Target end date
April, Stan			
☐ In-school suspension	In-school suspension	05/27/2005	05/27/2005
Brooker, Vonda			
☐ Physical Activity	Physical Activity	05/27/2005	05/27/2005
Giffin, Amira			
☐ In-school suspension	In-school suspension	05/27/2005	05/27/2005
Hilario, Bennett			
☑ Privilege restriction	Privilege restriction	05/27/2005	05/27/2005

A Student: The student to whom the action applies.

B **Action**: Each action is associated with a particular student. Click the action's name to tailor it to this student [p. 84].

C **Action step(s)**: Click the action steps' name to view or change them.

D Add: Enables you to add an action to this incident record.

E Delete: Deletes the selected action(s) from this incident record.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To view all student behavior incidents:

1 On the home page, in the control bar under **SCHOOL**, click **Student Behavior**. The Student Behavior page appears [Figure 58].

2 Click **Display All Records**.

ⓘ Or use **Student Behavior Search** to find incidents associated with a specific student, event/concern category, or action.

3. In the **Incident Number** column, click an incident's number. The Edit Behavior Incident page appears [Figure 60] [Figure 61] [Figure 62].
4. Click OK to close the record.

Recording a student behavior incident

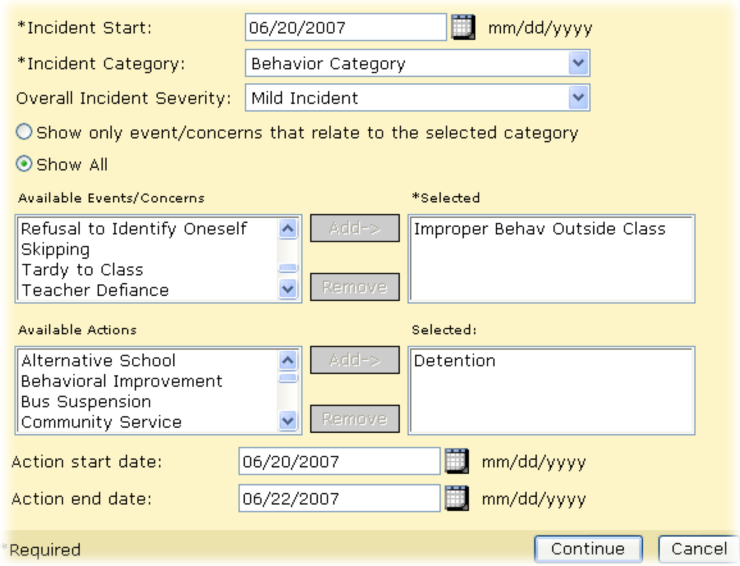
Recording an incident involves setting up a basic incident record, which you can do for one student, for several students, or none at all. Once the incident is recorded, you have the option of adding or adjusting its information at any time *[Viewing a student behavior incident, p. 77]*, such as the other people involved, additional events and concerns, and actions to be taken.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To record a student behavior incident for a student:

1. In the control bar, click **Student Behavior**. The Student Behavior page appears.
2. Click **Display All Records**. Chancery SMS displays a list of incidents.
   - Or, locate and view a student's record [p. 36]. The Student Demographics page appears. You can search for particular behavior incidents for this student using the **Student Behavior Search** on this page.
3. In the **Actions** menu click **Add Behavior Incident**. The Add Behavior Incident popup page appears [Figure 63].
   - Or, you on the Edit Student Demographics page [p. 51], in the **Actions** menu click **Add Behavior Incident**.
4. Enter or change information, which includes the information on an incident record [see *Viewing a student behavior incident, p. 77]* as well as the following:
   - **Show Only Events/Concerns That Relate to the Selected Incident Category**: May be pre-set by a District Administrator, in which case, this option does not appear.
   - **Show All**: Displays all Available Event/Concerns, not just those related to the Incident Category. May be pre-set by a District Administrator, in which case, this option does not appear.
   - **Available Events/Concerns**: Available events/concerns that apply to the chosen Incident Category. Move selected events/concerns to the **Selected** list. An incident must have at least one event/concern selected.
   - **Available Actions**: The action that apply to the chosen Incident Category. Move selected actions to the **Selected** list. (Appears only when you record an incident start from a student record.)
   - **Action Start Date**: The start date for the selected actions. (Appears only when you record an incident start from a student record.)
   - **Action End Date**: The end date for the selected actions. (Appears only when you record an incident start from a student record.)
5. Click Continue. Chancery SMS creates an incident record and the Edit Behavior Incident page appears.

FIGURE 63: Add Behavior Incident popup page



*Incident Start: 06/20/2007 mm/dd/yyyy

*Incident Category: Behavior Category

Overall Incident Severity: Mild Incident

○ Show only event/concerns that relate to the selected category

● Show All

Available Events/Concerns:
- Refusal to Identify Oneself
- Skipping
- Tardy to Class
- Teacher Defiance

*Selected:
- Improper Behav Outside Class

Available Actions:
- Alternative School
- Behavioral Improvement
- Bus Suspension
- Community Service

Selected:
- Detention

Action start date: 06/20/2007 mm/dd/yyyy

Action end date: 06/22/2007 mm/dd/yyyy

*Required

You can do this if your role is:
Teacher
School Administrator
District Administrator

To record a student behavior incident for several students at once:

1 Perform a search to locate the relevant students' record(s) [p. 36]. The Student Search results page appears.

2 Select the student(s) whom you want to record as the Primary person(s).

3 From the **Actions** menu, click **Add Behavior Incident**. The Add Behavior Incident popup page appears [Figure 63].

4 Set options.

5 Click Continue. Chancery SMS creates an incident record and the Edit Behavior Incident page appears.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To record a student behavior incident for no particular students:

1 On the home page, in the control bar under **SCHOOL**, click **Student Behavior**. The Student Behavior page appears.

2 In the **Actions** menu click **Add Behavior Incident**. The Add Behavior Incident popup page appears [Figure 63].

3 Set options.

4 Click Continue. Chancery SMS creates an incident record and the Edit Behavior Incident page appears.

5 Click OK to close the record.

Additional incident details

You can add details to a student behavior incident, specifically the exact location, scheduling group, period and class, times, influencing factors such as gangs or drugs, the use of weapons, legal implications, police involvement, costs, and links to other incidents. Since such detail is useful in resolving an incident, include as much information as you can.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To add details to a student behavior incident:

1 Locate and view the incident record [p. 77]. The Edit Behavior Incident page appears.

2 Click **Additional Incident Details**. The Additional Incident Details page appears.

3 Adjust the information, which includes:

- **Location category**: The category of the primary location of the incident; for example, “On school grounds”.
- **Location**: The specific location where the incident occurred. The choices available in the selection list depend on the Location Category.
- **School building**: The school building in which the incident occurred.
- **School room**: The room where the incident occurred. The choices available depend on the School Building chosen.
- **Other location details**: Additional information about the location where the incident occurred.
- **Scheduling group**: Specifies the scheduling group of the class in which the incident occurred.
- **Period**: Specifies the period of the class in which the incident occurred. The periods available are determined by the Scheduling Group chosen.
- **Class**: The class in which the incident occurred. The classes available are determined by the Period chosen.
- **Time classification**: The general category of time in which the incident started; for example, “During school hours”.
- **Time sub-classification**: The specific category of time in which the incident started; for example, “Period 1”. The choices available depend on the Time Classification chosen.
- **Other time details**: A description of the time the incident started.
- **Factors selected**: Factors that may have had a bearing on the incident; for example, “Gang involvement” or “Racial discrimination”. Select these from the list of **Factors available**.
- **Weapon category**: If a weapon was involved, the general category of that weapon; for example, “Firearm”.
- **Weapon**: The specific weapon used in the incident.
- **Convictable**: Indicates that one or more of the people involved could be convicted for an offense related to the incident.
- **Police involvement**: Indicates that the police were contacted regarding the incident.
- **Police file number**: If police were contacted, the case or file number.
- **Charges laid**: Indicates that one or more of the people involved had charges laid against them.
- **Case outcome**: If charges were laid, the outcome of the case.
- **Estimated cost**: The estimated or actual cost of damages.
- **Drug description**: If drugs were a factor in the incident, a description of that drug.
- **Relate to incident number**: If this incident is related to another, that incident’s number.

4. Click OK.

Adding incident events or concerns

A student behavior incident can involve more than one event or concern. You can add an event or concern to an incident record any time. The additional event or concern can involve one, some, or all of the Persons Involved.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To add an event/concern to a student behavior incident:

1. Locate and view the incident record [p. 77]. The Edit Behavior Incident page appears.
2. In the Events and Concerns panel, click Add. The Add/Edit Event/Concern page appears.
3. Add information, which includes:
    - **Event/concern category**: The general category of event or concern; for example, "Academic" or "Behavior".
    - **Event/concern sub-category**: A more specific category of event or concern; for example, "Sub-par performance" or "Substance Abuse". The choices available depend on the Category chosen.
    - **Event/concern**: The specific event or concern. The choices available depend on the sub-category chosen.
    - **Severity**: Assigned automatically based on the Event/Concern chosen.
    - **Event/concern description**: A more complete description of the event/concern.
    - **Requires police notification**: Indicates the police need to be notified of this event or concern. Set automatically for certain Events and Concerns.
    - **Requires specialized services notification**: Indicates that the office that provides specialized student services should be notified of this event or concern. Set automatically for certain Events and Concerns.
    - **Violates zero tolerance policy**: Indicates that the incident violates the district zero-tolerance policy. Set automatically for certain Events and Concerns.
    - **Persons involved**: Enables you to add this event/concern to some or all of the people involved.
4. Click OK.
    - Or click Save & Add to add another event or concern.

Assigning follow-up action

A student behavior incident may require follow-up action. You can assign an action to one, some, or all of the school's students on the list of Persons Involved. Once you have assigned an action to a student, you can tailor that action for each student [p. 85].

An action consists of at least one, usually several, action steps. Actions and their steps are set up by a District Administrator in accordance with district policies and procedures.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To assign an action to a student behavior incident:

1. Locate and view the incident record [p. 77]. The Edit Behavior Incident page appears.
2. In the **Actions** panel, click Add. The Add Action page appears.
3. Add information, which includes:
    - **Responsible person, school**: The school that employs the person responsible for overseeing the action.
    - **Responsible person**: The school staff member responsible for ensuring the action is completed.
    - **Responsible person (other)**: The name of the responsible person, if that person is not a staff member.

- **Action description**: A more complete description of the action.
- **Action category**: The general category of action.
- **Action sub-category**: A more specific category of action. The choices available depend on the Action Category chosen.
- **Action**: The specific action to be taken. The choices available depend on the Action Sub-category chosen
- **Action type**: The district's categorization of the chosen action, which Chancery SMS displays automatically.
- **Action severity**: The district's assessment of the action's severity, which Chancery SMS displays automatically.
- **Selected action steps**: The steps involved in taking this action. Chosen from the **Available action steps**. **Note**: An action must involve at least one step.
- **Persons involved**: Enables you to associate with this particular action some or all of the students from the list of Persons Involved in this incident. To be selected for an action, the student must be enrolled at this incident's "Referred by, school" [p. 77].
- **Related Events or Concerns**: Enables you to associate one or more of this incident's Events and Concerns with this particular action.
- **Demerits**: The number of demerits assigned to this action. This information is useful for custom reports [p. 104]. Accepts up to four digits followed by one decimal place.
- **Related to Specialized Services hearing**: Indicates that this action is the result of a hearing for a student who receives specialized services.
- **Zero tolerance policy**: Indicates that this action is related to a zero-tolerance policy.
- **Total time required**: The time in hours or days required to complete the action.
- **Previously completed**: The time in hours or days that the person associated with this action has committed to the action prior to the action being recorded in this incident record.
- **Discrepancy reason**: If the person associated with this action has not or does not intend to commit the Total time required for the action, the reason for this.

4. Click OK. The Edit Behavior Incident page appears.
   - Or click Save & Add to add another action.
   - **Note**: Once you save an action, any subsequent changes to that action apply only to the student for whom it was created [p. 84].

Tailoring an action

While you can assign an action to several students at once, you can tailor that action for each student. Tailoring involves adding and removing action steps, linking to the relevant events and concerns, and recording additional details. You also have the option of tailoring each action step [p. 85].

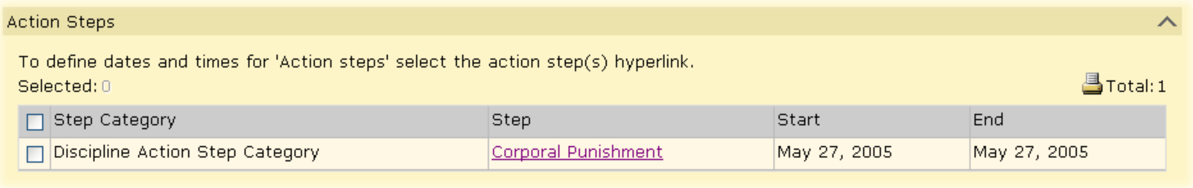
Note: The steps associated with some actions may automatically affect student attendance *[Attendance setup, p. 143]*, as in the case of suspensions, or student enrollment; for example, a student expelled from one school might be prevented from enrolling in another district school.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To tailor an action for a student:

1. Locate and view the student behavior incident record [p. 77]. The Edit Behavior Incident page appears [Figure 62].
2. In the **Actions** panel, in the **Action** column, under the student's name, click the action's name. The Edit Action page appears displaying the student's name in its title.
3. View the following information, which Chancery SMS determines based on the information in the incident record:
    - **Action created**: The date the action was created.
    - **Target action start date**: The earliest start date specified for the action steps associated with this action.
    - **Target action end date**: The latest end date specified for the action steps associated with this action.
    - **Actual completion date**: The date that the student completed the last action step associated with this action.
    - **Current enrollment status**: Indicates that the student is active or inactive [p. 49].
    - **Receives Specialized Services**: Indicates that the student receives specialized services.
    - **Total past suspension days**: The total number of suspension days assigned to this student for days prior to the current date.
    - **Total future suspension days (incl. today)**: The total number of suspension days assigned to this student for the current date and for the days after the current date.
4. Adjust, as necessary, the action's general information, which consists of the information on an action record [see *Assigning follow-up action, p. 83*].
5. Tailor each action step for this student [p. 85], as necessary [Figure 64].
6. In the **Related Events or Concerns** panel, select the events or concerns [p. 82] associated with this particular action for this student.
7. In the **Additional Action Details** panel, record any details specific to this action for this student [p. 81].
8. Click OK.

FIGURE 64: Action steps



Action Steps

To define dates and times for 'Action steps' select the action step(s) hyperlink.

Selected: 0

Total: 1

☐	Step Category	Step	Start	End
☐	Discipline Action Step Category	Corporal Punishment	May 27, 2005	May 27, 2005

Tailoring an action step for a student

When you set up an action step [p. 83], you choose a general category for the step. Tailoring an action step involves providing more detail and setting the time frame for the step's start and completion.

You can do this if your role is:
Teacher
School Administrator
District Administrator

To tailor an action step for a student:

1. Locate and view the student behavior incident record [p. 77]. The Edit Behavior Incident page appears [Figure 62].
2. In the **Actions** panel, in the **Action** column, under the student's name, click the action's name. The Edit Action page appears displaying the student's name in its title.
3. In the **Action Steps** panel, in the **Step** column, click the step's name [Figure 64]. The Edit Action Step page appears.
   - Or add an action step: in the **Actions** menu click **Add Action Step…**.
4. On the Edit Action Step page, change information as necessary, which includes:
   - **Action step category**: The general category of step.
   - **Action step**: The specific step. The steps available are determined by the Action step category.
   - **Description**: A more detailed description of the step and its purpose.
   - **Action step status**: The current status of the step, such as "Active" or "Pending".
   - **Start date**: The date on which the step is expected to begin. To add a date range, in the **Actions** menu click **Add Date Range**.
   - **End date**: The date on which the step is expected to conclude.
   - **Start time**: The time of day on which the step is expected to begin.
   - **End time**: The time of day on which the step is expected to end.
5. Click OK.
   - Or click Save & Add to add another Action Step.

Academic plans

A School Administrator can use an *academic plan* to help guide a secondary school student toward meeting the academic requirements for graduation, as mandated by the district. In Chancery SMS, an academic plan consists of a list of course groups. Each group has a minimum number of credits that the student must earn from his or her choice of courses in that group. An academic plan also has a time frame for which it is valid and optional rules regarding achievement and aptitude test results. Typically, a Counselor [p. 190] is assigned to a student to guide and monitor the student's progress relative to his or her plan [p. 87].

A District Administrator creates academic plans in Chancery SMS for use in the district [p. 197]. The District Administrator can specify a particular plan as the default, which is available to assign to all secondary school students in the district [p. 197]. If more plans than the default are available and system permissions allow it, a School Administrator can view the academic plans available and assign a different plan to a student) [p. 90]. **Note**: An administrator can search for students [p. 36] by academic plan version or Counselor and display either in a search results view [p. 44].

TABLE 16: Student academic plan permissions

To	You need this permission		Set to
View a student's academic plan.	**Academic Planning > Student Academic Plan**		View
View academic plans available in the district.	**District > Academic Plan Setup**		View
Change a student's assigned academic plan.	**Academic Planning > Override Student Academic Plan Version**		Yes

To	You need this permission		Set to
Assign an academic plan to several students at once.	**Academic Planning > Mass Assign Academic Plan**		Yes
Add, edit, or delete information on a student's academic plan.	**Academic Planning > Student Academic Plan**		Delete
Add or edit information on a student's academic plan, except for notes.	**Academic Planning > Student Academic Plan**		Edit
Add, edit, or delete notes attached to student's Academic Plan.	**Academic Planning > Student Academic Plan Notes**		Delete
Change the School Counselor assigned to a student's academic plan.	**Students > Modify Counselor Assignment**		Yes
Disable a user's ability to view or work with an academic plan.	**Academic Planning > Student Academic Plan**		None

Viewing a student's academic plan

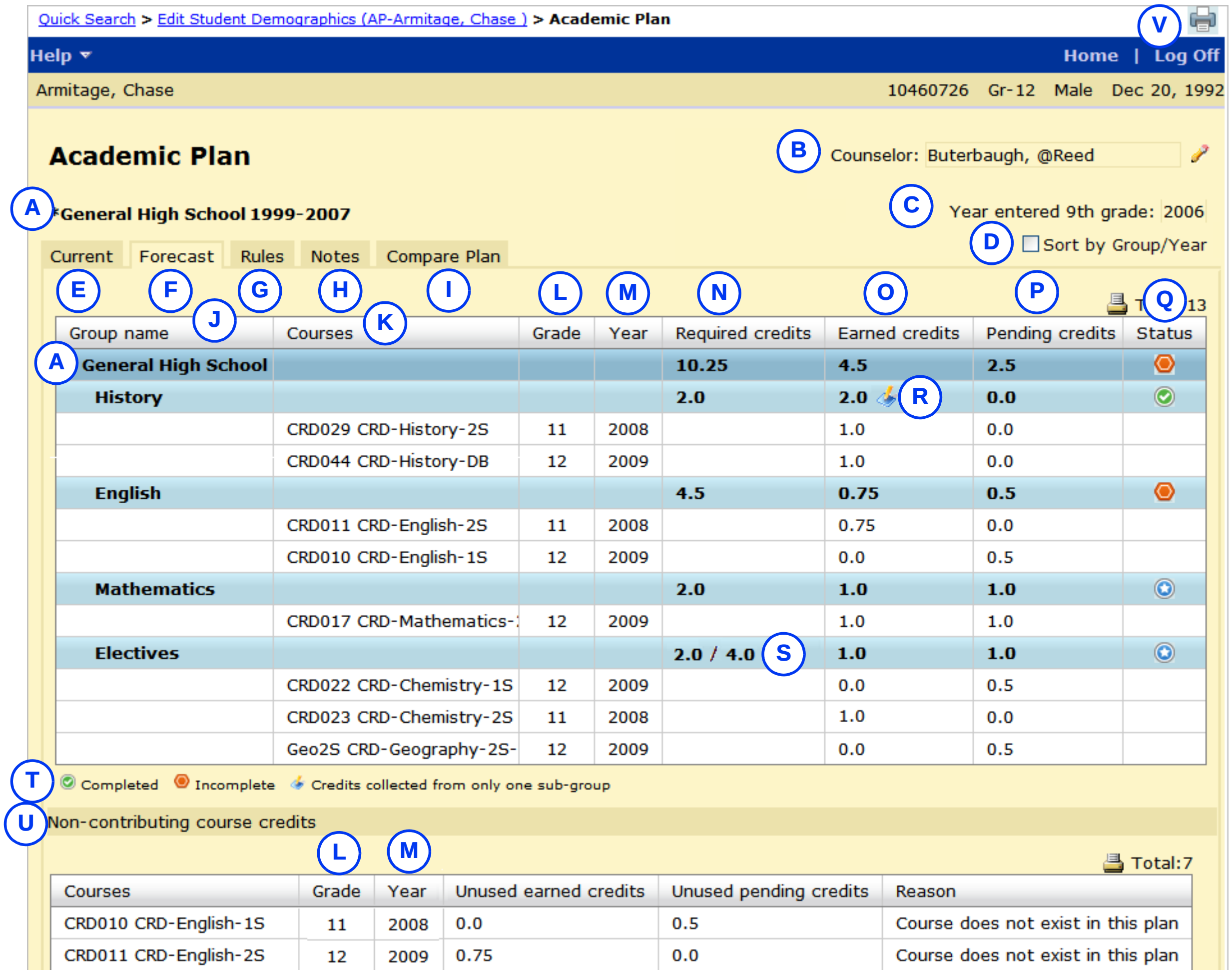
When an academic plan is assigned to a student, Chancery SMS maintains a record of academic credits earned toward its completion [p. 89], credits pending upon completion of courses in which the student is enrolled, and credits needed in course groups specified in the plan. This record enables a student's assigned School Counselor [p. 190] to help the student choose appropriate courses. **Note**: An academic plan is a useful guide—a student can graduate without completing his or her academic plan.

To view a student's academic plan:

1. Locate and view the student's record *[Searching for students, p. 36]*.
2. In the control bar, click **Academic Plan**. The Academic Plan page appears [Figure 65].

   ⓘ By default, Chancery SMS sorts the Courses list by Group then course priority. Select **Sort by Group/Year** to sort the list in ascending order of Group then calendar year then course priority.

FIGURE 65: A student's academic plan


Quick Search > Edit Student Demographics (AP-Armitage, Chase) > Academic Plan
Help
Home | Log Off
Current
Forecast
Rules
Notes
Compare Plan
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q
R
S
T
U
V

Armitage, Chase 10460726 Gr-12 Male Dec 20, 1992

Academic Plan

Counselor: Buterbaugh, @Reed

Year entered 9th grade: 2006

☐ Sort by Group/Year

*General High School 1999-2007

T 13

Group name	Courses	Grade	Year	Required credits	Earned credits	Pending credits	Status
General High School				**10.25**	**4.5**	**2.5**	●
History				**2.0**	**2.0**	**0.0**	✓
	CRD029 CRD-History-2S	11	2008		1.0	0.0	
	CRD044 CRD-History-DB	12	2009		1.0	0.0	
English				**4.5**	**0.75**	**0.5**	●
	CRD011 CRD-English-2S	11	2008		0.75	0.0	
	CRD010 CRD-English-1S	12	2009		0.0	0.5	
Mathematics				**2.0**	**1.0**	**1.0**	○
	CRD017 CRD-Mathematics-	12	2009		1.0	1.0	
Electives				**2.0 / 4.0**	**1.0**	**1.0**	○
	CRD022 CRD-Chemistry-1S	12	2009		0.0	0.5	
	CRD023 CRD-Chemistry-2S	11	2008		1.0	0.0	
	Geo2S CRD-Geography-2S-	12	2009		0.0	0.5	

✓ Completed ● Incomplete Credits collected from only one sub-group

Non-contributing course credits

Total:7

Courses	Grade	Year	Unused earned credits	Unused pending credits	Reason
CRD010 CRD-English-1S	11	2008	0.0	0.5	Course does not exist in this plan
CRD011 CRD-English-2S	12	2009	0.75	0.0	Course does not exist in this plan

A Academic plan name: The name of the academic plan assigned to this student.

B **Counselor**: The School Counselor [p. 190] assigned to this student. Click the pencil icon (if available) to change the Counselor, or select a Counselor on the on the **Demographics: School-Specific** tab of the student's record [p. 54]. To assign a Counselor to more than one student, select a list of students and in the **Actions** menu, click **Assign > Values**. Note: When a counselor becomes inactive, he or she continues to appear in the counselor field until you assign the student a new active counselor.

C **Year entered 9th grade**: The year this student entered Grade 9. Chancery SMS uses this value to determine the plan to assign to this student by default. Chancery SMS derives the year from the student's record [p. 55] or calculates it based on the student's historical or current year data.

D **Sort by Group/Year**: Sorts the Courses list in ascending order of Group then calendar year then course priority. Does not apply to a printout of this grid [p. 25].

E **Current**: Displays information about courses the student is currently taking.

F **Forecast**: Displays courses that the student has completed, that are pending, or that the student is currently taking.

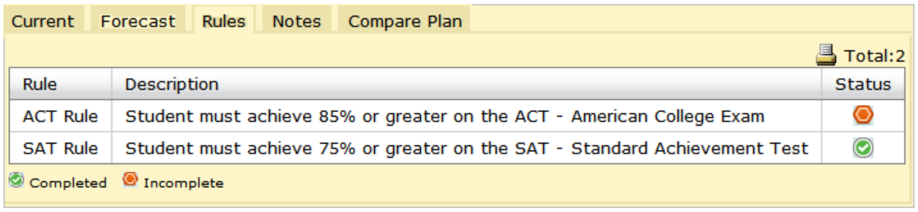
G **Rules**: Displays the student's status relative to the plan's aptitude and achievement requirements [Figure 66].

H **Notes**: Displays notes about this student's plan, such as the student's special interests or circumstances. A School Counselor or School Administrator can record notes.

I **Compare Plan**: Enables you to compare the student's current plan against a another plan available in the district [p. 91]. This is particularly useful when a student is struggling through an inappropriate plan. On the Compare Plan page, select another plan from **Compare Plan Version**. You can change the plan assigned to the student by selecting the plan at the top of the page and clicking Apply.

- **J** **Group name**: The plan's course groups. The first row contains the plan name.
- **K** **Courses**: On the **Current** tab, these are the plan's courses the student is currently taking. On the **Forecast** tab, these are the plan's courses that the student has either completed, has not completed, or is taking. Each retake of the same course is listed separately.
- **L** **Grade**: Displays the student's grade level at the time he or she took the course. If a student takes a course more than once, this is the latest grade level.
- **M** **Year**: Displays the year the student took the course.
- **N** **Required credits**: Lists the credits associated with each course group and course. The first row lists the total number of credits required for the plan—the sum of all the groups' credits must equal this number.
- **O** **Earned credits**: Displays the credits earned [p. 89]. Chancery SMS derives this information from the student's schedule for the current year and from their historical data for past years.
- **P** **Pending credits**: Potential credits not yet earned for courses the student is taking. Only current year courses show pending credits. **Note**: The **Pending Credits** column is hidden when the **Current** tab is active.
- **Q** **Status**: Displays the student's status relative to each course group [see *Earning credits on an academic plan, p. 89*]. Refer to the status indicator legend.
- **R** Credits collected from only one sub-group icon: Indicates that credits for the course group are collected from only one sub-group.
- **S** **x.x/y.y:** Indicates that maximum credits have been specified for these courses. x.x = required credits, y.y = maximum credits.
- **T** Status indicator legend.
- **U** **Non-contributing course credits** [see *Earning credits on an academic plan, p. 89*]
- **V** Print: Click the icon to produce a printable version of this student's academic plan.

FIGURE 66: Academic plan graduation rules status



Rule	Description	Status
ACT Rule	Student must achieve 85% or greater on the ACT - American College Exam	●
SAT Rule	Student must achieve 75% or greater on the SAT - Standard Achievement Test	✓

✓ Completed ● Incomplete

Earning credits on an academic plan

In a student's academic plan, Chancery SMS tallies earned credits [Figure 65] by course groups. When the student earns enough credits to meet the requirements of a course group, Chancery SMS applies the surplus credits to the next course group in the order of priority. The District Administrator sets the course group order of priority when creating the academic plan [p. 197].

For Permanent Record (PR) environments, the credit calculations are run as a nightly task. For non-PR environments, school administrators can manually update the credit calculations on the Calculate Grades, Credits, & GPAs page.

On the student's academic plan page, Chancery SMS displays the student's current status for each course group and for the academic plan as a whole [Figure 65]. Possible states include:

- "Complete": Indicates that the student's earned credits meet the group's requirements.
- "In-progress": Indicates that the student has credit-awarding grade items [p. 72] pending for courses in the group.

- “Incomplete”: Indicates that the student has no credit-awarding grade items pending.

When the student has earned enough credits to meet the credit requirements for all course groups in his or her plan, Chancery SMS designates the surplus earned and pending credits as non-contributing credits, that is, unused. Depending on how the academic plan is set up [p. 197], the surplus credits are either assigned to a designated course group or, on the student’s Academic Plan page, Chancery SMS displays the courses with surplus credits in the **Non-contributing course credits** grid [Figure 65]; the display includes the reason for designation, which include:

- “Incorrect plan setup”: The academic plan assigned to this student is set up incorrectly.
- “Overflow credits”: The requirements of the course group to which these credits apply has been met.
- “Course does not exist in this plan”: The course is not included in the student’s academic plan.
- “No credits earned or pending”: The student has taken a course included in the academic plan but no earned or pending credits are recorded for that course.
- “Dropped class”: Grades were entered but no credits were earned and the student dropped the course before the final reporting period for the class. **Note:** If grades were entered and partial credits were earned before the class was dropped, the course appears in the plan with earned credits but no pending credits. If a credit-awarding course is dropped before the final reporting period and before any grades are entered, Chancery SMS does not include the course in the student’s Academic Plan.

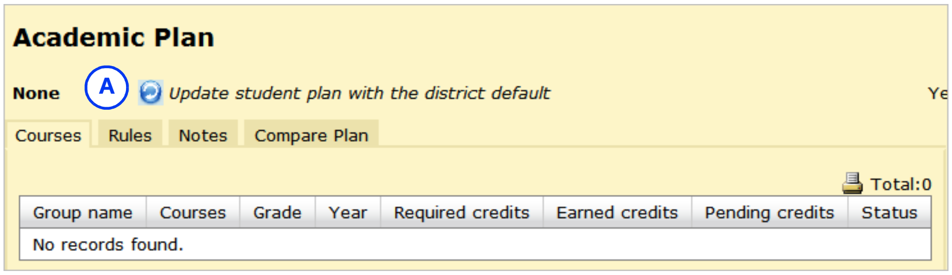
Assigning an academic plan

A School Administrator can assign one of the academic plans available on the system [p. 91] to one or more students. Where a system’s setup does not permit a choice of plans, a School Administrator can assign only the default academic plan, as designated by the District Administrator [p. 197]. A School Administrator can assign an academic plan to one student or to several students at once. When working with a varied list of students, the School Administrator can have Chancery SMS automatically assign each student the appropriate plan according to the year the student entered 9th grade.

To assign an academic plan to a student:

1. Locate and view the student’s record *[Searching for students, p. 36]*.
2. In the control bar, click **Academic Plan**. The Student Academic Plan page appears.
3. Click the update icon [Figure 67]. Chancery SMS displays a list of academic plans appropriate to this student. Select a plan from the list.
   - ⓘ In the list of academic plans, a plan name preceded by an asterisk (*) indicates a plan that is suitable for this student.
   - ⓘ Where a system’s setup does not permit a choice of plans, Chancery SMS assigns the district’s default academic plan to the student.
   - ⓘ If no plan is assigned to this student, the list of plans is set to “None” or, if no list is displayed, the icon is labeled **Update student plan with the district default**.
4. Click Apply.
5. Click OK.

FIGURE 67: Assigning an academic plan



Academic Plan

None *Update student plan with the district default*

Total:0

Group name	Courses	Grade	Year	Required credits	Earned credits	Pending credits	Status
No records found.							

A Update icon

To assign an academic plan to several students:

1. Generate a list of students [Searching for students, p. 36].
2. Select the students.
3. In the **Actions** menu, click **Assign > Academic Plan**. A web page dialog appears.
4. **Select a version** and choose one of the available academic plans.
   - ⓘ The **Select a version** option might not be available on some systems.
   - ⓘ Or, select **System will assign plan version based on student's year of entry into grade 9** to have Chancery SMS automatically assign the appropriate plan.
5. Click OK.

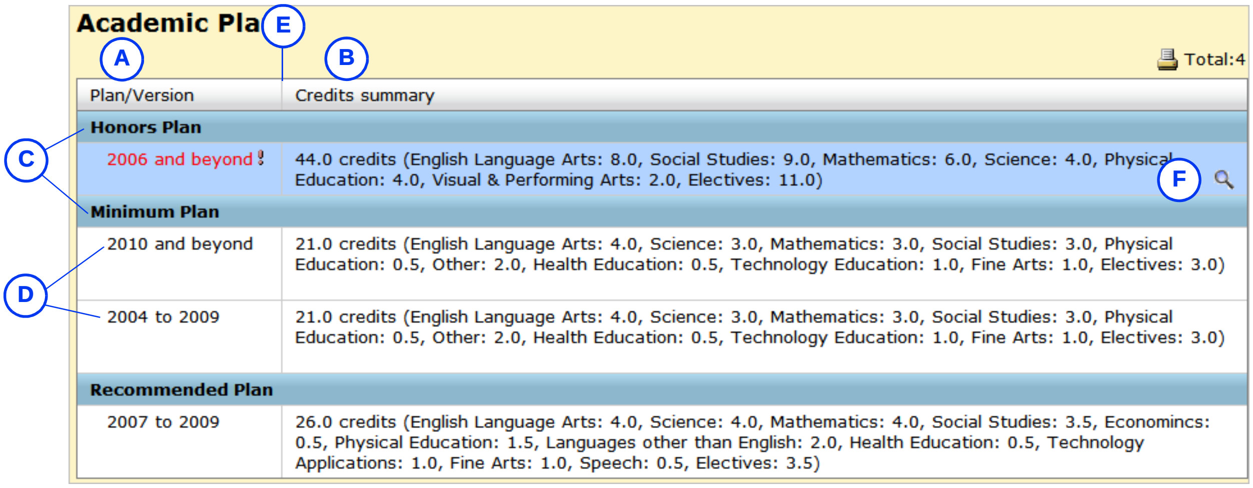
Viewing the plans available

A School Administrator can view the details of any of the academic plans available on the system. Each plan is a *version* of an academic plan as set up by the District Administrator [p. 197]. Typically, each version covers a separate time period.

To view the academic plans available:

1. On the home page, in the control bar, click **District Setup**. The District Setup page appears.
2. Under **Academic Planner**, click **Plan Setup**. The Academic Plans page appears [Figure 68].
   - ⓘ To view a plan version's setup, move the cursor over the plan version and click the magnifying glass. The Academic Plan Setup page appears [Figure 69].

FIGURE 68: Academic plans



Academic Pla

Plan/Version	Credits summary
Honors Plan	
2006 and beyond !	44.0 credits (English Language Arts: 8.0, Social Studies: 9.0, Mathematics: 6.0, Science: 4.0, Physical Education: 4.0, Visual & Performing Arts: 2.0, Electives: 11.0)
Minimum Plan	
2010 and beyond	21.0 credits (English Language Arts: 4.0, Science: 3.0, Mathematics: 3.0, Social Studies: 3.0, Physical Education: 0.5, Other: 2.0, Health Education: 0.5, Technology Education: 1.0, Fine Arts: 1.0, Electives: 3.0)
2004 to 2009	21.0 credits (English Language Arts: 4.0, Science: 3.0, Mathematics: 3.0, Social Studies: 3.0, Physical Education: 0.5, Other: 2.0, Health Education: 0.5, Technology Education: 1.0, Fine Arts: 1.0, Electives: 3.0)
Recommended Plan	
2007 to 2009	26.0 credits (English Language Arts: 4.0, Science: 4.0, Mathematics: 4.0, Social Studies: 3.5, Economincs: 0.5, Physical Education: 1.5, Languages other than English: 2.0, Health Education: 0.5, Technology Applications: 1.0, Fine Arts: 1.0, Speech: 0.5, Electives: 3.5)

A **Plan/Version**: Lists the academic plans available and one or more versions of each plan, the most recent version (in terms of year range) first. Red text and an exclamation mark indicate an incomplete plan setup [p. 197].

B **Credits Summary**: The course names and credits for the plan version.

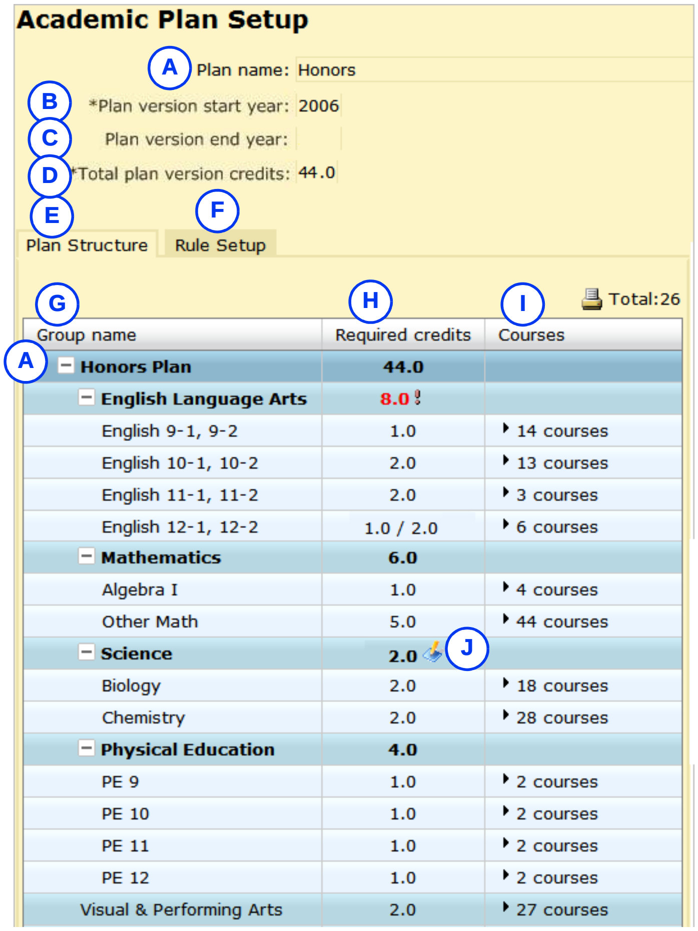
C Academic plan

D Academic plan version

E Column border. You can change the column width by dragging its border.

F Setup icon: To view a plan version’s setup [Figure 69], move your cursor over a row and click the icon.

FIGURE 69: Academic plan version setup



Academic Plan Setup

Plan name: Honors

*Plan version start year: 2006

Plan version end year:

*Total plan version credits: 44.0

Plan Structure | Rule Setup

Total:26

Group name	Required credits	Courses
Honors Plan	**44.0**	
English Language Arts	**8.0 !**	
English 9-1, 9-2	1.0	14 courses
English 10-1, 10-2	2.0	13 courses
English 11-1, 11-2	2.0	3 courses
English 12-1, 12-2	1.0 / 2.0	6 courses
Mathematics	**6.0**	
Algebra I	1.0	4 courses
Other Math	5.0	44 courses
Science	**2.0**	
Biology	2.0	18 courses
Chemistry	2.0	28 courses
Physical Education	**4.0**	
PE 9	1.0	2 courses
PE 10	1.0	2 courses
PE 11	1.0	2 courses
PE 12	1.0	2 courses
Visual & Performing Arts	2.0	27 courses

A **Plan name**: The name of this plan version.

B **Plan version start year:** The start year of this plan version.

C **Plan version end year**: The year this plan version concludes. “and beyond” indicates that the plan version has no end year [Figure 68].

D **Total plan version credits**: The number of credits a student needs to complete this plan version.

E **Plan Structure**: Defines the plan version’s course and credit requirements.

F **Rule Setup:** Displays aptitude and achievement requirements rules.

G **Group name**: The groups and subgroups of courses that make up the plan. The first row contains the plan version name.

H **Required credits**: Lists the credits associated with each course group and course. The first row lists the total number of credits required for this plan version—the sum of all the groups’ credits must equal this number. Red text followed by an exclamation mark indicates the number of credits where that number does not meet requirements. x.x/y.y indicate minimum and maximum credits.

I **Courses**: Lists the courses in each group and subgroup.

J Non-standard credit collection settings: This icon indicates that the credit collection settings for the group are not standard. To view the details, move your cursor over the icon.

3 Reporting on information

A typical Chancery SMS system is equipped with a variety of *reports*. A report gathers information from the system according to particular search criteria; for example, daily attendance, enrollment, and grade statistics. Reports enable teachers and other school staff to run daily tallies and spot exceptions, school administrators to assess and plan, and district administrators to analyze trends and report to other levels of government.

A report assembles the information for presentation on screen, in print, or in your choice of data formats. You need to *run* a report for it to begin its information assembly process. At the time you run a report, you may have the option of specifying additional parameters by means of *preferences* and *filters*; for example, for a report that generates a list of students with failing grades, you could specify only students in Grade 12. You can have Chancery SMS run a report at a specific time or regular interval.

Once a report is run, you often have the option of adjusting the presentation of the results by sorting rows and adding or removing columns. Moreover, you can save results as a list for later use. You have the option of customizing some or all of the reports in a system [p. 104].

Report types

Three kinds of reports appear in a Chancery SMS system: built-in, package, and customize:

- *Built-in reports* [p. 269] are integral to Chancery SMS. Of the built-in reports, some are available to all users and others are made available only to specific roles by an administrator [*Making reports available, p. 190*]. Reports built into Chancery SMS prior to version 4.2 are known as *legacy reports*.
- *Report Package reports* are part of the *Chancery SMS Report Package* [p. 107] of which there is one for each version of Chancery SMS. Report Packages are available at Pearson's user support site: *Pearson PowerSource* (*https://powersource.pearsonschoolsystems.com*). Each Report Package contains a set of reports which the administrator of a Chancery SMS system can install and make available to users. Where the reports are already installed on a system, the Report Package gives the administrator the option of updating those reports with the latest version. The reports available to a user are specific to his or her role.

- *Custom reports* are reports of your own creation that you add to the system. You can develop custom reports using a report writing tool such as Crystal Reports [p. 197].

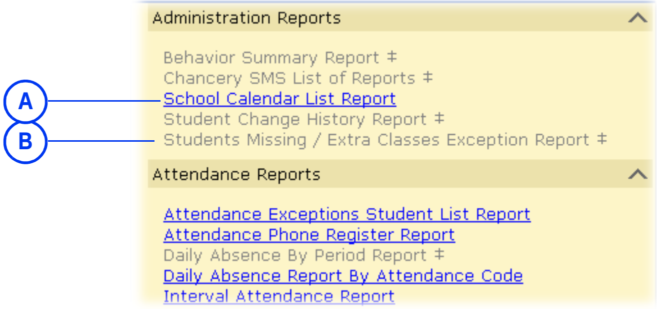
The District Administrator can control the specific reports available to a user or role [p. 12] using permissions.

Running a report

Chancery SMS displays the reports available for your role [p. 12] in several places:

- On a School Reports page: In general, this is a comprehensive list of the reports in the system. However, the list may contain more reports than those you can run [Figure 70].
- In the **Reports** menu of particular pages [Figure 71], such as a page of student search results [p. 46].
- In the **Reports** section of your home page [p. 98]: For convenient access, you can add your choice of available reports to your home page.

FIGURE 70: Example of reports available to a Teacher



Administration Reports

Behavior Summary Report ‡
Chancery SMS List of Reports ‡
School Calendar List Report
Student Change History Report ‡
Students Missing / Extra Classes Exception Report ‡

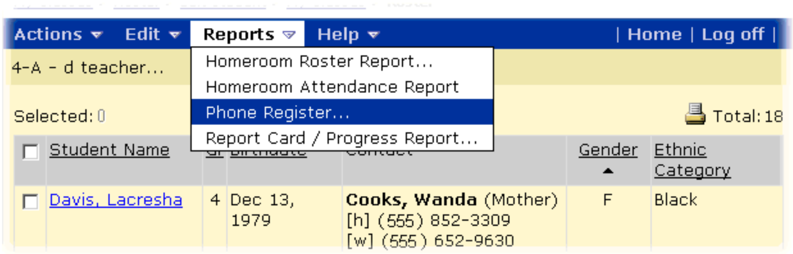
Attendance Reports

Attendance Exceptions Student List Report
Attendance Phone Register Report
Daily Absence By Period Report ‡
Daily Absence Report By Attendance Code
Interval Attendance Report

A A report you can run.

B A report you cannot run.

FIGURE 71: Reports menu example


Actions
Edit
Reports
Help
Home
Log off
Homeroom Roster Report...
Homeroom Attendance Report
Phone Register...
Report Card / Progress Report...

4-A - d teacher...

Selected: 0

Total: 18

☐	Student Name				Gender	Ethnic Category
☐	Davis, Lacresha	4	Dec 13, 1979	**Cooks, Wanda** (Mother) [h] (555) 852-3309 [w] (555) 652-9630	F	Black

You can run a report at any time. A report may take some time to generate its results, especially on large systems or where the report gathers a broad range of information. A report can run in the background as you carry on with other work in the system. You can run another report before the first is finished. In this case, Chancery SMS puts the reports in a queue and runs up to two at once.

To run a report:

1. On the home page, in the control bar under **ADMIN**, click **Reports**. The School Reports appears.
2. In the list of reports, click a report name. The Report Options popup page appears.

   ⓘ Some of the reports listed may not be available to your role [p. 12].

- On the School Reports , Chancery SMS displays a link for every report on the system even for a report that is not currently available to run. Such a link is a placeholder—clicking it will not generate a report until a District Administrator uploads that report from the Report Package [p. 107] to the system [p. 112].

3 On the Report Options page, set report options, which for most reports include:

- **Preferences**: These are optional parameters that the person who configured the report has included to increase the flexibility of the report; for example, a time span, specific classes, specific grade levels. Preferences may also include optional information to include in the presentation of the report results.
- **Filters**: These optional parameters enable you to refine the scope of the report. **Note:** Since Filters refer to database field names, they are complex and suitable for use only by knowledgeable users.
- **Scheduling Options** *[Scheduling a report, p. 99]*
- **Output Options** *[Report results, p. 101]*: Controls how the report's results are presented. The default option is the print-ready Adobe Acrobat (pdf) format.
- **Saved report options**: Displays the most recent options setting you have used for this report (Chancery SMS displays this only if you have run this report previously and saved the options setting) [Figure 73]. You can accept the options setting and run the report, choose one of your named options settings to re-apply it, or choose to apply the report's default setting. Having made any of these choices, you can also adjust the report options further (and perhaps save that setting under a new name).

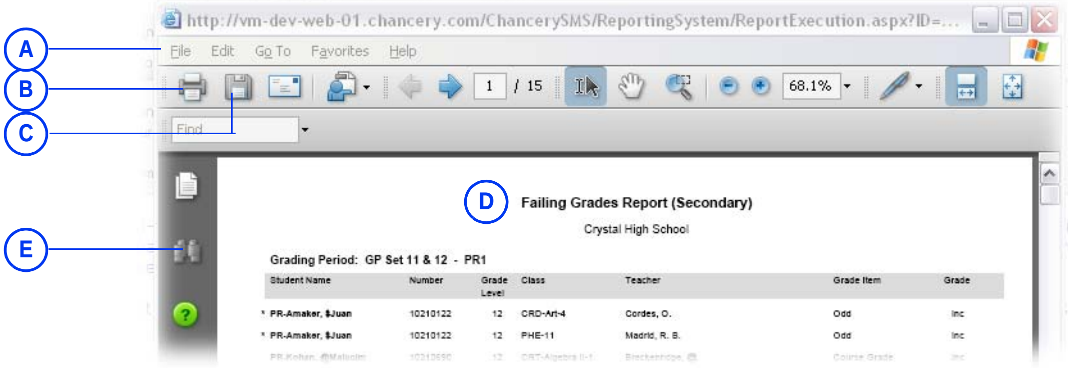
4 Click Run. The Report Status popup page appears. Chancery SMS displays information on the progress of the report, including a notice when it is complete.

- **Note:** When a report is processing, clicking **Cancel** might slow system performance. This is because a legacy report [p. 95] continues to run in the background until completed.
- Or click Save to save the options setting for later re-use without running the report. Chancery SMS saves the options setting under a name of your choice.
- Or click Save+Run to save the options setting for later re-use and run the report. Chancery SMS saves the options setting under a name of your choice.

5 Upon completion, Chancery SMS displays a print-ready version of the report results [Figure 72].

- To print the report results, click the print icon [Figure 72] or in the web browser's **File** menu click **Print...**.
- To save the report results, click the save icon [Figure 72] or in the browser's **File** menu click **Save As...**. Chancery SMS saves the file in PDF format (Adobe Acrobat).

FIGURE 72: Print-ready report results example


http://vm-dev-web-01.chancery.com/ChancerySMS/ReportingSystem/ReportExecution.aspx?ID=...
File
Edit
Go To
Favorites
Help
1
/ 15
68.1%
Find
A
B
C
D
E

Failing Grades Report (Secondary)

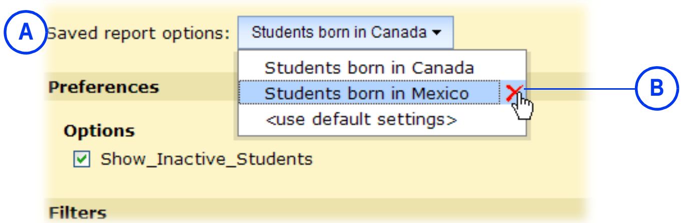
Crystal High School

Grading Period: GP Set 11 & 12 - PR1

Student Name	Number	Grade Level	Class	Teacher	Grade Item	Grade
* PR-Amaker, $Juan	10210122	12	CRD-Art-4	Cordes, O.	Odd	Inc
* PR-Amaker, $Juan	10210122	12	PHE-11	Madrid, R. B.	Odd	Inc
PR-Kohan, @Malcolm	10210690	12	CRT-Algebra II-1	Breckenridge, @	Course Grade	Inc

A The web browser's **File** menu
B Print icon
C Save icon
D Report results in a print-ready presentation. The results may consist of more than one page.
E Search icon: Search the report results for specific text.

FIGURE 73: Saved Report Options example


A
Saved report options:
Students born in Canada
Students born in Canada
Students born in Mexico
<use default settings>
B
Preferences
Options
☑ Show_Inactive_Students
Filters

A **Saved Report Options**: Lists options settings that you saved previously for this report. The default choice is the most recently saved options setting. "<use default settings>" re-applies the report's default options setting.
B Delete: Click to delete a named options setting.

Displaying reports on the home page

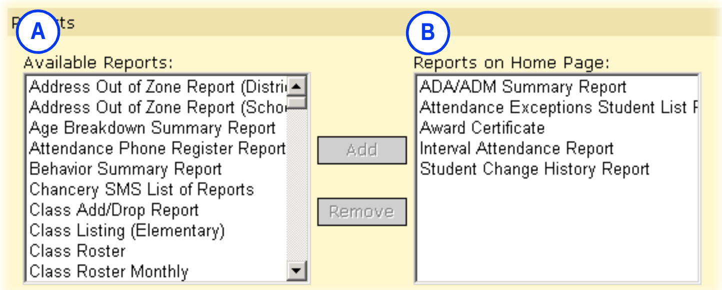
You can control the reports [p. 95] displayed in the Reports section of your role's home page [p. 14]. Any customization of your home page is specific to the user account and role [p. 12] in which you are working when you create it; in other words, Chancery SMS preserves the customized home page and displays it when your user account is logged on and that particular role is chosen. See also *Quick links to other pages* [p. 17].

You can do this if your role is:
School Secretary
Teacher
School Administrator

To add a report to your role's home page:

1. On the home page, in the **Actions** menu click **Customize Home Page...**. The Customize Home Page page appears.
2. In the **Reports** panel [Figure 74], in the **Available Reports** list, select the report and click Add. The report appears in the **Reports on Home Page** list.
   - ⓘ To remove a report from the home page, select the report in the **Reports on Home Page** list and click Remove.
3. Click OK.
   - ⓘ When you have at least on report added to the home page, Chancery SMS displays a **Reports** section on the home page [p. 14].

FIGURE 74: Customize Home Page page: Reports


A
B
Available Reports:
Address Out of Zone Report (Distri
Address Out of Zone Report (Scho
Age Breakdown Summary Report
Attendance Phone Register Report
Behavior Summary Report
Chancery SMS List of Reports
Class Add/Drop Report
Class Listing (Elementary)
Class Roster
Class Roster Monthly
Add
Remove
Reports on Home Page:
ADA/ADM Summary Report
Attendance Exceptions Student List F
Award Certificate
Interval Attendance Report
Student Change History Report

A **Available Reports**: The reports available to your role to run and display on the home page.

B **Reports on the Home Page**: If this list is empty, the Reports section is not displayed on the home page.

Scheduling a report

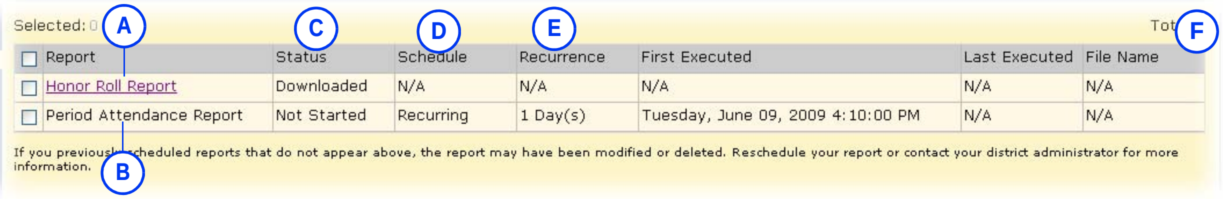
You have the option of scheduling a report to run once at a future time and date, or repeatedly at regular intervals. At the scheduled time(s), Chancery SMS runs the report automatically.

To schedule a report:

1. On the home page, in the control bar under **ADMIN**, click **Reports**. The School Reports appears.
2. In the list of reports, click a report name. The Report Options popup page for this report appears.
3. Open the **Scheduling Options** panel and enter or change information, which includes:
   - **Saved Report Options**: Displays the most recent options setting you have used for this report [Figure 73]. You can accept the options setting and run the report, choose one of your named options settings to re-apply it, or choose to apply the report's default setting.
   - **Run now**: Sets the report to run once at the time you click Run Report. This is the default choice.
   - **One time**: Enter the future date and time at which you want Chancery SMS to run the report. **Note:** If you inadvertently choose a past date and time, the report runs as soon as you click Run Report.
   - **Recurring**: Select the interval at which you want Chancery SMS to run the report and the future date and time at which you want the interval to commence. The interval can be by hour, day, week, or month. **Note:** If you inadvertently choose a past date and time, the report runs the first time as soon as you click Run Report.
4. Click Run Report. Chancery SMS saves the schedule and displays a message to that effect.
   - If you have changed the options setting, Chancery SMS displays a dialog that gives you to the opportunity to save the options as a new setting (enter a **Name**). Click Continue to save the setting and run the report. To not save the setting, do not enter a **Name**.
5. Click Close.

When you schedule a report, Chancery SMS adds the scheduled report to a list of reports on the home page [p. 14]. Chancery SMS also adds the scheduled report to the Report Management page [Figure 75] where you can view the details of all scheduled reports including the first and most recent times Chancery SMS has run it, and the name of the user who scheduled the report. You can also cancel a scheduled report.

FIGURE 75: Report Management page



Selected: 0

Tot

☐ Report	Status	Schedule	Recurrence	First Executed	Last Executed	File Name
☐ Honor Roll Report	Downloaded	N/A	N/A	N/A	N/A	N/A
☐ Period Attendance Report	Not Started	Recurring	1 Day(s)	Tuesday, June 09, 2009 4:10:00 PM	N/A	N/A

If you previously scheduled reports that do not appear above, the report may have been modified or deleted. Reschedule your report or contact your district administrator for more information.

A **Report**: A scheduled report that Chancery SMS has run. Click the title to view the most recent results.

B **Report**: A scheduled report that Chancery SMS has not yet run.

C **Status**: Indicates the state of the scheduled report. Potential states include Not Started, Downloaded (results have been generated in a print-ready format), and In Progress (scheduled to run at a future time).

D **Schedule**: Indicates the scheduling option for this report, that is, Recurring, One time, or N/A.

E **Recurrence**: Indicates the interval at which the report is scheduled to be run.

F **User**: Indicates the user who scheduled or ran the report.

To view the results generated by a scheduled report:

1 On the home page [p. 14], under **Scheduled Events**, click **Reports**. The Report Management page appears.

   - To view all reports scheduled by all users at your school, in the **Actions** menu click **Show All Reports...**.
   - To view only the reports scheduled by you, in the **Actions** menu click **Show My Reports...**.

2 Click the name of a scheduled report that Chancery SMS has run [Figure 75].

   - Select a scheduled report that Chancery SMS has run [Figure 75] and in the **Actions** menu click **Download Report**. A **File Download** dialog appears. In the dialog, click **Open** to view the report results or click Save to save the report results to a storage location
   - To delete a report, select it and in the **Actions** menu click **Delete Report**.You can delete multiple reports at once.

To cancel a scheduled report:

1 On the home page [p. 14], under **Scheduled Events**, click **Reports**. The Report Management page appears.

2 Select the report.

3 In the **Actions** menu click **Delete Scheduled Report**. A confirmation dialog appears.

4 Click OK. Chancery SMS removes the report from the Report Management page.

Calendar choice and reporting

The results of many reports depend on the Chancery SMS calendar with which you are working at the time you run the report. You can switch the calendar with which you are working [p. 135]. For example, reports concerning grades or student behavior would get more meaningful results from the *Active Calendar* (that is, the current year [p. 133]) whereas scheduling reports are better suited to a *planning calendar* (that is, a time period other than the current [p. 133]).

Report results

By default, a report generates its results in the print-ready Adobe Acrobat (*.pdf) format. A report may give you the alternative of setting it to generate its results as a file in a format usable by other applications. The following file formats are available:

- Crystal Reports, for which the file extension is ".rpt".
- Microsoft Excel (*.xls)
- Microsoft Word (*.doc)
- Rich Text (*.rtf)
- Comma-separated values (*.csv)
- Tab-separated values (*.tsv)
- Plain text (*.txt)

To generate results to a specific file format:

1. On the home page, in the control bar under **ADMIN** click **Reports**. The School Reports page appears.
2. Click the report's name. The Report Options popup page appears.
3. In the **Output Options** panel**,** click a **Report Format**.
   - ⓘ For a report that does not offer **Output Options**, Chancery SMS generates the results as a PDF.
   - ⓘ Select the **Output to file** check box to have Chancery SMS write the results to a file in a specific location. For **File**, type a file name. For **Path**, type a file path; for example, "C:\" is typically the root folder on your local computer, "C:\Documents and Settings\All Users\Desktop" is your Windows desktop. **Note:** If this check box is not selected, you can save the results to a file at the time they are generated.
4. Click Run Report. When the report runs, Chancery SMS generates results in the specified format.

Managing reports

The administrator of a Chancery SMS system can monitor the reports installed on that system using the report *Chancery SMS List of Reports*. This report is included in the Chancery SMS Report Package [p. 107]. The Chancery SMS List of Reports lists every report that is displayed on the Reports page, including custom reports, built-in reports, and those not available to run. For each report, the Chancery SMS List of Reports displays the version installed and the first compatible build.

Note: To run any report in the Chancery SMS Report Package [p. 107], the first time you upload the Report Package you must also upload the Chancery SMS List of Reports. This report contains a shared stored procedure used by all report package reports.

You can do this if your role is:
School Secretary
School Administrator
District Administrator

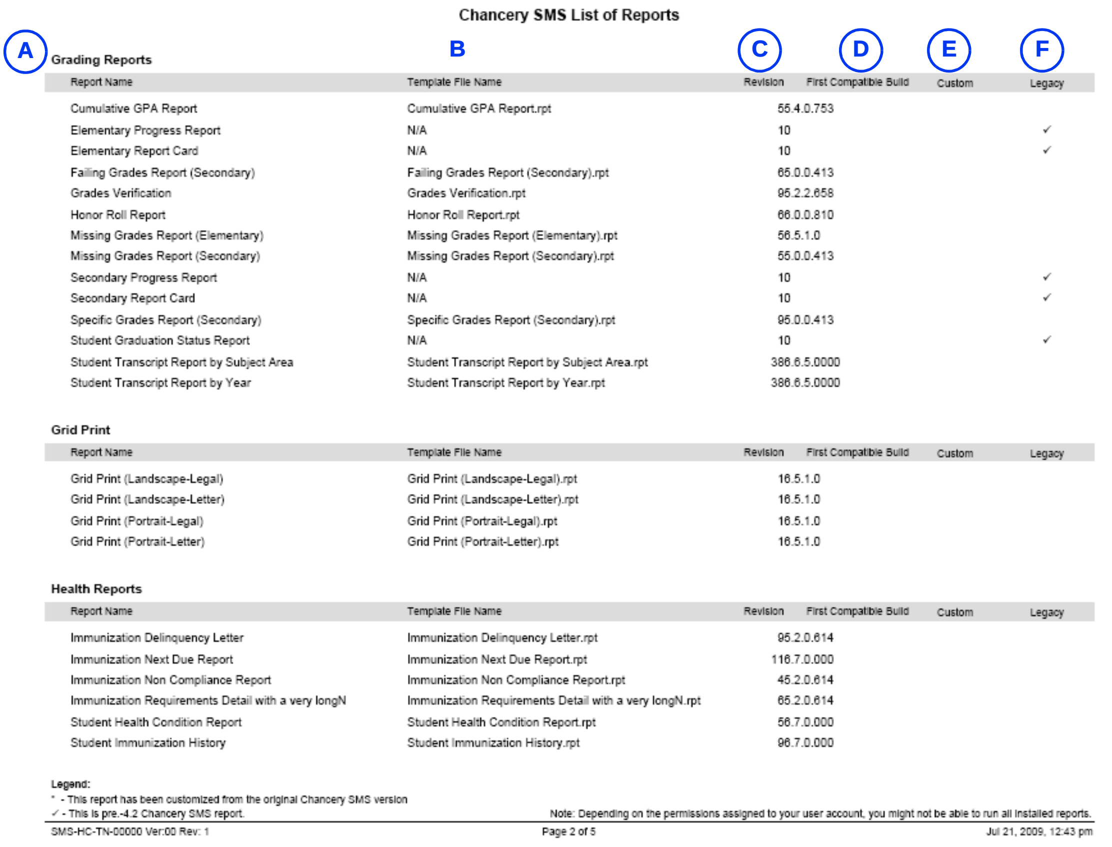
To view the Chancery SMS List of Reports:

1. On the home page, in the control bar under **ADMIN**, click **Reports**. The School Reports appears.
2. In the **Administration Reports** panel, click **Chancery SMS List of Reports**. The Report Options popup page appears.
3. Choose options.

ⓘ You have the option of including reports you have customized.

4 Click Run Report. The report appears [Figure 76].

FIGURE 76: Chancery SMS List of Reports example



Chancery SMS List of Reports

Grading Reports

Report Name	Template File Name	Revision	First Compatible Build	Custom	Legacy
Cumulative GPA Report	Cumulative GPA Report.rpt	55.4.0.753			
Elementary Progress Report	N/A	10			✓
Elementary Report Card	N/A	10			✓
Failing Grades Report (Secondary)	Failing Grades Report (Secondary).rpt	65.0.0.413			
Grades Verification	Grades Verification.rpt	95.2.2.658			
Honor Roll Report	Honor Roll Report.rpt	66.0.0.810			
Missing Grades Report (Elementary)	Missing Grades Report (Elementary).rpt	56.5.1.0			
Missing Grades Report (Secondary)	Missing Grades Report (Secondary).rpt	55.0.0.413			
Secondary Progress Report	N/A	10			✓
Secondary Report Card	N/A	10			✓
Specific Grades Report (Secondary)	Specific Grades Report (Secondary).rpt	95.0.0.413			
Student Graduation Status Report	N/A	10			✓
Student Transcript Report by Subject Area	Student Transcript Report by Subject Area.rpt	386.6.5.0000			
Student Transcript Report by Year	Student Transcript Report by Year.rpt	386.6.5.0000			

Grid Print

Report Name	Template File Name	Revision	First Compatible Build	Custom	Legacy
Grid Print (Landscape-Legal)	Grid Print (Landscape-Legal).rpt	16.5.1.0			
Grid Print (Landscape-Letter)	Grid Print (Landscape-Letter).rpt	16.5.1.0			
Grid Print (Portrait-Legal)	Grid Print (Portrait-Legal).rpt	16.5.1.0			
Grid Print (Portrait-Letter)	Grid Print (Portrait-Letter).rpt	16.5.1.0			

Health Reports

Report Name	Template File Name	Revision	First Compatible Build	Custom	Legacy
Immunization Delinquency Letter	Immunization Delinquency Letter.rpt	95.2.0.614			
Immunization Next Due Report	Immunization Next Due Report.rpt	116.7.0.000			
Immunization Non Compliance Report	Immunization Non Compliance Report.rpt	45.2.0.614			
Immunization Requirements Detail with a very longN	Immunization Requirements Detail with a very longN.rpt	65.2.0.614			
Student Health Condition Report	Student Health Condition Report.rpt	56.7.0.000			
Student Immunization History	Student Immunization History.rpt	96.7.0.000			

Legend:
* - This report has been customized from the original Chancery SMS version
✓ - This is pre.-4.2 Chancery SMS report.

Note: Depending on the permissions assigned to your user account, you might not be able to run all installed reports.

SMS-HC-TN-00000 Ver:00 Rev: 1   Page 2 of 5   Jul 21, 2009, 12:43 pm

A Report category: These are the same categories that Chancery SMS displays to users on the School Reports page.

B **Template File Name**: The name of the report definition. The file name extension is .rpt.

C **Revision**: The version of the template. When a report template is changed, the template revision number is increased.

D **First Compatible Build**: The number of the oldest build of Chancery SMS on which this report can run.

E **Custom**: This column indicates if a report is not a standard report provided by Pearson. Instead, it is customized version of a standard report or an entirely new creation.

F **Legacy**: This column indicates if a report is a report built into Chancery SMS prior to version 4.2 [p. 95]. Typically, a built-in report is not part of the Report Package.

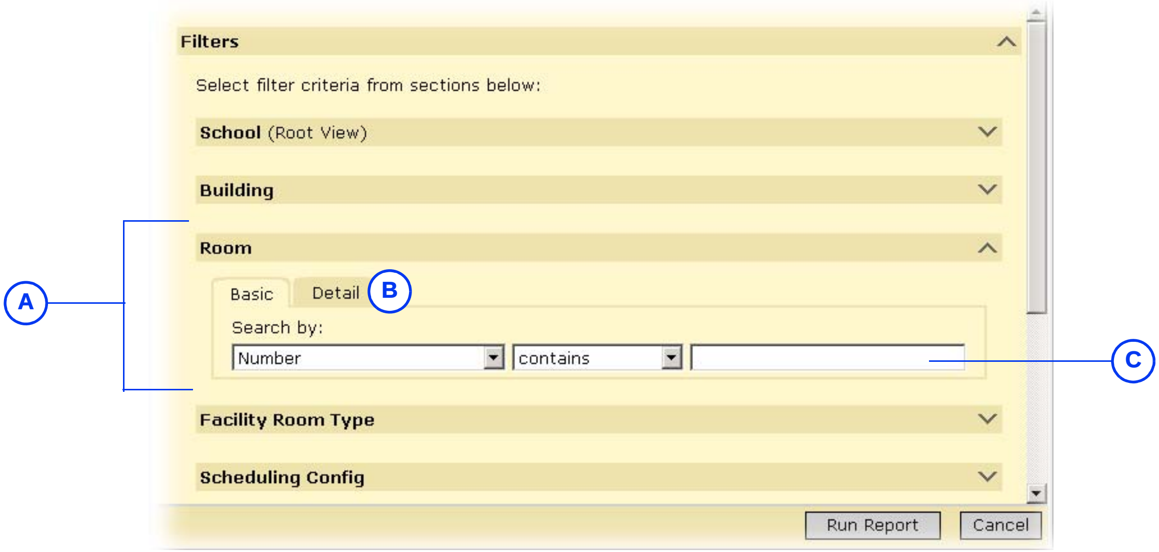
Setting default report filters

Each report has built-in options or preferences that the user sets before running the report. The user of a package report can also set filters. The report’s creator can set a *default filter* which prompts the report user to enter specific filter criteria.

When a system user opens a report containing a default filter, Chancery SMS opens the **Filters** panel automatically to the default filter setting. The default filter criteria are displayed [Figure 77]. The user has the option of entering a value for the default criteria, entering no value, or setting different or additional criteria, or removing the filter criteria completely.

For suggested default filters for a given report, consult the description of that report in Chancery SMS Report Package reports [p. 218].

FIGURE 77: Default report filter example


Filters
Select filter criteria from sections below:
School (Root View)
Building
Room
Basic
Detail
Search by:
Number
contains
Facility Room Type
Scheduling Config
Run Report
Cancel
A
B
C

A In this example, Chancery SMS automatically opened the **Filters** panel to **Room**. This is because a default filter is set for **Room** in which the user can have the report include rooms that include a particular “Number”.

B **Detail**: This tab enables the report user to change or remove the filter criteria.

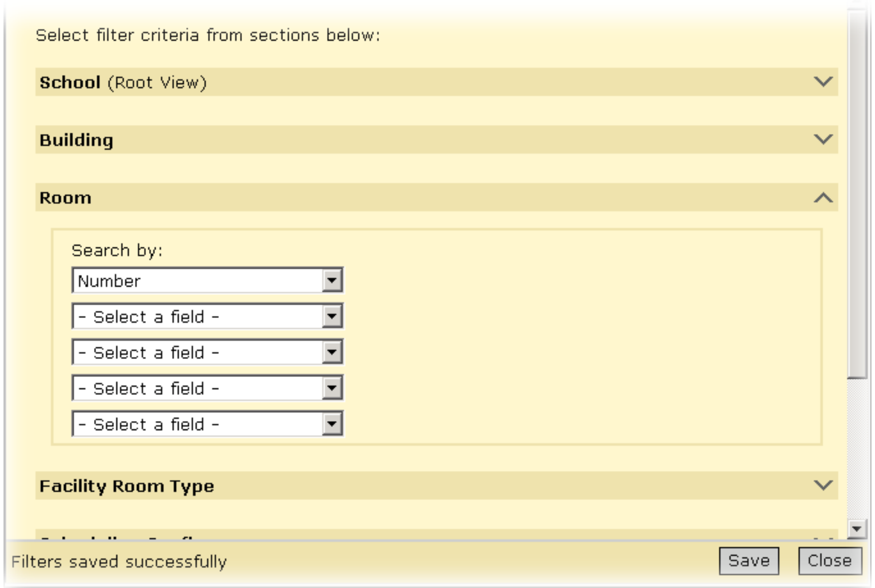
C Filter criteria: The report user can enter a value or leave it blank. **Note:** Text criteria are case-sensitive.

You can do this if your role is:
School Administrator
District Administrator

To define a default filter for a report:

1. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
2. On the **School Setup** page, under **Customization**, click **Customize Reports**. The Customize Reports page appears.
3. Select a report and in the **Actions** menu click **Edit Filters**. The Report Filters popup page appears [Figure 78].
4. Set the desired filter(s).
5. Click Save.
6. Click Close. The Report Filters popup page closes.

FIGURE 78: Setting a default report filter



Filters saved successfully

A In this example, the administrator has set the **Room** filter so that the user will be prompted to enter a particular “Room Number” [see Figure 77: *Default report filter example*].

Customizing reports

You can customize any of the reports available in Chancery SMS [p. 95]. Each report is defined by a report file (which has the file extension “.rpt”) stored in the system. Customizing a report involves downloading the report from the system, editing the report using the third-party report-editing tool Crystal Reports, then uploading the customized report. This process replaces the old report file with a new file, which is stored in the system until you customize it further. **Note**: For instructions on how to develop and edit reports using Crystal Reports, refer to the *Chancery SMS Report Writers Guide*.

A Chancery SMS system contains two types of reports, each of which you customize differently: package reports [p. 104] and built-in [p. 105].

Customizing a package report

These reports are available in *report packages* [p. 107], collections of reports for specific purposes that a system or District Administrator can install on a Chancery SMS system as needed.

You can do this if your role is:
School Administrator
District Administrator

To customize a package report:

1. Download the report from the system:
   a. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
   b. Under **Reports** or **Customization**, click **Customize Reports**. The Customize Reports page appears.
   c. Select the report.
      - To filter the list of reports, select a **Category**.

   d. In the **Actions** menu click **Download Report Template**. The File Download dialog appears.
   e. Click Save. The Save As dialog appears.
   f. Specify a location and file name and click Save.
      - Use the file name extension ".rpt".
2. Open the report file in Crystal Reports and edit it.
3. Upload the edited report to the system:
   a. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The **School** Setup page appears.
   b. Under **Customization**, click **Customize Reports**. The Customize Reports page appears.
   c. In the **Report Name** column, click the name of the report that you want to replace with the customized report.
      - To filter the list of reports, select a **Category**.
   d. In the **Report File** panel, for **New report file (.rpt)**, click **Browse...**. The Choose File dialog appears.
   e. Locate and select the report file and click **Open**.
      - If **Use report file** appears, select the **Custom** check box.
      - If necessary, adjust the report's **Permissions** *[Making reports available, p. 190]*. These determine the roles [p. 186] to which this report is available.
   f. Click OK.

Customizing a built-in report

Pearson developed built-in reports on an older reporting framework that dates from Chancery SMS version 4.2 or earlier. In general, the reports offer less flexibility than package reports in how you filter and generate results.

You can do this if your role is:
School Administrator
District Administrator

To customize a built-in report:

1. Download the built-in report from the system:
   a. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School page appears.
   b. Under **Customization**, click **Customize Pre-4.2 School Reports**. The Customize School Reports page appears.
   c. Click **School Report List**. The School Report List appears.
      - The **Type** column indicates which reports have been customized.
   d. In the **School Report Name** column, click the report's name. The Edit Report page appears.
      - Or select the report and in the **Actions** menu click **Edit Custom Report**.
   e. On the Edit Report page, in the **Report File** panel, for **Built in report file**, click **Download**. The File Download dialog appears.
   f. Click Save. The Save As dialog appears.
   g. Specify a location and file name and click Save.
      - Use the file name extension ".rpt".
2. Open the report file in Crystal Reports and edit it.
3. Upload the customized report to the system:

a. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
b. Under **Customization**, click **Customize Pre-4.2 Reports**. The Customize Reports page appears.
c. Click **School Report List**. The School Report List appears.
d. In the **School Report Name** column, click the name of the report that you want to replace with the customized report.
e. Under **Report File**, for **New report file (.rpt)**, click **Browse...**. The Choose file dialog appears.
f. Locate and select the report file and click **Open**.
   - If **Use report file** appears, select the **Custom** check box.
   - If necessary, adjust the report's **Permissions** *[Making reports available, p. 190]*. These determine the roles [p. 186] to which this report is available.
g. Click OK.

Viewing Chancery SMS schemas

Chancery SMS provides a built-in *Data Dictionary* that enables report writers and others to look through Chancery SMS schemas for information about schema content.

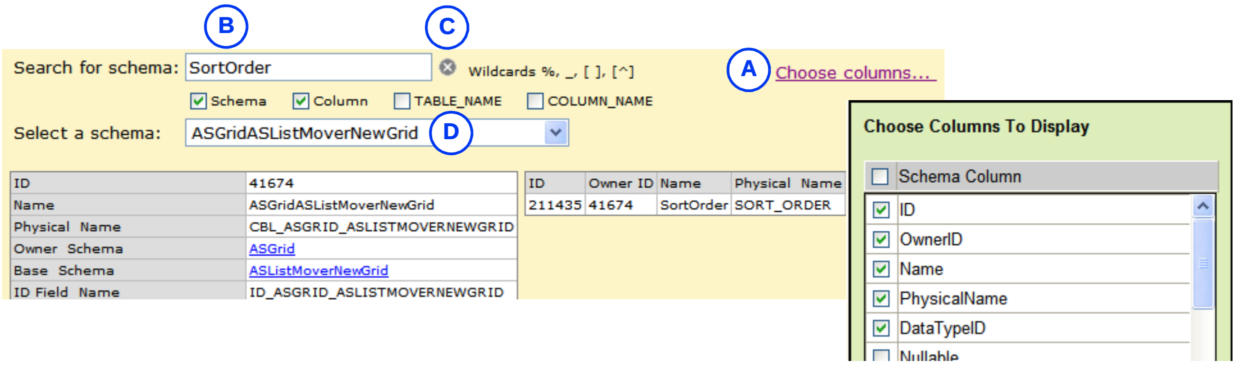
To view Chancery SMS schemas:

1. On the home page, in the control bar, click **District Setup**. The District Setup page appears.
   - ⓘ If you are logged on as a school user, click **School Setup**. The School Setup page appears.
2. Under **Reports**, click **Customize Reports**. The Customize Reports page appears.
   - ⓘ If you are logged on as a school user, under **Customization** click **Customize Reports**. The Customize Reports page appears.
3. In the **Actions** menu, click **Data Dictionary**. The Data Dictionary page appears.
4. Click **Choose Columns** [Figure 79]. The **Choose Columns to Display** dialog appears.
5. Select the information you want to view and click OK. The information you selected appears in the right-hand grid.
   - ⓘ When you leave the Data Dictionary page, your selections are retained.
6. Find the schema:
   - ⓘ Choose a schema from **Select a schema**.
   - ⓘ Or, enter all or part of the schema name in **Search for schema**. Chancery SMS displays in **Select a schema** schemas that match the characters you entered [Figure 79].
     - Use "%" to find a group of unknown characters.
     - Use "_" to find one unknown character.
     - Use "[ ]" to find a character in a set.
     - Use "[^]" to find a character that is not in a set.
   - ⓘ To refine the results in **Select a schema**, choose from the following options:
     - **Schema:** This is the default option. Chancery SMS displays in **Select a schema** schemas that match the characters you entered.

- **Column**: Chancery SMS displays in **Select a schema** schemas that contain a column that matches the characters entered in **Search for schema**.
- **TABLE_NAME**: Chancery SMS displays in **Select a schema** schemas that contain the physical database table name that matches the characters entered in **Search for schema**.
- **COLUMN_NAME**: Chancery SMS displays in **Select a schema** schemas that contain the physical database column name that matches the characters entered in **Search for schema**.

7 Choose the schema from **Select a schema**. The information from the schema you selected appears in the grids.

FIGURE 79:Data Dictionary page



Search for schema: SortOrder

☑ Schema ☑ Column ☐ TABLE_NAME ☐ COLUMN_NAME

Select a schema: ASGridASListMoverNewGrid

ID	41674
Name	ASGridASListMoverNewGrid
Physical Name	CBL_ASGRID_ASLISTMOVERNEWGRID
Owner Schema	ASGrid
Base Schema	ASListMoverNewGrid
ID Field Name	ID_ASGRID_ASLISTMOVERNEWGRID

ID	Owner ID	Name	Physical Name
211435	41674	SortOrder	SORT_ORDER

Choose Columns To Display

☐ Schema Column
- ☑ ID
- ☑ OwnerID
- ☑ Name
- ☑ PhysicalName
- ☑ DataTypeID
- ☐ Nullable

A Click **Choose Columns** to select the information you want to view.

B Search criteria.

C Click the x to clear search criteria.

D Schema that contains column name entered in **Search for schema**.

Report packages

A report package is a collection of standard reports available for use on any Chancery SMS system. Each package contains one or more reports, categorized by purpose, that supplement Chancery SMS’s built-in reports. The Chancery SMS Report Package [p. 107] is essential to most systems.

A report package is intended for the use of an administrator of a Chancery SMS system, who can upload [p. 112] the reports in the package to a system. Once the reports are uploaded, the administrator can go on to set default report filters [p. 102] and determine user access to the reports [*Making reports available, p. 190*].

Chancery SMS Report Package

The *Chancery SMS Report Package* contains a variety of reports that supplement Chancery SMS’s built-in reports and are essential to the usefulness of a Chancery SMS system. Pearson upgrades the Report Package at regular intervals with new reports and improved versions of existing reports. By installing the most current Report Package on a Chancery SMS system, the District or School Administrator can keep that system’s reports up to date. For a description of each report in the Chancery SMS Report Package, see Chancery SMS Report Package reports [p. 218].

The most current Chancery SMS Report Package is available for a District Administrator to download [p. 111] from Pearson' support web site, *Pearson PowerSource* (*https://powersource.pearsonschoolsystems.com*). Once the package is downloaded, a District or School Administrator can upload some or all of the reports to a Chancery SMS system [p. 112].

The Chancery SMS Report Package consists of one compressed file named "RptPckg.zip". **Note**: The Chancery SMS Report Package also contains an optional file "[version]PR-RptPckg.zip". This file contains reports [p. 111] for use only on a system that has been converted to Permanent Record (PR).

RptPckg.zip" contains "Rpt-US-[version]-All.zip" which holds all the reports in the package [Table 17]. The report package file also contains one zip file holding all the reports relevant to a specific feature area, including the following:

- Rpt-US-[version]-AddressValidation.zip
- Rpt-US-[version]-Attendance.zip
- Rpt-US-[version]-Behavior.zip
- Rpt-US-[version]-Generic.zip
- Rpt-US-[version]-Grading.zip
- Rpt-US-[version]-GridPrint.zip
- Rpt-US-[version]-Health.zip
- Rpt-US-[version]-PowerTeacherGradebookErrorReport.zip
- Rpt-US-[version]-Scheduling.zip
- Rpt-US-[version]-Testing.zip

Within these files, each report is stored as a separate zip file. The zip file name identifies the report; for example, "ADA Summary.zip". Typically, each report consists of four files:

- `[Report_Name].rpt`
  The report template. Refer to Table 17 [p. 108] for a complete list of template names.
- `[Report_Name].xml`
  Contains the name, description, category, and attributes of the report. This file ensures the presence of the other files when a District Administrator uploads the report to a Chancery SMS system.
- `[Report_Name]-Add.sql`
  Contains stored procedures necessary for Chancery SMS to run this report. Implements the report extensibility feature.
- [Report_Name]-Drop.sql
  Contains stored procedures necessary for Chancery SMS to run this report.

TABLE 17: Reports in the Chancery SMS Report Package

Feature area	Reports included	Details	Report file name
Address Validation	Address Out of Zone	P. 218	Address Out of Zone.rpt
Administration (.zip file name = Generic)	Chancery SMS List of Reports	P. 218	Chancery SMS List of Reports.rpt

TABLE 17: Reports in the Chancery SMS Report Package (Continued)

Feature area	Reports included	Details	Report file name
Attendance	Daily Absence by Attendance Code	P. 219	Daily Absence Report By Attendance Code.rpt
	Daily Absence by Period	P. 219	Daily Absence Report By Period.rpt
	Period Attendance	P. 220	Period Attendance Report.rpt
	Student Cumulative Attendance	P. 221	Student Cumulative Attendance Report.rpt
	Teacher Attendance Verification	P. 222	Teacher Attendance Verification Report.rpt
	Unsubmitted Attendance	P. 224	Unsubmitted Attendance.rpt
	Unsubmitted Attendance by Period	P. 222	Unsubmitted Attendance by Period.rpt
	Unsubmitted Attendance by Teacher	P. 223	Unsubmitted Attendance by Teacher.rpt
Grading	Cumulative GPA	P. 224	Cumulative GPA Report.rpt
	Failing Grades (Secondary)	P. 225	Failing Grades Report (Secondary).rpt
	Grades Verification	P. 225	Grades Verification.rpt
	Honor Roll	P. 226	Honor Roll Report.rpt
	Missing Grades (Elementary)	P. 227	Missing Grades Report (Elementary).rpt
	Missing Grades (Secondary)	P. 228	Missing Grades Report (Secondary).rpt
	Specific Grades	P. 228	Specific Grades Report (Secondary).rpt
	Student Transcript by Subject Area	P. 230	Student Transcript Report by Subject Area.rpt
	Student Transcript Report by Year	P. 231	Student Transcript Report by Year.rpt
Grid Print	Portrait Letter		Grid Print (Portrait-Letter).rpt
	Portrait Legal		Grid Print (Portrait-Legal).rpt
	Landscape Letter		Grid Print (Landscape-Letter).rpt
	Landscape Legal		Grid Print (Landscape-Legal).rpt
Health	Immunization Delinquency Letter	P. 232	Immunization Delinquency Letter.rpt
	Immunization Next Due	P. 233	Immunization Next Due Report.rpt
	Immunization Non-Compliance	P. 234	Immunization Non Compliance Report.rpt
	Student Health Condition	P. 235	Student Health Condition Report.rpt
	Student Immunization History	P. 236	Student Immunization History.rpt
PowerTeacher	PowerTeacher Grades Entry Error		PowerTeacher Grades Entry Error Report.rpt

TABLE 17: Reports in the Chancery SMS Report Package (Continued)

Feature area	Reports included	Details	Report file name
Scheduling	Class Add/Drop	P. 236	Class Add Drop.rpt
	Class Listing (Elementary)	P. 237	Class Listing (Elementary).rpt
	Class Roster	P. 238	Class Roster.rpt
	Class Roster Monthly	P. 239	Class Roster Monthly.rpt
	Class Roster Weekly	P. 239	Class Roster Weekly.rpt
	Class Schedule Log	P. 240	Class Schedule Log.rpt
	Contacts Roster	P. 241	Contacts Roster.rpt
	Course Catalog by Name	P. 241	Course Catalog by Name.rpt
	Course Catalog by Number	P. 242	Course Catalog by Number.rpt
	Course Request List	P. 243	Course Request List.rpt
	Course Request Rule Violation	P. 244	Course Request Rule Violation.rpt
	Course Request Tally	P. 245	Course Request Tally.rpt
	Course Request Tally by Grade	P. 245	Course Request Tally By Grade.rpt
	Course Request Tally by Grade	P. 245	Course Req Tally By Grade By Dept.rpt
	Course Request Tally by Term	P. 246	Course Request Tally By Term.rpt
	Course Request Tally by Term by Dept	P. 247	Course Req Tally By Term By Dept.rpt
	Course Request Verification	P. 247	Course Request Verfication.rpt
	Full Time Equivalent Summary	P. 248	Full Time Equivalent Summary.rpt
	Load Students Log	P. 249	Load Students Log.rpt
	Master Schedule	P. 249	Master Schedule.rpt
	Master Schedule by Meeting Pattern	P. 250	Master Schedule by Meeting Pattern.rpt
	Open Seats Summary	P. 250	Open Seats Summary.rpt
	Room Matrix by Day Period	P. 251	Room Matrix by Day Period.rpt
	Room Schedule	P. 252	Room Schedule.rpt
	Room Schedule Matrix	P. 253	Room Schedule Matrix.rpt
	Scheduling Configuration	P. 253	Scheduling Configuration.rpt
	Scheduling Performance Statistics	P. 254	Scheduling Performance Statistics.rpt
	Scheduling Pre-Check Builder	P. 255	Scheduling Pre-check Builder.rpt
	Scheduling Pre-Check Loader	P. 256	Scheduling Pre-check Loader.rpt
	Student Schedule	P. 257	Student Schedule.rpt
	Student Schedule (Elementary)	P. 257	Student Schedule (Elementary).rpt
	Student Schedule Matrix	P. 259	Student Schedule Matrix.rpt
	Student Schedule Matrix (Elementary)	P. 258	Student Schedule Matrix (Elementary).rpt
	Student Scheduling Load Summary	P. 259	Student Scheduling Load Summary.rpt
	Teacher Matrix by Day and Period	P. 261	Teacher Matrix by Day Period.rpt
	Teacher Schedule Matrix	P. 260	Teacher Schedule Matrix.rpt
	Teacher Schedule	P. 260	Teacher Schedule.rpt

TABLE 17: Reports in the Chancery SMS Report Package (Continued)

Feature area	Reports included	Details	Report file name
	Unscheduled Rooms	P. 262	Unscheduled Rooms.rpt
	Unscheduled Student Analysis	P. 262	Unscheduled Student Analysis.rpt
	Unscheduled Students	P. 263	Unscheduled Students.rpt
	Unscheduled Teachers	P. 263	Unscheduled Teachers.rpt
Student Behavior	Discipline Profile	P. 264	Discipline Profile Report.rpt
Summary	ADA/ADM Summary	P. 265	ADA Summary.rpt
	Student Behavior Summary	P. 269	Student Behavior Summary.rpt
Test Management	Student Test History	P. 266	Student Test History Report.rpt
	Student Test Profile	P. 266	Student Test Profile.rpt
	Test Scores Below Minimum Requirements	P. 266	Test Scores Below Minimum Requirements.rpt
	Test Session Details	P. 267	Test Session Details Report.rpt
	Test Session Summary	P. 267	Test Session Summary Report.rpt

Permanent Record reports

For a system that has converted to Permanent Record (PR), three additional reports are available [Table 18] in the file “[version]PR-RptPckg.zip”. **Important:** Do NOT upload these PR reports unless you are working in a Chancery SMS PR environment.

TABLE 18: Permanent Record Reports

Feature area	Reports included	Cross ref.	Report file name
Grading	Cumulative GPA		Cumulative GPA Report.rpt
	Student Transcript by Subject Area PR		Student Transcript by Subject Area PR.rpt
	Student Transcript by Year PR		Student Transcript by Year PR.rpt

Downloading the Report Package

You can download the latest version of the Chancery SMS Report Package [p. 107] (appropriate to the version of the Chancery SMS software on your system [Figure 3]) from *Pearson PowerSource*, for which you need a valid user name and password. The Report Package consists of one compressed file with the extension “.zip”.

To download the Report Package:

1 Using a web browser, go to *https://powersource.pearsonschoolsystems.com*. The Pearson PowerSource login page appears.

2 Log in. The **Home** page appears.

3 On the Home page, click the Chancery SMS tab.

4 Under **Important Links**, click **Downloads**.

5 In the sidebar, locate the appropriate Chancery SMS version and click its associated Report Package. The report package page appears.

ⓘ For example, Downloads > Releases and Updates > SMS [version #] Report Package > SMS [version #] Report Package.

6 Under **Available Resources**, locate the Report Package you wish to download.

ⓘ Instructions and other associated information may also be available.

7 In the **Download** column, click the file. A **File Download** dialog appears.

8 Click **Save**. A Save As dialog appears.

9 Find a suitable location to save the file and click **Save**.

ⓘ Ensure that the file name extension is ".zip".

Uploading the Report Package to Chancery SMS

Once you have the Report Package [p. 107] downloaded [p. 111] and saved in its original .zip format, you can use Chancery SMS to upload some or all of the reports to a system. A District or School Administrator can upload Report Package reports.

During the upload process, you have the opportunity to view the reports in the package and select which of the reports Chancery SMS should upload. If a report of the same name as a package report exists on the system, you have the option of instructing Chancery SMS to overwrite the existing report with the new one.

When the upload process is complete, all reports that are new on the system are automatically available to all of that system's users. All upgraded reports (that is, reports in the package that have the same name as an existing report) retain their permissions and default filters.

Caution: The first time you upload the Chancery SMS Report Package to a system, you must upload the report named "Chancery SMS List of Reports" from the file "Rpt-US-[version]-All.zip".

You can do this if your role is::
School Administrator
District Administrator

To upload the Report Package to a Chancery SMS system:

1 Extract the contents of the Report Package file to a folder to which you have access:

  a In Windows File Manager, double-click "RptPckg.zip" to extract its contents, which consist of the file "Rpt-US-[version]-All.zip" and several other zip files, one for each feature area; for example, "Rpt-US-[version]-Attendance.zip" [see *Chancery SMS Report Package, p. 107*].

  b Double-click the file "Rpt-US-[version]-All.zip" to extract its contents, which consist of one zip file for each report.

2 On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.

3 Under **Reports**, click **Customize Reports**. The Customize Reports page appears.

  ⓘ Or on the School Setup page, under **Customization**, click **Customize Reports**.

4 On the Customize Reports page, in the **Actions** menu click **Upload Report Package**. The Report Package page appears.

5 Upload a group of reports (that is, zip file) as follows:

  a Click **Browse**. A Choose File dialog appears.

  b Locate and select the relevant zip file [p. 107] extracted in step 1 and click **Open**. The path to the file appears in **New report package (.zip)**.

  c On the **Report Package** page, click OK. The Upload Confirmation page displays the reports in the package [Figure 80].

  d In the **Actions** column, select an action for each report listed.

    - "Overwrite" replaces an existing report of the same name with the report from the package.

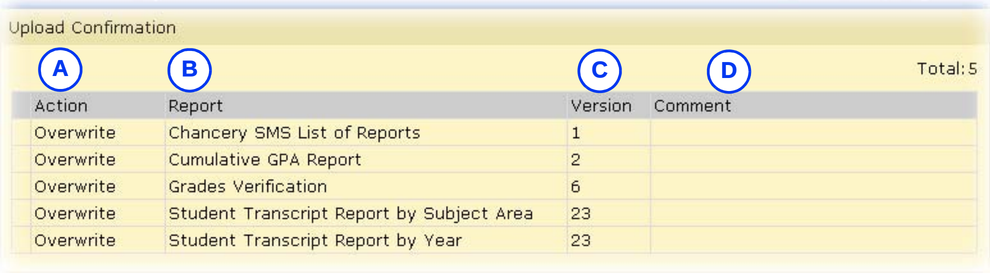
- “None” does not upload this report. This is the default action when Chancery SMS detects an existing customized version of a report of the same name.

e Click OK. Chancery SMS uploads the report(s) as specified and displays the results on the Upload Results page.

  - If you receive an error message while uploading a group of reports, this may mean your system cannot handle the size of the upload. Upload the desired reports one at a time.

6 To upload another group of reports, start again at step 2.

FIGURE 80: Upload Confirmation page



Action	Report	Version	Comment
Overwrite	Chancery SMS List of Reports	1	
Overwrite	Cumulative GPA Report	2	
Overwrite	Grades Verification	6	
Overwrite	Student Transcript Report by Subject Area	23	
Overwrite	Student Transcript Report by Year	23	

A **Action**: Specifies the action Chancery SMS will take when you start the upload.

B **Report**: The name of the report in the selected file.

C **Version**: The version number of the report template. When a report template is changed, its version number is increased.

D **Comment**: Additional information included by the developer of the report template.

4 School operation

This section describes aspects of the system that bear on the routine operation of a school, such as enrollment and attendance, or the district as a whole, such as backing up the system. Typically, these tasks are the responsibility of a school or district administrator.

Registration

Registering a student in a Chancery SMS system enables all users of that system—school administrators, teachers, counselors, and so on—to work with that student and adjust his or her information as necessary. A student must be registered in order to be enrolled in a school [p. 118].

Registering a student involves the following steps:

- Searching for registered students [p. 115]
- Registering a new student [p. 117]
- Registration completion steps [p. 117]

Once a student is registered you can update that student's registration information through the student record [p. 50].

TABLE 19: Permissions pertaining to registration

To	You need this permission	Set to	
Register a student	**Students > Registration Information**	Yes	
Adjust a student's demographic information	**Students > Demographic Data**	Edit	
Delete a student's registration	**Students > Delete Students**	Yes	

Searching for registered students

Before registering a student, we recommend that you search the system for that student. This search ensures that you do not create a second student record for a student who is already registered.

For this purpose, you use a search that examines student records across the entire system. The search encompasses students that are registered but not enrolled. **Note**: Other student searches [p. 36] examine only the student records that are enrolled as well as registered.

For convenience, Chancery SMS provides you with a default set of 5 search criteria for which you need only enter values [Figure 81]. Of course, you can alter these criteria.

You can do this if your role is:
School Administrator
District Administrator

To search for a registered student:

1 On the Home page [p. 14], in the Actions menu click **Register/Enroll Student...**. The Registration/Enrollment Search page appears.

2 Under **Search by**, for the first criterion [Figure 81]:

   a Enter the value to find.

   - For text fields, the case of the search value does not matter; for example, “lancaster” finds “Lancaster”.
   - Spaces are relevant; for example, “delos santos” will not find “de los santos”.

   b [Optional] Choose another field on which to search.

   c [Optional] Change the operator.

3 Configure some or all of the four other criteria.

4 [Optional] Change the **Match** setting.

5 Click Search. Chancery SMS displays matching student records (if any) under **Search Results**.

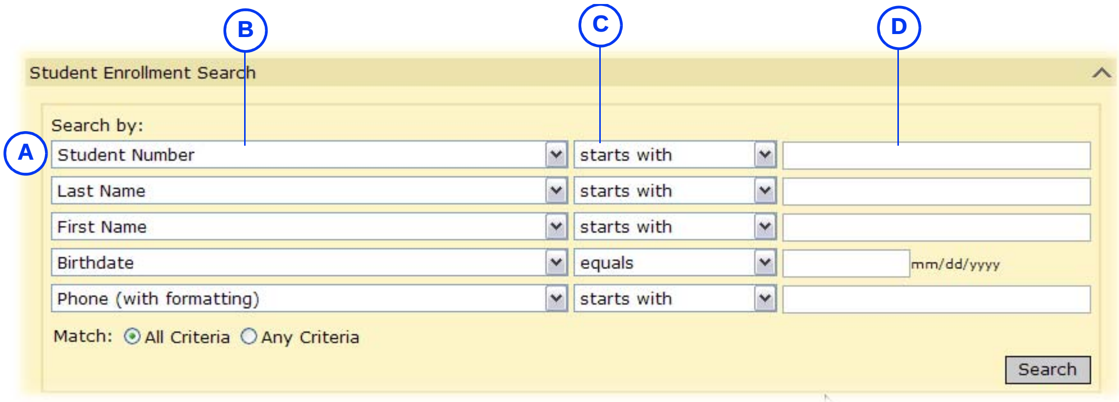
   ⓘ Chancery SMS saves the search criteria. Should you want to conduct this same search again, select it in **List**.

   ⓘ You can changed the sorting of these results or adjust the columns displayed [p. 22].

   ⓘ **Note**: If your search results contain over 1000 records, Chancery SMS displays a message to that effect and no results. You must refine the search.

   ⓘ To view a student’s record, select it and click Open, or click the student’s name. The Registration/Enrollment Steps page appears (or the Student Demographics page).

FIGURE 81: Student Enrollment Search: default criteria



Student Enrollment Search

Search by:

Student Number	starts with	
Last Name	starts with	
First Name	starts with	
Birthdate	equals	mm/dd/yyyy
Phone (with formatting)	starts with	

Match: ● All Criteria ○ Any Criteria

A	Criterion	**C**	Operator
B	Field	**D**	Value

Registering a new student

Registering a new student involves entering the student's personal information and assigning an initial grade level. **Note**: Before registering a new student, we recommend that you search the system for that student [p. 115] to ensure that he or she is not already registered. If you find a similar student—a sibling, for example—you can use this student's record as a basis for the new student.

You can do this if your role is:
District Administrator

To register a student:

1. On the Home page [p. 14], in the Actions menu click **Register/Enroll Student...**. The Registration/Enrollment Search page appears.
2. Click New. The Register in District page appears.
   - To use an existing student record as the basis for a new registrant, search for similar students (such as siblings), select the student and click Copy. Chancery SMS opens a new student record with some of the information, such as Last Name, already entered. **Note**: Copy is available only on a system that employs Family Management.
3. Set options, including:
   - **Grade level**: The student's grade level at the time of registration or the grade in which the student will be enrolled.
   - **Registration status**: Set to "Registered".
   - **School for Student # Generation**: Appears if a default Student Projected School is specified for all students new to the district. Changing this school overrides the district default.
   - For information on other fields, refer to Student records [p. 50].
4. Click Continue. The Registration/Enrollment Steps page appears [see p. 117].

Registration completion steps

Chancery SMS provides a reminder of the typical tasks involved in completing a student's registration. The Registration/Enrollment Steps page appears after you initially register a new student [p. 117]; you can also view this page from a student's record [p. 50].

Each task on the Registration/Enrollment Steps page is a link to the relevant page in the system. The tasks displayed depend on the state of the student's registration and enrollment; for example, if the student is enrolled in another school in the district or not yet enrolled in a school, only the relevant tasks appear; once the student is enrolled in your school, Chancery SMS displays a complete list of tasks when you return to the Registration/Enrollment Steps page.

The potential tasks include:

- **Update Registration Information**: You can also update registration information via the student's record [p. 50].
- **Enter Address Information and Other Student Data** [see *Student record: Demographics, p. 51*]
- **Add Student Contacts** [see *Student record: Contacts, p. 58*]
- **Apply to Program** [see *Student record: Program Profile, p. 63*]
- **Enroll Student in a School** [see *Enrollment, p. 118*]
- **Manage Student's Family Data** [see *Student record: Family, p. 60*]: Available only if the system employs family management.
- **Register and Enroll a Sibling**: Enables you to use the current student record as the basis for a new registrant.

Note: If a particular task's page holds information that is incomplete, Chancery SMS marks that task with an exclamation mark (**!**).

Deleting a student's registration

A District Administrator can delete a student's registration in the district, that is, delete all district-specific information about a student. This effectively removes the student from the system. A administrator can delete a student's registration only if that student is not enrolled in a district school [p. 118].

Enrollment

Once a student is registered in the system [p. 115], that student can be enrolled in one or more schools. A student can have multiple *active enrollments*, that is, enrollment records with an entry-type status code that does not have a corresponding withdrawal record and where the date of the enrollment is on or before the Active Calendar's end date.

You can enroll a student when working in either the Active or Planning Calendar [p. 135]—the date of enrollment determines whether the student is active in the current school year or will be active in the next school year. Your ability to enroll a student in a school may be affected if program management is employed at that school.

You can view a record of a student's enrollments.

You can do this if your role is:
School Administrator
District Administrator

To manage a student's enrollments:

On a page of the student's record [p. 50], in the control bar click **Enrollment...**. The Enrollment popup page appears.

- ⓘ To delete an enrollment [p. 119], select it and click **Delete**.
- ⓘ Set **Status Codes for** to limit the list of enrollments displayed to a particular school.

TABLE 20: Permissions pertaining to enrollment

To	You need this permission	Set to	
Register a student	**Students > Registration Information**	Yes	
Enroll a student in a school	**Students > Enroll Student in School** **Students > Student Status Code**	Yes Edit or Delete	
Withdraw a student from a school	**Students > Student Status Code**	Edit or Delete	
Adjust a student's demographic information	**Students > Demographic Data**	Edit	
Delete a student enrollment record	**Students > Student Status Codes**	Edit or Delete	
On the Add Status Code page [p. 118], choose a **School**.	**Students > Multiple School Status Access**	Yes	

Enrolling a student

Before enrolling a student in a school, you may have to first withdraw [p. 119] the student from any school in which he or she is enrolled. However, on some systems it is possible for a student to be enrolled in more than one school, that is, have more than one active enrollment [*Student enrollment setup, p. 197*]. Transfer of enrollment mid-year may be possible [p. 120]. **Note**: If the system employs address validation, ensure that you validate a student’s address prior to enrolling that student. **Note**: A student who does not yet meet immunization requirements may be provisionally enrolled.

You can do this if your role is:
School Administrator
District Administrator

To enroll a student in a school:

1. On a page of the student’s record [p. 50], in the control bar click **Enrollment...**. The Enrollment popup page appears.
2. Click Add.... The Add Status Codes page appears.
   - ⓘ If this is the student’s first enrollment, click Enroll....
3. Set options. For information on these options, refer to Student record: Enrollment [p. 62]. Additional notes include:
   - ⓘ **Status code**: Select an entry-type code such as “Enrolled” or “Returned”.
   - ⓘ **Zoned school**: Chancery SMS displays this school after you have set the Date and Grade and clicked Update.
4. Click OK.

TABLE 21: Permissions pertaining to student enrollment

To	You need this permission	Set to	
Enroll students in a school	**Students > Enroll Student in School**	Yes	

Withdrawing a student

You can withdraw a student from his or her school of enrollment.

You can do this if your role is:
School Administrator
District Administrator

To withdraw a student from a school:

1. On a page of the student’s record [p. 50], in the control bar click **Enrollment...**. The Enrollment popup page appears.
2. Click Enroll.... The Add Status Codes page appears.
3. Set **Status Code** to a withdrawal-type code such as “Dropped Out” or “Moved”.
4. Click OK.

Deleting a student’s enrollment

You can delete a student’s enrollment in a school, that is, delete all school-specific information about a student, including attendance, scheduling, and grading records. This does not delete he student from the district—you can enroll the student in other schools.

To delete a student’s enrollment:

1. On a Student Search result page [p. 44], select one or more students.
2. In the **Actions** menu, select **Delete Student Enrollment**. The Delete Student Enrollment: Confirmation page appears.
3. Click OK.

Or

1. On a page of the student’s record [p. 50], in the control bar click **Enrollment...**. The Enrollment popup page appears.
2. In the **Select** column, select an enrollment.
   - ⓘ You may not be able to select certain enrollments.
3. Click Delete.

Transferring a student mid-year

On some systems, you can transfer a student from one school to another during the school year. When you do so, Chancery SMS records each school as a separate enrollment.

You can do this if your role is:
School Administrator
District Administrator

To transfer a student from one school to another mid-year:

1 On a page of the student's record [p. 50], in the control bar click **Enrollment...**. The Enrollment popup page appears.
2 Select the student's current enrollment.
3 Click Transfer.... The Transfer To School page appears.
4 Set options, which include:
   - ⓘ **Withdrawal Code**
   - ⓘ **Entry Code**: For the new school of enrollment.
   - ⓘ **New School**
5 Click OK.

Projecting enrollment for the next year

When the district's school year comes to an end, and the District Administrator runs *Year-End Processing* [p. 208] to convert the Planning Calendar [p. 136] to the new Active Calendar. During Year-End Processing, Chancery SMS adjusts each student's enrollment and grade level according to the system's *year-end transfer method* [p. 121] and various student-related criteria such as the student's school's *graduation grade level* [p. 122]. For a particular student, a District or School Administrator can override the year-end transfer method and directly project the student's enrollment [p. 123].

Enrollment changes during Next-Year Preparation

When a School Administrator creates a Planning Calendar, Chancery SMS changes each student's enrollment according to various factors [p. 120]. The resulting change might involve Chancery SMS:

- Promoting the student to another grade level in the student's School.
- Enrolling the student in a grade level at a different school.
- Withdrawing the student from enrollment in the District.
- Graduating the student from the District.
- Retaining the student in the School at the current grade level.

In general, Chancery SMS can determine a student's enrollment in the Planning Calendar where:

- The student's current school is the school in which the student is enrolled in the Active Calendar.
- The student's enrollment is active at the completion of the Active Calendar.
- The student's enrollment status is promoted or pending.
- The student is assigned to a **Home School** [see *Student record: Enrollment, p. 62*].
- The student is assigned a **Home School (Active)** [see *Student record: Demographics, p. 51*].
- The student has a projected school [p. 121].

Chancery SMS advances a student's grade level in his or her school (and does not transfer the student to another school) where:

- The student's **Zoned School** [p. 123] is the same as the student's current school.

- The student's **Requested School** [p. 123] is the same as the student's current school.

To enroll a student in a grade level at a different school, Chancery SMS takes into account:

- The year-end transfer method used by the district [p. 121].
- If the student is in a graduating grade.
- The district's setting for **Set graduated student grade level to** (on the District Preferences page).
- The student's **Requested School** [p. 123]
- Program management settings (if the system employs it), including:

  Controlled enrollment at a school: A School Administrator must explicitly enroll a student in a controlled enrollment program after the student has applied and been accepted. **Note**: A student can only be enrolled in a program if that student is enrolled at that program's school, that is, Chancery SMS does not automatically create participant records and program applications for a student not enrolled in the school.

  The setting of **Planning Calendar Requested School Controlled by Program Management** [see *Projecting enrollment for the next year, p. 120]*

  A program session's setting for the **Planning Calendar Option**.

  If the student is enrolled in several controlled-enrollment programs at a school.

Year-end transfer method

During Year-End Processing [p. 208], for each district student who has completed a grade level, Chancery SMS determines if that student it to be transferred to another school by applying the year-end transfer method. The District Administrator sets the method to use. Options are:

- *Projected School Map* [p. 121]: This is the default method.
- *Geocode Map* [p. 122]: This is available only on a system that employs Address Validation.

Projected School Map

A *Projected School Map* pairs each feeder school in the district to a *projected school*, that is, another school in the district to which Chancery SMS transfers a student during Year-End Processing [p. 208] when that student has completed the school's graduation grade level [p. 122]. A School Administrator can specify the projected school for a school. **Note**: The administrator must be in the Active Calendar [p. 136] to set the projected school mappings. **Caution**: If a student's school is not mapped to a projected school, Chancery SMS withdraws the student from his or her school but does not enroll the student in another.

You can do this if your role is:
School Administrator
District Administrator

To set a school's projected school:

1. On the home page, in the control bar under **SCHOOL**, click **School Info**. The School Info page appears.
2. Click the school's name. The School Info Detail page, click **Edit**. The School popup page appears.
3. Set the **Projected School**.

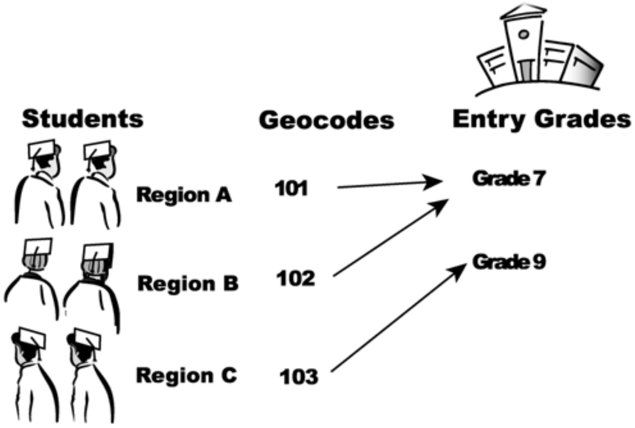
   ⓘ At a school that does not feed students into another school, the Projected School is "N/A". Projected School appears only if the district's Year End Transfer Method is set to "Projected School Map" [p. 121].
4. Click Save.

Geocode Map

On a system that employs Address Validation, a District Administrator can set the year-end transfer method so that Chancery SMS refers to the district's *Geocode Map* [p. 122]. During Year-End Processing [p. 208], Chancery SMS uses the Geocode Map to transfer a student (where that student has completed the school's graduation grade level [p. 122]) to the appropriate school by examining the location of that student's residence.

The Geocode Map, created by the District Administrator, pairs each of the district's geocodes with an *entry grade level* [p. 123] at a particular school [Figure 82]. A school's entry grade can have more than one geocode assigned to it (the school can serve a broad geographical area). A geocode can be assigned to only one school's entry grade. **Note**: The Planning Calendar [p. 136] must be active for an administrator to change the Geocode Map.

FIGURE 82: Geocode mapping example



Note: For Year-End Processing [p. 208] to run successfully, the Planning Calendar must have a Geocode Map. **Caution**: If a student does not end up with a valid Geocode in the Planning Calendar, Chancery SMS withdraws or graduates the student from his or her school but does not enroll the student in another.

School graduation grade level

To determine if it should transfer a student to another school during Year-End Processing [p. 208], Chancery SMS refers to the student's school's graduation grade level. This is the grade level at which a student completes his or her education at the school. A School Administrator can specify the graduation grade level for a school.

You can do this if your role is:
School Administrator
District Administrator

To set a school's graduation grade level:

1. On the home page, in the control bar under **SCHOOL**, click **School Info**. The School Info page appears.
2. Click the school's name. The School Info Detail page appears.
3. On the **Basics** panel, click **Edit**. The Schools popup page appears [Figure 83].
4. Under **Basics**, set **Graduation Grade**.
5. Click Save.

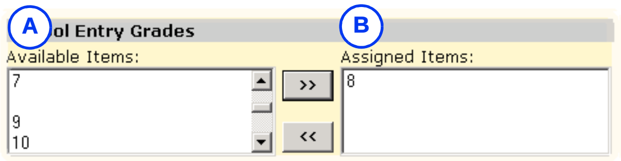
School entry grade level

An entry grade level at a school is a grade level into which students from other schools can be automatically transferred. Most schools have only one entry grade level set, typically the lowest grade level. However, for the purposes of the geocode mapping year-end transfer method [p. 122], a school may have more than one entry grade; for example, the elementary school for Geocode A may offer grade levels 1 to 5, while the elementary school for Geocode B offers grade levels 1 to 6. The middle school these students go to would have two entry grade levels: Grade 6 for students in Geocode A and Grade 7 for students in Geocode B. A School Administrator designates entry grade levels at a school.

To designate a school's grade as an entry grade:

1. On the home page, in the control bar under **SCHOOL**, click **School Info**. The School Info Detail page appears.
2. On the **Basics** panel, click **Edit**. The Schools popup page appears [Figure 83].
3. Under **School Entry Grades**, designate one or more Grades as an entry grade level by transferring them to the **Assigned Items** column from the **Available Items** column.
   - ⓘ Double-click a grade to transfer it between columns.
   - ⓘ **School Entry Grades** is available only if the year-end transfer method is set to Geocode Map [p. 122].
4. Click Save.

FIGURE 83: School Entry Grades popup page



Available Items:
7
9
10

Assigned Items:
8

A **Available items**: Grade levels in this school.

B **Assigned items**: Grade levels into which Chancery SMS transfers students from other schools during Year-End Processing.

Specifying a student's school of enrollment for the next year

During Year-End Processing [p. 208], Chancery SMS assesses each district student for potential transfer to another school by referring to the District's transfer mapping [p. 121]. Typically, a student who has graduated from a school is subject to transfer to another school or graduation from the district.

A District or School Administrator can override this mapping for a particular student by requesting a particular school. For example, a student interested in a specialized vocational program would want to go to the only district school to offer such a program. **Note**: Since either a District or School Administrator can override the transfer mapping, we recommend that the district impose a policy on such overrides.

You can do this if your role is:
School Administrator
District Administrator

To project a student's enrollment:

1. On a page of the student's record [p. 50], in the control bar click **Enrollment...**. The Enrollment popup page appears.
2. In the **Status Code** column, click an enrollment's status code. The Edit Status Code page appears.
3. Under **Projected Enrollment for Planning Calendar**, set options, which include:

- ⓘ **Zoned school (projected)**: The school the student is projected to attend in the next school year for this school of enrollment. Chancery SMS sets the school based on the year-end transfer method [p. 121].
- ⓘ **Requested school**: The desired school of enrollment (home school) for the student for the next school year. Selection options include:
  - "Use Zoned School": This is the default choice. Directs Chancery SMS to—during Year-End Processing [p. 208]—enroll the student in the school specified by the district's transfer mapping [p. 121] (Zoned School displays this school [p. 51]). **Note**: Chancery SMS applies this choice if the request for a specific school is rejected or fails for any reason. Chancery SMS also applies this choice of if the request is pending. When the request is approved, then during NYP processing Chancery SMS changes the student's enrollment accordingly.
  - [School name]: Specifies a District school. You can choose the school if the student is currently in a graduating grade and program management does not control the requested school.
  - "None": Withdraws the student from this school and prevents Chancery SMS from enrolling the student in another school next year. **Note**: Use "None" for a student who will no longer attend the school of enrollment (for example, he or she was attending an Advanced Math program at this school and does not plan to continue). During the Next-Year Preparation process, the student will be withdrawn from the school and a new enrollment record will not be created.
- ⓘ If **Exception reason** is displayed, enter a reason. This is necessary if the system employs Address Validation and approval is required for enrollment exceptions. Chancery SMS enrolls the student in the Requested School only if approval is granted; otherwise Chancery SMS enrolls the student in the Zoned School. **Note**: A School Administrator can set Chancery SMS to automatically copy approved address exceptions for returning students from the Active Calendar to the Planning Calendar.
- ⓘ **Note**: On a system that allows a student to be enrolled in more than one school, the administrator can specify the school to which the student should transfer for each school of enrollment: Under **Planning District Calendar**, click **Enrollment Status**. An Enrollment summary for all the student's schools appears. Under **Status Code**, click the status for a school and make an appropriate selection for **Requested School**.
- ⓘ **Projected Grade**: Chancery SMS sets this grade based on the current Grade at the school of enrollment.

4. Click OK.
   - ⓘ Chancery SMS takes time to implement any change to the Zoned School [p. 51]. It unenrolls the student from the former school and, during the nightly process, enrolls the student in the new school. You can view these changes in the Planning Calendar the next day.
   - ⓘ **Caution**: Where a student's school of enrollment changes and the student is withdrawn from a school, Chancery SMS deletes any schedules created for that student at that school. You cannot recover these deleted schedules.

Note: You may be prevented from projecting a student’s enrollment at a school that employs controlled enrollment in the following circumstances:

- The student is not currently enrolled at that school (the student must apply to a program at the controlled-enrollment school, be offered a position in the program, and enroll in the school).
- The program associated with the enrollment will not continue in the next active year (that is, it has an end date within the current active year).
- A Planning Calendar is created, but program sessions for the program associated with the enrollment are not available in the Planning Calendar for the controlled enrollment program.

Calculating daily attendance codes

For each day, Chancery SMS calculates each student’s *daily attendance code* for every school in the district. Chancery SMS calculates this code based on rules set up at each school *[Setting up the daily attendance code calculation, p. 150]*. The resulting figures are used in reports for such purposes as school funding, communications to parents, and state reporting *[Report results, p. 101]*.

Since calculating daily attendance codes is a task that typically makes heavy demands of system processing power, Chancery SMS makes its calculations for the district at a scheduled time each day. Typically this is an off-peak time outside school hours. Chancery SMS calculates an attendance code for each student for each day only once and stores the result.

Recalculating daily attendance codes

As a School Administrator, you have the option of having Chancery SMS recalculate school attendance codes for specific purposes, such as:

- If daily attendance code calculation rules are changed at a school [p. 150], we recommend that you recalculate daily attendance codes for the affected period.
- If attendance records are cleared [p. 127], we recommend that you recalculate daily attendance codes for the affected period.
- If attendance records for a student have been changed, you can make Chancery SMS to recalculate that student’s daily attendance codes [p. 126].

You can have Chancery SMS recalculate immediately, at a future time, or at regular intervals.

You can do this if your role is:
School Administrator

To recalculate daily attendance codes:

1. On the home page, in the control bar, under **ADMIN**, click **Attendance**. The Attendance page appears.
2. Click **Schedule Attendance Calculations**. The Schedule Attendance Calculations page appears with a list of scheduled and completed calculations.
3. From the **Actions** menu, click **Add Scheduled Calculation**. The Job Schedule page appears.
4. In the **General** panel, enter or change information, which includes:
   - ⓘ **Job name**: Each job requires a unique name.
   - ⓘ **Calculation**:
     - “Daily attendance minutes” calculates daily attendance minutes, if your school tracks these *[Setting up minutes-based attendance (optional), p. 146]*.

        - “Initialize behavior for day” sets attendance codes based on the action steps defined for student behavior [p. 158]. (Typically, this calculation is made each day for all schools in the district.) **Note**: Use this calculation for dates on which you have cleared attendance records [p. 127].
        - “Daily attendance calculation” sets Chancery SMS to make the standard code calculation.
    - **Period**: Sets the range of days for which to recalculate daily attendance codes. Options include:
        - **Current Date**: Today’s date.
        - **Year-to-date**: All the days of the calendar year up to today.
        - **Report Card Period**: Select a period from the list.
        - **Date Range**: Enter Start and End dates.
5. In the **Students** panel, set the students for whom you want to calculate daily attendance. Options include:
    - **All students in the school**: This is the default selection.
    - **Selected Students**: Find students by setting search criteria and clicking Search or by clicking **Display All Records**. This generates a list of **Available Students** from which you can select by moving one or more to **Selected Students**.
6. In the **Scheduling Options** panel, enter or change Information, which includes:
    - **Run now**: Sets the calculation to run once at the time you click OK. This is the default choice.
    - **One time**: Set the future date and time at which you want Chancery SMS to run the calculation. **Note:** If you inadvertently choose a past date and time, the report runs as soon as you click OK.
    - **Recurring**: Set the interval at which you want Chancery SMS to run the calculation and the future date and time at which you want the interval to commence. The interval can be by hour, day, week, or month. **Note:** If you inadvertently choose a past date and time, the report runs the first time as soon as you click OK.
7. Click OK.

Recalculating daily attendance codes for a student

You have the option of making Chancery SMS recalculate daily attendance codes for an individual student for one or more days in the past as well as the current day. You may wish to do this if the attendance records for a student have been changed. **Note**: Changing attendance codes assigned to students for days that have passed could affect daily code calculations.

You can do this if your role is:
School Administrator

To recalculate daily attendance codes for a student:

1. Locate and view a student record [p. 36]. The Edit Student Demographics page appears.
2. In the control bar, click **Attendance**. The Student Attendance page appears.
3. Select a **Date Range**.
    - Selecting “Date Range” enables you to set a range based on **From** and **To** dates.
    - When you proceed to the next step, Chancery SMS gives you the option of including Today.
4. From the **Actions** menu, click **Calculate Daily Codes**.

Clearing attendance records

As a School Administrator, you may encounter circumstances in which you need to clear attendance records. One such circumstance is when you need to make changes to a student record such as attendance records for future days. Another circumstance is when you have to clear attendance for an exception day [p. 141], such as a snow day.

You can clear attendance records for any or all students in any or all classes. You can clear attendance records for any date or date range as long as it is in the current Active Calendar year. In a school that takes attendance twice daily [p. 144] you can clear attendance for an entire day, but you cannot clear attendance for only the morning or afternoon.

Note: If you clear attendance for a past date, re-initialize that day before allowing Chancery SMS to recalculate daily attendance codes [p. 125]. When you re-initialize the day, Chancery SMS reassigns the default daily attendance code; otherwise Chancery SMS assigns the first code in the daily attendance code rules list [p. 151].

You can do this if your role is:
School Administrator

To clear attendance records:

1 On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.

2 Under **Attendance**, click **Clear Attendance**. The Clear Attendance page appears.

3 Under Step 1, select the students for whom to clear attendance. Options include:
   - **All students**
   - **Saved Student List** [p. 43]
   - **Student number**

4 Under Step 2, select the classes for which to clear attendance. Options include:
   - **All classes**: Select the **Clear daily codes** check box to remove any overrides in the attendance records. **Note**: An elementary School Administrator has the option of clearing all homerooms and classes.
   - **Selected classes**: Specify one or more classes.

5 Under Step 3, set the dates on which attendance is to be cleared. Options include:
   - **Entire school calendar year**
   - **Today**
   - **Date range**: The range can include future dates.

6 Click OK. A confirmation dialog appears with the clearance criteria listed.

7 Click OK.

Clearing a record of attendance taking

As a School Administrator, you may encounter circumstances in which you need to clear a record of attendance having been taken; for example, when a Teacher has made a mistake in recording attendance and the record needs to be changed.

Clearing a record of attendance taking involves clearing *submit flags*. You can clear submit flags for any or all classes for a date or date range in the current Active Calendar year. In a school that takes attendance twice daily [p. 144] you can clear submit flags for an entire day, but you cannot clear them for only the morning or afternoon.

You can do this if your role is:
School Administrator

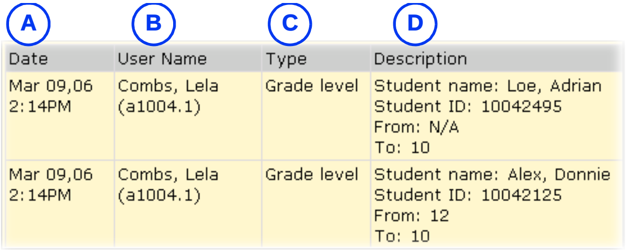
To clear attendance submit flags:

1. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Attendance**, click **Clear Submit Flags**. The Clear Submit Flags page appears.
3. Under Step 1, select the classes for which to clear the flags. Options include:
    - **All classes**: **Note**: An elementary School Administrator has the option of clearing all homerooms and classes.
    - **Selected classes**: Specify one or more classes.
4. Under Step 2, set the dates for which to clear the flags. Options include:
    - **Entire school calendar year**
    - **For today**
    - **Date range**: The range can include future dates.
5. Click OK. A confirmation dialog appears with the clearance criteria listed.
6. Click OK.

Reviewing information-changing activity

A School or District Administrator can review the activity of user accounts on a Chancery SMS system. This is made possible by Chancery SMS's *Database Audit Log*, which contains a time-stamped record of any action that changes the information stored in the system [Figure 84].

FIGURE 84: Database Audit Log sample records



Date	User Name	Type	Description
Mar 09,06 2:14PM	Combs, Lela (a1004.1)	Grade level	Student name: Loe, Adrian Student ID: 10042495 From: N/A To: 10
Mar 09,06 2:14PM	Combs, Lela (a1004.1)	Grade level	Student name: Alex, Donnie Student ID: 10042125 From: 12 To: 10

A **Date**: The date and time of the change.

B **User Name**: The name and User ID of the user account responsible for the change. Where an automated process (such as nightly calculations) was responsible for the change, this field is blank. **Note**: User Name and ID are not recorded for student enrollment audit entries.

C **Type**: Indicates the functional area of the system associated with the change.

D **Description**: Describes the change. "From" indicates the state of the information before it was changed. "To" indicates the new information. "N/A" indicates that there was no information.

In general, changes to information are recorded while changes to system setup, such as modifications to the grading structure, are not. The Database Audit Log includes records of user-made changes to the following:

- Student academic plans [p. 86], including notes
- Attendance [p. 67]
- Grade level transfers and any resulting attendance reassignments
- Modifications to daily code calculation rules, including rule priority changes
- Student health records
- Gradebook task and server errors
- GPA and honor roll definitions during Year-End Processing [p. 208]

- Grading calculation overrides, including GPA, credit, honor roll, and class rank overrides
- Student enrollment [p. 129]

The Database Audit Log also records the following:

- Course deletions from a student's Academic Plan [p. 86] as a result of a course deletion from the district Planning Calendar course catalog made by Chancery SMS during Year-End Processing [p. 208].

Chancery SMS logs some changes immediately and others during an overnight auditing process. The default time at which Chancery SMS conducts its audit is 8:00 pm. **Note**: If Chancery SMS fails or times out in an attempt to audit a particular feature during its overnight process, it records the failure in the Database Log as a "Task Manager Event" and alerts [p. 30] the District Administrator with the message "Audit log tasks could not be completed".

You can view the Database Audit Log's records according to date range, district, school, student, user account, and functional area of the system. You also have the option of clearing the log of the records you view.

You can do this if your role is:
School Administrator
District Administrator

To view Database Audit Log records:

1. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Audit Log**, click **Database**. The Database Audit Log page appears.
3. Set search criteria, which include:
   - ⓘ **Type**: Specifies the functional area of the system. Select "Year-End" to view activity related to Year-End Processing [p. 208].
   - ⓘ **Date range**: Sets the days from which to retrieve the records.
   - ⓘ **User Name**: Identifies the user for which to retrieve records. The User ID associated with a user account [p. 185].
   - ⓘ **Student ID**: Identifies the student for which to retrieve records.
4. Click Search. Under **Search Result,** Chancery SMS displays a list of records [Figure 84].
   - ⓘ You can print the listed records *[Printing a grid, p. 25]*.
   - ⓘ You can clear the Database Audit Log of the listed records: in the **Actions** menu click **Clear Logs**.

TABLE 22: Permissions pertaining to the Audit Log

To	You need this permission	Set to	
View the Audit Log	**School Setup > View Audit Log**	Yes	
Print an Audit Log report	**School Setup > View Audit Log**	Yes	
Clear the Audit Log	**School Setup > Purge Audit Log**	Yes	

Auditing student enrollment

The Database Audit Log provides a convenient way to double-check student enrollment. Reviewing the log is especially useful for the following circumstances:

- A student has transferred from one school to another

  When a student is transferred from one school to another, Chancery SMS logs a withdrawal at student's original school and an enrollment at the student's new school.

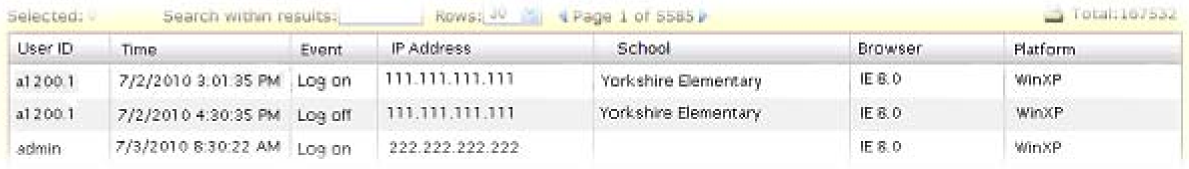
Also of note regarding enrollment:

- Chancery SMS does not log the name of the user who makes an enrollment or withdrawal change.
- Chancery SMS enables you to track enrollment errors by logging enrollment records with a status of N/A.
- Chancery SMS logs enrollment data that is mass-assigned. However, imported enrollment data and enrollment records generated during Next Year Preparation [p. 202]/Year-End Processing [p. 208] are not logged.

Reviewing user access

Primarily for security purposes, a School or District Administrator can review which users logged on to the system, when a user logged on or off, the user's IP address and school, and the browser and operating system used. This involves consulting the *Web Audit Log* [Figure 85].

FIGURE 85 Web Audit Log sample records



User ID	Time	Event	IP Address	School	Browser	Platform
a1200.1	7/2/2010 3:01:35 PM	Log on	111.111.111.111	Yorkshire Elementary	IE 8.0	WinXP
a1200.1	7/2/2010 4:30:35 PM	Log off	111.111.111.111	Yorkshire Elementary	IE 8.0	WinXP
admin	7/3/2010 8:30:22 AM	Log on	222.222.222.222		IE 8.0	WinXP

A **Event**: Possible events are "Sign in" and "Log off". A session timeout (that is, when a logged-in user's session expires due to inactivity) is not logged as an event.

B **School**: Identifies the school associated with the User ID. For a district-level user, this column is empty.

C **Browser**: The user's web browser; for example, "IE 8.0" (Internet Explorer).

D **Platform**: The operating system of the user's computer; for example "WinXP" (Windows XP).

You can do this if your role is:
School Administrator
District Administrator

To view Web Audit Log records:

1. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Audit Log**, click **Web**. The Web Audit Log page appears.
3. Set search criteria, which include:
   - **User ID**: Identifies the user for which to retrieve records. The User ID associated with a user account [p. 185]
   - **IP Address**: Specifies the IP address through which the user gained access to the system.
   - **Date Equals**: Sets the range of time in which to look for user activity.
4. Click Search. Under **Search Result,** Chancery SMS displays a list of records [Figure 84].
   - You can print the listed records *[Printing a grid, p. 25]*.
   - You can clear the Web Audit Log of the listed records: in the **Actions** menu click **Clear Logs**.

The Security Audit Summary [p. 271] and the Security Audit Details (by Time) [p. 272] reports are also useful for reviewing user activity.

Making information available for parents to view

You can make a student's information— grades, attendance, and discipline incidents— available for parents to view securely on the web through Pearson's parent portal, *ParentCONNECTxp*™. A School Administrator can control which student's information is available to post on ParentCONNECTxp [p. 131].

ParentCONNECTxp works with Chancery SMS 6.7.3 or later and PowerTeacher Release 1.5 or later. For detailed information, refer to the *ParentCONNECTxp Administrator's Guide*.

Preventing the viewing of a student's information

By default, each students' grades, attendance, and discipline information is available for uploading to ParentCONNECTxp where parents can view it. If necessary, you can exclude a student's information from the uploading process.

You can do this if your role is:
School Administrator

To exclude a student's information from uploading:

1. Locate and view the student's record [p. 50]. The Edit Demographics page appears.
2. On the **School Specific** tab, clear the **Upload to parent portal** check box.
3. Click Save.

5 School setup

One Chancery SMS system serves a school district. A typical school district has many schools. Each school in the system can have a unique setup; however many aspects of a school's setup are derived from options set at the district level [p. 193]; for example, grade levels, district calendar, course catalog, and so on. Thus, district setup precedes a school setup.

Typically, a District Administrator determines the initial setup of a school. Starting from this initial setup, a School Administrator is able to adjust his or her school's setup to best serve its needs.

Setting up a school involves (in the preferred order):

- School calendar setup [p. 133]
- Scheduling [refer to the *Chancery SMS Scheduling Guide*]
- Attendance setup [p. 143]
- Grade level setup [p. 158]
- Facility setup [p. 159]
- Grading setup [p. 162]

School setup may also involve the following:

- Awards setup [p. 171]
- School staff [p. 172]
- Program Management: Refer to the *Chancery SMS Program Management Guide*.

To set up a school, a user must be assigned a role as a School Administrator and have a staff record assigned to the school [see Ch. 6, *User setup, p. 185]*.

School calendar setup

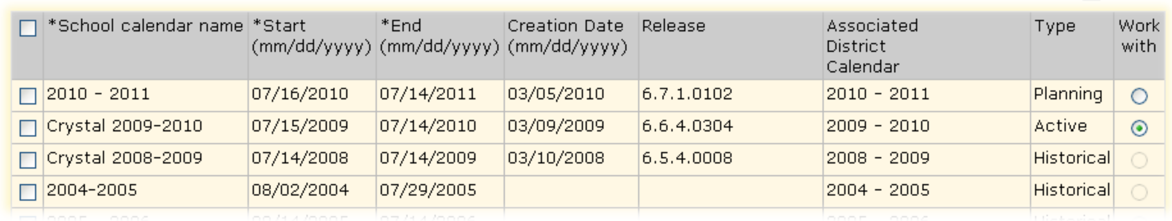
A school's calendar is the foundation upon which other aspects of the school's setup and operation are laid out. A school calendar is a prerequisite for setting up any other aspect of the school. In a Chancery SMS system, a school has three types of calendars [Figure 86]:

- *Active Calendar* [p. 136]: The calendar for the current school year. At the end of the school year, when the district runs Year-End Processing [p. 208], Chancery SMS converts this calendar into a Historical Calendar. A school can have only one

Active Calendar. For other Active Calendar considerations, refer to School Active Calendar [p. 136].

- *Planning Calendar* [p. 136]: The calendar used to plan the coming school year, including scheduling classes and enrolling students. At the end of the school year, when the district runs Year-End Processing [p. 208], Chancery SMS converts this calendar into the Active Calendar. A school can have only one Planning Calendar. For other Planning Calendar setup considerations, refer to School Planning Calendar [p. 136].
- *Historical Calendar* [p. 139]: A former Active Calendar for a past school year. The system can hold several historical calendars. For other Historical Calendar considerations, refer to School Historical Calendar [p. 139].

FIGURE 86: School Calendars page



☐	*School calendar name	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)	Creation Date (mm/dd/yyyy)	Release	Associated District Calendar	Type	Work with
☐	2010 - 2011	07/16/2010	07/14/2011	03/05/2010	6.7.1.0102	2010 - 2011	Planning	○
☐	Crystal 2009-2010	07/15/2009	07/14/2010	03/09/2009	6.6.4.0304	2009 - 2010	Active	●
☐	Crystal 2008-2009	07/14/2008	07/14/2009	03/10/2008	6.5.4.0008	2008 - 2009	Historical	○
☐	2004-2005	08/02/2004	07/29/2005			2004 - 2005	Historical	○

You can do this if your role is:
School Administrator

To manage a school’s calendars:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **School Calendars**. The School Calendars page appears [Figure 86].
3. To change a calendar’s name, click the calendar and in the **School Calendar Name** column, enter a new name.
   - ⓘ The name must be unique among calendars in the system.
4. To change a calendar’s date range, click the calendar and in the **Start** and **End** columns change the dates.
   - ⓘ **Warning:** Be extremely cautious with date changes. Changing the date range of a calendar can affect scheduling and attendance.
5. To delete a Planning Calendar, select the calendar and in the **Actions** menu click **Delete Calendar**.
   - ⓘ You cannot delete an Active or Historical Calendar.
   - ⓘ If you delete a Planning Calendar, you will need to recreate any Planning Calendar-specific data you had entered.
6. Click OK.

You can do this if your role is:
School Administrator

To create a school’s Planning Calendar:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The **School Setup** page appears.
2. Under **Calendar**, click **School Calendars**. The School Calendars page appears [Figure 86].
3. To create a new calendar, in the **Actions** menu click **Add Calendar**. Chancery SMS adds a new row to the list of calendars and enters the date the calendar was created, the release in which the calendar was created, the name of the associated district calendar, and a calendar type of “Planning”.
   - ⓘ If a school has the calendars it needs, **Add Calendar** is not available.
4. Set options, which include:
   - ⓘ **School Calendar Name**: A unique name describing the calendar, such as “2007-2008”.

- **Start** and **End**: Sets the date range, ensure:
    - Is from 1 to 550 days. A typical number of days is 365.
    - Includes a number of days at least double the number of terms.
    - Encompasses all attendance reporting periods [p. 147].
    - Encompasses all scheduling term reporting periods [p. 147].
    - Encompasses all grading periods [p. 162].
    - Does not overlap any other school calendar.
- Ensure that the **Start** date:
    - Is at least one day before students actually attend school, so that the start date is not the same day that the first Attendance Reporting Period begins.
    - Is on or after the Start date of the district calendar identified in the **Associated District Calendar** column.
    - Is the same day of the week as the Start date of the Active Calendar. This is because on a system that employs program management, program session start dates are linked to the Planning Calendar's start date.
    - Is later than the district calendar start date at a school that has a year-round calendar where returning students receive both a withdrawal and enrollment code.
- Ensure that the **End** date is on or before the End date of the district calendar identified in the **Associated District Calendar** column.

5. View other information, which includes:
    - **Creation Date**: The date the calendar was created.
    - **Release**: The Chancery SMS software release number in use when the calendar was created.
    - **Associated District Calendar**: The district-level calendar associated with this particular school calendar. A change in one may cause a change in the other [p. 137].
    - **Type**: The type of calendar, such as Active [see *School Active Calendar, p. 136*], Planning [see *School Planning Calendar, p. 136*], or Historical [see *School Historical Calendar, p. 139*].
6. Click OK.

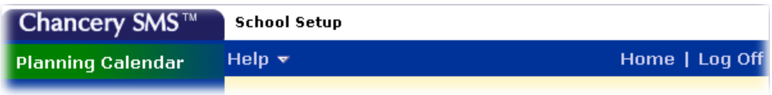
TABLE 23: Permissions pertaining to school calendar setup

To	You need this permission	Set to	
Create, edit, or delete school active or Planning Calendars	**School Setup > Define School Calendar**	Yes	

Switching between school calendars

Typically, a School Administrator works with the school's Active Calendar. However, for such purposes as planning or reporting [see p. 100], the administrator can switch the calendar in use to the planning calendar. When a School Administrator logs in, Chancery SMS displays the last calendar the administrator used. Chancery SMS displays a constant reminder when the user is working in the Planning Calendar [Figure 87].

FIGURE 87: Calendar indicator



To switch school calendars:

1. On the Home page [p. 14], in the **Actions** menu, click **Switch Calendar**. The School Calendar page appears [Figure 86].
2. In the **Work with** column, select the appropriate calendar's check box.
3. Click OK.

School Active Calendar

A school's Active Calendar spans the current school year, which includes all preparation days at the beginning of the year and makeup days at the end. A school's Active Calendar is associated with the district' Active Calendar. The system has only one Active Calendar. A School Administrator can view the Active Calendar by switching to it [p. 135].

A school's Active Calendar is created when the District Administrator first adds the school to the system. Chancery SMS creates the school's Active Calendar, using the dates of the district's Active Calendar; these dates can be adjusted to ac como date the school's requirements. The school can then create a Planning Calendar whenever they deem it appropriate to do so. During Year-End Processing [p. 208], Chancery SMS converts that calendar into an Active Calendar for the new year.

School Planning Calendar

The Planning Calendar enables a School Administrator to prepare for the next school year (also known as *next-year preparation*) [p. 202]. During Year-End Processing [p. 208], Chancery SMS converts the Planning Calendar to the Active Calendar (and the Active Calendar becomes a Historical Calendar). A school has only one Planning Calendar.

When a School Administrator is working with the Planning Calendar [see *Switching between school calendars, p. 135*], the information available differs from that of the Active Calendar. In general, the administrator has access to less than the Active Calendar and the information available supports the planning process [Figure 88]. The information includes.

- **Student**: Enables you to work with students who will be attending the school next year.
- **User Settings**: Enables you to pre-define the way columns of data display.
- **School Setup**: Including the following:

  School Calendars

  Attendance Reporting Periods

  Day Types (setup list)

  Calendar Day Exceptions

  General Settings

  Homerooms

  Courses: Appears if Secondary Scheduling is employed OR **Subject Framework:** Appears if Elementary Scheduling is employed.

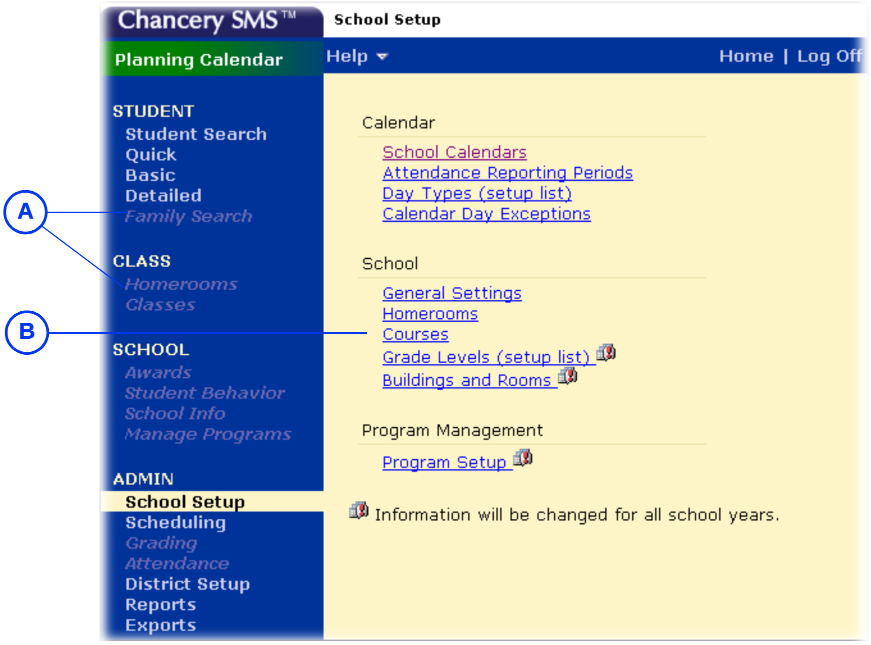
  Grade Levels (setup list)

  Buildings and Rooms

  Program Setup

- **Scheduling**: Enables you to schedule students who will be attending the school next year.
- **District Setup**: Enables you to view courses and subjects, and the district calendar.

FIGURE 88: Planning Calendar School Setup page example (secondary school)


Chancery SMS™
School Setup
Planning Calendar
Help
Home | Log Off
STUDENT
Student Search
Quick
Basic
Detailed
Family Search
CLASS
Homerooms
Classes
SCHOOL
Awards
Student Behavior
School Info
Manage Programs
ADMIN
School Setup
Scheduling
Grading
Attendance
District Setup
Reports
Exports
Calendar
School Calendars
Attendance Reporting Periods
Day Types (setup list)
Calendar Day Exceptions
School
General Settings
Homerooms
Courses
Grade Levels (setup list)
Buildings and Rooms
Program Management
Program Setup
A
B

Information will be changed for all school years.

A Grayed out link: Indicates that you do not have access to this link in this calendar.

B **Courses**: Appears for a school using secondary scheduling in its planning. If the school uses elementary scheduling in, Chancery SMS displays **Subject Framework**.

School Planning Calendar setup

A School Administrator can only create the school's Planning Calendar after the district Planning Calendar is created.

Many elements of the school's Planning Calendar are shared with its Active Calendar. Thus any changes to these elements in one calendar affect both calendars. Such elements include:

- Grade levels
- Saved lists
- Staff: Except staff course preferences
- Users
- Buildings and rooms
- Program setup

Some elements of the school Planning Calendar are set up in the school Active Calendar only (that is, these elements cannot be changed in the school Planning Calendar). When a School Administrator makes a change to one of these elements in the school Active Calendar, the change also affects the school Planning Calendar. These elements include:

- Alerts
- Attendance codes
- Attendance exception rules

- Attendance rules for credit calculations
- Awards
- Daily code calculation rules
- Default attendance settings
- Minutes-based attendance
- Student photos
- Supplementary attendance
- Transcript grade items

Some elements of a school's Planning Calendar are copied from its Active Calendar when the School Administrator creates the Planning Calendar. Thereafter, these elements in the two calendars are separate—any changes to the elements in the Active Calendar do not affect their counterparts in the Planning Calendar. Indeed, some of these elements must be modified to suit the year being planned. Such elements include:

- Address exceptions: Schools can be set up so that approved Address Exception records for students returning to the same out-of-zone school are copied from the Active to the Planning Calendar each time the Next-Year Preparation nightly process runs. For detailed information, refer to the *Chancery SMS Address Validation Guide*.
- School-defined scheduling constraints: Chancery SMS copies school-defined constraints when a School Administrator creates the Planning Calendar. Subsequent changes made to such constraints in the school Active Calendar do not affect the Planning Calendar, and changes made in the Planning Calendar do not affect the school Active Calendar. For information about school-defined scheduling constraints, refer to the *Chancery SMS Scheduling Guide*
- Course properties: Including room, room type, and department
- General settings
- Homerooms: All homeroom settings, including Teachers and Grades
- Program sessions: Chancery SMS copies program sessions to the Planning Calendar the first time the Next-Year Preparation nightly process runs. Subsequent changes made to program sessions in the school Active Calendar do not affect the school Planning Calendar and changes made in the Planning Calendar do not affect the Active Calendar. For information about program sessions, refer to the *Chancery SMS Program Management Guide.*
- Staff course preferences: Staff course preferences are calendar-specific. Chancery SMS copies staff course preferences to the Planning Calendar only if a new planning schedule is copied from the Active Calendar. When the new planning schedule is created, staff course preferences apply to the entire Planning Calendar and all planning schedules. After staff course preferences are copied, each time the administrator copies to a planning schedule from the Active Calendar, any staff course preferences that do not exist in the Planning Calendar are updated from the Active Calendar. If a course preference is already set in the Planning Calendar, the value is not updated. Staff course preferences deleted only in the Planning Calendar are re-copied from the Active Calendar and staff course preferences deleted in the Active Calendar are retained in the Planning Calendar. To remove or change course preferences, you must make the change in both the Active Calendar and the Planning Calendar. Deleting the Planning Calendar after staff course preferences are copied from the Active Calendar does not delete the staff course preferences for the Planning Calendar.
- Student behavior

Some elements of a school's Planning Calendar are neither copied from the Active Calendar nor linked to it. The School Administrator must set up these elements in the Planning Calendar.

- Address exceptions: For graduating or withdrawn students
- Attendance reporting periods
- Calendar day exceptions
- Courses and subjects: These are derived from the catalog published in the district Planning Calendar. A District Administrator assigns courses to each school.
- Day types: When the administrator creates the Planning Calendar, Chancery SMS sets up default day types.
- Scheduling: When the administrator creates a Planning Calendar, Chancery SMS includes a blank Planning Schedule. To configure the Planning Schedule(s), the administrator can copy schedule settings from the school's Active Calendar.

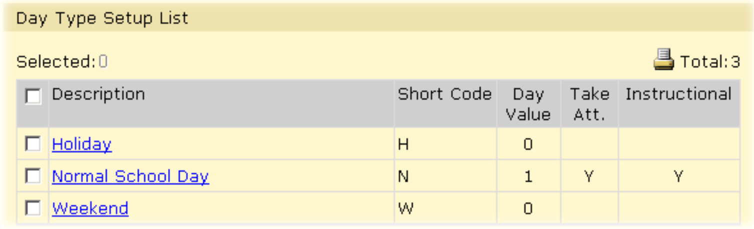
School Historical Calendar

Once an Active Calendar is converted to a Historical Calendar by Chancery SMS, school and district personnel can no longer make changes to it.

Day types

On a calendar, each day of the week is assigned a *day type*. The day type determines when attendance is taken (if at all) and how that day's attendance and student membership are tallied in reports [Ch.3, *Reporting on information, p.95*]. A Chancery SMS system has three *base day types*: Normal School Day, Weekend, and Holiday [Figure 89].

FIGURE 89: Day Types Setup List



Day Type Setup List

Selected:0 Total:3

☐	Description	Short Code	Day Value	Take Att.	Instructional
☐	Holiday	H	0		
☐	Normal School Day	N	1	Y	Y
☐	Weekend	W	0		

A **Day value**: The day's value where attendance is tallied by value rather than occurrence [p. 95].

B **Take att.**: Determines if attendance is due to be taken on this day [p. 67].

C **Instructional**: Determines if this day is considered an instructional day.

Note: The default properties for each type are shown.

A School Administrator can use the base day types as they are or use them as the basis for defining additional day types [p. 140]. By default, Chancery SMS assigns to weekdays the Normal School Day type and to weekend days the Weekend day type. For example, if the school offers classes on Saturday, you can set the day type for Saturday to Normal School Day. The administrator can change the default day type assigned to a day (later on, you can assign a day type to specific dates in the calendar).

You can do this if your role is:
School Administrator

To change the default day type assigned to a day of the week:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **Day Types (setup list)**. The Day Types page appears. This page displays the day types available in the **Day Type Setup List** panel [Figure 89], and the day types assigned to the days of the week.
3. In the **List Settings** panel, click **Edit**. The List Settings page appears.
4. Change the default setting for the day of the week.
5. Click OK.
6. Click OK.

Defining day types

You supplement the base day types provided by Chancery SMS with day types of your own; for example, if your school has an early dismissal day once a month, you can create an “Early Dismissal” day type, or if your area is subject to periodic heavy snowfalls, you can create a “Snow Day” day type.

You can do this if your role is:
School Administrator

To define a day type:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **Day Types (setup list)**. The Day Types page appears.
3. From the **Actions** menu, click **Add Day Type**. The Add Day Type page appears.
   - To change a day type, in the **Description** column, click its name. The Edit Day Type page appears.
   - To delete a day type, select the day type and in the Actions menu click **Delete Day Type**.
4. Enter or change the information, which includes:
   - **Description**: The day type’s name, such as “Professional Day” or “Snow Day”.
   - **Short code**: A short name, such as “P” or “S”.
   - **State equivalent**: A description used for state reporting purposes. **Note**: The State Day Type Code setup list (handled by a District Administrator) determines the options available. **Caution**: If you change this value, reports for the state may be inconsistent among schools.
   - **Base Day Type**: The day type on which to base the values for this day type. For a Snow Day, use “Holiday”.
   - **Day Value**: The day’s value where attendance is tallied by value rather than occurrence [p. 95]. Typical values are 1.00, 0.50, and 0.00 Applies only if Base Day Type is “Normal School Day”.
     - For once-daily attendance [p. 144], enter Present and Absent code values of 1.00. For twice daily attendance [p. 144], enter Present and Absent code values of 0.50. In both cases, the value counts as one student per day.
     - For half-day homerooms, use 1.00, unless you want to report a half count for half-day homerooms, in which case use 0.50.
   - **Take Attendance**: Determines if attendance is due to be taken on this day [p. 67]. Applies only if Base Day Type is set to “Normal School Day”.

   - **Instructional Day**: Determines if this day is considered to be a day on which students receive instruction. Applies only if Base Day Type is set to “Normal School Day”.
   - **Use for Defaults in Day Type List Settings**: Indicates that this day type can be used as a default day type [p. 139]. Applies only if the school employs secondary school scheduling. If this is set to “No” and Instructional Day to “Yes”, then Chancery SMS treats this as an exception day [p. 141], and you must specify the bell schedule for this exception day type [p. 142]. For a Snow Day, set to “Yes”.

5. Click OK.

Exception days

An *exception day* is any interruption in the pattern of default day type assignments; for example, a snow day (a day on which the school is closed due to heavy snowfall) or when the Thanksgiving Day holiday falls on a Friday (this particular Friday would be designated an exception day). Since Chancery SMS assigns day types to all the days of the week in a school calendar (using the default day types), you assign an exception day to a specific date or date ranges as necessary. When you designate a specific date as an exception, you assign it a day type, typically “Holiday”.

Note: When you designate exception days with Holiday or Weekend base day types, existing Weekend days, as based on your school calendar start and end dates and the default day type settings, are retained. Only Normal School Day types are updated with the new exception day.

Note: When you designate exception days with a Normal base day type, existing Weekend and Holidays are overwritten. This is useful when scheduling exception days, such as Make Up days, on a Saturday or Sunday, where you want the Make Up days counted as Normal school days, not Weekend or Holiday days.

Note: If you plan to designate the current day or a past day as an exception day, you must select a day that has the same base day type as the day to which you want to apply this exception day; so that all the periods for both days match for any attendance that might have been taken.

Note: At a school that employs secondary school scheduling in a relative day pattern, when you create an exception day, you must specify when you want this exception day to begin; that is, you must specify where you want to insert this exception day into your school schedule.

You can do this if your role is:
School Administrator

To assign an exception day to a day:

1. On the home page, in the control bar, under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **Calendar Day Exceptions**. The Calendar Day Exceptions page appears.
   - This page displays a breakdown of the base day types in your calendar. This is useful to ensure that your calendar holds the required number of instructional days.
3. In the **Actions** menu click **Add Exception Day**. The Add Exception Day page appears.
4. Enter or change the information, which includes:
   - **Exception day description**: For example, “Christmas Vacation” or “Snow Day”.
   - **Date**: A specific date or date range.

    - **Day Type**: The base day type [p. 139]; for example, “Holiday”, or “Snow Day” if you have defined such a day type [p. 140].
    - **Bell Schedule Based on Day**: Applies only to a school that employs secondary scheduling. If the Day Type is “Normal School Day” and you are using a relative day pattern, select which relative day’s bell schedule you want for this exception day [p. 142].
5. Click OK.
    - At a school that employs secondary school scheduling with a relative day pattern [p. 142], click Continue to verify or change the regular day pattern following this exception day.

Bell schedules and an exception day

At a school that employs secondary school scheduling and a relative day pattern [p. 142], it may be necessary to set the bell schedule for an exception day. For information about secondary school bell schedules, refer to the *Chancery SMS Scheduling Guide*.

You can do this if your role is:
School Administrator

To set the bell schedule for an exception day:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **Day Types (setup list)**. The Day Type List page appears.
3. In the **Actions** menu click **Add Day Type**. The Add Day Type page appears.
    - Or click a day type. The Edit Day Type page appears.
4. Set **Instructional** to “Yes”.
5. Set **Use for defaults in day type list** to “No”.
6. Click Continue. The Bell Schedules page appears.
7. Enter or change information, which includes:
    - **Bell Schedule Based on Day**: The day type the bell schedule of which this exception day employs. Does not apply if you are setting up exception days before school starts. **Note**: If you plan to apply this exception day to the current day or a past day, you must select the same day type as the day to which you wish to apply this exception day; so that all the periods for both days match for any attendance that might have been taken.
    - **Scheduling group**: The scheduling group to which the bell schedule belongs.
    - **Start Time** and **End Time**: The start and end time for each period.
    - **Period Name** and **Label**: Defined in the Bell Schedules page for the regular day.
    - **Details**: Hovering the cursor over the icon reveals the period’s details. To change the details, click the icon.
8. Click OK.

Relative day patterns

A *relative day pattern* is a sequence of day types. A relative day pattern enables you to schedule classes based on days that rotate through the school instructional days, skipping holidays and weekends. For example, you can define a Red day and a Blue day, which alternate for each instructional day. Using this pattern, when a holiday lands on a Blue day, the next instructional day becomes a Blue day.

When you use relative days, you must specify the date that the pattern begins and indicate which relative day is applied to the first day; for example, if school begins September 6, you can specify that the first day of school is a Red day. If classes are interrupted during the school year (the school closes due to heavy snow, for example), you can change the relative day assigned to the next instructional day.

You can only apply a relative day pattern if relative day patterns are set up at your school. You can set up relative day patterns in the active or Planning Calendar,. For more information about setting up relative day patterns, refer to the *Chancery SMS Scheduling Guide*.

Note: You cannot apply a relative day pattern to the past (days before today) if attendance has already been taken for those days. If you apply a relative day pattern to a future date and attendance has already been taken for those future dates, the attendance for those future dates is deleted.

You can only apply a day pattern to regular days. A regular day meets all of the following conditions:

- Base day type is “Normal School Day”.
- Instructional day is “Yes”.

You can do this if your role is:
School Administrator

To view relative day pattern assignments:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **Relative Day Pattern**. The Relative Day Pattern page appears.
3. In the **Calendar Day Search** panel, enter a date or date range and click Search.

You can do this if your role is:
School Administrator

To apply a day pattern:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **Relative Day Pattern**. The Relative Day Pattern page appears.
3. In the **Apply Regular Day Pattern** panel, for **Start Pattern Using Day**, select the relative day that you want to apply to the specified date.
4. For **As of Date**, set the date on which you want the relative day pattern to begin.
5. Click Apply Day Pattern. Chancery SMS displays your changes in the **Calendar Day List** panel.

Attendance setup

For the purpose of recording student attendance at a school, you must define how attendance will be taken at a school using the various options provided by Chancery SMS. In general, you set up attendance-taking before the school year begins. However, some adjustments are possible as the year progresses. Once you have set up attendance taking at a school, Chancery SMS can calculate daily attendance codes for that school on demand or across the district at scheduled times *[Calculating daily attendance codes, p. 125]*.

Setting up attendance-taking at a school involves the following (in order):

- Setting an attendance method [p. 144]
- Setting up supplementary class attendance [p. 144]
- Setting up minutes-based attendance (optional) [p. 146]

- Defining attendance reporting periods [p. 147]
- Setting up school attendance codes [p. 147]
- Configuring attendance quick-entry buttons (optional) [p. 148]
- Setting the default attendance code [p. 149]
- Setting up the daily attendance code calculation [p. 150]
- Setting up attendance exception rules [p. 155]
- Setting up an attendance rule for credit calculations [p. 157]
- Setting up attendance related to student behavior [p. 158]

TABLE 24: General permissions pertaining to school attendance setup

To	You need this permission...	Set to	
Set up attendance in general	**School Setup > Attendance General Settings**	Yes	

Setting an attendance method

The attendance method determines how often attendance is taken each day and how it is tallied. At a school, you can set up one of three methods for taking attendance:

- *Once-daily*: Attendance is taken once a day, typically in the homeroom.
- *Twice-daily*: Attendance is taken twice a day, typically in the homeroom. By default, half-day homerooms are set to take once-daily attendance based on their interval time (AM or PM).
- *By class*: Attendance is taken in each class. This method is only available to a secondary school.

Caution: Once you set up the attendance-taking method for a school, and schedules have been created or attendance has been taken [p. 67], you can change the attendance method only if you first clear attendance [p. 127]. For information about scheduling, refer to the *Chancery SMS Scheduling Guide*.

You can do this if your role is:
School Administrator

To set the attendance method for a school:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **School**, click **General Settings**. The General Settings page appears.
3. Under **Attendance General Settings**, select the check box of the attendance method you want to use: **Once daily**, **Twice daily**, or **By class**.
4. Click OK.

Note: For any attendance-taking method, you can specify the assumed attendance, that is, the default attendance code [p. 149].

TABLE 25: Permissions pertaining to attendance method setup

To	You need this permission	Set to	
Set up attendance	**School Setup > Attendance General Settings**	Yes	
Set an attendance method	**School Setup > Daily Attendance Calculation Method**	Edit	

Setting up supplementary class attendance

In a school using the once-daily or twice-daily methods, you can also designate individual classes for supplementary attendance taking. Elementary classes [p. 145] are handled differently from secondary school classes [p. 145]. Supplementary attendance does not affect daily attendance code calculations. Chancery SMS uses supplementary attendance data for other purposes, such as Program Management. For more information, refer to the *Chancery SMS Program Management Guide*.

Supplementary attendance for an elementary class

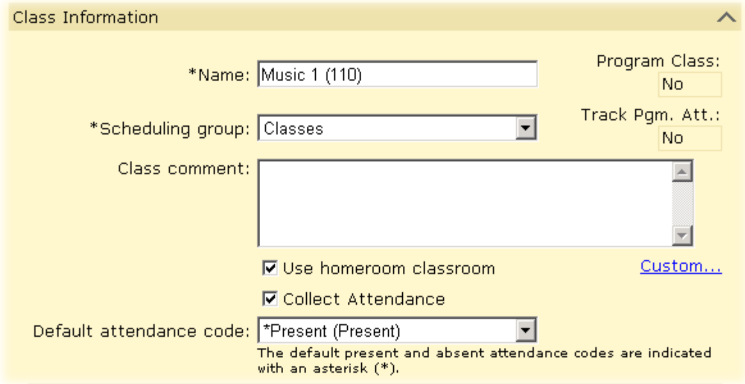
To designate an elementary class for supplementary attendance, that class must have a meeting pattern (refer to the *Chancery SMS Scheduling Guide*).

You can do this if your role is:
School Administrator

To designate an elementary school class for supplementary attendance taking:

1. On the home page, in the control bar under **ADMIN**, click **Scheduling**. The Scheduling page appears.
2. Under **Step 4**, click **Class Setup**. The Class Setup page appears.
3. Find and view the class. The Class Setup page appears.
   - ⓘ Click **Display All Records** or search for a specific class.
4. Under the **Class Information** panel, select the **Collect Attendance** check box [Figure 90].
5. Click Save.

FIGURE 90: Supplementary attendance taking - elementary school class



Class Information

*Name: Music 1 (110)

Program Class: No

*Scheduling group: Classes

Track Pgm. Att.: No

Class comment:

☑ Use homeroom classroom

Custom...

☑ Collect Attendance

Default attendance code: *Present (Present)

The default present and absent attendance codes are indicated with an asterisk (*).

Supplementary attendance for a secondary school class

To designate a secondary school class for supplementary attendance, that class must have a meeting pattern (refer to the *Chancery SMS Scheduling Guide*). For a Teacher to be able to take supplementary attendance for a class, the course to which a class belongs must also be designated for attendance collection.

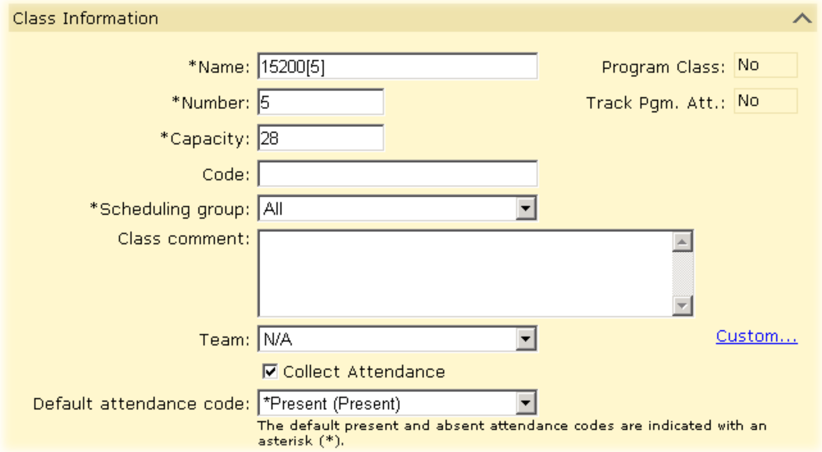
You can do this if your role is:
School Administrator

To designate a secondary school class for supplementary attendance taking:

1. On the home page, in the control bar under **ADMIN**, click **Scheduling**. The Scheduling page appears.
2. Under **Step 5**, click **Master Schedule**. The Master Schedule page appears.
3. Find and view the class. The Course Scheduling page appears.
   - ⓘ Click **Display All Records** or search for a specific class.
4. Under the **Class Information** panel, select the **Collect Attendance** check box [Figure 91].
5. Click Save.
6. Ensure that the corresponding course is designated for attendance collection:
   a. On the home page, in the control bar under **ADMIN**, click **District Setup**. The District Setup page appears.

b Under **District**, click **Course Catalog**. The Course Catalog Home page appears.
c Under **Step 3**, click **Courses**. The Course list appears.
d In the **Number** column, click the course that corresponds to the class. The Course Detail page appears.
e Ensure that the **Collect Attendance** check box is selected.
f Click OK or return to a previous page.

FIGURE 91: Supplementary attendance taking - secondary school class



Class Information

*Name: 15200[5]
*Number: 5
*Capacity: 28
Code:
*Scheduling group: All
Class comment:
Team: N/A
☑ Collect Attendance
Default attendance code: *Present (Present)
The default present and absent attendance codes are indicated with an asterisk (*).

Program Class: No
Track Pgm. Att.: No

Setting up minutes-based attendance (optional)

You can have the system track the number of minutes students are present in classes. In a school where minutes-based attendance is set up, a class or home room Teacher can record the number of minutes each student was absent from that class and a School Administrator can view daily totals of attendance minutes.

Chancery SMS uses the attendance minutes recorded to calculate Daily Attendance Minutes, the result of which is visible only through reports *[Running a report, p. 96]*. To track the number of minutes a student is in a class or homeroom, that class or home room must be assigned to a meeting pattern (refer to the *Chancery SMS Scheduling Guide*) that includes periods that are included in the Daily Attendance Minutes calculation. Typically, this is set up before classes convene.

You can do this if your role is:
School Administrator

To include a period in the Daily Attendance Minutes calculation:

1. On the home page, the control bar under **ADMIN**, click **Scheduling**. The Scheduling page appears.
2. Click **Bell Schedules**. The Bell Schedules page appears.
3. In the **Details** column, click the Details icon in the row for the period you want to set up. The **Edit Period** page appears.
4. Select the **Include in instructional/attendance minutes calculation** check box.
   ⓘ You cannot change this setting if the period is part of a meeting pattern for which attendance has been recorded.
5. Click OK.

Defining attendance reporting periods

An *attendance reporting period* is a preset date range used to generate attendance reports on a school's attendance. While a school must have at least one attendance reporting period per school year, a School Administrator can define several periods for the course of a school year; for example, one period per month. The periods must not overlap. Typically, the number of periods a School Administrator creates depends on state reporting requirements.

You can do this if your role is:
School Administrator

To define an attendance reporting period:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Calendar**, click **Attendance Reporting Periods**. The **Attendance Reporting Periods** page appears.
3. Create a period:
    a. In the **Start** column, click in a cell for the period.
    b. Enter a start date in the format mm/dd/yyyy.
    c. In the **End** column, click in the cell.
    d. Enter an end date in the format mm/dd/yyyy.
4. Click OK.

Setting up school attendance codes

When a Teacher or School Administrator records attendance in the system, he or she chooses an *attendance code* that indicates the student's status. To save the Teacher time, each class has a default attendance code (typically, "Present").

A Teacher can choose from a preset list of *school attendance codes*. Every school attendance code has a base type (Present, Absent, or Tardy), subtype (Unexcused), and weighting. You can reserve a code for the use of non-Teachers and set it to expire on a future date. Also, for district reporting purposes, each school attendance code is mapped to a *district attendance code*. A District Administrator maintains district attendance codes.

For each school, Chancery SMS includes several preset school attendance codes, such as Present (a Present type), Absent Unexcused (an Absent type), and Tardy Unexcused (a Tardy type). To supplement these, you can define additional attendance codes; for example, to record a student being absent for a field trip, to track the number of students who buy lunch in the cafeteria.

You can do this if your role is:
School Administrator

To set up a school attendance code:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **Attendance**, click **Attendance Codes (setup list)**. The Attendance Codes page appears.
    - ⓘ Or, in the control bar, under **ADMIN**, click **Attendance**. The Attendance page appears. Under **Step 2**, click **Attendance Codes (setup list)**. The Attendance Codes page appears.
3. In the **Actions** menu click **Add Attendance Code…**. The Add Item page appears.
    - ⓘ To change an attendance code, in the **Description** column click an attendance code. The Edit item page appears. Or in the Actions menu click **Edit Attendance Code…**.

   - To delete an attendance code, select the attendance code and in the **Actions** menu click **Delete Attendance Code…**.
4. Enter or change Information, which includes:
   - **Description**: A clear description (“Absent - Field Trip”, for example) which should be unique among the school’s codes. Chancery SMS uses this as the code’s name in lists visible to Teachers and others who take attendance.
   - **Short code**: A short code (“FT”, for example) which should be unique among the school’s codes.
   - **State equivalent**: Maps this school attendance code to a district attendance code, which are used for reporting district attendance. A District Administrator sets up these codes. **Caution**: Choosing this code demands care since it affects the consistency of state reporting.
   - **Attendance value**: Specifies the weighting given to Present, Absent, and Tardy. This enables school attendance to be tallied by value. For example, a code named “Field Trip” might have the following values: Present = 1.00, Absent = 0.00, and Tardy = 0.00.
   - **Attendance type**: Specifies the base type: Present, Absent, or Tardy.
   - **Unexcused**: For Tardy or Absent attendance types.
   - **Use for intervals**: The options available depend on the school’s attendance-taking method *[Setting an attendance method, p. 144]*. For example, at a secondary school using daily attendance, the options Daily attendance and Class attendance would be available.
   - **Teacher can use**: Determines if Teachers are able to use this code.
   - **Inactive as of**: Enables you to set an expiry date for the use of the code. This is useful if you want to retain an obsolete attendance code in the system for reporting purposes, or when attendance tracking requirement change. **Note**: You cannot render inactive an attendance code that is assigned to a student behavior action *[Behavior, p. 76]*.
5. Click OK.

TABLE 26: Permissions pertaining to attendance code setup

To	You need this permission	Set to	
Set up attendance codes	**School Setup > Attendance Code Setup List**	Edit	

Configuring attendance quick-entry buttons (optional)

You can assign the most commonly used attendance codes to three quick entry buttons. These buttons enable staff to record attendance with a single click rather than having to repeatedly select a frequently used code from a list [Figure 48].

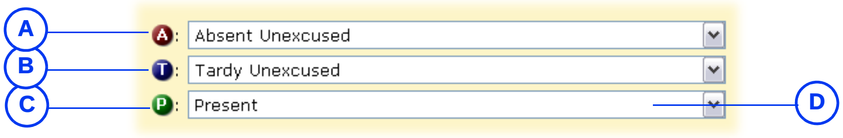
You can do this if your role is:
School Administrator

To configure attendance code quick-entry buttons:

1. On the home page, in the control bar under **ADMIN**, click **Attendance**. The Attendance page appears.
2. Under **Step 2**, click **Attendance Codes (setup list)**. The Attendance Codes (setup list) page appears.
   - Chancery SMS displays the current quick-entry button configuration under **Default Settings**.
3. On the **Default Settings** panel, click **Edit**. The Default Settings page appears.
4. For each quick-entry button (**A**, **T**, and **P**), select a default attendance code [Figure 92].

5 Click OK.

FIGURE 92: Attendance quick-entry button configuration


A: Absent Unexcused

T: Tardy Unexcused

P: Present

A **A** button: Generally used for an Absent-type attendance code [p. 147]. Chancery SMS treat the attendance code chosen as the default attendance code used for the positive attendance method, that is, where students are assumed to be absent *[Setting the default attendance code, p. 149]*.

B **T** button: Generally used for a Tardy-type attendance code [p. 147].

C **P** button: Generally used for a Present-type attendance code [p. 147]. Chancery SMS treat the attendance code chosen as the default attendance code used for the exception attendance method, that is, where students are assumed to be present *[Setting the default attendance code, p. 149]*.

D The school attendance code [p. 147] assigned to this button.

Setting the default attendance code

You can specify a default attendance code for the school, that is, the code that Chancery SMS assigns to every student in every class and homeroom at the start of each day. You can set the default attendance code to one of the following:

- **Present**: Also known as *exception attendance*. Chancery SMS records the student as present unless a staff member records otherwise. The Present-type school attendance code that Chancery SMS records is that which is assigned to the “P” quick-entry button [p. 148].
- **Absent**: Also known as *positive attendance*. Chancery SMS records the student as absent unless a staff member records otherwise. The Absent-type school attendance code that Chancery SMS records is that which is assigned to the “P” quick-entry button [p. 148].

Caution: Changing the default attendance code has a retroactive effect. If you change the default attendance code after attendance has been recorded, Chancery SMS changes all attendance codes that were used by default to the new default attendance code.

You can do this if your role is:
School Administrator

To set the default attendance code for a school:

1. On the home page, in the control bar under **ADMIN**, click **Attendance**. The Attendance page appears.

   ⓘ **Note**: Before setting the default attendance code, ensure that you have set up day types (refer to the *Chancery SMS Scheduling Guide*).
2. Under **Step 2**, click **Attendance Codes (setup list)**. The Attendance Codes (setup list) page appears.
3. Click **Edit**. The Default Settings page appears.
4. Set **Present** or **Absent**.
5. Click OK.

TABLE 27: Permissions pertaining to attendance code setup

Task	Permission Name	Set to	
Set up attendance codes	**School Setup > Attendance Code Setup List**	Edit	

Setting a default attendance code for a class or homeroom

Once you set a default attendance code for the school, you have the option of setting a different one for specific classes or homerooms; for example, in a school using Present as the default code might have an independent study class that uses Absent. When you change the default attendance code for a class or homeroom, Chancery SMS also changes the code associated with the relevant (Present/Absent/Tardy) quick-entry button for this class [p. 148]. The procedure differs by school and class type.

You can do this if your role is:
School Administrator

To set the default attendance code for an elementary school class:

1. On the home page, in the control bar under **ADMIN**, click **Scheduling**. The Scheduling page appears.
2. Under **Step 4**, click **Class Setup**. The Class Setup page appears.
3. Find and view the class. The Class Setup page appears.
   ⓘ Click **Display All Records** or search for a specific class.
4. Under the **Class Information** panel, select a **Default attendance code** [Figure 92].
5. Click Save.

You can do this if your role is:
School Administrator

To set the default attendance code for a secondary school class:

1. On the home page, in the control bar under **ADMIN**, click **Scheduling**. The Scheduling page appears.
2. Click **Master Schedule**. The Master Schedule page appears.
3. Find and view the class.
   ⓘ Click **Display All Records** or search for a specific class.
4. Select the class check box.
5. Under the **Class Information** panel, select a **Default attendance code** [Figure 92].
6. Click Save.

You can do this if your role is:
School Administrator

To set the default attendance code for a secondary school homeroom:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **School**, click **Homerooms**. The Homerooms page appears [p. 161].
3. Select the homeroom check box.
4. In the **Actions** menu click **Edit Homeroom...**. The Edit Homeroom page appears.
5. Click a **Default attendance code**.
6. Click OK.

Setting up the daily attendance code calculation

Chancery SMS calculates a *daily attendance code* for each student, that is, whether the student is to be recorded as present or absent for the day. Chancery SMS uses this code for its daily attendance calculations *[Calculating daily attendance codes, p. 125]*.

In a school that uses the Once-daily attendance method, the daily attendance code calculation is straightforward and Chancery SMS makes it by default. In a school that uses the Twice-daily or By class attendance method, this calculation is more complex. In these cases, a School Administrator must choose the calculation method [p. 151] and configure that method [p. 151].

Table 28: Permissions pertaining to daily attendance code calculation

To	You need this permission	Set to	
Specify the daily attendance calculation method	**School Setup > Daily Attendance Calculation Method**	Edit	
Set up rules for calculating daily attendance using the sample method	**School Setup > Attendance Calc Sample Method**	Edit	
Set up rules for calculating daily attendance using the Occurrence Method	**School Setup > Daily Attendance Occurrence Method**	Edit	
Set up attendance exception rules	**School Setup > Attendance Exception Rules**	Edit	

Choosing a daily attendance code calculation method

You choose the method by which Chancery SMS calculates daily attendance code. Your choice depends on the school's attendance method [p. 144]. Your options are:

- **Sample Method**: Chancery SMS calculates a daily code based on samples of period attendance code combinations that correspond to a daily attendance code. For example, Chancery SMS may assign a student a daily attendance code of "Absent" to a student if that student was recorded absent in period 1 and period 5. With the Sample Method, you must create a sample for every possible combination. This method is mandatory in a school that uses the Twice-daily attendance method.
- **Occurrence Method**: Chancery SMS calculates a daily code based on the number of times a specific attendance code is recorded within specific periods. For example, Chancery SMS may assign a student a daily attendance code "Present" if that student was recorded present at least twice within periods 1, 4, and 8.

You can do this if your role is:
School Administrator

To set the daily attendance code calculation method:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
   ⓘ Or, click **Attendance**.
2. Click "Daily Attendance Code Calculation Method". The Daily Attendance Code Calculation Method page appears.
3. Select the check box of a method: **Sample Method** or **Occurrence Method**.
4. Click OK.

Configuring the daily attendance code calculation

In a school that uses the Twice-daily or By class attendance, you must set up rules that enable Chancery SMS to calculate each student's daily attendance code each day. These attendance code calculation rules are also known as *bell rules*.

Attendance code calculation rules only affect how attendance reports are generated, not the attendance records. Typically, you set up calculation rules for a school at the beginning of a school year. You can adjust the calculation rules at any time, however all reports that you run (such as attendance reports, progress reports, and report cards) will generate results according to the new rules, even if the report covers dates prior to the change in calculation rules. However, the results of subsequent attendance reports may be hard to compare to those generated before the rules change. Chancery SMS records in its Audit Logs any changes made the daily attendance code calculation rules. You can review such changes, when they were made, and who made them.

A set of attendance code calculation rules consists of an ordered list of rules. Chancery SMS processes the rules in order from the top of the list; when it reaches a rule that enables it to generate a daily attendance code for that student, Chancery SMS generates the code and stops; it does not process the remaining rules in the list. If Chancery SMS reaches the end of the list without generating a code, it sets the student's code to the to the default daily attendance code [p. 149]. **Note**: If you do not set up attendance code calculation rules, Chancery SMS sets each student's daily attendance code to the default daily attendance code [p. 149], regardless of whether that student is marked Absent or Present.

The attendance code calculation rules are based on the Attendance Values you have assigned to each Attendance Code *[Setting up school attendance codes, p. 147]*. You set attendance code calculation rules according the attendance-taking method in use: Sample Method [p. 152] or Occurrence Method [p. 153].

Setting attendance code calculation rules for the Sample Method

Prior to adding rules to your system, we recommend that you first draft those rules on a worksheet. Refer to Daily attendance code calculation rules planning worksheets [p. 287] for samples. Refer also to Additional considerations for setting attendance code calculation rules [p. 154]. We recommend that you retain a clean copy of such drafts for future reference and records purposes. These drafts also come in handy should you have to seek technical support. Keep in mind that you can also have Chancery SMS print a copy of the rules you set.

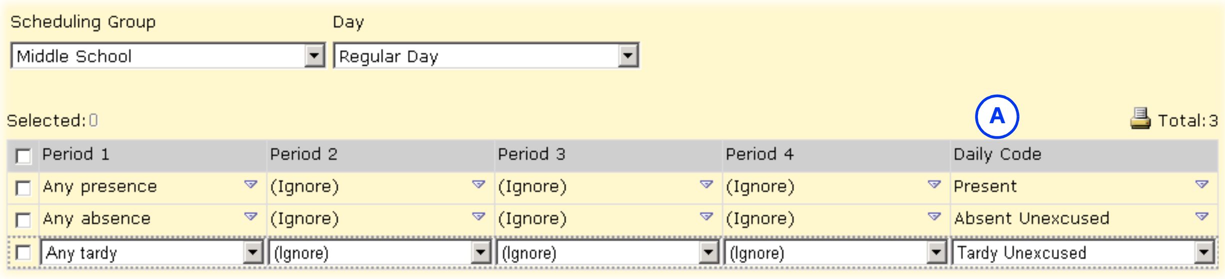
You can do this if your role is:
Secondary School Administrator

To set up attendance code calculation rules:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
   - ⓘ Or, under **ADMIN**, click **Attendance**.
2. Click **Daily Code Calculation Rules-Sample Method**. The Daily Code Calculation page appears [Figure 93].
3. Select a **Scheduling group**.
4. Select a **Day**.
   - ⓘ You must define the daily attendance code calculation rules for each day in the day cycle.
5. In the **Actions** menu click **Add Row**. A new row appears in the list of rules.
6. For the new rule:
   a. Select a code type for each **Period #**.
      - ⓘ "Any Presence" encompasses any attendance code with a Present value greater than 0.
      - ⓘ "Any Absence" encompasses any attendance code with an Absent value greater than 0.
      - ⓘ "Ignore" instructs Chancery SMS to disregard any attendance code recorded for the period.
   b. Select a **Daily Code**.
7. Add more rules or adjust rules as necessary.
   - ⓘ To delete a rule, select the rule and in the **Actions** menu click **Delete Row**.
   - ⓘ To change a rule, select the rule and change choices as necessary.
   - ⓘ To move a rule up or down the list, select the rule and in the **Actions** menu click Move row up or Move row down.
   - ⓘ To print the rules set, in the **Actions** menu click **Print**.
8. Click OK. Chancery SMS starts using this rules set immediately.

ⓘ We recommend testing the rules. To do so, record attendance for a student [p. 67], then view that student's daily attendance code [Figure 94].

FIGURE 93: Daily attendance code calculations rules: Sample Method



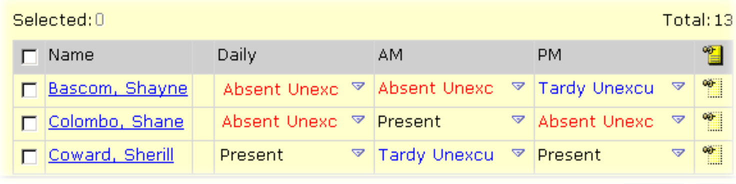
Scheduling Group: Middle School
Day: Regular Day

Selected: 0
Total: 3

☐	Period 1	Period 2	Period 3	Period 4	Daily Code
☐	Any presence	(Ignore)	(Ignore)	(Ignore)	Present
☐	Any absence	(Ignore)	(Ignore)	(Ignore)	Absent Unexcused
☐	Any tardy	(Ignore)	(Ignore)	(Ignore)	Tardy Unexcused

A **Daily Code**: The attendance code that Chancery SMS assigns to the student should this rule be met.

FIGURE 94: Daily attendance code calculation results summary



Selected: 0
Total: 13

☐	Name	Daily	AM	PM
☐	Bascom, Shayne	Absent Unexc	Absent Unexc	Tardy Unexcu
☐	Colombo, Shane	Absent Unexc	Present	Absent Unexc
☐	Coward, Sherill	Present	Tardy Unexcu	Present

Setting attendance code calculation rules for the Occurrence Method

Prior to adding rules to your system, we recommend that you first draft those rules on a worksheet. Refer to Daily attendance code calculation rules planning worksheets [p. 287] for samples. Refer also to Additional considerations for setting attendance code calculation rules [p. 154]. We also recommend that you retain a clean copy of such drafts for future reference and records purposes. These drafts also come in handy should you have to seek technical support. Keep in mind that you can also have Chancery SMS print a copy of the rules you set.

You can do this if your role is:
School Administrator

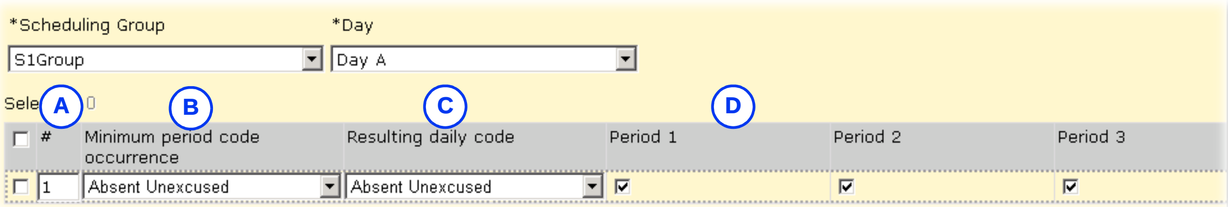
To set up attendance code calculation rules for the Occurrence Method:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
   ⓘ Or, under **ADMIN**, click **Attendance**.
2. Click **Daily Code Calculation Rules-Occurrence Method**. The Daily Code Calculation page appears [Figure 95].
3. Select a **Scheduling group**.
4. Select a **Day**.
5. In the **Actions** menu click **Add Row**. A new row appears in the list of rules.
6. For the new rule:
   a. Set a **#**.
   b. Select an **Attendance Code**.
   c. Select a **Resulting Daily Code**.
   d. Select the periods (**Period 1**, **Period 2**, **Period 3**, etc.) to which these apply.
   ⓘ Chancery SMS displays the periods defined for the specified **Day**.

7 Add more rules or adjust rules as necessary.
   - To delete a rule, select the rule and in the **Actions** menu click **Delete Row**.
   - To change a rule, select the rule and change choices as necessary.
   - To move a rule up or down the list, select the rule and in the **Actions** menu click Move row up or Move row down.
   - To print the rules set, in the **Actions** menu click **Print**.

8 Click OK. Chancery SMS starts using this rules set immediately.
   - We recommend testing the rules. To do so, record attendance for a student [*Taking attendance, p. 67*], then view that student's daily attendance code [Figure 94].

FIGURE 95: Daily attendance code calculations rules: Occurrence Method



*Scheduling Group: S1Group

*Day: Day A

Sele

☐	#	Minimum period code occurrence	Resulting daily code	Period 1	Period 2	Period 3
☐	1	Absent Unexcused	Absent Unexcused	☑	☑	☑

A #: Specifies the number of times the attendance code must be assigned within the selected periods.

B **Minimum period code occurrence**: Select the attendance code that must be assigned for the specified periods.

C **Resulting day code**: The attendance code that Chancery SMS assigns to the student should this rule be met.

D **Period #**: Select the periods in which the attendance code must occur to satisfy the rule.

Additional considerations for setting attendance code calculation rules

When setting up the rules and their order, consider the following:

- Periods

  For a period to be included in the daily attendance code calculation for By Class attendance, the **Include in daily attendance code calculation rules** check box must be selected. (This is the default setting when you set up a period.) **Note**: Chancery SMS counts periods, not classes.

- Bell schedules

  You can have a different bell schedule for each scheduling group, and for different days.When a student attends periods from one bell schedule (the period start and end times through a day), Chancery SMS uses that bell schedule to calculate daily attendance codes, even if that bell schedule is not the student's primary bell schedule. (Typically, a student's primary bell schedule is assigned by Grade.) For example, a Grade 5 student in classes all on a Grade 6 bell schedule, receives daily attendance based on the Grade 6 bell schedule

  When a student attends periods from more than one bell schedule, Chancery SMS uses the bell schedule in which the student attends the greatest number of periods to calculate daily attendance codes. For example, a Grade 5 student in classes mostly on a Grade 6 bell schedule, but also some classes in other bell schedules, receives daily attendance based on the Grade 6 bell schedule.

  When a student attends an equal number of periods from more than one bell schedule, Chancery SMS uses the school's initially created bell schedule, that is, the bell schedule which shares the maximum number of periods in which the student is attending for that day. Thus, where a Grade 5 student is scheduled in an equal number of classes in the bell schedules “Grade 5” and “Grade 6”, and the School Administrator created the bell schedule “Grade 6” before the bell schedule “Grade 5”, that student’s daily code is calculated by “Grade 6” bell schedule.

- Scheduling exceptions

  When a student is not scheduled in a period that the daily code calculation rules consider, Chancery SMS calculates attendance according to the first rule that matches the student’s attendance, except for the unscheduled periods and where “ignore” is selected for the unscheduled periods.

  If this does not apply, Chancery SMS calculates attendance according to the first rule that matches the student’s attendance, except for the periods in which the student did not have a scheduled class.

  If neither applies, Chancery SMS assigns the default daily attendance code.

  For example, if the following attendance code calculation rules are defined for the bell schedule:

  Rule 1: “any presence” in period 1, “ignore” in remaining periods = present
  Rule 2: “any absent” in 1st period, “ignore” in remaining periods = absent

  According to these rules, where a student was scheduled in classes in period 2 through 6, and was marked present for those classes, and was not scheduled in a class in period 1, Chancery SMS would set the student’s a daily attendance code to Present (based on rule 1). Here’s why: the first rule that matches the student’s attendance for all of the scheduled periods is rule 1; no rule has “ignore” selected for the unscheduled period.

  By way of another example, if the following daily attendance code calculation rules are defined for the bell schedule:

  Rule 1: At least 3 presents in periods 1, 5, and 8 = Present
  Rule 2: At least 1 absent in periods 1, 5, and 8 = Absent

  According to these rules, where a student was scheduled in classes in period 2 through 8, and was marked present for those classes, but was not scheduled in a class in period 1, Chancery SMS would set the student’s a daily attendance code to Present (based on rule 1).

- Classes in several consecutive periods

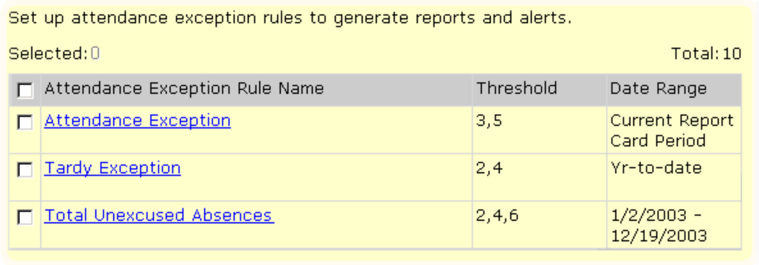
  When a student is scheduled in two or more consecutive periods, depending on your school’s general settings, Chancery SMS considers each period separately when calculating daily attendance codes.

  Where attendance is taken only once in a class that spans two contiguous periods, the attendance code in the second period defaults to the code in the first period.

Setting up attendance exception rules

Based on the daily attendance code that Chancery SMS generates for each student [p. 150], you can have Chancery SMS alert you to unusual attendance patterns that merit appropriate action. You can specify each such *attendance exception* by setting up an attendance exception rule [Figure 96]. For example, you can set the system to alert the homeroom Teacher when a student is recorded tardy 5 times in a week, or alert the School Secretary when a student is absent on 3 consecutive days.

FIGURE 96: Attendance exception rules



Set up attendance exception rules to generate reports and alerts.

Selected: 0 Total: 10

☐	Attendance Exception Rule Name	Threshold	Date Range
☐	Attendance Exception	3,5	Current Report Card Period
☐	Tardy Exception	2,4	Yr-to-date
☐	Total Unexcused Absences	2,4,6	1/2/2003 - 12/19/2003

You can do this if your role is:
School Administrator

To set up an attendance exception rule:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
   - Or, click Attendance.
2. Click **Attendance Exception Rules**. The Attendance Exception Rules page appears.
3. From the **Actions** menu, click **Add Attendance Exception Rule…**. The Add Rule page appears.
   - To view a rule, click the rule’s name.
   - To edit a rule, click the rule’s name and on the Edit Rule Actions page click **Edit** (or select the rule and in the **Actions** menu click **Edit Attendance Exception Rule…**).
   - To delete a rule, select the rule and click **Delete Attendance Exceptions Rule…**.
4. Enter a **Rule name**.
5. Under **Define By**, define the occurrences for which Chancery SMS is to watch:
   - Select “Total” to have Chancery SMS watch for the total number of occurrences of an attendance code type, such as “Any Absence”, “Any Excused Tardy”.
   - Or, select “Consecutive” to have Chancery SMS watch for the total number of consecutive occurrences (for example, Monday, Tuesday, and Wednesday) of an attendance code type, such as “Any Absence”, “Any Excused Tardy”.
   - Or, select the **Combined total of the selected codes** check box to have Chancery SMS watch for the total number of occurrences of specified attendance codes. Specify the codes in the **Selected codes** list (move them from the **Available codes** list).
6. Set at least one threshold:
   - **1st Threshold**: Specifies the number of occurrences after which Chancery SMS takes action. Any number between 1 and 99 is acceptable.
   - **2nd** (and higher) **Threshold**: Option that specifies the next number of occurrences at which Chancery SMS takes action. Each threshold must be a higher value than the previous.
7. Set the **Count within** period: Specifies the calendar period within which Chancery SMS counts occurrences. When the period ends, Chancery SMS resets the occurrences to 0. The default period is from the first day of the school year to the last.
8. Click Continue. The Edit Rule Actions page appears.
9. Set rule actions:

a Under **Action by Rule Threshold**, set the daily time at which Chancery SMS sends any alerts [p. 30] associated with this rule.

b For each **# Threshold**, specify an alert notification [p. 30], if desired.

c Click OK.

TABLE 29: Permissions pertaining to attendance exception rules

To	You need this permission	Set to	
Set up attendance exception rules	**School Setup > Attendance Exception Rules**	Edit	

Setting up an attendance rule for credit calculations

You can set the system to deny credit to a student whose attendance record is substandard; for example, to ensure that a student who was absent from a class over 50% of the time does not get credit for that class. A District Administrator can set up such an *attendance rule* for all schools in the district, or a School Administrator for a single school.

For the purpose of this rule, Chancery SMS:

- Uses class attendance [p. 144], not daily attendance.
- Uses attendance type [p. 147], not attendance values.
- Counts unexcused absences, not excused absences.
- Considers the start date as the first day after the last credit awarding period and the end date as the last day of the credit awarding period [p. 162].
- Considers a credit awarding period as one that contains a credit awarding grade item [p. 162].

For example, a school has four quarters or grading periods. Q2 collects a Semester 1 grade that is credit-awarding, and Q4 collects a Semester 2 grade that is credit-awarding. Attendance is evaluated for the Semester 1 grade from the first day of school to the last day of Q2, and attendance is evaluated for the Semester 2 grade from the first day of Q3 to the last day of Q4.

You can do this if your role is:
School Administrator
District Administrator

To set up an attendance rule for credit calculations:

1 On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.

2 Under **School**, click **Attendance Rules for Credit Calculations**. The Attendance Rules for Credit Calculations page appears.

3 Set options:

   ⓘ **Disregard Attendance in Credit Calculations**: Sets Chancery SMS to not take attendance into account. This is the default choice.

   ⓘ **Use Attendance in Credit Calculations**: Sets Chancery SMS to deny credit to a student in any class for which that student meets the absence criterion specified, either a minimum number of classes absent (for example, 5) or a percentage of classes missed (for example, 10).

4 Click OK.

TABLE 30: Permissions pertaining to attendance rules for credit calculations

To	You need this permission	Set to	
Set up attendance rules for credit calculations at the district	**District > Attendance Rules for Credit Calculations**	Delete	
Set up attendance rules for credit calculations at the school	**School Setup > Attendance Rules for Credit Calculations**	Delete	

Setting up attendance related to student behavior

You can set the system to assign an attendance code to a student when a specific *student behavior action* *[Behavior, p. 76]* is recorded for a student; for example, where a student is suspended for three days, Chancery SMS can record that student absent for each of those three days.

Chancery SMS sets the student’s default attendance value to the attendance code assigned to the behavior action. The attendance code applies to periods in a school that collects class attendance, to half days in a school that collects twice-daily attendance, and to full days in a school that collects daily attendance. Where several behavior actions are recorded for a student on the same day and those actions are associated with different attendance codes, Chancery SMS assigns an attendance code by referring to the priorities on the Behavior Attendance Action setup list [see p. 196]. Chancery SMS assigns the attendance code when the system is next able.

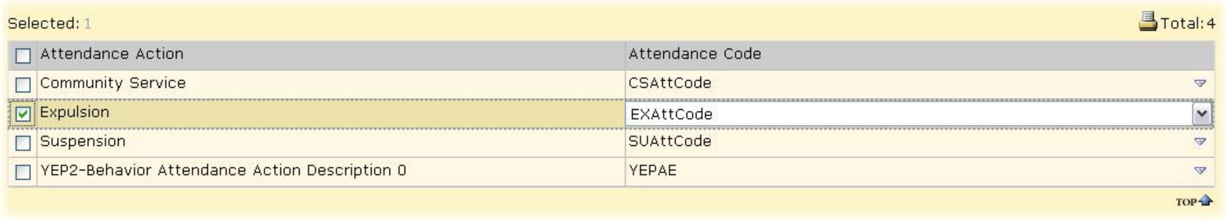
You set this up by associating an attendance code [p. 147] with an *student behavior attendance action*, which a District Administrator sets up [p. 196].

You can do this if your role is:
School Administrator

To associate an attendance code to a student behavior attendance action:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **School**, click **General Settings**. The General Settings page appears.
3. Under **Student Behavior Attendance Actions** [Figure 97], select an Attendance code for each attendance action.
4. Click OK.

FIGURE 97: Student Behavior Attendance Actions



Selected: 1 Total: 4

☐ Attendance Action	Attendance Code
☐ Community Service	CSAttCode
☑ Expulsion	EXAttCode
☐ Suspension	SUAttCode
☐ YEP2-Behavior Attendance Action Description 0	YEPAE

A **Attendance Action**: A student behavior attendance action.

B **Attendance Code** [p. 147]

TABLE 31: Permissions pertaining to attendance related to student behavior

To	You need this permission	Set to	
Associate an attendance code with a student behavior attendance action	**School Setup > Attendance General Settings**	Yes	

Grade level setup

You must specify the grade levels taught at the school. You choose grade levels provided by the district. While the District Administrator can choose any name for a grade level, typical grade levels include:

- 1 through 20
- K: Kindergarten
- KA: Kindergarten-AM
- KP: Kindergarten-PM

- PE: Pre-enrolled
- PK: Pre-Kindergarten
- N/A: Not available

For example, an elementary School Administrator might choose the following: KA, KP, 1, 2, 3, 4, 5, 6, and PE. A high School Administrator might choose 9, 10, 11, 12, and PE.

You can do this if your role is:
School Administrator

To choose the grade levels to use in a school:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **School**, click **Grade Levels (setup list)**. The Grade Levels page appears with a list of grade levels available for use in the school.
3. In the **Use** column, select the check boxes of the desired grade levels.
4. Click OK.

Facility setup

In a school you must set up *rooms* in which to schedule classes and assign homerooms [p. 161]. Rooms may also be used for other tasks such as recording the location of student behavior incidents. A room is located in a *building*, which you must set up first.

TABLE 32: Permissions pertaining to rooms

To	You need this permission	Set to	
Add, edit, or delete buildings	**Facilities Management > Buildings**	Delete	
Add, edit, or delete rooms	**Facilities Management > Rooms**	Delete	

Building setup

A building can contain one or more rooms. A school can have one or more buildings. A building, and thus some or all of the rooms it contains, may be shared between two or more schools. In a shared building, some rooms may belong to one school while others are shared (for example, a band room or computer lab). Where a room is shared, you can specify when it is available to the school. Each school can give the same shared building a different name.

You can do this if your role is:
School Administrator

To set up a building:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **School**, click **Buildings and Rooms**. The Buildings page appears.
3. In the **Actions** menu click **Add Building...**. The Edit Building page appears.
   - To change the properties of an existing building, click the building's name or select the building and in the **Actions** menu click **Edit Building...**.
4. On the Edit Building page, enter or change Information, which includes:
   - **Building no.**: A short name for the building. This is the name Chancery SMS uses in lists across the system.
   - **Building name**: A meaningful description; for example, "Main Building", "Sports Complex".

- **Contact name**: A person responsible for the use of the building, if such a person is designated.
- **Maximum capacity**: The maximum number of students that the building is permitted to hold.
- **Physical address**: The physical location of the building.
- **Mailing address**: The mailing address, if it is different than the Physical Address.
- **Communication number**: The telephone, pager, fax, or similar number of the main office in the building, of the Contact Name, of alternate contacts, or all of these. An email address is also acceptable.

5. Click OK.

You can delete a building. However, before doing so you must ensure that it contains no rooms.

You can do this if your role is:
School Administrator

To delete an existing building:

1. Ensure that the building has no rooms.
2. On the Buildings page, select the building.
3. In the **Actions** menu click **Delete Building**.

Room setup

Once you have a building set up in a school, you can add rooms to that building.

You can do this if your role is:
School Administrator

To set up a room:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
2. Under **School**, click **Buildings and Rooms**. The Buildings page appears with a list of buildings.
3. In the **# Rooms** column, click the number of rooms for the building in which the room is located. The Rooms page appears.
4. In the **Actions** menu click **Add Room…**.
   - To change the properties of a room in a building, click the room's name or select the room and in the **Actions** menu click **Edit Room…**.
5. Enter or change Information, which includes:
   - **Room no.**: A short name for the room. This is the name Chancery SMS uses in lists across the system.
   - **Room name**: A meaningful description; for example, "Social Studies Classroom", "Biology Lab".
   - **Room type**: Functional description, such as "Classroom", "Gymnasium", "Lecture hall", "Multi-purpose room".
   - **Optimal capacity**: The optimal number of students for this room.
   - **Maximum capacity**: The maximum number of students this room is permitted to hold.
   - **Can be scheduled**: Indicates that this room is available for use by a class in the schedule.
   - **Allow** (#) **concurrent classes**: Where the room can accommodate more than once class at the same time, specifies how many simultaneous classes are possible. Examples of such rooms include a gymnasium, a science lab, a library, and a trades shop.

   - **Wheelchair accessible**: Indicates that a student in a wheelchair can get to and use the room.
   - **Communication number**: The telephone, pager, fax, or similar number for the room or the main contact person for the room, of alternate contacts, or all of these. An email address is also acceptable.
6. Click OK.
   - Or, to immediately add another room, click Save & Add.

You can delete a room. However, before doing so you must ensure that no class is assigned to it.

You can do this if your role is:
School Administrator

To delete a room:

1. Ensure that no class is assigned to the room.
2. Select the room.
3. In the **Actions** menu click **Delete Room**.

Homeroom setup

A School Administrator can adjust the array of homerooms available at a school for enrolling students. Typically, the administrator works with homerooms as part of scheduling the year, editing, deleting, and adding homerooms as necessary. A homeroom is associated with one of the rooms set up in a school *[Facility setup, p. 159]*.

TABLE 33: Permissions pertaining to homerooms

To	You need this permission	Set to	
Add, edit, or delete homerooms	**School Setup > Homerooms**	Delete	

You can do this if your role is:
School Administrator

To set up a homeroom:

1. On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.
   - Or, click **Scheduling**.
2. Click **Homerooms**. The Homerooms page appears.
3. In the **Actions** menu click **Add Homeroom...**. The Add Homeroom page appears.
   - To change the properties of an existing homeroom, click that room's name (in the **HR** column) or select it and in the **Actions** menu click **Edit Homeroom...**.
   - To delete a homeroom, select it and from the **Actions** menu click **Delete Homeroom**. **Caution**: Only delete a homeroom to which no students or teachers are assigned.
4. On the Add Homeroom page, enter or change Information, which includes:
   - **Homeroom name**: Chancery SMS uses this name for the homeroom in lists across the system. Typically a number, such as "6A" or "8C".
   - **Room**: The room to which this homeroom is assigned. You can choose from any one of the rooms set up for this school *[Room setup, p. 160]*.
   - **Capacity**: The maximum number of students allowed in this homeroom.
   - **Teacher**: The teacher(s) assigned to this homeroom. You can choose between one and three staff members set up for this school *[Adding staff, p. 183]*.

   - **Grade**: The grade level(s) of this homeroom. You can choose two or more grades to create a *split class*, for example, Grades 2 and 3 for a Grade 2/3 split class.
   - **Default attendance code**: Indicates the attendance codes that Chancery SMS uses by default when it initializes the day *[Setting up school attendance codes, p. 147]* for present and absent students.
   - **Attendance**: Indicates when attendance for this class is taken (which affects how attendance is calculated). **Note:** Not available if attendance is set to **By Class** on the School Setup > General Settings page.
   - **Scheduling group**: The scheduling group, which enables an administrator to track instructional minutes for this homeroom. **Note**: Chancery SMS displays this field only when twice daily attendance and scheduling are set up.
   - **Meeting pattern**: The meeting pattern (refer to the *Chancery SMS Scheduling Guide*), which enables an administrator to track instructional minutes for this homeroom. **Note**: Chancery SMS displays this field only when twice daily attendance and scheduling are set up.
5. Under Constraints, adjust student enrollment constraints as necessary.
   - The School Administrator cannot remove **Mandatory constraints**.
6. Click Save.
   - Or, to immediately create another homeroom, click Save & Add.

Grading setup

Setting up a school involves the School Administrator defining standard comments, grading tables and grading periods, and grade items and courses for secondary schools. A *standard comment* [p. 163] is a re-usable comment that teachers can add to students' progress reports and report cards. A *grading table* [p. 163] defines the format and meaning of the grades that students receive on their report cards. A *grading period* specifies the date range covered by a report card or progress report, and thus is significant to their timing. Typical grading periods are 6-week periods, trimesters, and quarters. Secondary schools use *grade items* to describe the way a school measures student performance; for example, "Semester Grade", "Semester 1 Exam", "Conduct", and "Effort". **Note**: This section is incomplete. For complete information on grading setup, refer to the *Chancery SMS Grading Setup Guide*.

TABLE 34: Permissions pertaining to grading

To	You need this permission	Set to	
Specify standard comments	**School Setup > Standard Comments**	Delete	
Create grading tables	**School Setup > Grading Tables**	Delete	
Define grading periods	**School Setup > Grading Period Sets**	Delete	
	School Setup > Define Report Card Periods	Yes	
	School Setup > Define Progress Report Periods	Yes	
Set up report cards and progress reports	**School Setup > Report Card Setup**	Delete	

Creating re-usable comments

A *standard comment* is a sentence or two that teachers can re-use on any report card or progress report. If your school uses many standard comments, create as many categories as you need to group the comments. If teachers at your school typically enter unique, rather than standard, comments set up a *narrative grading table* [p. 169].

You can do this if your role is:
School Administrator

To define a standard comment category:

1. On the home page, in the control bar under **ADMIN**, click **Grading**. The Grading page appears.
2. Under Step 1, click **Standard Comment Categories**. The **Standard Comment Categories** page appears.
3. In the **Actions** menu click **Add Rows**.
   - ⓘ To edit a category, click in the row and make your changes.
   - ⓘ To delete a category, select the category and in the **Actions** menu, click **Delete Row**.
4. Enter the category name and a short name of no more than six characters.
   - ⓘ Make the short name as descriptive as possible because it appears on the **Standard Comments** page as the category description.
5. Click **OK**.
   - ⓘ Comments are sorted first by category and then by code. Comments that are not categorized appear first.

You can do this if your role is:
School Administrator

To create a standard comment:

1. On the home page, in the control bar under **ADMIN**, click **Grading**. The Grading page appears.
2. Under Step 1, click **Standard Comments**. The **Standard Comments** page appears.
   - ⓘ To show only the comments for a specific standard comment category, select a **View**.
   - ⓘ To edit a comment, click in a row and make your changes.
   - ⓘ To delete a comment, select the comment and in the **Actions** menu, click Delete**.**
3. In the **Actions** menu, click **Add Comments**....
   - ⓘ To assign the comment to a category, select a **Comment category**.
4. Enter a unique 4-or 5-character code for the comment and then enter the complete comment text as it should appear on the report card.
   - ⓘ To add more comments, click **Save+Add**.
5. Click OK.
6. Set up a Standard Comments grading table [p. 169].

Defining the format and meaning of grades

A *grading table* defines the format and meaning of the grades that students receive on their report cards. The main purpose of a grading table is to list all of the possible grades a student can receive and the meaning of each grade. Grading tables can also identify conversions from one format to another—such as percentages to letters—whether a grade is a pass or a fail and, for secondary schools, the grade points available for numeric, letter, or graphic symbol grades earned in courses of various difficulty levels.

Grading tables appear as a legend on report cards to help readers interpret the grades. Since a report card often includes items with different grading tables, report cards often display multiple grading table legends.

Defining a grading table

You need to create a grading table for each way that your school captures grades. For example, in an elementary school subjects might be graded as a G (Good), S (Satisfactory), or N (Needs Improvement), while conduct or participation are graded using teacher comments. Secondary students might be graded using percentages, while GPAs use grade points on a 4.0 scale. In each of these scenarios, a different type of grading table is required [p. 164].

In addition, you can add special grades, such as “Incomplete” or “Exempt”, to all grading table [p. 170].

You can do this if your role is:
School Administrator

To define a grading table:

1. On the home page, in the control bar under **ADMIN**, click **Grading**. The Grading page appears.
2. Under **Step 2**, click **Grading Tables**. The Grading Table page appears.
3. In the **Actions** menu, click **Add Grading Table**.
    - To adjust an existing grading table, select the grading table and in the **Actions** menu click **Edit Grading Table...**.
    - To delete a grading table, select the grading table and in the **Actions** menu click **Delete Grading Table**.
4. On the **Edit Grading Table** page, enter or change Information, which includes:
    - **Grading table name:** The name can be up to 30 characters.
    - **Short name:** The short name can be an abbreviation of up to six characters. Chancery SMS uses this abbreviation on report cards. This abbreviation also appears when you set up course grading properties.
    - **Description:** A general description of the table and how to use it.
    - **Type:** Specifies the grading table type [p. 164]. Refer to the following sections for grading table setup instructions:
        - Setting up a letter grade grading table [p. 165]
        - Setting up a numeric grading table [p. 167]
        - Setting up a graphic symbol grading table [p. 168]
        - Setting up a narrative comment or standard comment grading table [p. 169]

About grading table types

Grading tables are divided into five different types:

- Letter Grade: Grades entered as letters appear on report cards as letters; for example A, B, C, D, F [p. 165].
- Numeric: Grades entered as numbers are either left as is or Chancery SMS converts the grades so that they appear as letter grades or graphic symbols on the report card [p. 167].
- Graphic Symbol: Grades entered as codes will appear on the report card as graphic symbols; for example, “H” for ☺ [p. 168].
- Narrative Comments: Grades are entered as free form text [p. 169].
- Standard Comments: Grades are selected from a list of options [p. 169].

Grading table types correspond to the way teachers enter the grades, not to how the grades appear on the report card. The type you choose depends on the needs of your school [Table 35].

TABLE 35: Selecting a grading table type

If teachers should enter...	Choose this grading table type:
Letter grades (such as A, B, C, D, F or G, S, N) that appear as letter grades on report cards	Letter Grade [p. 165]
Numbers that appear as letter grades on report cards	Numeric. Set **Equivalent grade type** to “Letter Grade” [p. 167].
Numbers, such as percentages, that appear as numbers on report cards	Numeric. Set **Equivalent grade type** to “None” [p. 167].
Numbers that appear as graphic symbols	Numeric. Set **Equivalent grade type** to “Graphic Symbol” [p. 167].
Letters that appear as graphic symbols (such as “H” appears as ☺)	Graphic symbol [p. 168]
Free-form comments	Narrative Comments [p. 169]
Comments by selecting from a pre-defined list	Standard Comments [p. 169]

Setting up a letter grade grading table

Set up a letter grade grading table when your school uses letters to represent a student’s grade. Letter grades appear as letters on the report card. You can design letter grades in any format; for example, A, B, C, D, and F, or G, S, and N for Good, Satisfactory, and Needs Improvement.

Note: For secondary schools, If you plan to use calculated grades with a letter grade grading table, you must set up grade points and use a 100-point grading scale. Calculated grades and GPAs use grade points to determine the value of the letter grade.

You can do this if your role is:
School Administrator

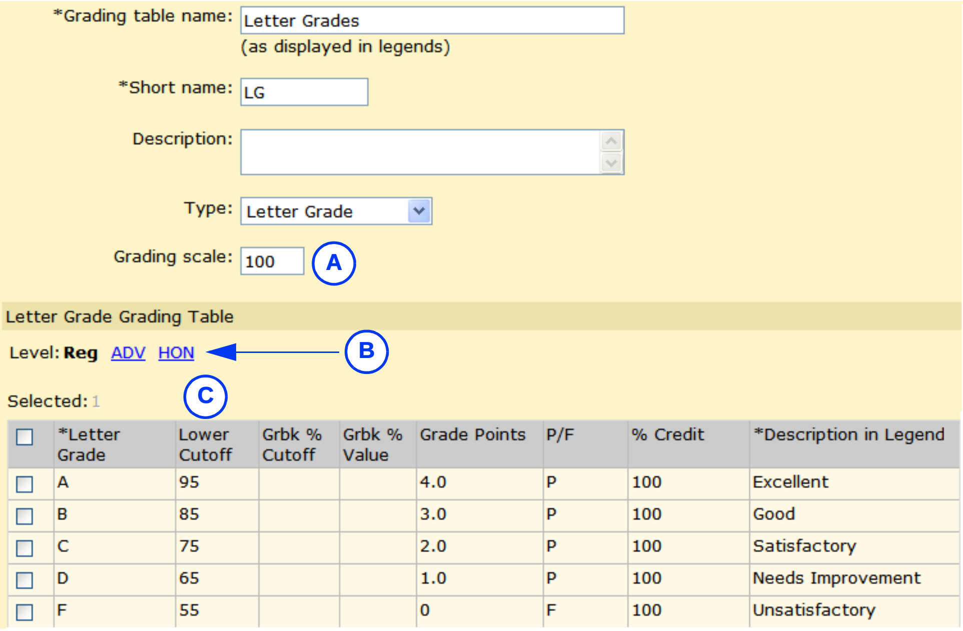
To set up a letter grade grading table:

1. Follow the steps in Defining a grading table [p. 164].
2. For **Type**, select “Letter Grade”.
3. For **Grading scale**, enter the maximum value of any grade.
   - ⓘ For example, enter 100 for a 100-point scale or 4 for a 4-point scale.
4. Under **Letter Grade Grading Table**, enter or change Information, which includes:
   - ⓘ **Level:** For secondary schools only, if your school provides courses with different difficulty levels, such as remedial or honors, links to grading table versions for the other levels appear here. Click a link to add or edit the grading table version.
   - ⓘ **Letter Grade**: A shortcut key sequence, up to 3 characters, long that staff can use to enter this grade on a report card. For example, “A” enables the staff to press the `A` key to enter this grade.
   - ⓘ **Lower Cutoff**: The lowest mark required to earn the grade. The range of marks for this grade start at this value and go to the next highest grade, with the specified grading scale determining the highest possible value [Figure 98].
     - The marks you enter in the **Lower Cutoff** column must be of the same format as the scale you entered for **Grading Scale**. For example, if you enter a grading scale of 100, the lower cutoff marks must also be on a 100-point scale.

- **Grbk % Cutoff:** If grades will be transferred in from a gradebook, the lowest mark (as a percentage) required to earn this grade in Chancery SMS. This value can differ from Lower Cutoff.
- **Grbk % Value**: If your school uses PowerTeacher, enter the percentage represented by the letter grade. For further information, refer to the *PowerTeacher Gradebook Installation and Setup Guide* - Chancery SMS—available from *Pearson PowerSource > PowerTeacher*.
- **Grade Points:** For secondary schools only, the number that represents this grade in calculations, such as GPAs or calculated grades. This value is used in calculations only; it is not displayed on the report card. For example, the grade point equivalent of A is 4.0.
  - If your district offers courses of varying difficulty levels, such as regular, remedial, advanced placement and so on, you can enter different grade points for each level.
- **P/F**: Indicates that the grade is considered a passing (“P”) or failing grade (“F”). For example, if the a subject or course requires 50% to pass, select “F” for all grades under 50%.
- **% Credit:** The percent of total credit that the student receives for this grade.
- **Description in Legend:** A description of the grade, up to 15 characters long, which Chancery SMS displays in the report card’s legend. Ensure the description includes the grade itself. For example,“3.0-4.0 - Excellent”, “A = 85-100”, “I = Incomplete”, “D - Poor”, and “☺ Good”.

5 Click OK.

FIGURE 98: Letter grade grading table



*Grading table name: Letter Grades
(as displayed in legends)

*Short name: LG

Description:

Type: Letter Grade

Grading scale: 100

Letter Grade Grading Table

Level: **Reg** ADV HON

Selected: 1

☐	*Letter Grade	Lower Cutoff	Grbk % Cutoff	Grbk % Value	Grade Points	P/F	% Credit	*Description in Legend
☐	A	95			4.0	P	100	Excellent
☐	B	85			3.0	P	100	Good
☐	C	75			2.0	P	100	Satisfactory
☐	D	65			1.0	P	100	Needs Improvement
☐	F	55			0	F	100	Unsatisfactory

A **Grading scale**: Specifies the highest possible grade.

B **Level**: Click a link to toggle between “Reg” (regular) and other grading table versions.

C **Lower Cutoff**: The range of marks to receive the grade start at the lower cutoff value and go to the next highest grade. In this example, to receive an “A” the student must achieve marks of between 95% and 100%.

Setting up a numeric grading table

Depending on the *equivalent grade type* you choose for the numeric grading table, the grades that Chancery SMS displays when the teacher enters marks are either numbers, letters, or graphic symbols on students’ report cards [p. 164].

You can do this if your role is:
School Administrator

To set up a numeric grading table:

1. Follow the steps in Defining a grading table [p. 164].
2. For **Type**, select “Numeric”.
3. Enter or change Information, which includes:
    - **Max no. of digits**: The maximum number of digits that teachers can enter.
        - To determine the maximum number of digits, add the **Decimal places** digits to the digits in the upper range of the **Numeric grades input range**. For example, for an input range of 0 to 100 with no decimal places, the max number of digits is 3.
    - **Decimal places**: The number of digits that indicate how many of the digits in **Max No. of Digits** will appear to the right of the decimal point. For example, if you enter 3 for **Max No. of Digits** and 1 for **Decimal places**, the maximum value possible is 99.9.
    - **Numeric grades scale**: The maximum grade a student can receive without bonus points [p. 170]. This number is used as the denominator in all calculations using this grading table.
    - **Numeric grades input range**: The minimum grade and maximum grade allowed. For example, 0 to 4.0 or 0 to 100.
        - Use only positive numbers.
        - If teachers enter grades as percentages, use a grading scale of 100 and a numeric grade input range of 0 to 100.
        - If teachers enter grades on a 4-point scales, use a grading scale of 4 and a numeric input range of 0 to 4.
        - If you want to award bonus points [p. 170], make the upper input range greater than 100. For example, 0 to 125.
    - **Equivalent grade type**: Determines how grades will display on student report cards.
        - Select **None** to display the numeric grades as numbers.
        - Select **Letter Grade** to display the numeric grades as letters.
        - Select **Graphic Symbol** to display the numeric grades as symbols.
    - **Level adjustment factor**: Chancery SMS displays this (for secondary schools only) if your district offers courses of varying difficulty levels, such as regular, remedial, advanced placement and so on. Select one of the following:
        - **Add**: To adjust the grade, Chancery SMS adds the value entered in the **Level Adjustment** column to the numeric grade.
        - **Multiply**: To adjust the grade, Chancery SMS multiplies the value entered in the **Level Adjustment** column by the numeric grade.
        - **Note:** When you select Add or Multiply during the initial setup of the grading table, a Copy button appears that enables you to copy the regular level version of the grading table to create a new version for other levels.
4. Under **Numeric Grading Table**, enter or change Information, which includes:
    - **Level:** For secondary schools only, if your school provides courses with different difficulty levels, such as remedial or honors, links to

grading table versions for the other levels appear here. Click a link to add or edit the grading table version.

- ⓘ **Lower Cutoff**: The lowest mark required to earn the grade. The range of marks for this grade start at this value and go to the next highest grade, with the specified grading scale determining the highest possible value.
  - The marks you enter in the **Lower Cutoff** column must be of the same format as the scale you entered for **Grading Scale**. For example, if you enter a grading scale of 100, the lower cutoff marks must also be on a 100-point scale.
  - If you are using course leveling, the lower cutoff values can differ between different course level versions of the grading table.
- ⓘ **Grade Points:** For secondary schools only, the number that represents this grade in calculations, such as GPAs or calculated grades. This value is used in calculations only; it is not displayed on the report card. For example, the grade point equivalent of A is 4.0.
- ⓘ **P/F**: Indicates that the grade is considered a passing (“P”) or failing grade (“F”). For example, if the a subject or course requires 50% to pass, select “F” for all grades under 50%.
- ⓘ **% Credit:** The percent of total credit that the student receives for this grade.
- ⓘ **Description in Legend:** A description of the grade, up to 15 characters long, which Chancery SMS displays in the report card’s legend. Ensure the description includes the grade itself. For example,“3.0-4.0 - Excellent”, “A = 85-100”, “I = Incomplete”, “D - Poor”, and “☺ Good”.

5 Click OK.

Setting up a graphic symbol grading table

Graphic symbol grading tables allow grades to be entered as letters that Chancery SMS converts and displays as graphic symbols on students’ report cards.

You can do this if your role is:
School Administrator

To set up a graphic symbol grading table:

1 Follow the steps in Defining a grading table [p. 164].

2 For **Type**, select **Graphic Symbol**.

3 For **Grading scale**, enter the maximum value of any grade.

4 Under **Numeric Grading Table**, enter or change Information, which includes:

- ⓘ **Level:** For secondary schools only, if your school provides courses with different difficulty levels, such as remedial or honors, links to grading table versions for the other levels appear here. Click a link to add or edit the grading table version.
- ⓘ **Input Grade**: Enter up to 3 characters that staff will use to enter this grade on a report card. For example, enter “H” so that staff can press the H key to enter a happy face symbol.
- ⓘ **Reporting Grade**: Select how the grade should appear on students’ report cards:
  - To display the letter entered in the **Input Grade** column, select “Same”.
  - To display a symbol, select “Check Mark”, “Happy Face”, “Neutral Face”, or “Sad Face”.
  - To display a blank area, select “Blank Space”.

- **Grbk % Cutoff:** If grades will be transferred in from a gradebook, the lowest mark (as a percentage) required to earn this grade in Chancery SMS. This value can differ from Lower Cutoff.
- **Grbk % Value**: If your school uses PowerTeacher, enter the percentage represented by the letter grade. For further information, refer to the *PowerTeacher Gradebook Installation and Setup Guide* - Chancery SMS—available from *Pearson PowerSource > PowerTeacher*.
- **Grade Points:** For secondary schools only, the number that represents this grade in calculations, such as GPAs or calculated grades. This value is used in calculations only; it is not displayed on the report card. For example, the grade point equivalent of A is 4.0.
  - If you are applying linear course adjustment factors, this value will be adjusted by the value specified. If you are applying nonlinear course adjustment factors, you can enter different values in this column to reflect the adjusted value for each course level.
- **P/F**: Indicates that the grade is considered a passing (“P”) or failing grade (“F”).
- **% Credit:** The percent of total credit that the student receives for this grade.
- **Description in Legend:** A description of the grade, up to 15 characters long, which Chancery SMS displays in the report card’s legend. Ensure the description includes the grade itself. For example,“3.0-4.0 - Excellent”, “A = 85-100”, “I = Incomplete”, and “☺ Good”.

5. Click OK.

Setting up a narrative comment or standard comment grading table

Enter comments for conduct or participation grades. Narrative comment grades are entered in free form text and appear on the report card as entered. Standard comment grades are selected from a list of pre-defined options and appear on the report card as entered.

You can do this if your role is:
School Administrator

To set up a narrative or standard comment grading table:

1. Follow the steps in Defining a grading table [p. 164].
2. For **Type**, select “Narrative Comment” or “Standard Comment”.
3. For narrative comments, enter the maximum number of characters allowed on students’ report cards and progress reports.

   OR

   For standard comments, enter the maximum number of comments allowed on students’ report cards and progress reports.

   - If your school requires that teachers must add narrative or standard comments to report cards and progress reports, select “Comments are mandatory”**.** If this option is selected, but a teacher does not enter or select comments, the Missing Grades report displays the comment grades as “Missing”.
4. Click OK.

Adding special grades to grading tables

To handle special circumstances, such as exemptions, incomplete courses, and grades that are not available, use the Special Grades area at the bottom of numeric, letter, or graphic symbol grading tables. If your district is using course levels for secondary schools, you can only edit special grades for the “Regular” course level. However, the special grades themselves apply to courses for all course levels.

You can do this if your role is:
School Administrator

To add special grades:

1. Create a letter grade, numeric, or graphic symbol grading table [see *Defining a grading table, p. 164]*.
2. Under **Special Grades**, enter or change Information, which includes:
   - **Input Grade:** A shortcut key sequence, up to 3 characters, long that staff can use to enter this grade on a report card. For example, “A” enables the staff to press the `A` key to enter this grade, or `I` for an incomplete.
   - **Reporting Grade**: Select how the grade should appear on students’ report cards:
     - To display the letter entered in the **Input Grade** column, select “Same”.
     - To display a symbol, select “Check Mark”, “Happy Face”, “Neutral Face”, or “Sad Face”.
     - To display a blank area, select “Blank Space”.
   - **P/F**: Indicates that the grade is considered a passing (“P”) or failing grade (“F”).
   - **% Credit:** The percent of total credit that the student receives for this grade.
   - **Description in Legend:** A description of the grade, up to 15 characters long, which Chancery SMS displays in the report card’s legend. Ensure the description includes the grade itself. For example,“3.0-4.0 - Excellent”, “A = 85-100”, “I = Incomplete”, and “☺ Good”.
   - **Grade Calculations**: Specifies the action that Chancery SMS takes (for a secondary school only) when it encounters special grades in grade calculations:
     - “Ignore grade item”: The system removes both the numerator and the denominator from the formula.
     - “Count item as zero”: The numerator is counted as zero. The student is penalized for the special grade.
     - “No calculated grade”: The calculation cannot be completed.
     - “Treat as missing grade”: Allows special grades to be treated differently in different calculations. The grade is treated as a missing grade, and the **Missing Grade** setting for the grade item in the calculated grade formula is applied.

Setting up a grading table to allow bonus points

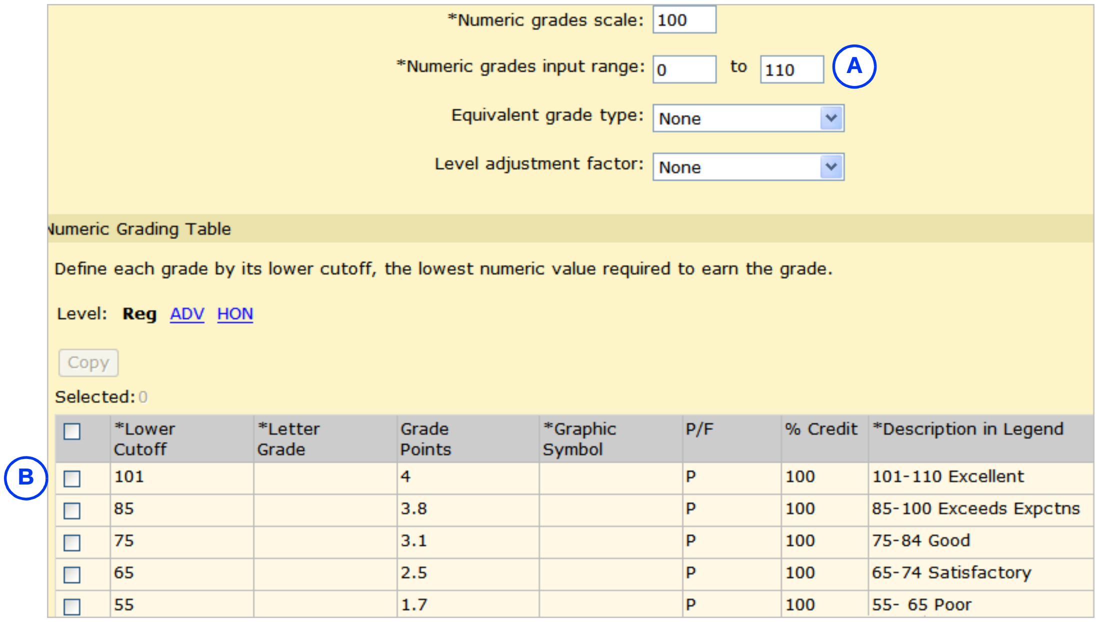
You can set up numeric grading tables to accommodate awarding bonus points [Figure 99]. For secondary schools, this setup allows you to not only manage bonus points but also specify equivalent numeric values or grade points for multiple course levels, so that you can set up your GPA definitions to use the appropriate method of calculating your GPAs.

You can do this if your role is:
School Administrator

To set up a grading table to allow bonus points:

1. Create a numeric grading table [p. 167].
2. For **Numeric grades input range**, enter a maximum value that is greater than the **Numeric grades scale** value. For example, if you are working with percentages and students are eligible for up to ten bonus points, enter a grading scale of 100 and a numeric grades input range of 0 to 110.
3. Under **Numeric Grading Table**, add a row to accommodate all grades above 100%.
   - Enter a lower cutoff that is higher than the numeric grades scale, for example, 101.
   - Enter the applicable grade points, pass/fail and % credit information, and enter a description.
4. Complete the remainder of the grade table.
5. Click OK.

FIGURE 99: Numeric grading table



*Numeric grades scale: 100

*Numeric grades input range: 0 to 110

Equivalent grade type: None

Level adjustment factor: None

Numeric Grading Table

Define each grade by its lower cutoff, the lowest numeric value required to earn the grade.

Level: **Reg** ADV HON

Selected: 0

☐	*Lower Cutoff	*Letter Grade	Grade Points	*Graphic Symbol	P/F	% Credit	*Description in Legend
☐	101		4		P	100	101-110 Excellent
☐	85		3.8		P	100	85-100 Exceeds Expctns
☐	75		3.1		P	100	75-84 Good
☐	65		2.5		P	100	65-74 Satisfactory
☐	55		1.7		P	100	55- 65 Poor

A Grade input allows up to 10 bonus points.

B Lower cutoff is higher than grades scale to accommodate marks above 100.

Awards setup

Where a school gives a standard award to students, you can set up the award in the Chancery SMS system. When the award is granted, you can record it and print an award certificate for presentation [*Granting awards, p. 65*]. For the award certificate, Chancery SMS provides a standard layout; you can customize the text of the award to correspond to the granting criteria [Figure 47].

In addition to using awards, you can use customized school reports to create award templates. You can then put any field onto a custom award template. For more information about creating customized school reports, see the *Chancery SMS Report Writer Guide*.

TABLE 36: Permissions pertaining to student awards

To	You need this permission	Set to	
Set up student awards	**School Setup > Awards Setup**	Delete	

You can do this if your role is:
School Administrator

To set up an award:

1 On the home page, in the control bar under **ADMIN**, click **School Setup**. The School Setup page appears.

2 Under **School**, click **Awards**. The Awards page appears.

3 From the **Actions** menu, click **Add Award…**.

- To adjust an existing award, select the award and in the **Actions** menu click **Edit Award…**.
- To delete an award, select the award and in the **Actions** menu click **Delete Award**.

4 On the **Add Award** page, enter or change Information, which includes:

- **Award name**: The title that appears at the top of the award certificate [Figure 47]. Ensure that the name is short enough to fit on the certificate.
- **Certificate description**: Enter the purpose of the award, which appears on the award certificate [Figure 47]. Ensure that the description fits on one line of the certificate.
- **Award criteria**: A general description, for the benefit of administrators, of the criteria a student must meet to receive the award. **Note**: You must explicitly add recipients, using the award criteria as a guide.

5 Click OK.

School staff

In a Chancery SMS system, each person who works with students is considered *staff* and must have a *staff record*. A staff record holds information such as personal details, status, contacts details, credentials, schools, course and room preferences, time restrictions, and teaching load.

In general, a District or School Administrator sets up staff records *[Adding staff, p. 183]* which a School Administrator can use in scheduling classes and other activities. A District or School Administrator can view a staff record and maintain the information therein. Once a staff member is assigned to a school, users at that school can view the record and add and change some information. These capabilities may vary, subject to permissions for roles and individual users.

A District Administrator can view staff records across the district. A School Administrator can view staff records assigned to your school. **Note:** For a system user at a school to view a staff record at that school, that user must have a staff record at that school (and that school is the staff members' home school) and be logged in to the Chancery SMS system with a user account for which the role permits the viewing of staff records.

Given the amount of information stored in a staff record, and the purpose for which it is used, Chancery SMS provides several different views of a staff record: a Staff Demographics record [p. 176], a staff Schools record, and a Staff Scheduling Properties record [p. 181].

Viewing staff

A staff record contains the staff member's personal details, contact information, and professional statistics. In general, this information is maintained by a District or School Administrator.

You can do this if your role is:
School Administrator
District Administrator

To view a staff demographics record:

1. On the home page, in the control bar under **ADMIN**, click **District Setup**. The District Setup page appears.
2. Under **District**, click **Staff**. The Staff Search page appears.
3. Click **Display All Records** [Figure 100]. A complete list of staff records for your school appears.
   - ⓘ Chancery SMS displays the first 1000 staff records. If the system holds more than 1000 staff records, search for particular staff records using basic [p. 173] or detailed criteria [p. 174].
   - ⓘ Or reuse a previously specified search by choosing it from **List**.
4. In the **Staff name** column, click the name of a record. The Edit Staff Demographics page appears *[Staff Demographics record, p. 176]*.
   - ⓘ To view the staff members Schools record [p. 178], in the control bar click **Schools**.
   - ⓘ To view the staff member's Staff Scheduling record [p. 181], in the control bar click **Staff Scheduling**.

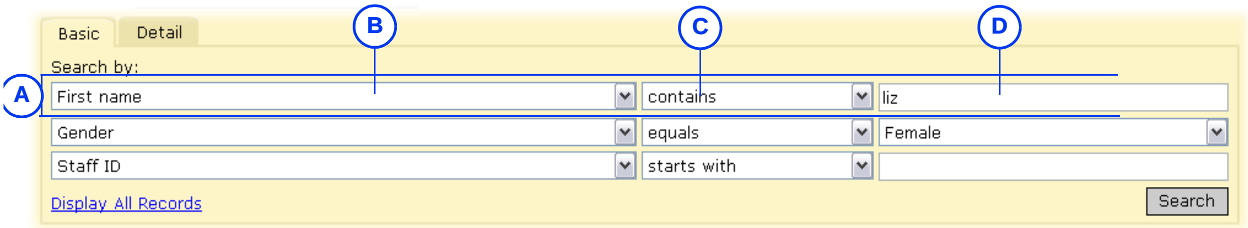
Searching for staff records using basic criteria

Rather than displaying all staff records available to you, you can search for a limited set of records based on the information stored in up to three staff record fields [Figure 100]. For basic criteria you can search on fields containing largely demographic information [p. 176] including home school. For example, you want to locate a female teacher you met at a staff meeting named Eliza or Liz [Figure 100].

To conduct a search for staff records using basic criteria:

1. On the **Staff Search** page, click the **Basic** tab.
2. Under **Search by**, for the first criterion [Figure 100]:
   - a Select the field on which to search.
   - b Select an operator.
   - c Enter the value to find.
3. Configure up to two more criteria.
4. Click **Search**. Chancery SMS displays matching staff records (if any) under **Staff Search Results**.
   - ⓘ Chancery SMS saves the search criteria. Should you want to conduct this same search again, select it from **List**.
   - ⓘ In a search for staff at a specific school, the results include staff who have a school record at the searcher's school or the specified school. Staff members who have been assigned the specified school as a Home School, but who do not have a school record at the school, do not appear.
   - ⓘ You can changed the sorting of these results [p. 176] or adjust the columns displayed [p. 175].

FIGURE 100: Setting basic search criteria



Search by:

First name	contains	liz
Gender	equals	Female
Staff ID	starts with	

A Criterion
B Field
C Operator
D Value

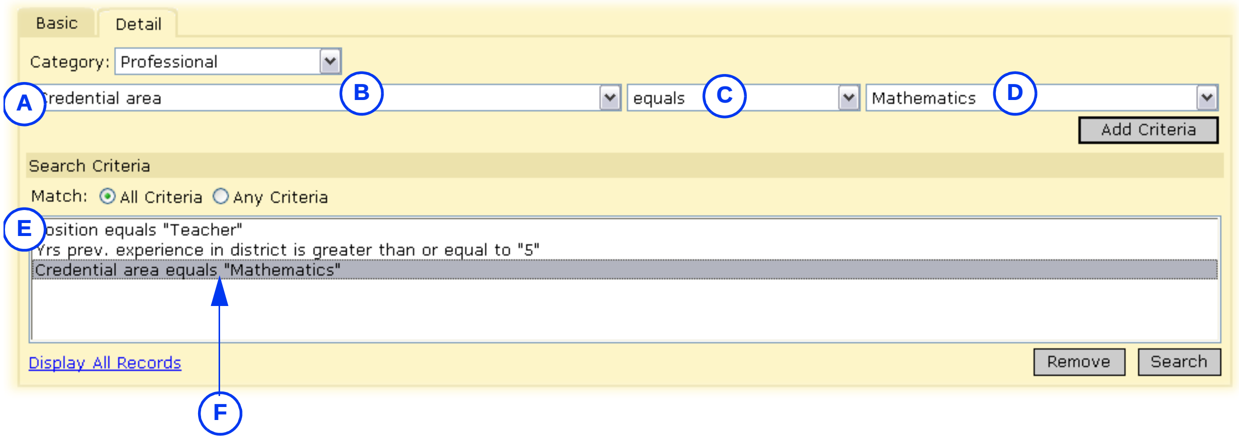
Searching for staff records using detailed criteria

Rather than displaying all staff records available to you, you can find a more specific set by searching the system for records based on the information stored in a large range of staff record fields. For detailed criteria you can search on fields containing demographic information [p. 176] including home school, scheduling properties [p. 181], as well as any custom data fields unique to your system. For example, you want to identify all mathematics teachers with at least 5 years of experience in the district [Figure 101].

To conduct a search for staff records using detailed criteria:

1. On the **Staff Search** page, click the **Detail** tab.
2. Add a criterion [Figure 101]:
    - a For **Category**, select a set of fields. Your choice determines the fields available to search.
    - a Select the field on which to search.
    - b Select an operator.
    - c Enter the value to find.
    - d Click Add Criteria. The criterion appears in the list of **Search Criteria**.
3. Add more criteria.
    - To remove a criterion, click it to select it and click Remove [Figure 101].
4. For **Match**, click **All Criteria** or **Any Criteria**.
    - Select the **Any Criteria** check box to find staff records that match any one of the criteria in the list. This generates more results.
    - Select the **All Criteria** check box to find staff records that match all of the criteria in the list. This generates fewer results.
5. Click Search. Chancery SMS displays matching staff records (if any) under **Staff Search Results**.
    - Chancery SMS saves the search criteria for the remainder of your session. Should you want to conduct this same search again, select it from **List**.
    - You can change the sorting of these results [p. 176] or adjust the columns displayed [p. 175].

FIGURE 101: Setting detailed search criteria



Category: Professional

redential area | equals | Mathematics

Match: ● All Criteria ○ Any Criteria

osition equals "Teacher"
Yrs prev. experience in district is greater than or equal to "5"
Credential area equals "Mathematics"

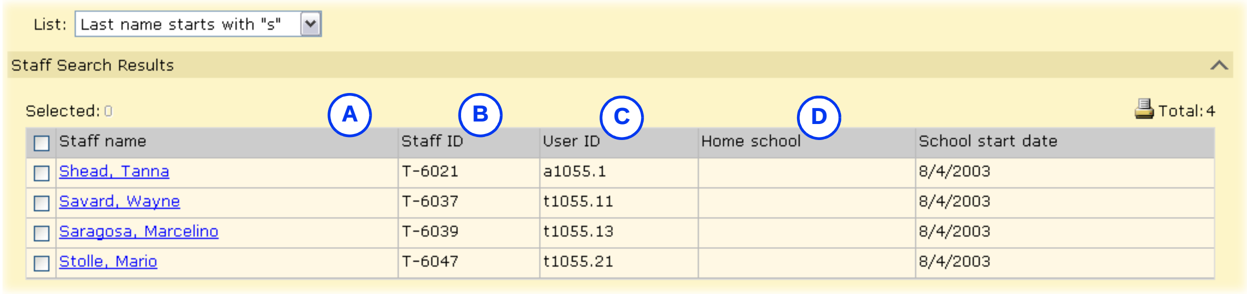
Display All Records

A Criterion	**D** Value
B Field	**E** Search criteria
C Operator	**F** Selected criterion

Adjusting the staff record search results display

A successful search of staff records generates a list of results. By default, Chancery SMS displays 5 columns of information, starting with Staff name [Figure 102]. You can change the columns displayed and rearrange them.

FIGURE 102: Staff record search results: Default columns and sorting



List: Last name starts with "s"

Selected: 0 Total: 4

☐	Staff name	Staff ID	User ID	Home school	School start date
☐	Shead, Tanna	T-6021	a1055.1		8/4/2003
☐	Savard, Wayne	T-6037	t1055.11		8/4/2003
☐	Saragosa, Marcelino	T-6039	t1055.13		8/4/2003
☐	Stolle, Mario	T-6047	t1055.21		8/4/2003

A Column: Displays information from a staff record field, in this case **Staff name**. The default columns are shown.

B First sort column: Chancery SMS sorts the list of staff records by the values in this column in ascending order [p. 176].

C Second sort column: After sorting by the first sort column, Chancery SMS sorts further by the values in this column [p. 176].

D Third sort column: After sorting by the first and second sort columns, Chancery SMS sorts further by the values in this column [p. 176].

You can do this if your role is:
School Administrator
District Administrator

To adjust the columns displayed in staff search results:

1 On the Staff Search page, conduct a search [p. 173] [p. 174]. Chancery SMS displays a list under **Staff Search Results**.

2 In the **Edit** menu click **Choose Columns…**. The Choose Columns page appears.

- ⓘ **Selected Columns** are those that are displayed under **Staff Search Results**. The vertical order corresponds to the left-to-right display order.
- ⓘ **Available Columns** are the fields from which you can choose to form a column.

3 Adjust the columns displayed:

   - ⓘ To remove a field from display, double-click it under **Selected Columns**. Chancery SMS moves it to **Available Columns**.
   - ⓘ To remove a field from display, double-click it under **Selected Columns**. Chancery SMS moves it to **Available Columns**.
4. Adjust the left-to-right display order of the columns:
   - ⓘ To move a field up (that is, left), click it to select it and click the up arrow button.
   - ⓘ To move a field down (that is, right), click it to select it and click the down arrow button.
5. Click OK.
   - ⓘ To return to Chancery SMS's default column display settings, click Restore Defaults.

Sorting the staff record search results display

By default, Chancery SMS sorts the search results by the values in the columns **Staff ID** (ascending order), **User ID** (ascending), and **Home school** (ascending). You can change the sorting by one or more columns, in ascending or descending order. For example, you might want to sort the list of staff in ascending order by name, then by gender. For details, refer to *Sorting records [p. 21].*

Staff Demographics record

Your main and initial view of a staff record is of its demographic information. Chancery SMS displays this information in a Staff Demographics record, which includes the following information organized under several tabs:

- Staff Demographics: Overview [p. 176]
- Staff Demographics: Address/Phone [p. 177]
- Staff Demographics: Professional Info [p. 177]
- Staff Demographics: Additional Info [p. 177]

Note: Some of the fields contain information that is set when staff record is created and cannot be changed thereafter. These fields are marked with a "**!**".

Staff Demographics: Overview

The information fields on the Add/Edit Staff Demographics page include the following:

- **Staff ID**: The staff member's ID number. Typically, the format of this number conforms to a district standard.
- **User**: A staff record must be associated with a user account on the Chancery SMS system [p. 185].
- **Title**, **Last name**, **First name**, **Middle name**, **Generation**, **Preferred name**: Chancery SMS automatically enters this information based on information in the user record, that is, the user account assigned to this staff record. When you create a staff record [p. 183], Chancery SMS enters this information when you click Apply.
- **Social security #**: The person's Social Security Number (SSN).
- **Birthdate**: The format is MM/DD/YYYY, for example, 06/29/1965.
- **Home school**: The school to which the staff member is primarily posted. The *home school* determines which users can view this staff record. The home school is also significant in other areas of the system such as staff record displays and staff searches [p. 175].

Staff Demographics: Address/Phone

- **Work phone**, **Home phone**, **Email address**: Chancery SMS automatically enters this information based on information in the user record, that is, the user account assigned to this staff record. When you create a staff record, Chancery SMS enters this information when you click Apply.
- **Emergency contact name**: The staff member's emergency contact person.
- **Emergency contact number**: The phone number for the staff member's emergency contact person.
- **Cellular phone**: The staff member's cellular phone number.
- **Physical address**: The staff member's physical address.
- **Mailing address**: The staff member's mailing address.

Staff Demographics: Professional Info

- **License #**: The number of the staff member's teaching license.
- **Licensure check**: Indicates if it is necessary to confirm the teacher's license number, area of certification or specialty, state, and year/date of expiration.
- **Other staff number 1**: An additional staff identification number, if needed.
- **Other staff number 2:** An additional staff identification number, if needed.
- **% of full time status**: The staff member's status as a full-time or part-time employee.
- **Hire date**: The staff member's hire date in MM/DD/YYYY format.
- **Exit date**: The staff member's exit date in MM/DD/YYYY format.
- **Position**: The staff member's current position, such as administrator, teacher, teacher's aide.
- **Instr. services to English learners**: The services this staff member can offer English language learners, such as specialized, normal, and so on.
- **Education level**: The staff member's highest level of education.
- **Year degree earned**: The year the staff member's most recent degree was granted in YYYY format.
- **Yrs prev. experience in district**: The number of years of experience the staff member has in this district prior to the most recent hire date; for example, if a teacher worked for the district in the 2001–2002 and 2005–2006 school years, then left and came back in 2007 and is still working for the district, the value for this field would be two.
- **Yrs experience outside district**: The number of years of experience the staff member has outside of this district.
- **Credentials**: The staff member's record of academic achievements. Records the credential area, type, date earned, and date expired. Click Add Row to add an achievement.

Staff Demographics: Additional Info

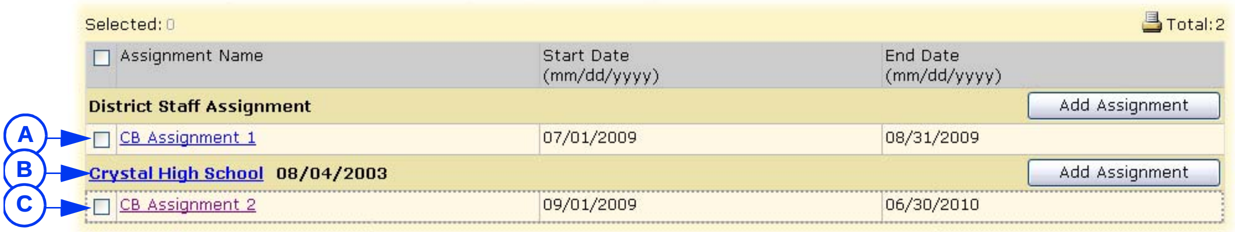
- **Federal ethnic category**: The staff member's Federal Ethic Category. The categories are provided.
- **Federal race categories**: The staff member's race categories. Choose one or more categories by moving it from the **Available Items** list to the **Selected Categories** list.
- **Previous social security #**, **Previous license number**, **Previous last name**, **Previous first name**, **Previous middle name**: The staff member's previous number or name, if he or she had one.

Staff Schools record

When a District Administrator assigns a staff member to a school, a *school record* is created for the staff member at that school. A user must have a staff record containing a school record in order to sign in to a Chancery SMS system and view information for a school.

Since one staff member can provide services to more than one school in the district, a District Administrator can give a staff member a *school assignment* [p. 179] at one or more schools; a School Administrator can give a staff member at his or her school assignment at a school in the district. A school assignment contains information about the type of work a staff member performs at a particular school, such as teaching English and Math or counseling. Chancery SMS stores all school assignments at a particular school with a *school record* [Figure 103]. A staff member may also provide services to the district, that is, services not associated with just one school; to record this information you can give a staff member one or more *district staff assignments* [p. 180].

FIGURE 103: Schools list



Selected: 0 Total: 2

☐ Assignment Name	Start Date (mm/dd/yyyy)	End Date (mm/dd/yyyy)
District Staff Assignment		Add Assignment
☐ CB Assignment 1	07/01/2009	08/31/2009
Crystal High School **08/04/2003**		Add Assignment
☐ CB Assignment 2	09/01/2009	06/30/2010

A District staff assignment [p. 180]

B School record

C School assignment

School records

You can view school records on the Schools list page [Figure 103].

You can do this if your role is:
School Administrator
District Administrator

To view or change a school record:

1. Locate and view a staff record [p. 173]. The Edit Staff Demographics page appears.
2. In the control bar, click **Schools**. The Schools List page appears [Figure 103].
3. Click the name of a school. The Edit School page appears.
4. Enter or change Information, which includes:
   - **School**: The school at which the assignment is located. Once the school record is saved, this school cannot be changed (the "**!**" symbol indicates this).
   - **Start date**: The start date for the assignment in MM/DD/YYYY format.
   - **End date**: The end date of the assignment in MM/DD/YYYY format. An end date is optional.
   - **Staff status**: The staff member's work time status at the school, such as full-time or part-time.
   - **Disciplinary action administrator**: Indicate that a staff member is a disciplinary action administrator at the school. This means that the staff member appears in the **Responsible person** list on the Behavior Incident > Add/Edit Action page [p. 62].
   - **Staff departments**: Selected Departments lists the departments to which this staff member can be assigned. To add a department to the list, double-click the department in the Available Departments list. To

remove a department from the Selected Departments list, double-click it.

5 Click OK. Chancery SMS saves the school record and displays it on the Schools list page.

We recommend that you maintain only one school record for all of a staff member's assignments at that school, even if the staff member was assigned to that school in several different years. **Note**: If a staff member has more than one school record for the same school, on the Schools List page each staff assignment for that school will appear under each instance of the school record. If your district requires school records to start and end each year, on the Schools List page, you can hide school records that have an end date in the past. **Note**: If your district uses Active Directory to create consolidated user accounts, a school record is automatically created based on the user role and scope. For more information, see the *Chancery SMS Directory Integrator Guide*.

You can do this if your role is:
School Administrator
District Administrator

To add a school record:

1. Locate and view a staff record [p. 173]. The Edit Staff Demographics page appears.
2. In the control bar, click **Schools**. The Schools List page appears.
3. From the **Actions** menu, click **Add School**. The Add School page appears.
4. Set options.
5. Click OK. Chancery SMS saves the school record and displays it on the Schools list page.

A District Administrator can delete a staff member's school record. When this is done, the staff member is no longer available to users at that school. However, the staff member's staff record is still available to district users. Chancery SMS also retains but does not display the staff member's school assignments at the school. If you set up a new school record for the school, Chancery SMS displays all the staff member's school assignments at that school. Chancery SMS does not retain the staff member's scheduling preferences, staff department, and program management staff assignments at the school. Also, Chancery SMS removes the staff member from any student behavior incidents at the school with which they were associated.

School assignments

You can view school assignments on the Schools list page [Figure 103]. Each school record may have one or more school assignments.

You can do this if your role is:
School Administrator
District Administrator

To view or change a school assignment:

1. Locate and view a staff record [p. 173]. The Edit Staff Demographics page appears.
2. In the control bar, click **Schools**. The Schools List page appears.
3. Click an assignment [Figure 103]. The Edit Assignment page appears.
4. Enter or change Information, which includes:
   - **School**: Matches the school record. This is set at the time the assignment was created and cannot be changed.
   - **Start date**: The date on which the assignment is to start.
   - **End date**: The date on which the assignment is to end.
   - **Job classification**: The primary type of work involved in this assignment.

    - **Staff assignment**: One position. To assign a staff member to more than one position, add a separate school assignment for each position.
    - **FTE**: The percentage of full-time equivalency.
    - **Language of instruction**: The primary language the staff member will use to communicated with the students.
    - **Teacher funds**: Indicates the staff member’s eligibility for teacher funds.
    - **Instr. type to Eng. learners**: The type of instruction this staff member offers English language learners.
5. Click OK. Chancery SMS saves the assignment and displays it on the Schools List page.

A staff member may be assigned to a school at several different periods during their employment in the district. Each such period should be entered as a separate school assignment under the relevant school record. Also, where you need to assign a staff member to more than one position, add an assignment for each position.

You can do this if your role is:
School Administrator
District Administrator

To add a school assignment:

1. Locate and view a staff record [p. 173]. The Edit Staff Demographics page appears.
2. In the control bar, click **Schools**. The Schools List page appears.
3. Click **Add Assignment** [Figure 103]. The Add Assignment page appears.
4. Set options.
5. Click OK. Chancery SMS saves the assignment and displays it on the Schools List page.

District staff assignments

You can view district staff assignments on the Schools list page [Figure 103].

You can do this if your role is:
School Administrator
District Administrator

To view or change a district staff assignment:

1. Locate and view a staff record [p. 173]. The Edit Staff Demographics page appears.
2. In the control bar, click **Schools**. The Schools List page appears.
3. Under **District Staff Assignment**, click an assignment [Figure 103]. The Edit Assignment page appears.
4. Enter or change Information, which includes:
    - **Start date**: The date on which the assignment is to start.
    - **End date**: The date on which the assignment is to end.
    - **Job classification**: The primary type of work involved in this assignment.
    - **Staff assignment**: One position. To assign a staff member to more than one position, add a separate school assignment for each position.
    - **FTE**: The percentage of full-time equivalency.
    - **Language of instruction**
    - **Teacher funds**: Indicates the staff member’s eligibility for teacher funds.
    - **Instr. type to Eng. learners**: The type of instruction this staff member provides to English language learners.
5. Click OK. Chancery SMS saves any changes to the assignment and displays it on the Schools List page.

A staff member may be assigned to duties at the district level at several different periods during their employment in the district. Each such period should be entered as a separate district staff assignment.

You can do this if your role is:
School Administrator
District Administrator

To add a district staff assignment:

1 Locate and view a staff record [p. 173]. The Edit Staff Demographics page appears.

2 In the control bar, click **Schools**. The Schools List page appears.

3 From the **Actions** menu, click **Add District Staff Assignment**. The Add School page appears.

   ⓘ Or under **District Staff Assignment**, click **Add Assignment**.

4 Set options.

5 Click OK. Chancery SMS saves the assignment and displays it on the Schools List page.

Staff Scheduling Properties record

This view of a staff record is for use by schools that employ secondary scheduling.The record contains preferences regarding courses, rooms, and time restrictions. Since these preferences apply to a school, a School Administrator sets this information. **Note**: Scheduling preferences apply only to teachers, not to administrators, secretaries, and teachers on leave-of-absence. **Note**: The Chancery SMS Master Schedule Builder schedules a teacher based on her course preferences. A teacher with no course preferences is not scheduled automatically (but a School Administrator can do so manually).

You can do this if your role is:
School Administrator

To set scheduling defaults:

1 Locate and view a staff record [p. 173]. The Edit Staff Demographics page appears.

2 In the control bar, click **Staff Scheduling**. The Staff Scheduling Properties page appears.

3 Enter or change Information, which includes:

   ⓘ **Scheduling Load**: A load expressed in terms of hours per day. Select **District default (5.0000)** or **Override**, for which you can type a number of hours. **Note**: Chancery SMS does not accept zero. **Note**: A course scheduling load is a value that reflects the number of hours of instruction for that course. For example, the District Administrator could set a course's scheduling load at 1.0 where that course that meet six hours a week over one term, and to 0.5 for a course that meets three hours a week for one term. Thus, a teacher with a scheduling load of 4.0 could teach two 1.0 courses and four 0.5 courses.

4 Set **Course Preferences**:

   a Find one or more courses using **Basic** or **Detailed** search.

      - Or, for Course number, enter the number of one or more courses. Separate each number with a comma.

   b Under **Search results**, select one or more courses.

   c Click Add to add the selected courses to the **Preferred Courses** list.

   d For each course, under **Preference**, select a preference level.

      - The default level is 5 on a scale of 1 to 9 (where 1 is the most preference). Since the Master Schedule Builder does not automatically schedule a course with a preference of 9, the administrator can set this level for a course that she intends to schedule manually.

5 Set **Room Preferences**:
   - a Move one or more rooms from the **Available Rooms** list to the **Selected Rooms** list.
   - b In the **Selected Rooms** list, use the up and down arrows to adjust the order of the rooms in the list. A room higher in the list takes priority over a room lower in the list.

6 Set **Time Restrictions**:
   - ⓘ **Teacher is available at all times**: Indicate that the teacher is available for scheduling during all regular school hours
   - ⓘ **Teacher is not available at the following times**: Indicate that the teacher is not available for scheduling on specific days of the week or at specific times of day. Caution: At a school that employs relative days [p. 142], do not set teacher time restrictions.
     - For **Full day Restrictions**, select one or more days of the week.
     - To set **Time-of-day restrictions**: In the Actions menu, click **Add Time Restriction** and set the **Day**, **Start Time**, and **End Time**.

7 Click Save.

Staff placeholder

To take into account a staff member that the school expects to bring in for the next school year, the School Administrator can create a *placeholder* in the Planning Calendar. Using one or more placeholders, the School Administrator can schedule courses before hiring is not complete.

You can do this if your role is:
School Administrator

To create a staff placeholder:

1 On the home page, in the control bar under **ADMIN**, click **Scheduling**. The Scheduling page appears.

2 Click **Staff Setup**. The Scheduling Staff List appears.

3 From the **Actions** menu, select **Create Placeholder...**. The Staff Scheduling Properties page appears.

4 Enter a **Name**.
   - ⓘ Enter a one-word name. Chancery SMS uses this as a last name for search purposes.

5 For **Department**, move one or more departments to the **Selected departments** list.

6 Set **Teaching Load**, **Course Preferences**, **Room Preferences**, and **Time Restrictions** as for any other staff member [p. 181].

7 Click OK.

When necessary, such as when a staff member is hired, the School Administrator can convert a placeholder, that is transfer all of that placeholder's scheduling properties to a staff record. When the conversion is complete, Chancery SMS deletes the placeholder record.

You can do this if your role is:
School Administrator

To convert a staff placeholder:

1 On the home page, in the control bar under **ADMIN**, click **Scheduling**. The Scheduling page appears.

2 Click **Staff Setup**. The Scheduling Staff List appears.

3 Click **All Placeholders** and locate the placeholder under Staff Search Results.

   - ⓘ Or click **All Staff** and locate the placeholder under Staff Search Results.

4. Select the placeholder.
5. From the **Actions** menu, select **Convert Placeholder...**. The Convert <placeholder name> to Staff Member page appears.
6. Search for a staff member.
   - ⓘ Or, click **All Staff**.
7. Under Staff Search Results, select the staff member.
8. Click OK.

Adding staff

For a District or School Administrator to set up a staff record for a person, that person must have a user account [p. 185] on the Chancery SMS system.

You can do this if your role is:
School Administrator
District Administrator

To create a staff record:

1. On the home page, in the control bar under **ADMIN**, click **District Setup**. The District Setup page appears.
2. Under **District**, click **Staff**. The Staff Search page appears.
3. From the **Actions** menu, click **Add Staff**. The Add Staff Demographics page appears.
4. Enter demographic information [see *Staff Demographics record, p. 176*].
   - ⓘ **Note**: If you are a School Administrator, assign the staff member to your school before you close the staff record.
   - ⓘ **Note:** Some of the fields contain information that is set when staff record is created and cannot be changed thereafter. These fields are marked with a “**!**”.
5. Click **Apply**. Chancery SMS creates the staff record.
   - ⓘ Chancery SMS places information in some fields (such as **Last name**) based on your choices in others (such as **User**).
   - ⓘ If you have assigned the staff member to a school, a link to the staff member’s **Schools** record [p. 178] appears in the control bar.
6. Click OK.

Removing staff

When you delete a staff record, Chancery SMS deletes all aspects of the record from the system, including scheduling preferences, staff department, and staff assignments. The staff record is also removed from any associated student behavior incidents, although the incident record is not deleted. Thus, before deleting a staff record, we recommend that you re-assign the staff member’s homeroom, class, and resource teacher assignments.

To delete a staff record:

1. On the home page, in the control bar under **ADMIN**, click **District Setup**. The District Setup page appears.
2. Click **Staff**.
3. Search for and select the staff record.
4. From the **Actions** menu, click **Delete Staff**.
5. Click OK.

6 User setup

Setting up and managing system users involves managing user accounts, adjusting roles and permissions, and controlling access to specialized features such as reports. Some of these tasks fall to the school and others to the District Administrator.

User accounts

For a person to have access to a school's Chancery SMS system, that person must have a user account on the system. A user account consists of a user ID, matching password, and one or more associated roles [p. 186]. For a user account to operate, it must also have an associated staff record [p. 172].

Typically, each person has one user account. Since one user account can have more than one role, the user can switch between the roles within the account depending on the task at hand [p. 12]. At a school, we recommend that every staff member have a user account.

Note: If your school employs Active Directory, refer to the *Chancery SMS Directory Integrator Guide* for more information about working with roles, accounts, and staff records.

By default, a School Administrator can view the configuration of user accounts; a District Administrator can set up and adjust a user account.

You can do this if your role is:
School Administrator
District Administrator

To view a user account:

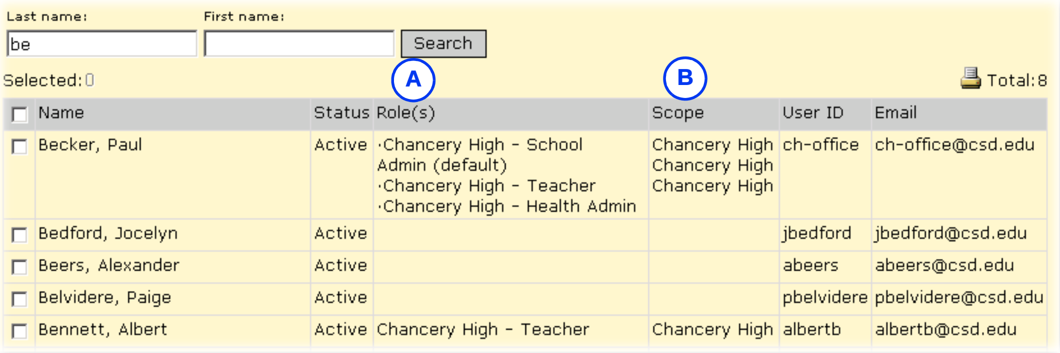
1 On the home page, in the control bar under **ADMIN**, click **District Setup**. The District Setup page appears.

2 Under **Users and Security**, click **Accounts**. The Accounts page appears [Figure 104].

3 Search for user accounts using **Last name** and/or **First name** and the **Search** button. Chancery SMS displays matching user accounts on the page.

   ⓘ This page displays all user accounts the scope of which include the school.

Figure 104: Accounts page



Last name: be

First name:

Selected: 0

Total: 8

☐ Name	Status	Role(s)	Scope	User ID	Email
☐ Becker, Paul	Active	·Chancery High - School Admin (default) ·Chancery High - Teacher ·Chancery High - Health Admin	Chancery High Chancery High Chancery High	ch-office	ch-office@csd.edu
☐ Bedford, Jocelyn	Active			jbedford	jbedford@csd.edu
☐ Beers, Alexander	Active			abeers	abeers@csd.edu
☐ Belvidere, Paige	Active			pbelvidere	pbelvidere@csd.edu
☐ Bennett, Albert	Active	Chancery High - Teacher	Chancery High	albertb	albertb@csd.edu

A **Role(s)**: [p. 186]

B **Scope**: [p. 187]

Table 37: Permissions pertaining to user account viewing

To	You need this permission	Set to	
View user account information such as User ID	**Users > User Accounts**	View	

Setting up user accounts

Typically, a District Administrator can change, delete, and add user accounts. The District Administrator also has the option of rendering a user account temporarily inactive, which prevents the user from using the system but maintains the account.

Table 38: Permissions pertaining to user account editing

To	You need this permission	Set to	
Change user settings such as User ID and password	**Users > User Accounts**	Edit	
Add, change, and delete users	**Users > User Accounts**	Delete	

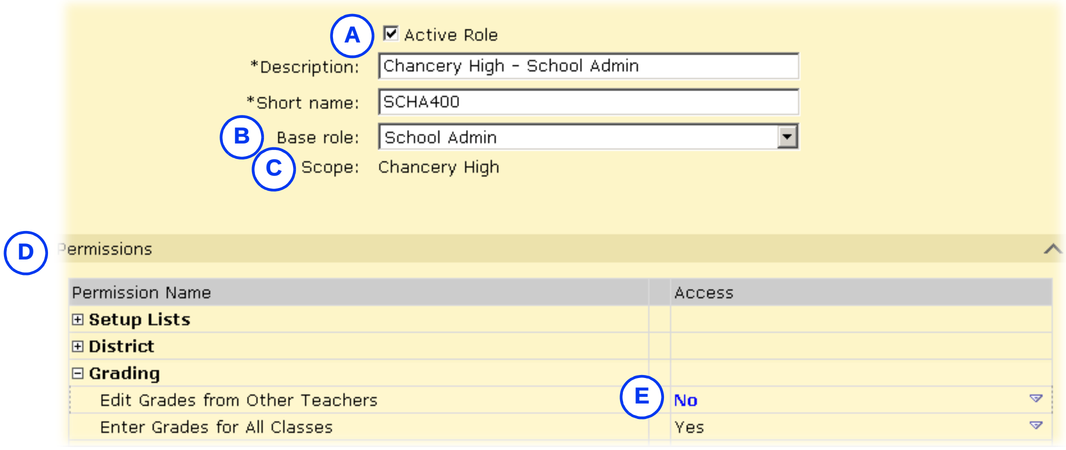
Administrative user account

By default, a Chancery SMS system starts with one user account: *Admin*. The Admin account has complete access to all aspects of the system, that is, district-wide scope [p. 187] and all permissions [p. 189]. Typically only a District Administrator has access to an administrative user account.

Roles

A user's *role* consists of the scope of information available to that user account [p. 185] and permissions [p. 189] that give the user access to information and to actions, such as changing information or configuring how it is stored [see also *Understanding your role, p.12*]. A role is derived from one of a few standard types or *base roles* [p. 190].

FIGURE 105: Roles page



☑ Active Role

*Description: Chancery High - School Admin

*Short name: SCHA400

Base role: School Admin

Scope: Chancery High

Permissions

Permission Name	Access
⊞ **Setup Lists**	
⊞ **District**	
⊟ **Grading**	
Edit Grades from Other Teachers	**No**
Enter Grades for All Classes	Yes

A **Active Role** [p. 190]

B **Base Role** [p. 190]

C **Scope** [p. 187]

D **Permissions** [p. 189]

E Bold blue text indicates a permission inherited from the base role has been changed by the District Administrator for this role. In this example, the District Administrator has used the “School Admin” base role but removed its ability to edit grades for teachers.

Role scope

A role’s scope determines the information to which the user has access. Scope is either district-wide or for a specific school in the district as follows:

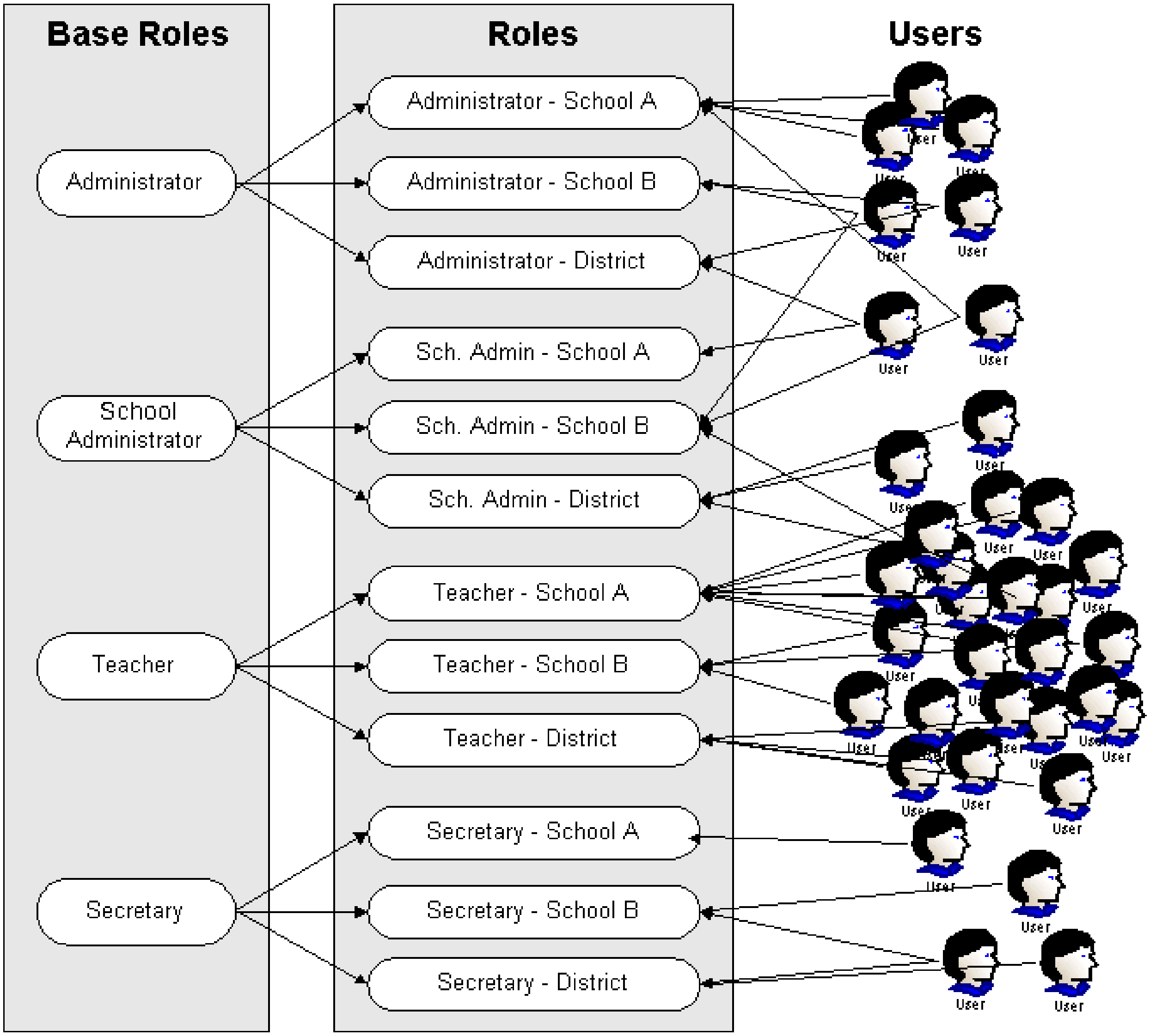
- *District*: Enables the user to view information on all students in the district. Gives the user access to district-related pages, such as School Transfers and Replication, and additional options on the District Setup page.
- *School*: Enables the user to view information on students in one specified district school. Gives the user access to school-related pages, including Attendance, school Reports, Awards, Student Behavior, School Setup, Scheduling, and Grading. When setting a role’s scope to School, the District Administrator must select the specific school to which that role has access.

Roles example

In a typical district, user accounts might be based on the following [Figure 106]:

- Six base roles [p. 190]
- Several roles at each school (adding up to dozens of roles in the district)
- One user account for each staff member (adding up to hundreds of accounts for each district).
- Several roles per user account; for example, a Teacher who is also a School Administrator, a Teacher who teaches at two schools, a School Administrator who needs to work with district data, a District Administrator who needs to work with the school data in every school, a School Secretary who works at more than one school.

FIGURE 106: Roles example


Base Roles
Roles
Users
Administrator
School Administrator
Teacher
Secretary
Administrator - School A
Administrator - School B
Administrator - District
Sch. Admin - School A
Sch. Admin - School B
Sch. Admin - District
Teacher - School A
Teacher - School B
Teacher - District
Secretary - School A
Secretary - School B
Secretary - District
User

Managing roles

A District Administrator creates and manages all the roles needed for the district or school. A role consists of a scope (specific school or district-wide [p. 187])and a set of permissions [p. 189], which enable a district administrator to control a user's access to information and system features.

Typically, a school has from three to ten roles. Other roles are needed for use across the district. Typical roles include: District Administrator, District Health Professional, School Health Professional, School Administrator, School Secretary, and Teacher. Using permissions, it is possible for a District Administrator to create roles for more specific purposes, such as Homeroom Teacher and Non-Homeroom Teacher.

TABLE 39: Permissions pertaining to users

To	You need this permission	Set to	
View role settings such as permissions	**User > User Roles**	View	
Change role settings such as permissions	**User > User Roles**	Edit	
Add, change, and delete roles	**User > User Roles**	Delete	

Default role

While a user account [p. 185] has one or more roles, one is designated as the *default role*. The default role is the role that Chancery SMS automatically applies when the user logs on to the system [p. 10].

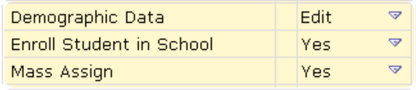
If the user account has only one role, that role is the default role. If the user account has more than one role, the user designates which of the roles available in the account is to be the default role [p. 12]. When the user logs on to a user account for the very first time, Chancery SMS prompts the user to designate the default role. Thereafter, the user can change the default role for all future sign-ins [p. 12].

After logging on, the user can switch between roles in the user account at will [p. 12].

Role permissions

A role's permissions enable a District Administrator to control each that role's ability to view and change information (such as legal alerts, report cards, and photos) and the actions a user can take [Figure 107]. A role inherits the permission settings of its associated base role [p. 190]. Any changes to a role's permissions affect only that role.

FIGURE 107: Permission settings example



Demographic Data	Edit
Enroll Student in School	Yes
Mass Assign	Yes

Permissions pertaining to actions can be set to:

- *Yes*: The user can complete the action.
- *No*: The user cannot complete the action.

Permissions pertaining to viewing information can be set to:

- *None*: The user cannot see the information.
- *View*: The user can view the information but he or she cannot change or delete it.
- *Edit*: The user can view and change the information but he or she cannot delete it.
- *Delete*: The user can view, change, or delete the information.

A setting for one permission can affect another permission. Use the Permissions index [p. 303] to locate and view all Chancery SMS permissions in the context of the system features to which they apply.

Base roles

A role [p. 186] is derived from one of a few standard types or *base roles*. A base role, which consists of a set of permissions, acts as both a starting point for new roles and a means of resetting the permissions of existing roles.

By default, Chancery SMS provides the following base roles:

- *Administrator*: Can view and change information on all students and staff at all schools in the district. Synonymous with *District Administrator*.
- *School Administrator*: Can view and change information for staff at the administrator's school.
- *Teacher*: Can view information on students who attend the Teacher's classes. Cannot change a student's demographic or contact information.
- *School Secretary*: Can view and change information on students who attend the secretary's school and on staff who work at that school.
- *District Health Professional*: Can view and change information on all students at all schools in the district.
- *School Health Professional*: Can view and change health information on students who attend the professional's school.
- *School Counselor*: Can view information on students who attend the counselor's school and change information for students assigned to him or her by a District or School Administrator. Typically, a counselor is assigned to a student's Academic Plan [p. 86]. Chancery SMS has a Counselor-specific home page [p. 14] the unique characteristic of which is a link to a list of students to whom the Counselor is assigned (this link is labeled **My Students**).
- *Guest*: Is intended for School scope [p. 187]only and roles created from this base role must be assigned permissions. If the District Administrator does not assign a specific role to user account, Chancery SMS assigns this role.**Caution**: Creating a role named "Guest" may cause a software upgrade to fail. This is because during software upgrading Chancery SMS needs exclusive use of the Guest base role.

Making reports available

All reports installed on a Chancery SMS system are automatically available to all user roles [*Understanding your role, p. 12*]. However, you can control the access of each user role to each report using permissions [p. 189], or you can make a report inactive [p. 190].

Access options include:

- *View*: The user can run the report and set options prior to doing so.
- *Edit*: In addition to viewing the report, the user can create a custom version of it.
- *Delete*: In addition to editing the report, the user can delete it.
- *None*: The link to the report is disabled. The user can see the report's name but cannot view it.

Making a report inactive

You also have the option of hiding a report from other users at the school. Chancery SMS displays *active* reports, that is, reports that are available for use by you and other users. You have the option of rendering a Report Package report *inactive* (but not built-in reports [p. 95]); in this state, the report is not visible to other users at the school.

Pre-4.2 Reports page is available, you cannot make one of these reports inactive.

You can do this if your role is:
School Administrator
District Administrator

To make a report inactive:

1 On the control bar, under **ADMIN** click **School Setup**. The School Setup page appears.

2 Under **Customization**, click **Customize Reports**. The Customize Reports page appears displaying a list of available reports.

ⓘ To restrict the list to a certain kind of report, select a **Category**.

3 In the **Report Name** column, click the report's name. The Edit Report page appears.

4 In the **General** panel, set the **Report Status** to **Inactive**.

5 Click **OK**.

7 District setup

A District Administrator sets up and maintains district-specific information, district-wide preferences such as for student numbers, and standard choices for use by School Administrators such as attendance codes and grade levels.

Setting up and maintaining a district in Chancery SMS involves, among other responsibilities, the following:

- District-specific information [p. 193]
- District calendar setup [p. 194]
- Grade level specification [p. 195]
- Staff setup [p. 195]
- Alerts setup [p. 196]
- Student enrollment setup [p. 197]
- Academic plan setup [p. 197]
- Developing reports [p. 197]

District setup and maintenance may also involve setting preferences and formats involving:

- Student numbers [p. 194]
- Student behavior setup [p. 196]

To work with a district's setup, a user must be assigned a role as a District Administrator [p. 185]. The information in this section is intended to help the School Administrator understand how the district setup affects his or her work.

District-specific information

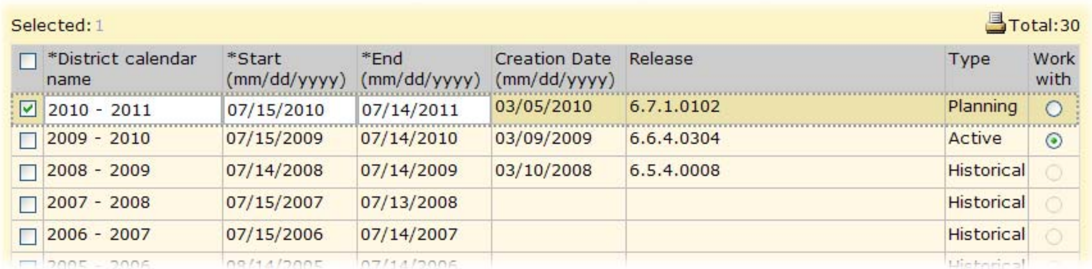
A District Administrator can store district-specific information, such as the district's identity, office contact details, and the superintendant's identity and contact details. Chancery SMS uses this information throughout the system.

District calendar setup

A district calendar is the foundation upon which other aspects of the district's setup and operation are laid out. In a Chancery SMS system, a district has three types of calendars [Figure 108]:

- *Active Calendar*: The calendar for the current district year.
- *Planning Calendar*: The calendar used to schedule and plan for the coming district year. At the end of the year, this calendar is converted to the Active Calendar. A school's Planning Calendar [p. 136] is derived from the district's.
- *Historical calendar*: A former Active Calendar for a past district year. The system can hold several historical calendars. For information about viewing the data in a historical calendar, contact Pearson Technical Support.

FIGURE 108: District Calendars page



Selected: 1

Total:30

☐	*District calendar name	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)	Creation Date (mm/dd/yyyy)	Release	Type	Work with
☑	2010 - 2011	07/15/2010	07/14/2011	03/05/2010	6.7.1.0102	Planning	○
☐	2009 - 2010	07/15/2009	07/14/2010	03/09/2009	6.6.4.0304	Active	●
☐	2008 - 2009	07/14/2008	07/14/2009	03/10/2008	6.5.4.0008	Historical	○
☐	2007 - 2008	07/15/2007	07/13/2008			Historical	○
☐	2006 - 2007	07/15/2006	07/14/2007			Historical	○

TABLE 40: Permissions pertaining to the district Planning Calendar

To	You need this permission	Set to	
Create a district Planning Calendar	**District > Define District Calendar**	Yes	
Switch district calendars	**District > Define District Calendar**	Yes	

Student numbers

Chancery SMS identifies each student in a district by a number. Every student number in the district is unique. Chancery SMS prevents duplicate numbers, that is, no two students can have the student number.

System users can type in each new student number where it is needed, or as a District Administrator you can set Chancery SMS to generate new student numbers automatically. In the latter case, Chancery SMS generates a student number for a new student record [p. 50] when a change is made to a student number in an existing student record [p. 50].

Automatically generated student numbers

Chancery SMS can generate student numbers according to preset criteria, including length in digits. These criteria are applied to the creation of student numbers across the district.

An auto-generated student number has up to four components. For examples, see Table 41 [p. 195]:

- Prefix padding: Increases the number of digits in the prefix by a fixed number to ensure the number matches the specified prefix length.
- Prefix: This can be fixed set of characters or an automatic set generated from such information as graduation year, current year, or school ID number.

- Main part padding: Increases the number of digits so that the number matches the specified student number length.
- Main part: Increments for each new number according to your specified amount. If the main part is a mixture of letters and numbers, the number increments starting from the last character; for example: AA98, AA99, AB00, AB01.

TABLE 41: Sample auto-generated student numbers

Complete number	Prefix Padding	Prefix	Main part padding	Main part
0001999AAA29412	000	1999	AAA	29412
2009QQQQQ000600		2009	QQQQQ	000600

Grade level specification

Each school must specify the grade levels available at that school. A School Administrator selects grade levels defined for use across the district by a District Administrator. A grade level definition consists of a name and a description; for example, grade level 2 could be named “2”, “02”, or “Two”.

TABLE 42: Permissions pertaining to grade levels

To	You need this permission	Set to	
Set grade levels for a school	**School Setup > Grade Level Setup List**	Edit	

Staff setup

In general, a District or School Administrator sets up records for each staff member *[Adding staff, p. 183]* while School Administrators maintain those *staff records* and use them for scheduling classes and other school-level assignments *[School staff, p. 172]*. Before setting up staff records for the district, you may wish to customize the standard staff record by configuring the relevant staff setup lists [p. 196].

By default only a District or School Administrator can delete staff records, school assignments, and staff assignments. Access to staff records can be adjusted using permissions [Table 43].

TABLE 43: Permissions pertaining to staff records

To	You need this permission	Set to	
Delete staff records	**Staff > Staff Demographics**	Delete	
Create staff records	**Staff > Staff Demographics**	Edit	
Change staff records’ Overview information	**Staff > Staff Overview** **Staff > Staff Demographics**	Edit Edit	
Change staff records’s Address/Phone information	**Staff > Staff Address/Phone** **Staff > Staff Demographics**	Edit Edit	
Change staff records’s Professional Info information	**Staff > Staff Professional Info** **Staff > Staff Demographics**	Edit Edit	
Change staff records’s Additional Info information	**Staff > Staff Additional Info** **Staff > Staff Demographics**	Edit Edit	
Change school information for staff on the Staff School page	**Staff > Staff Schools**	Edit	
Delete school records	**Staff > Staff Schools** **Staff > Staff Demographics**	Delete Delete	

To	You need this permission	Set to	
Change school staff assignments	**Staff > School Staff Assignments** **Staff > Staff Demographics**	Edit Edit	
Delete school staff assignments	**Staff > School Staff Assignments** **Staff > Staff Demographics**	Delete Delete	
Change district staff assignments on the Schools List page	**Staff > District Staff Assignments** **Staff > Staff Demographics**	Edit Edit	
Delete district staff assignments	**Staff > District Staff Assignments** **Staff > Staff Demographics**	Delete Delete	

Staff setup lists

Staff setup lists, maintained by a District Administrator, determine the choices available in various choice lists on the staff record used across the district.

Alerts setup

Chancery SMS can automatically monitor information and conditions in the system for changes that are relevant to users. For alerts to operate, users must subscribe *[Alerts, p. 30]*. If the alert definition includes a mobile alert option, then an administrator must support it with system-wide settings [p. 196].

Supporting mobile alerting

For a user at a school to be able to subscribe to a mobile alert [p. 30], a District Administrator and system administrator must set up the Chancery SMS system to support the sending of SMS (simple messaging service) text messages.

Student behavior setup

A District Administrator can set preferences for the handling of student behavior incident records across the district. Such preferences include the calculation of suspension days, the category of incidents displayed to users, and access to the behavior incident records of students who transfer from one district school to another.

TABLE **44**: Permissions pertaining to student behavior setup

To	You need this permission	Set to	
Set district student behavior preferences	**Student Behavior > Student Behavior Preferences**	Yes	

Behavior attendance actions setup

A District Administrator sets up student behavior attendance actions and associates them with a behavior action step. This enables a School Administrator to associate a school attendance code with each attendance action *[Setting up attendance related to student behavior, p. 158]*. Each behavior attendance action has a priority setting that enables Chancery SMS to determine which attendance code to assign where several behavior actions are recorded for a student on the same day and those actions are associated with different attendance codes.

TABLE 45: Permissions pertaining to student behavior attendance setup

To	You need this permission	Set to	
Set up student behavior attendance actions	**School Setup > Attendance General Settings**	Yes	
To change an attendance code set by student behavior action steps	**Attendance > Override Student Behavior Attendance**	Yes	

Student enrollment setup

A District Administrator can configure how students are enrolled [p. 62] in the district and how Chancery SMS manages enrollment information. Chancery SMS applies these settings across the system. These settings are of particular significance for year end [p. 201].

Academic plan setup

TABLE 46A District Administrator can create one or more *academic plans* [p. 86] for use in the district. To create a plan, a District Administrator creates an academic plan and then creates *versions* of that plan. Typically, each plan version corresponds to a specific year or range of years. It is the plan version that a School Administrator assigns to a student [p. 90]. To facilitate assignment to students, a District Administrator can designate one plan as the default for the district. **Note**: Academic plans replace graduation plans.: Permissions pertaining to academic plan setup

To	You need this permission	Set to	
Add, edit, delete, and copy academic plans and versions.	**District > Academic Plan Setup**	Delete	
Add or edit academic plans and versions.	**District > Academic Plan Setup**	Edit	
Hide the **Plan Setup** link on the District Setup page.	**District > Academic Plan Setup**	None	

Developing reports

An administrator can develop reports for use in a Chancery SMS system [p. 95] using a third-party development tool such as *Crystal Reports*®. For more information about developing new reports for specific purposes, refer to the *Chancery SMS Report Writer Guide*.

8 System maintenance & setup

System planning, setup, and maintenance tasks are the responsibility of the District Administrator and a team of technical specialists such as business analysts, data architects, developers, and database administrators. Their tasks include:

- Monitoring system tasks
- Maintaining a system's database
- Maintaining a system's Web Server
- Implementation planning
- Assessing system requirements
- Installing a new system
- Upgrading an existing system

9

Year end

Typically several months before the school year ends, District and School Administrators begin setting up their Chancery SMS system to move current year student and system information over to the next school year. Extensive planning and preparation by both the District Administrator and School Administrators takes place—tasks collectively known as *next-year preparation* (*NYP*) [p. 202].

As the school year comes to an end, School Administrators prepare the information in their Active and Planning Calendars [p. 133] so that the District Administrator can initiate Year-End Processing [p. 208]. Year-End Processing converts the Planning Calendars to Active Calendars and stores the information that was in the previous year's Active Calendars in the Historical database. After Year-End Processing is complete, administrators take care of several follow-up tasks [p. 214].

The complete year-end sequence of tasks is as follows:

- **Next-year preparation [p. 202]**

District Administrator	School Administrator(s)
1 Configure student enrollment settings [p. 202]	
2 Ensure that students will be assigned to the appropriate school [p. 203]	
3 Override a student's year-end transfer mapping [p. 206]	
4 Create and configure the district Planning Calendar [p. 206]	
	5 Define the school's Planning Calendar [p. 206]
	6 Adjust student enrollment [p. 208]
	7 Select a planning schedule [secondary school] [p. 208]

- **Year-End Processing [p. 208]**

District Administrator	School Administrator(s)
	1 Preparing for Year-End Processing [school] [p. 208]
	2 Declare YEP preparation complete [p. 212]
3 Preparing for Year-End Processing [district] [p. 213]	
4 Running Chancery SMS Year-End Processing [p. 213]	
5 Post-processing tasks [p. 213]	

- **Year-end follow-up [p. 214]**

District Administrator	School Administrator(s)
	1 GPA adjustments after Year-End Processing [p. 214]
2 Resynchronize SIF after Year-End Processing [p. 214]	
3 Connecting to the Historical Database [p. 214]	

Note: On a system converted to *Permanent Record*, some of the navigation described in this section may differ from a standard system (that is, non-Permanent Record). For help with these differences, refer to the *Chancery SMS Permanent Record Guide*.

Next-year preparation

It is the responsibility of the District Administrator and the School Administrators at each school in the district to confirm that student enrollment settings are suitably configured, and the necessary information is ready. This next-year preparation (NYP) involves the following tasks:

- Configure student enrollment settings [p. 202]
- Ensure that students will be assigned to the appropriate school [p. 203]
- Override a student’s year-end transfer mapping [p. 206]
- Create and configure the district Planning Calendar [p. 206]
- Define the school’s Planning Calendar [p. 206]
- Adjust student enrollment [p. 208]
- Select a planning schedule [secondary school] [p. 208]

Configure student enrollment settings

It is the District Administrator’s responsibility to confirm that system-wide student enrollment settings are suitably configured.

TABLE 47: Permissions pertaining to setting up the YEP method

To	You need this permission	Set to	
Set projected grade levels	**District > Grade Levels**	Edit	
Set district preferences	**District > District Preferences**	Edit	
Set up the Geocode setup list	**District > Setup Lists**	Merge	
Define Geocode Maps	**District > Geocode Maps**	Edit	
Define projected school Maps	**District > Projected School Maps**	Edit	
Set cTools options	**District > District Preferences**	Edit	
Set up the elementary permanent record	**Transcript/Permanent Record > Elementary Permanent Record Setup**	Delete	

Ensure that students will be assigned to the appropriate school

As part of next-year preparation, the administrator must ensure that all students whom Chancery SMS should transfer to another school at year end are set to do so and that Chancery SMS will assign each student to the appropriate school. This involves the following tasks:

- Ensure that all students are assigned a home school [p. 203]
- Ensure students are assigned a geocode [Geocode Map method only] [p. 204]
- Ensure that grade points are set for the school [secondary schools] [p. 205]

Note: Since a District Administrator can complete most of these tasks for all students in the district, or a School Administrator at each school can complete the tasks for that school's students, we recommend that the district assign responsibility for these tasks.

TABLE 48: Permissions pertaining to working with student information

To	You need this permission	Set to	
Assign values to students	**Students > Assign values**	Yes	
Enroll students in a school	**Students > Enroll Student in School**	Yes	
Change a student's home school	**Students > Modify Home School**	Yes	

Ensure that all students are assigned a home school

Ensure that every student is assigned a home school. This is because during Year-End Processing [p. 208] Chancery SMS only moves cumulative GPAs to the historical transcript pages of students who have a home school.

You can do this if your role is:
School Administrator
District Administrator

To identify students who do not have a home school assigned:

1. Using the advanced student search [p. 38], create a search using the following criteria:
   - Field: "Home School (Active)"
   - Operator: "Equals"
   - Value: "N/A"
2. Click Search. Chancery SMS displays a list of students who do not have a home school assigned.
3. For each student, assign a home school [p. 204].
   - Or print the list of students for future reference (in the **Actions** menu, click **Print**).

You can do this if your role is:
School Administrator
District Administrator

To assign a student a home school:

1. View the student’s record. The Student Demographics page appears.
2. On the **Overview** tab, under **Student Summary**, for **Home School (Active)** select a school.
   - ⓘ Your role might restrict you to selecting your own school or “N/A”.
3. Click OK.

To assign a home school to one or more students:

1. Select one or more students in a list of students.
   - ⓘ For example, in a list of Student Search results [p. 38].
2. In the **Actions** menu, click **Assign > Values**. The Assign Values popup page appears.
3. For **Assign Field**, select “Home School (Active)”.
4. For **New Value**, select the home school to assign.
   - ⓘ Your role might restrict you to selecting your own school or “N/A”.
5. Click Add to List.
6. Click OK. A dialog appears asking you to confirm the changes.
7. Click OK. A dialog appears that confirms that Chancery SMS has made the changes.
8. Click OK. Chancery SMS assigns the home school to the selected students.
   - ⓘ If Chancery SMS fails to assign the home school to one or more of the selected students, it saves a list of the those students. You can view this list on the Quick Search page [p. 37].

Ensure students are assigned a geocode [Geocode Map method only]

On a system that employs the Geocode Map [p. 122] as its year-end transfer method, the administrator should ensure that every student is assigned a geocode. This enables Chancery SMS to transfer each student to the appropriate school. **Note**: On a system that employs Address Validation, Chancery SMS assigns geocodes automatically—the administrator cannot assign geocodes. Refer to the *Chancery SMS Address Validation Guide*.

You can do this if your role is:
School Administrator
District Administrator

To identify students who do not have a geocode assigned:

1. Using a detailed student search page [p. 38], create a search using the following criteria:
   - ⓘ Field: “Geocode (Planning)”
   - ⓘ Operator: “Equals”
   - ⓘ Value: “N/A”
2. Click Search. Chancery SMS displays a list of students who do not have a geocode assigned.
3. For each student, assign a geocode [p. 204].
   - ⓘ Or print the list of students for future reference (in the **Actions** menu, click **Print**).

You can do this if your role is:
School Administrator
District Administrator

To assign a student a geocode:

1. View the student’s record. The Student Demographics page appears.
2. On the **Address/Phone** tab, under **Addresses**, under **Geocodes**, for **Planning Calendar**, select a geocode.
3. Click OK.

You can do this if your role is:
School Administrator
District Administrator

To assign a geocode to one or more students:

1. Select one or more students in a list of students.
   - ⓘ For example, in a list of Student Search results [p. 38].
2. In the **Actions** menu, click **Assign > Values**. The Assign Values popup page appears.
3. For **Assign Field**, select “Geocode (Planning)”.
4. For **New Value**, select the geocode to assign.
5. Click Add to List.
6. Click OK. A dialog appears asking you to confirm the changes.
7. Click OK. A dialog appears that confirms that Chancery SMS has made the changes.
8. Click OK. Chancery SMS assigns the geocode to the selected students.
   - ⓘ If Chancery SMS fails to assign the geocode to one or more of the selected students, it saves a list of the those students. You can view this list on the Quick Search page [p. 37].

Ensure that grade points are set for the school [secondary schools]

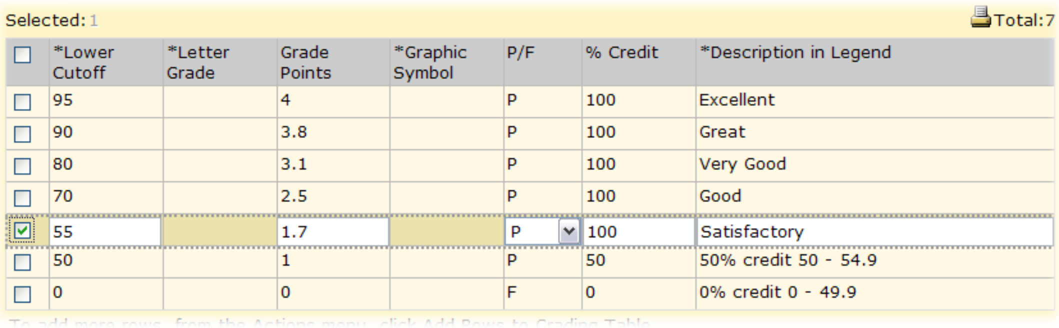
The School Administrator should ensure that grade points are set for the letter grade, numeric, and graphic symbol grading tables in use at the secondary school (refer to the *Chancery SMS Grading Setup Guide*). This is because during Year-End Processing [p. 208] Chancery SMS creates historical records for each student. To successfully create historical records for secondary students, each grade assigned to the student must have an associated grade point.

You can do this if your role is:
School Administrator

To ensure that grade points are set for the secondary school’s grading tables:

1. On the home page, in the control bar under **ADMIN**, click **Grading**.
2. Under **Step 2**, click **Grading Tables**. The Grading Table page appears.
3. Under **Grading Table Name**, click a grading table. The Edit Grading Table page appears.
4. Under **Numeric Grading Table**, view the **Grades** and associated **Grade Points** [Figure 109].
5. Click OK.
   - ⓘ To change or enter a grade point, select the grade and enter the new grade point in the table.

FIGURE 109: Changing a grade point



Selected: 1 Total:7

☐	*Lower Cutoff	*Letter Grade	Grade Points	*Graphic Symbol	P/F	% Credit	*Description in Legend
☐	95		4		P	100	Excellent
☐	90		3.8		P	100	Great
☐	80		3.1		P	100	Very Good
☐	70		2.5		P	100	Good
☑	55		1.7		P	100	Satisfactory
☐	50		1		P	50	50% credit 50 - 54.9
☐	0		0		F	0	0% credit 0 - 49.9

Override a student's year-end transfer mapping

During Year-End Processing [p. 208], Chancery SMS automatically transfers each student who has graduated from a school to another school by referring to the district's year-end transfer mapping. In special circumstances, a District or School Administrator can override this mapping for a particular student [see *Specifying a student's school of enrollment for the next year, p. 123*].

Create and configure the district Planning Calendar

Since a school's Planning Calendar [p. 206] is derived from that of the district, a District Administrator must define the Planning Calendar for the next year before each school can begin work.

-

TABLE 49: Permissions pertaining to district Planning Calendar creation

To	You need this permission	Set to	
Define the district Planning Calendar	**District > Define District Calendar**	Yes	

Define the school's Planning Calendar

A school's Planning Calendar [p. 136] is the foundation of Next-Year Preparation. A School Administrator derives a school's Planning Calendar from that of the district, thus the District Administrator must first define the district's Planning Calendar [p. 206]. To create the school Planning Calendar, refer to School calendar setup [p. 133].

Defining a school's Planning Calendar involves the following tasks:

- Create a school Planning Calendar [p. 207]
- Confirm the scheduling method [p. 207]
- Define attendance reporting periods [p. 207]
- Define calendar day exceptions [p. 207]
- Adjust day types [p. 207]
- Adjust homerooms [p. 207]
- Adjust grade levels in use [p. 208]
- Adjust buildings and rooms [p. 208]

TABLE 50: Permissions pertaining to school Planning Calendar definition

To	You need this permission	Set to	
Define school Planning Calendars	**School Setup > Define School Calendar**	Yes	
Create user roles	**Users > User Roles**	Delete	
Edit user accounts	**Users > User Accounts**	Delete	
Define calendar day exceptions	**School Setup > Calendar Day Exceptions**	Delete	
Review and modify day types	**School Setup > Day Types Setup List**	Yes	
Update homerooms	**School Setup > Homerooms**	Delete	
Modify grade levels	**School Setup > Grade Level Setup List**	Edit	
Modify buildings	**Facilities Management > Buildings**	Edit	
Modify rooms	**Facilities Management > Rooms**	Edit	
Create and change planning schedules (secondary schools only)	**School Setup > Change Planning Schedule**	Yes	

Create a school Planning Calendar

A School Administrator creates the school's Planning Calendar [p. 136] based on that of the district. To create a school's Planning Calendar, refer to School calendar setup [p. 133].

Confirm the scheduling method

Two general scheduling methods are available: Elementary and Secondary (refer to the *Chancery SMS Scheduling Guide*). Typically, a school uses the same scheduling method each year and thus there is no need to change it when creating a school's Planning Calendar. If, however, a change in the scheduling method is needed, the School Administrator should consider the following:

- A school that employs elementary scheduling for the Active Calendar can change to secondary scheduling in the Planning Calendar.

  When the School Administrator makes this change, subjects currently assigned to the school in the Planning Calendar are unassigned and secondary classes cannot be scheduled until the District Administrator assigns courses to the school.
- A school that employs secondary scheduling for the Active Calendar cannot change to elementary scheduling in the Planning Calendar.

Define attendance reporting periods

The School Administrator needs to define the Planning Calendar's attendance reporting periods [p. 147]. By default, the Planning Calendar has a single reporting period that spans that calendar's entire date range. (Chancery SMS does not copy the Active Calendar's reporting periods to the Planning Calendar since attendance reporting periods are closely tied to specific days of the year.).

Define calendar day exceptions

The School Administrator needs to define the Planning Calendar's exception days [p. 141]. By default, the Planning Calendar has no exception days. (Chancery SMS does not copy the Active Calendar's exception days to the Planning Calendar since these days are closely tied to specific days of the year.)

Adjust day types

The School Administrator needs to adjust the Planning Calendar's day types [p. 139]. While Chancery SMS copies the Active Calendar's day types to the Planning Calendar, the coming year may require changes or additions. These changes do not affect the Active Calendar's day types.

Note: During Year-End Processing [p. 208], when calculating Days Possible for a student in a multi-track environment, Chancery SMS does not include days of the type *off-track*. An off-track days is a day for which system users cannot take attendance.

Adjust homerooms

The School Administrator needs to adjust the Planning Calendar's homerooms [p. 161]. While Chancery SMS copies the Active Calendar's homerooms to the Planning Calendar, the coming year may require changes or additions. These changes do not affect the Active Calendar's homerooms.

Adjust grade levels in use

The School Administrator might need to adjust the selection of grade levels that are used at the school [p. 158]. (The School Administrator selects grade levels from those set up by the District Administrator [p. 195].) Any changes the School Administrator makes to the grade levels used in the Planning Calendar also affect the Active Calendar.

Adjust buildings and rooms

The School Administrator might need to adjust the buildings and rooms that are available to be used in the Planning Calendar [p. 159]. Any changes the School Administrator makes to the buildings and rooms also affect the Active Calendar.

Adjust student enrollment

With the Planning Calendar in place [p. 206], the School Administrator can enroll students in the school [p. 118] for the next year. Since the date of enrollment determines whether the student is active in the current school year or will be active in the next school year, the School Administrator can enroll a student at any time in either the Planning or Active Calendar.

The School Administrator can also review the projected enrollment of any student [p. 120] and adjust it as necessary. To identify where Chancery SMS will enroll a student during next-year processing, refer to the **Planning District Calendar** panel of the **Personal Info** tab of the student's Demographics record [p. 55].

Select a planning schedule [secondary school]

Where a secondary school has more than one planning schedule, the School Administrator must specify the planning schedule that is to be the active schedule for the upcoming school year. For more information, refer to the *Chancery SMS Scheduling Guide*.

Year-End Processing

During Year-End Processing, Chancery SMS stores the information in the district and schools' Active Calendars in a Historical Database and then converts district and schools' Planning Calendar information into Active Calendar information. To close off the school year, School and District Administrators must update student information and system properties in preparation for running Year-End Processing [p. 213] by performing the following tasks:

- Preparing for Year-End Processing [school] [p. 208]
- Preparing for Year-End Processing [district] [p. 213]

Note: The ability to run Year-End Processing is not available in all versions of Chancery SMS.

Preparing for Year-End Processing [school]

Before the District Administrator can run Year-End Processing [p. 208], School Administrators must ensure the data for their schools is suitably configured in their Active Calendars. This involves the following tasks:

- Update student information [p. 209]
- Declare YEP preparation complete [p. 212]

Update student information

Just prior to Year-End Processing [p. 208] is an opportune moment for the School Administrator to update the information for each of the school's students. Indeed some changes are critical to this process, such as promotion or retention. The complete list of tasks is as follows:

- Set the students' promotion status [p. 209]
- Calculate grades, credits, and GPAs [secondary school] [p. 211]
- Calculate honor roll [secondary school] [p. 211]
- Calculate class rank [secondary school] [p. 211]
- Calculate daily attendance codes [p. 212]
- Run reports [p. 212]

TABLE 51: Permissions pertaining to updating student information

To	You need this permission	Set to	
Assign values to multiple students	**Students > Assign Values**	Yes	
Promote and graduate students	**District > Promote and Graduate Pending Students**	Yes	
Calculate grades	**Grading > Run Grade, Credit & GPA Calculations**	Yes	
Override calculated grades	**Grading > Override Calculated Grades**	Yes	
Calculated credits	**Grading > Run Grade, Credit & GPA Calculations**	Yes	
Override calculated credits	**Grading > Override/Recalculate Earned Credits**	Yes	
Calculated class ranks	**Grading > Run Class Ranks**	Yes	
Override calculated class ranks	**Grading > Override Student Ranks**	Yes	
Calculated daily attendance	**Attendance > Daily Attendance**	Yes	
Override calculated daily attendance values	**Attendance > Daily Attendance Override**	Yes	
Run reports	**Reporting > <Report>**	Yes	

Set the students' promotion status

In preparation for Year-End Processing [p. 208], the School Administrator must set the *promotion status* of the district's students. This enables Chancery SMS to, during Year-End Processing, adjust each student's enrollment appropriately according to circumstances. A student's promotion status can be one of the following:

- **Promoted**: During Year-End Processing, Chancery SMS promotes this student to the next grade, graduates the student from the school (and likely transfers the student to another), or graduates the student from the district.
- **Retained**: During Year-End Processing, Chancery SMS keeps this student in the same grade. In some cases, Chancery SMS transfers the student to the same grade in another school.

Setting students' promotion status involves two steps:

1. Adjusting the promotion status of particular students [p. 209].
2. Running the Student Graduation and Promotion process [p. 210].

Adjusting the promotion status of particular students

Prior to the School Administrator running the Student Graduation and Promotion process [p. 210], a student's promotion status can be either of the following:

- **Pending**: This is the default status for every student. When the School Administrator runs the Student Graduation and Promotion process [p. 210], Chancery SMS converts this status to "Promoted".
- **Retained**: If necessary, the School Administrator can change a student's promotion status to "Retained". When the School Administrator runs the Student Graduation and Promotion process [p. 210], Chancery SMS keeps this status as "Retained". This status is school-specific; if a student is enrolled in more than one school, that student can have a different promotion status at each school.

For a student whose promotion status can't be determined until after Year-End Processing**Year-End Processing [p. 208]** (such as a student taking a make-up course in summer school), the School Administrator can adjust that student's enrollment in the next year's Active Calendar.

You can do this if your role is:
School Administrator

To set a student's promotion status to "Retained":

1 In the Active Calendar, locate and view the student's record [p. 36].

ⓘ Or, on the Year-End Processing page, click **Retain Students**.

2 On the Student Demographics page [p. 51], click the **School Specific** tab.

3 For **Student promotion status**, select "Retained".

4 Click OK.

You can do this if your role is:
School Administrator

To set the promotion status of more than one student:

1 In the Active Calendar, locate and view the students' records [p. 36].

ⓘ Or, on the Year-End Processing page, click **Retain Students**.

2 On the Student Search page, select the students.

3 In the **Actions** menu, click **Assign > Values**. The Assign Values dialog appears.

4 For **Assign Field**, select "Student promotion status".

5 For **New Value**, select "Retained".

6 Click Add to List. The "Retained" statement appears in **Fields to Assign**.

7 Click OK.

ⓘ If, for some reason, Chancery SMS is unable to assign the value to a student, Chancery SMS lists that student in a saved list [p. 43].

Running the Student Graduation and Promotion process

To ensure that Chancery SMS makes the appropriate adjustments to student enrollment during Year-End Processing [p. 208], the School Administrator has Chancery SMS run a process that sets each student's promotion status. In this process, Chancery SMS does the following:

- For a student whose promotion status is "Pending", changes the status to "Promoted".
- For a student in the school graduation grade at his or her active school whose promotion status is "Pending", changes that status to "Promoted" at all schools in which the student is enrolled, changes the "has graduated" status to "Y", and sets the student's graduation year to the current year.
- For a student in the school graduation grade at a school that is not his or her active school whose promotion status is "Pending", changes that status to "Promoted", changes the "has graduated" status to "Y", and sets the student's graduation year to the current year.
- For a student whose promotion status is "Retained", keeps that status as "Retained".

You can do this if your role is:
School Administrator

To run the Student Graduation and Promotion process:

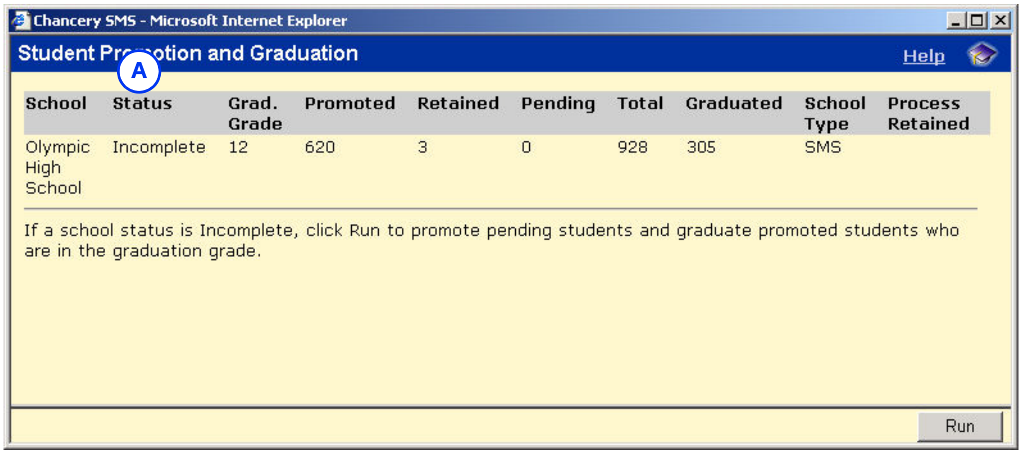
1 In the Active Calendar, in the control bar, under **ADMIN**, click **District Setup**. The District Setup page appears.

2 Under **Year-End Processing**, click **Year-End Processing**. The Year-End Processing page appears.

3 Under **Step 2**, click **Promote and Graduate Students...**. The Student Promotion and Graduation popup page appears [Figure 110].

4 Click Run. Chancery SMS processes all students at the school and in the **Status** column indicates that the process is "Completed".

FIGURE 110 Student Promotion and Graduation dialog:


Chancery SMS - Microsoft Internet Explorer
Student Promotion and Graduation
Help
A
Run

School	Status	Grad. Grade	Promoted	Retained	Pending	Total	Graduated	School Type	Process Retained
Olympic High School	Incomplete	12	620	3	0	928	305	SMS	

If a school status is Incomplete, click Run to promote pending students and graduate promoted students who are in the graduation grade.

A **Status**: "Completed" indicates that an administrator has run this process.

Calculate grades, credits, and GPAs [secondary school]

To ensure that Chancery SMS transfers historical information to students' transcripts correctly during Year-End Processing [p. 208], the School Administrator at a secondary school must ensure that every student's calculated grades, credits, and GPAs (both weighted and unweighted) are up-to-date in the Active Calendar. For detailed information on working with grading calculations, refer to the *Chancery SMS Grading Setup Guide*.

Calculate honor roll [secondary school]

To ensure that Chancery SMS transfers historical information to the students' transcripts correctly during Year-End Processing [p. 208], the School Administrator at a secondary school must ensure that the school's honor roll is up-to-date in the Active Calendar. For detailed information on honor rolls, refer to the *Chancery SMS Grading Setup Guide*.

Calculate class rank [secondary school]

To ensure that Chancery SMS transfers historical information to the students' historical transcript pages accurately during Year-End Processing [p. 208], the School Administrator at a secondary school must ensure that the school's class ranks are up to date in the Active Calendar. The calculation is based on students' cumulative GPAs for the year. If the district has set up GPA/class rank reporting terms, the administrator can calculate class ranks for each term (for further information, refer to the *Setting up GPA/Class Rank Reporting Terms Technical Bulletin*). Cumulative and term-based calculations are stored separately; one does not override the other. For detailed information on class ranks, refer to the *Chancery SMS Grading Setup Guide*.

Calculate daily attendance codes

To ensure that Chancery SMS transfers historical information to the students' transcripts accurately during Year-End Processing [p. 208], the School Administrator must ensure that all students' daily attendance codes [p. 125] are up to date in the Active Calendar. This is because during Year-End Processing Chancery SMS deletes attendance calculation rules [p. 150], which are based on periods and class schedules that may not be relevant in the next school year. To calculate students' daily attendance codes, refer to [p. 125].

Run reports

Prior to Year-End Processing [p. 208], we recommend that the School Administrator run reports [p. 96] on information that is not copied from the Planning Calendar to the Active Calendar [p. 137], which includes attendance reports and report cards.

Declare YEP preparation complete

For the District Administrator to initiate Year-End Processing [p. 208], he or she needs to know that every school has completed the necessary preparations. The School Administrator declares to the District Administrator that a school's preparations for Year-End Processing are complete by filling out a checklist.

You can do this if your role is:
School Administrator

To fill out the Year-End Processing checklist:

1. In the control bar, under **ADMIN**, click **District Setup**. The District Setup page appears.
2. Under **Year-End Processing**, click **Year-End Processing**. The Year-End Processing page appears.
   - The Year-End Processing checklist for a secondary school is longer than that of an elementary school.
3. Under **Step 3**, select the tasks that are complete. These tasks might include:
   - **Grade calculations** [p. 211] [secondary schools]
   - **Credit calculations** [p. 211] [secondary schools]
   - **Cumulative GPA calculations (weighted/unweighted)** [p. 211] [secondary schools]
   - **Current year GPA calculations** [p. 211] [secondary schools]
   - **Class rank calculations** [p. 211] [secondary schools]
   - **Attendance calculations** [p. 212]
   - **Honor roll calculations** [p. 211] [secondary schools]
   - **Reports** [p. 212]
4. Under **Step 4**, verify that **Status** of any additional Year-End Processing requirements is "OK". Such requirements might include:
   - "Student promotion and graduation" [p. 209]
   - "Planning calendar is required" [p. 136]
   - "Planning schedule must be selected" [p. 208]
5. Click OK.

Preparing for Year-End Processing [district]

The District Administrator must make final preparations to run Year-End Processing.

Running Chancery SMS Year-End Processing

Note: The ability to run Year-End Processing is not available in all versions of Chancery SMS.

When the District Administrator starts Year-End Processing [p. 208], Chancery SMS runs a series of pre-programmed tasks which include large-scale changes to the information stored in the system. The District Administrator cannot stop this process nor undo the results once the process is complete.

TABLE 52: Permissions pertaining to performing Year-End Processing

To	You need this permission	Set to	
Delete schools	**School Specific Pages > Delete Schools**	Yes	
Run Year-End Processing	**District > Perform Year-End Processing**	Yes	

Post-processing tasks

As soon as Chancery SMS completes Year-End Processing [p. 208], the District Administrator and School Administrators should verify and consolidate the changes. This includes the following tasks:

- Verify each school's Active Calendar [p. 213]
- Adjust grading period dates [p. 213]
- Double check elementary subject framework and report cards [p. 213]

Verify each school's Active Calendar

When Chancery SMS completes Year-End Processing [p. 208], School Administrators should verify that they can use the (new) Active Calendar, by testing aspects of the system such as scheduling, courses, and attendance.

Adjust grading period dates

When Year-End Processing [p. 208] is complete, School Administrators need to update the grading period start and end dates (refer to the *Chancery SMS Grading Setup Guide*). Also, for secondary schools, confirm that all grading periods are correct for individual courses. During Year-End Processing, Chancery SMS attempts to copy the grading period set assigned to a course, but may not be able to in some cases. Course grade items are available to secondary schools only once the grading period end dates are correct.

Double check elementary subject framework and report cards

When Year-End Processing [p. 208] is complete, elementary School Administrators should check the subject framework and report card setup for errors before allowing teachers to enter grades. For further information, refer to the *Chancery SMS Scheduling Guide* and the *Chancery SMS Grading Setup Guide*.

Year-end follow-up

After Chancery SMS has completed Year-End Processing [p. 208] and changes have been verified, [p. 208], the District Administrator and School Administrators need to complete the following tasks:

- GPA adjustments after Year-End Processing [p. 214]
- Resynchronize SIF after Year-End Processing [p. 214]
- Connecting to the Historical Database [p. 214]

TABLE 53: Permission pertaining to year-end follow-up

To	You need this permission	Set to	
View audit logs	**School Setup > View Audit Log**	Yes	
Update grading period end dates	**School Setup > Grading Period Sets**	Delete	
Verify the subject framework and course catalog	**School Setup > Subject Framework/Course Catalog**	Delete	

GPA adjustments after Year-End Processing

The School Administrator must manually update any secondary student's summary cumulative GPA (on the historical transcript pages) where:

- An administrator enters a grade for that student after Year-End Processing [p. 208], such as for a summer school course.
- An administrator changes a grade or credit on that student's historical record.

Resynchronize SIF after Year-End Processing

For any system running the Schools Interoperability Framework (SIF), the District Administrator must re synchronize the data after Year-End Processing [p. 208]. (For information about SIF, refer to the *Chancery SMS SIF Agent Guide*.)

Connecting to the Historical Database

After Year-End Processing [p. 208], the Chancery SMS system works with the Active Database. It has stored the old Active Database as the Historical Database in the location specified by the District Administrator in an earlier step. To enable administrators to adjust historical information and run reports [p. 96] on the Historical Database, the District Administrator must set up Chancery SMS to connect to the Historical Database.

10 Customizing a system

Chancery SMS *cTools* enables the District Administrator, technical analyst, or developer to customize a Chancery SMS system to meet the unique needs of a school district and to meet state reporting requirements. The administrator can add to the structure of a Chancery SMS system and create new custom pages that capture unique district and school setup information, as well as information about staff, programs, academic plans, demographics, health, and tests.

Appendices

- Chancery SMS Report Package reports [p. 218]
- Chancery SMS built-in reports [p. 269]
- Daily attendance code calculation rules planning worksheets [p. 287]

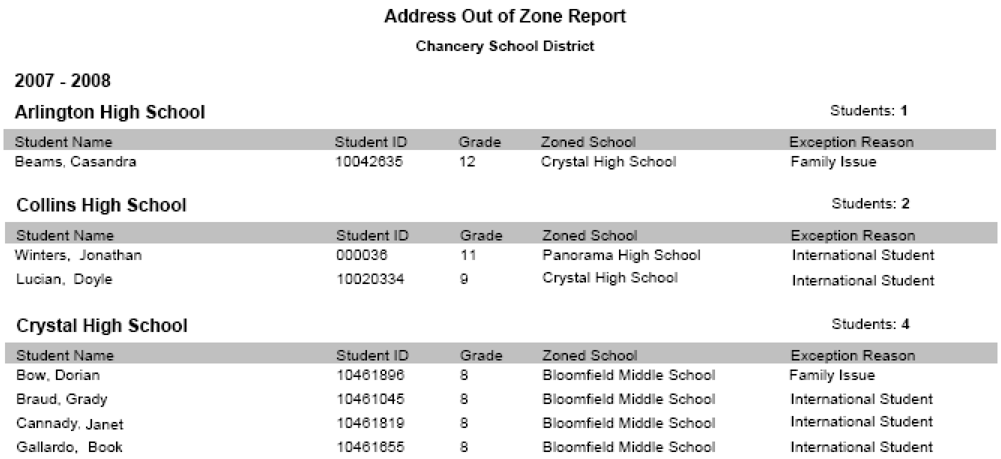
Chancery SMS Report Package reports

Administration Reports

Address Out of Zone

In a district using Address Validation, use this report to identify students registered in out-of-zone schools. The report displays the student's name, Student ID, Grade, and Zoned School, as well as the Exception Reason [Figure 111].

FIGURE 111: Address Out of Zone Report results sample



Address Out of Zone Report

Chancery School District

2007 - 2008

Arlington High School Students: 1

Student Name	Student ID	Grade	Zoned School	Exception Reason
Beams, Casandra	10042635	12	Crystal High School	Family Issue

Collins High School Students: 2

Student Name	Student ID	Grade	Zoned School	Exception Reason
Winters, Jonathan	000036	11	Panorama High School	International Student
Lucian, Doyle	10020334	9	Crystal High School	International Student

Crystal High School Students: 4

Student Name	Student ID	Grade	Zoned School	Exception Reason
Bow, Dorian	10461896	8	Bloomfield Middle School	Family Issue
Braud, Grady	10461045	8	Bloomfield Middle School	International Student
Cannady, Janet	10461819	8	Bloomfield Middle School	International Student
Gallardo, Book	10461655	8	Bloomfield Middle School	International Student

Report options include:

- **Hide Inactive Students**

Chancery SMS List of Reports

Refer to Managing reports [p. 101]. **Note**: To run any report in the Chancery SMS Report Package, you must upload the Chancery SMS List of Reports. This report contains a shared stored procedure used by all report package reports.

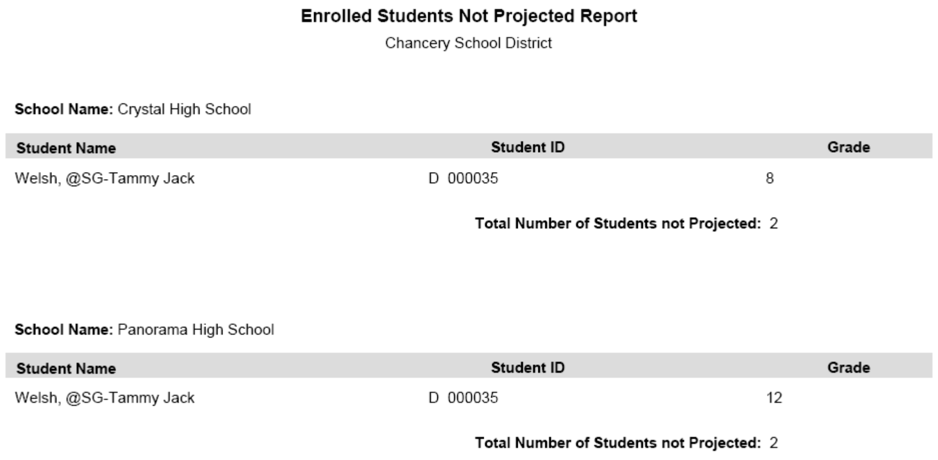
Enrolled Students Not Projected

This report displays students who are enrolled in a district school but for whom no enrollment is projected [p. 120] for the next year, that is, the system does not specify a district school to which Chancery SMS will transfer the student during Year-End Processing [p. 208]. Enrolled students are those who set to be retained or promoted, are active on the last day of a school's active calendar, but are not in the district's graduating grade level and are not subject to withdrawal after the last day of the school's active calendar [p. 118]. The report results will also include the following:

- A student who has requested a particular school but does not have a district approval (in a district where approval is required).
- A student who has a pending or promoted status, is in a non-graduating grade level, and is a participant in a single program session [p. 76] at a school and that program session is set to not roll over and the program session is set to withdraw the student.

The report displays the student's name, Student ID, and Grade [Figure 112]. It is useful for a District Administrator prior to running Year-End Processing. A School Administrator can run the report for his or her school. It enables the administrator to ensure that every student has a projected school. A link to this report appears on the District-Level Checklist section of the Year-End Processing Pre-Check page.

FIGURE 112: Enrolled Students Not Projected sample results



Enrolled Students Not Projected Report

Chancery School District

School Name: Crystal High School

Student Name	Student ID	Grade
Welsh, @SG-Tammy Jack	D 000035	8

Total Number of Students not Projected: 2

School Name: Panorama High School

Student Name	Student ID	Grade
Welsh, @SG-Tammy Jack	D 000035	12

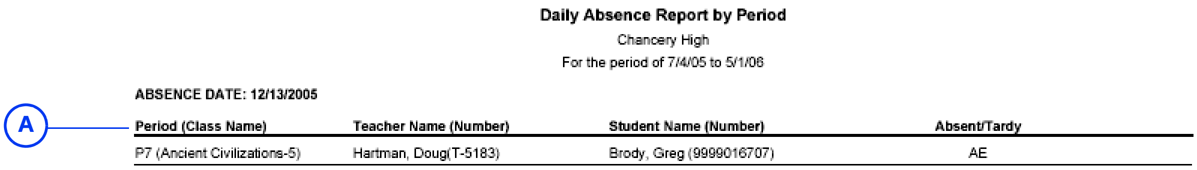
Total Number of Students not Projected: 2

Attendance Reports

Daily Absence by Period

For schools using secondary scheduling, this report lists all students for a given date range who have a non-present attendance code [Figure 113].

FIGURE 113: Daily Absence by Period report sample results



Daily Absence Report by Period

Chancery High

For the period of 7/4/05 to 5/1/06

ABSENCE DATE: 12/13/2005

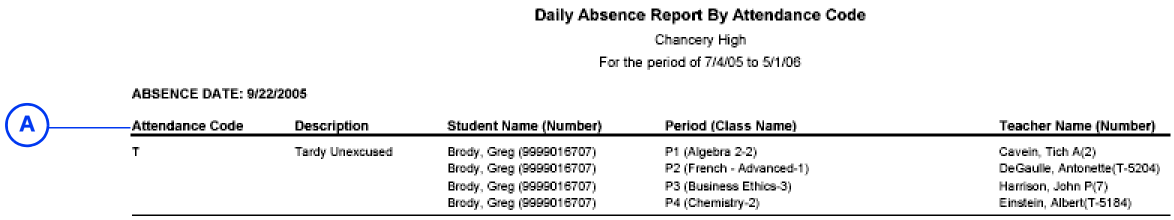
Period (Class Name)	Teacher Name (Number)	Student Name (Number)	Absent/Tardy
P7 (Ancient Civilizations-5)	Hartman, Doug(T-5183)	Brody, Greg (9999016707)	AE

A **Period (Class Name)**: The results are listed in order of period.

Daily Absence by Attendance Code

For schools using secondary scheduling, this report lists all students for a specified date range who have a non-present attendance code [Figure 114].

FIGURE 114: Daily Absence by Attendance Code report sample results



Daily Absence Report By Attendance Code

Chancery High

For the period of 7/4/05 to 5/1/06

ABSENCE DATE: 9/22/2005

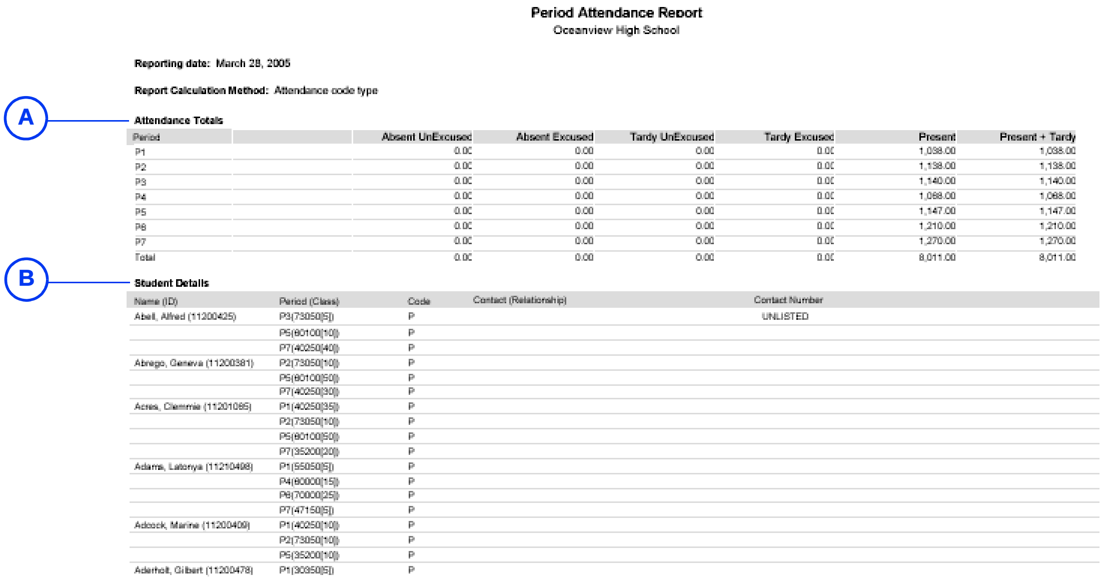
Attendance Code	Description	Student Name (Number)	Period (Class Name)	Teacher Name (Number)
T	Tardy Unexcused	Brody, Greg (9999016707) Brody, Greg (9999016707) Brody, Greg (9999016707) Brody, Greg (9999016707)	P1 (Algebra 2-2) P2 (French - Advanced-1) P3 (Business Ethics-3) P4 (Chemistry-2)	Cavein, Tich A(2) DeGaulle, Antonette(T-5204) Harrison, John P(7) Einstein, Albert(T-5184)

A **Attendance Code**: The results are grouped by code.

Period Attendance

This report summarizes student attendance for each period broken down by attendance category (present, absent, and tardy) [Figure 115]. Typically, this report is used to generate a list of students who are absent unexcused and subject to follow-up action such as a call to the home. Also, a School Administrator can use the report to monitor school-wide attendance.

FIGURE 115: Period Attendance report sample results



Period Attendance Report
Oceanview High School

Reporting date: March 28, 2005

Report Calculation Method: Attendance code type

Attendance Totals

Period		Absent UnExcused	Absent Excused	Tardy UnExcused	Tardy Excused	Present	Present + Tardy
P1		0.00	0.00	0.00	0.00	1,038.00	1,038.00
P2		0.00	0.00	0.00	0.00	1,138.00	1,138.00
P3		0.00	0.00	0.00	0.00	1,140.00	1,140.00
P4		0.00	0.00	0.00	0.00	1,088.00	1,088.00
P5		0.00	0.00	0.00	0.00	1,147.00	1,147.00
P6		0.00	0.00	0.00	0.00	1,210.00	1,210.00
P7		0.00	0.00	0.00	0.00	1,270.00	1,270.00
Total		0.00	0.00	0.00	0.00	8,011.00	8,011.00

Student Details

Name (ID)	Period (Class)	Code	Contact (Relationship)	Contact Number
Abell, Alfred (11200425)	P3(73050[5])	P		UNLISTED
	P5(80100[10])	P		
	P7(40250[40])	P		
Abrego, Geneva (11200381)	P2(73050[10])	P		
	P5(80100[50])	P		
	P7(40250[30])	P		
Acres, Clemmie (11201085)	P1(40250[35])	P		
	P2(73050[10])	P		
	P5(80100[50])	P		
	P7(35200[20])	P		
Adams, Latonya (11210498)	P1(55050[5])	P		
	P4(80000[15])	P		
	P6(70000[25])	P		
	P7(47150[5])	P		
Adcock, Marine (11200409)	P1(40250[10])	P		
	P2(73050[10])	P		
	P5(35200[10])	P		
Aderholt, Gilbert (11200478)	P1(30350[5])	P		

A **Attendance Totals**: Presents attendance broken down by category.

B **Student Details**. Displays a list of students who have been assigned a particular attendance code for the selected periods.

Report options include:

- **Calculation Method**: Specifies how totals are calculated for the **Attendance Totals** section and how attendance codes are calculated in the **Student Details** section [Figure 115].

  Attendance code type calculation is based on the Attendance Type field for the attendance code. If the type is “Present”, the present total is incremented. If the type is “Absent”, the absent total is incremented. If the type is “Tardy”, the tardy total is incremented. If the type is “Early Dismissal”, the early dismissed total is incremented.

  Attendance code value calculation is based on the value assigned in the Attendance Value field for the attendance code. Attendance totals are calculated by summing the attendance value for each attendance code assigned to the student.

- **Report Display Options:**

  Print Attendance Details: Select this check box to have the report generate a **Student Details** section [Figure 115].

  Print Contact Information: Select this check box to have the Student Details section show contact information for all students in each attendance code. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

  Print Attendance Code Legend: Select this check box to have the Student Details section include a description of the attendance codes. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

Print Attendance Comments: Select this check box to have the Student Details section include any comments entered by the student's teacher. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

Print Office Attendance Comments: Select this check box to have the Student Details section include any comments entered by the school office. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

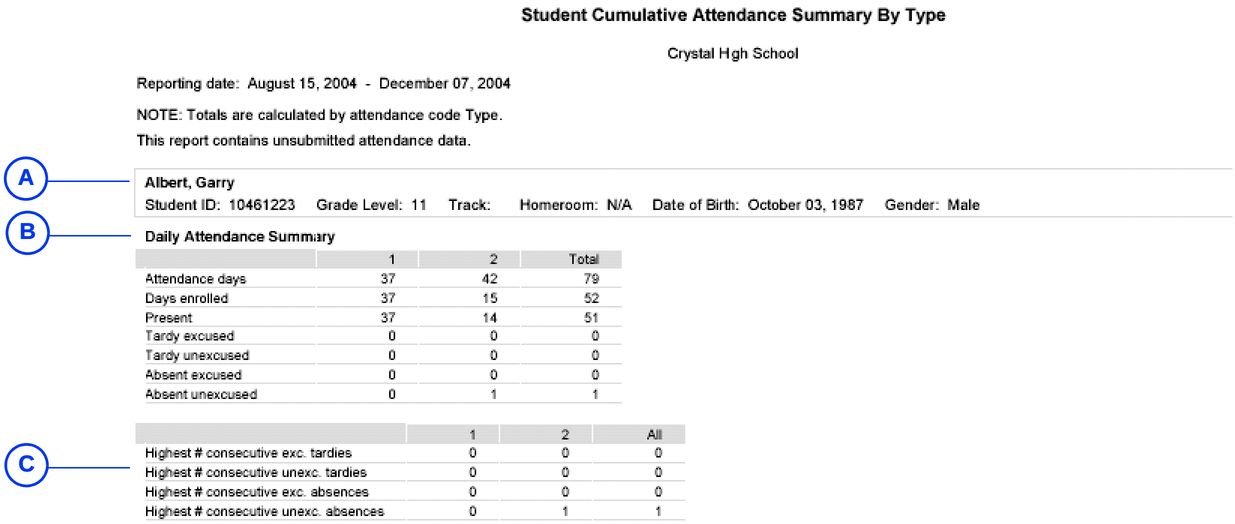
Print Unlisted Phone Numbers: Select this check box to have the Student Details section include contact phone numbers flagged as "unlisted". **Note:** This option applies only if the **Print Attendance Details** check box is selected.

- **Sort Order**: Specifies the Student Details section's listing order.

Student Cumulative Attendance

This report presents the entire personal attendance record in a specified date range for one or more students, student by student. Attendance totals can be calculated based on attendance code values or attendance code types.

FIGURE **116**: Student Cumulative Attendance Summary By Type report sample results



Student Cumulative Attendance Summary By Type

Crystal Hgh School

Reporting date: August 15, 2004 - December 07, 2004

NOTE: Totals are calculated by attendance code Type.

This report contains unsubmitted attendance data.

Albert, Garry

Student ID: 10461223 Grade Level: 11 Track: Homeroom: N/A Date of Birth: October 03, 1987 Gender: Male

Daily Attendance Summary

	1	2	Total
Attendance days	37	42	79
Days enrolled	37	15	52
Present	37	14	51
Tardy excused	0	0	0
Tardy unexcused	0	0	0
Absent excused	0	0	0
Absent unexcused	0	1	1

	1	2	All
Highest # consecutive exc. tardies	0	0	0
Highest # consecutive unexc. tardies	0	0	0
Highest # consecutive exc. absences	0	0	0
Highest # consecutive unexc. absences	0	1	1

A Student

B **Daily Attendance Summary**: Summarizes the student's attendance codes during the specified date range.

C **Class Summary**: Summarizes the student's attendance codes by class in which the student was enrolled.

Note: The optional **Attendance Exception Details** section is not shown. This section summarizes the student's attendance on exception days.

Report options include:

- **Calculation Method**: Specifies how totals are calculated for the **Attendance Totals** section and how attendance codes are calculated in the **Student Details** section [Figure 115].

  Attendance code type calculation is based on the Attendance Type field for the attendance code. If the type is "Present", the present total is incremented. If the type is "Absent", the absent total is incremented. If the type is "Tardy", the tardy total is incremented. If the type is "Early Dismissal", the early dismissed total is incremented.

  Attendance code value calculation is based on the value assigned in the Attendance Value field for the attendance code. Attendance totals are calculated by summing the attendance value for each attendance code assigned to the student.

- **Report Display Options:**

  Start New Page for Each Student: Select this check box to have each student's information start on a new page [Figure 115].

  Print Class Attendance Summary: For schools using class attendance, select this check box to include a **Class Summary** section, which displays attendance totals based on period attendance codes rather than daily attendance codes [Figure 115]. If a student transferred classes during the selected period, only the class transferred into (not the class transferred from) is included in the report.

  Print Attendance Details: Select this check box to include an **Attendance Exception Details** section.

  Print Attendance Code Legend: Select this check box to include in the **Student Details** section a description of the attendance codes. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

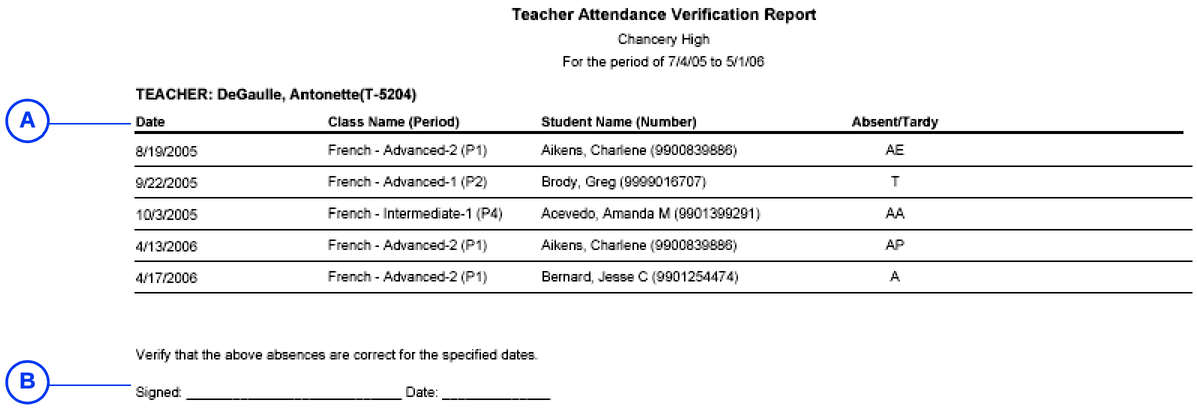
  Print Teacher Attendance Comment: Select this check box to include in the **Student Details** section any comments entered by the student's teacher. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

  Print Office/Administrator Attendance Comment: Select this check box to include in the **Student Details** section any comments entered by the school office. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

Teacher Attendance Verification

For a specific Teacher, this report lists all students assigned non-present attendance codes during a specified date range [Figure 117].

FIGURE 117: Teacher Attendance Verification Report sample results



Teacher Attendance Verification Report

Chancery High

For the period of 7/4/05 to 5/1/06

TEACHER: DeGaulle, Antonette(T-5204)

Date	Class Name (Period)	Student Name (Number)	Absent/Tardy
8/19/2005	French - Advanced-2 (P1)	Aikens, Charlene (9900839886)	AE
9/22/2005	French - Advanced-1 (P2)	Brody, Greg (9999016707)	T
10/3/2005	French - Intermediate-1 (P4)	Acevedo, Amanda M (9901399291)	AA
4/13/2006	French - Advanced-2 (P1)	Aikens, Charlene (9900839886)	AP
4/17/2006	French - Advanced-2 (P1)	Bernard, Jesse C (9901254474)	A

Verify that the above absences are correct for the specified dates.

Signed: ________________________ Date: ____________

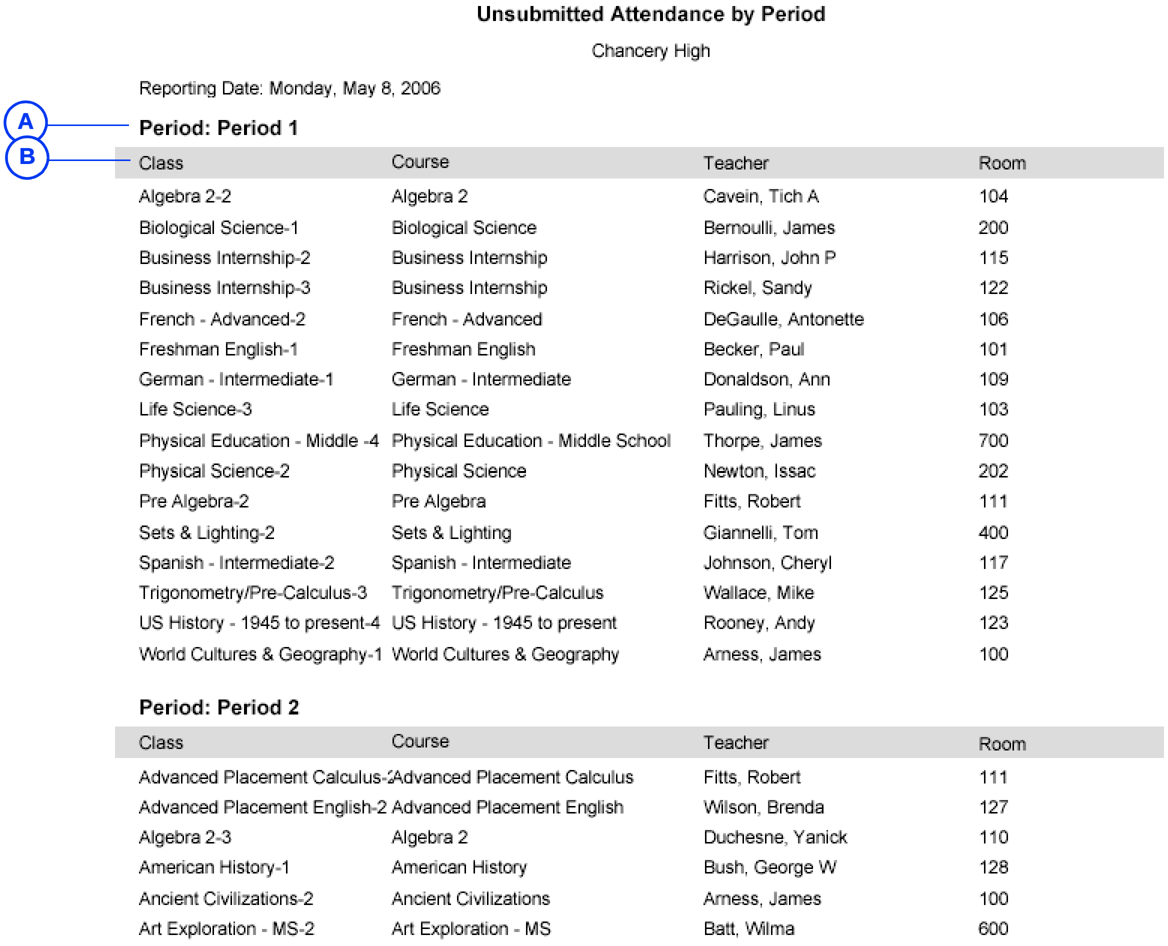
A Absences: Listed in order of date, from the oldest to the most recent.

B Signature line: Enables the Teacher to confirm the report's accuracy.

Unsubmitted Attendance by Period

This report lists all classes on a specific date for which the "Submit for teacher" check box is not selected [Figure 118].

FIGURE 118: Unsubmitted Attendance by Period report sample results



Unsubmitted Attendance by Period

Chancery High

Reporting Date: Monday, May 8, 2006

Period: Period 1

Class	Course	Teacher	Room
Algebra 2-2	Algebra 2	Cavein, Tich A	104
Biological Science-1	Biological Science	Bernoulli, James	200
Business Internship-2	Business Internship	Harrison, John P	115
Business Internship-3	Business Internship	Rickel, Sandy	122
French - Advanced-2	French - Advanced	DeGaulle, Antonette	106
Freshman English-1	Freshman English	Becker, Paul	101
German - Intermediate-1	German - Intermediate	Donaldson, Ann	109
Life Science-3	Life Science	Pauling, Linus	103
Physical Education - Middle -4	Physical Education - Middle School	Thorpe, James	700
Physical Science-2	Physical Science	Newton, Issac	202
Pre Algebra-2	Pre Algebra	Fitts, Robert	111
Sets & Lighting-2	Sets & Lighting	Giannelli, Tom	400
Spanish - Intermediate-2	Spanish - Intermediate	Johnson, Cheryl	117
Trigonometry/Pre-Calculus-3	Trigonometry/Pre-Calculus	Wallace, Mike	125
US History - 1945 to present-4	US History - 1945 to present	Rooney, Andy	123
World Cultures & Geography-1	World Cultures & Geography	Arness, James	100

Period: Period 2

Class	Course	Teacher	Room
Advanced Placement Calculus-2	Advanced Placement Calculus	Fitts, Robert	111
Advanced Placement English-2	Advanced Placement English	Wilson, Brenda	127
Algebra 2-3	Algebra 2	Duchesne, Yanick	110
American History-1	American History	Bush, George W	128
Ancient Civilizations-2	Ancient Civilizations	Arness, James	100
Art Exploration - MS-2	Art Exploration - MS	Batt, Wilma	600

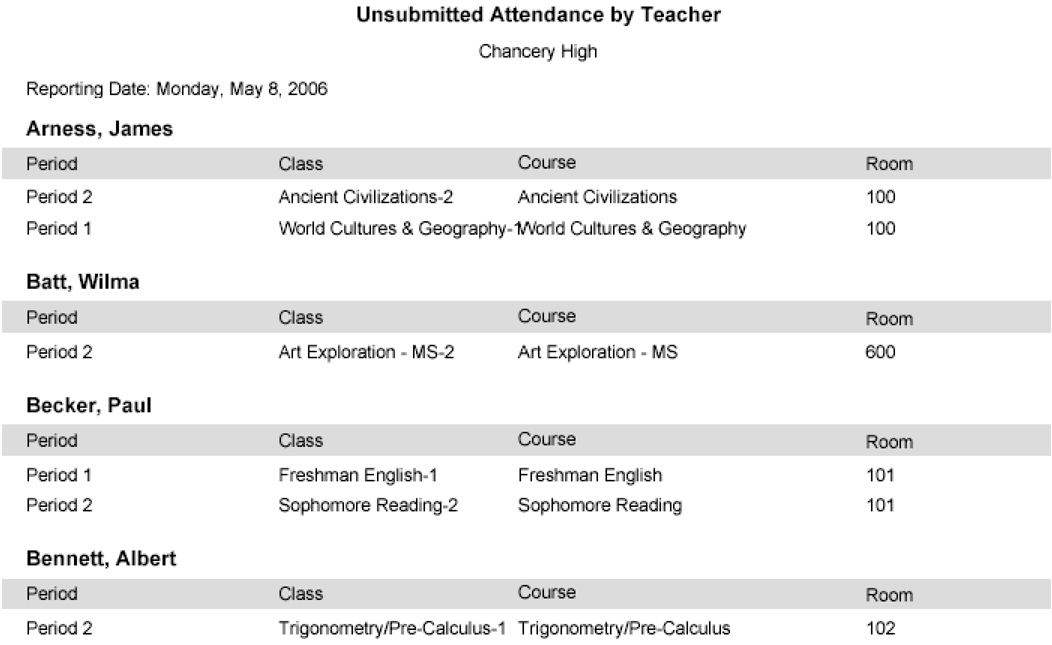
A **Period**: The results are grouped by period.

B **Class**: Listed in alphabetical order.

Unsubmitted Attendance by Teacher

This report lists all classes on a specific date for which the Teacher has not submitted attendance, that is, the “Submit for teacher” check box is not selected [Figure 119]. The report encompasses any class on the specified date that is complete or in progress when the report is run; a class scheduled for later in the day is excluded.

FIGURE 119: Unsubmitted Attendance by Teacher report sample results



Unsubmitted Attendance by Teacher

Chancery High

Reporting Date: Monday, May 8, 2006

Arness, James

Period	Class	Course	Room
Period 2	Ancient Civilizations-2	Ancient Civilizations	100
Period 1	World Cultures & Geography-1	World Cultures & Geography	100

Batt, Wilma

Period	Class	Course	Room
Period 2	Art Exploration - MS-2	Art Exploration - MS	600

Becker, Paul

Period	Class	Course	Room
Period 1	Freshman English-1	Freshman English	101
Period 2	Sophomore Reading-2	Sophomore Reading	101

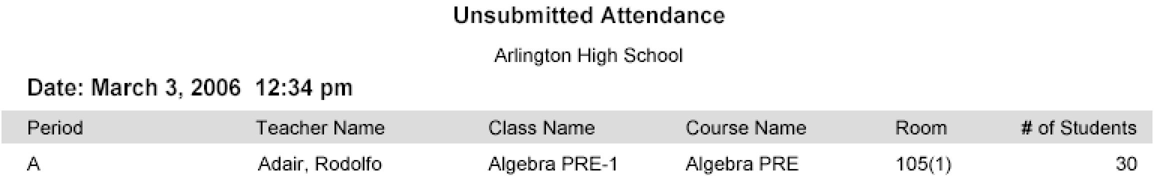
Bennett, Albert

Period	Class	Course	Room
Period 2	Trigonometry/Pre-Calculus-1	Trigonometry/Pre-Calculus	102

Unsubmitted Attendance

This report lists students with unsubmitted attendance [Figure 120], including attendance recorded for a date in the past then cleared later.

FIGURE 120: Unsubmitted Attendance report sample results



Unsubmitted Attendance

Arlington High School

Date: March 3, 2006 12:34 pm

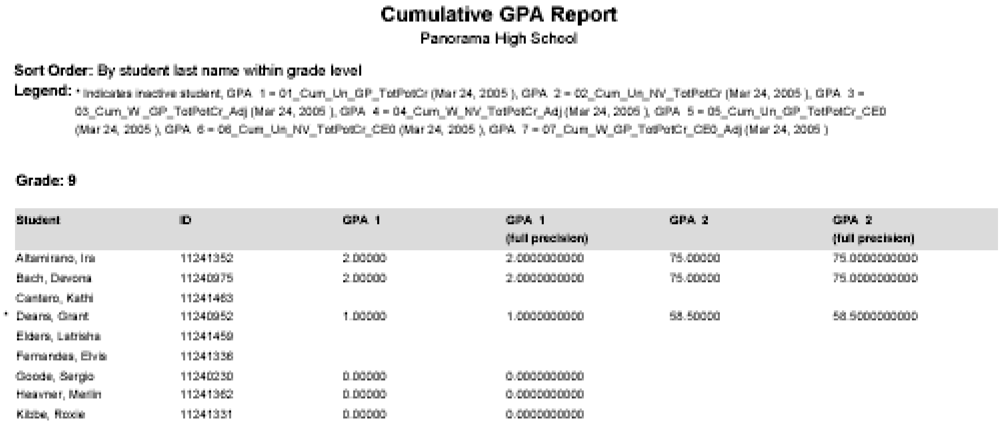
Period	Teacher Name	Class Name	Course Name	Room	# of Students
A	Adair, Rodolfo	Algebra PRE-1	Algebra PRE	105(1)	30

Grading Reports

Cumulative GPA

This report lists GPA scores by student [Figure 121]. You can use this report to verify cumulative GPA values and check for unexpected results. **Note:** This report has two versions: one for Permanent Record (PR) environments and one for other environments. The PR version use data from a combination of existing historical tables and new permanent record tables.

FIGURE 121: Cumulative GPA Report sample results



Cumulative GPA Report

Panorama High School

Sort Order: By student last name within grade level

Legend: * Indicates inactive student, GPA 1 = 01_Cum_Un_GP_TotPotCr (Mar 24, 2005), GPA 2 = 02_Cum_Un_NV_TotPotCr (Mar 24, 2005), GPA 3 = 03_Cum_W_GP_TotPotCr_Adj (Mar 24, 2005), GPA 4 = 04_Cum_W_NV_TotPotCr_Adj (Mar 24, 2005), GPA 5 = 05_Cum_Un_GP_TotPotCr_CE0 (Mar 24, 2005), GPA 6 = 06_Cum_Un_NV_TotPotCr_CE0 (Mar 24, 2005), GPA 7 = 07_Cum_W_GP_TotPotCr_CE0_Adj (Mar 24, 2005)

Grade: 9

Student	ID	GPA 1	GPA 1 (full precision)	GPA 2	GPA 2 (full precision)
Altamirano, Ira	11241352	2.00000	2.0000000000	75.00000	75.0000000000
Bach, Devona	11240975	2.00000	2.0000000000	75.00000	75.0000000000
Cantero, Kathi	11241463				
* Deans, Grant	11240952	1.00000	1.0000000000	58.50000	58.5000000000
Elders, Latrisha	11241459				
Fernandes, Elvis	11241336				
Goode, Sergio	11240230	0.00000	0.0000000000		
Heavner, Merlin	11241362	0.00000	0.0000000000		
Kibbe, Roxie	11241331	0.00000	0.0000000000		

Report options include:

- **Sort order**:

  By student last name within grade level [Figure 121]

  Descending by cumulative GPA within grade level

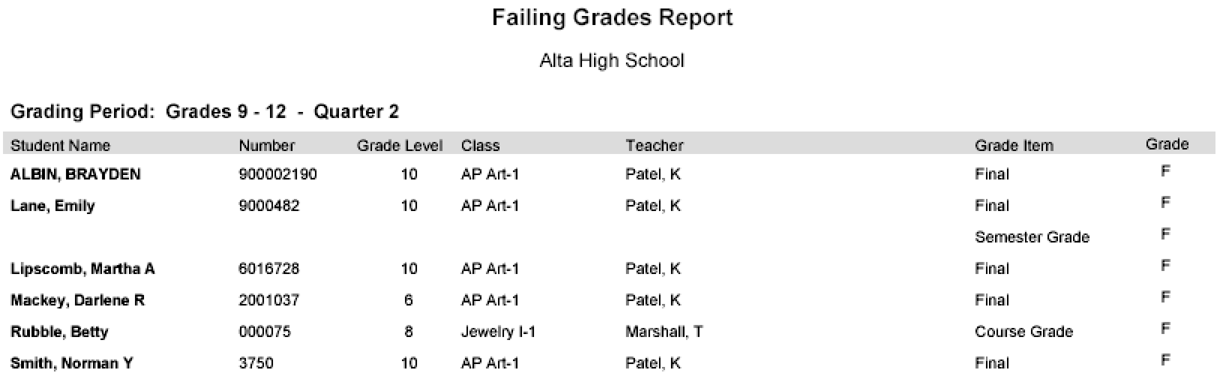
  Ascending by cumulative GPA within grade level

- **Include full precision cumulative GPA values:** Generates cumulative GPAs to ten decimal places. This is particularly useful for class ranking purposes.

Failing Grades Report (Secondary)

This report identifies students who are failing specific classes [Figure 122]. This enables a School Administrator or Teacher to identify students at risk of not graduating, or students who need assistance such as tutoring. The report is most useful at the end of a grading period, just before report cards are generated.

FIGURE 122: Failing Grades Report sample results



Failing Grades Report

Alta High School

Grading Period: Grades 9 - 12 - Quarter 2

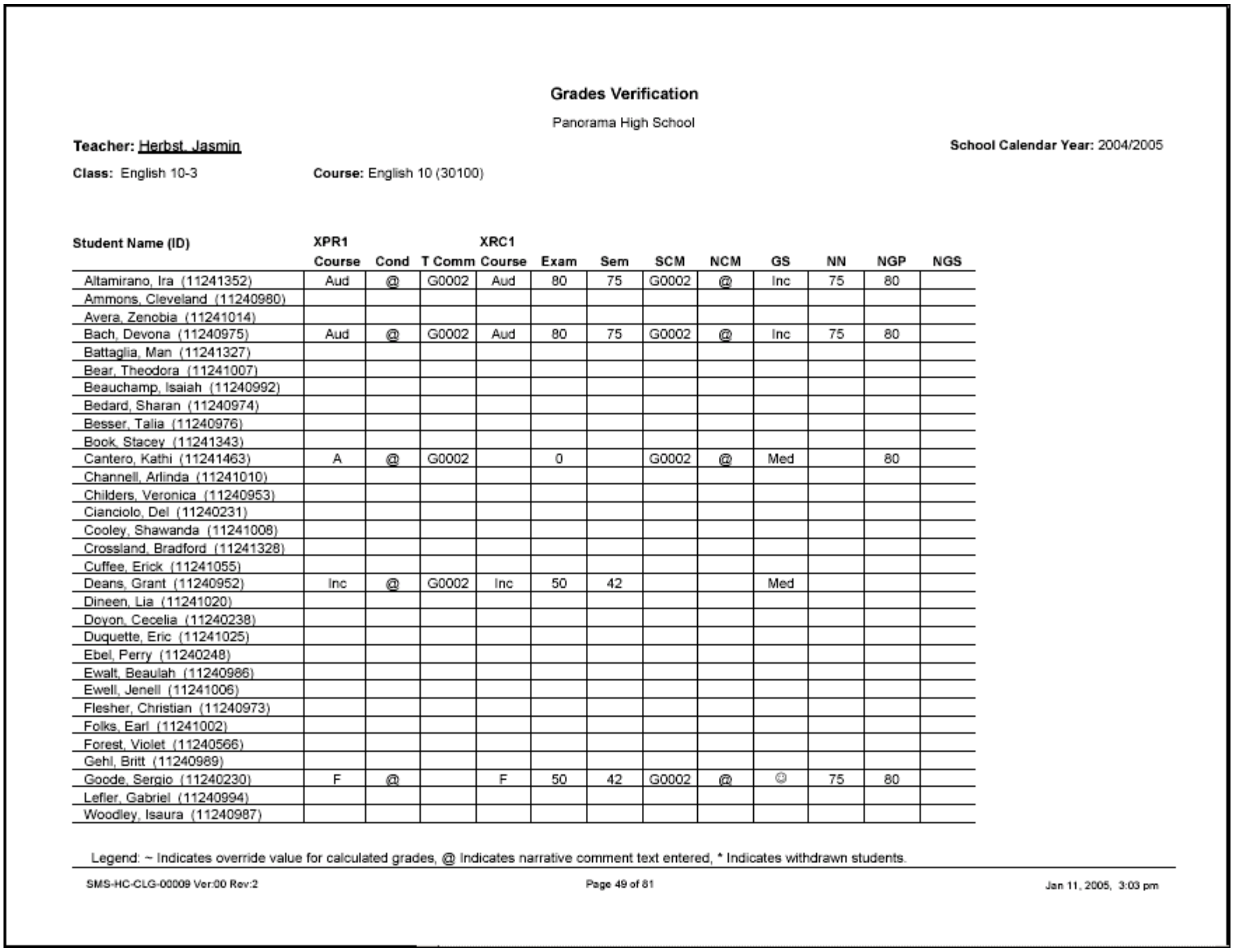
Student Name	Number	Grade Level	Class	Teacher	Grade Item	Grade
ALBIN, BRAYDEN	900002190	10	AP Art-1	Patel, K	Final	F
Lane, Emily	9000482	10	AP Art-1	Patel, K	Final	F
					Semester Grade	F
Lipscomb, Martha A	6016728	10	AP Art-1	Patel, K	Final	F
Mackey, Darlene R	2001037	6	AP Art-1	Patel, K	Final	F
Rubble, Betty	000075	8	Jewelry I-1	Marshall, T	Course Grade	F
Smith, Norman Y	3750	10	AP Art-1	Patel, K	Final	F

Grades Verification

For secondary schools, this report gives a Teacher an overview of student grades for all students in a class roster. It presents all grade items assigned to the student for each grading period [Figure 123].

In the report options, there is no link between filtering by Term and filtering by Grading Period. The intent of the Term filter is to specify the classes (for example, all of a Teacher's Semester 1 classes). If you also want to show only the Grading Periods that coincide with a particular term, specify this in a separate filter.

FIGURE 123: Grades Verification report sample results



Grades Verification

Panorama High School

Teacher: Herbst, Jasmin

School Calendar Year: 2004/2005

Class: English 10-3

Course: English 10 (30100)

Student Name (ID)	**XPR1**			**XRC1**								
	Course	**Cond**	**T Comm**	**Course**	**Exam**	**Sem**	**SCM**	**NCM**	**GS**	**NN**	**NGP**	**NGS**
Altamirano, Ira (11241352)	Aud	@	G0002	Aud	80	75	G0002	@	Inc	75	80	
Ammons, Cleveland (11240980)												
Avera, Zenobia (11241014)												
Bach, Devona (11240975)	Aud	@	G0002	Aud	80	75	G0002	@	Inc	75	80	
Battaglia, Man (11241327)												
Bear, Theodora (11241007)												
Beauchamp, Isaiah (11240992)												
Bedard, Sharan (11240974)												
Besser, Talia (11240976)												
Book, Stacey (11241343)												
Cantero, Kathi (11241463)	A	@	G0002		0		G0002	@	Med		80	
Channell, Arlinda (11241010)												
Childers, Veronica (11240953)												
Cianciolo, Del (11240231)												
Cooley, Shawanda (11241008)												
Crossland, Bradford (11241328)												
Cuffee, Erick (11241055)												
Deans, Grant (11240952)	Inc	@	G0002	Inc	50	42			Med			
Dineen, Lia (11241020)												
Doyon, Cecelia (11240238)												
Duquette, Eric (11241025)												
Ebel, Perry (11240248)												
Ewalt, Beaulah (11240986)												
Ewell, Jenell (11241006)												
Flesher, Christian (11240973)												
Folks, Earl (11241002)												
Forest, Violet (11240566)												
Gehl, Britt (11240989)												
Goode, Sergio (11240230)	F	@		F	50	42	G0002	@	☺	75	80	
Lefler, Gabriel (11240994)												
Woodley, Isaura (11240987)												

Legend: ~ Indicates override value for calculated grades, @ Indicates narrative comment text entered, * Indicates withdrawn students.

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Indicators on the report include:

@: Indicates a narrative comment (the actual comment does not appear).

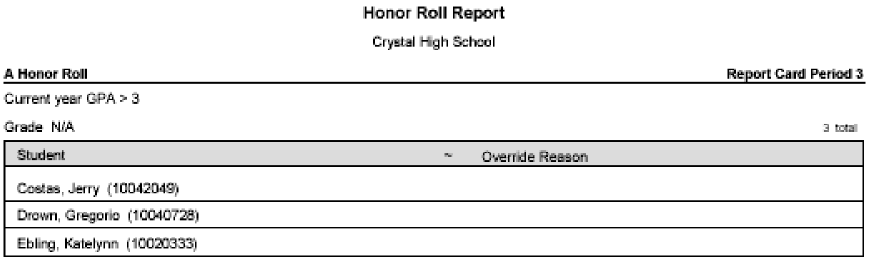
~: Indicates a manual override of a calculated grade.

*: Identifies a student who has withdrawn from the class before the last day of the class. If you specify a Grading Period filter, the asterisk appears only if the student has withdrawn before the end of the last grading period shown for the class.

Honor Roll

This report displays a list of students on a school's honor roll [Figure 124].

FIGURE 124: Honor Roll Report sample results



Honor Roll Report

Crystal High School

A Honor Roll

Report Card Period 3

Current year GPA > 3

Grade N/A

3 total

Student	~	Override Reason
Costas, Jerry (10042049)		
Drown, Gregorio (10040728)		
Ebling, Katelynn (10020333)		

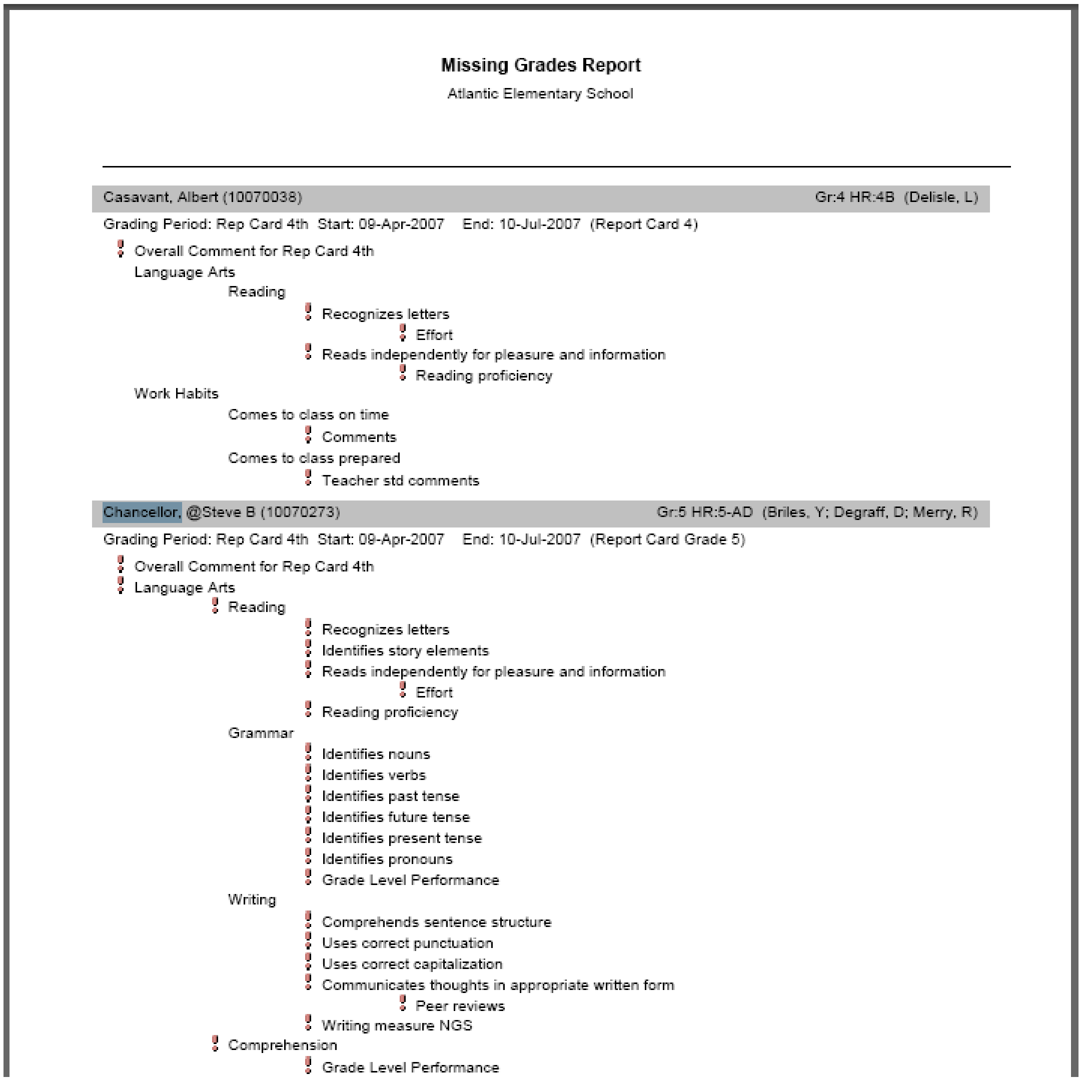
Report options include:

- **New page for each grade level**
- **Include columns for the override indicator and reason**

Missing Grades Report (Elementary)

For elementary schools, this report identified students who are missing grading information for a specified grading period [Figure 125]. Typically, a Teacher or School Administrator runs this report is before report cards are generated at the end of a grading period.

FIGURE 125: Missing Grades Report sample results



Missing Grades Report
Atlantic Elementary School

Casavant, Albert (10070038) Gr:4 HR:4B (Delisle, L)
Grading Period: Rep Card 4th Start: 09-Apr-2007 End: 10-Jul-2007 (Report Card 4)
! Overall Comment for Rep Card 4th
Language Arts
Reading
! Recognizes letters
! Effort
! Reads independently for pleasure and information
! Reading proficiency
Work Habits
Comes to class on time
! Comments
Comes to class prepared
! Teacher std comments

Chancellor, @Steve B (10070273) Gr:5 HR:5-AD (Briles, Y; Degraff, D; Merry, R)
Grading Period: Rep Card 4th Start: 09-Apr-2007 End: 10-Jul-2007 (Report Card Grade 5)
! Overall Comment for Rep Card 4th
! Language Arts
! Reading
! Recognizes letters
! Identifies story elements
! Reads independently for pleasure and information
! Effort
! Reading proficiency
Grammar
! Identifies nouns
! Identifies verbs
! Identifies past tense
! Identifies future tense
! Identifies present tense
! Identifies pronouns
! Grade Level Performance
Writing
! Comprehends sentence structure
! Uses correct punctuation
! Uses correct capitalization
! Communicates thoughts in appropriate written form
! Peer reviews
! Writing measure NGS
! Comprehension
! Grade Level Performance

Indicators on the report include:

!: Indicates a missing grade.

Report options include:

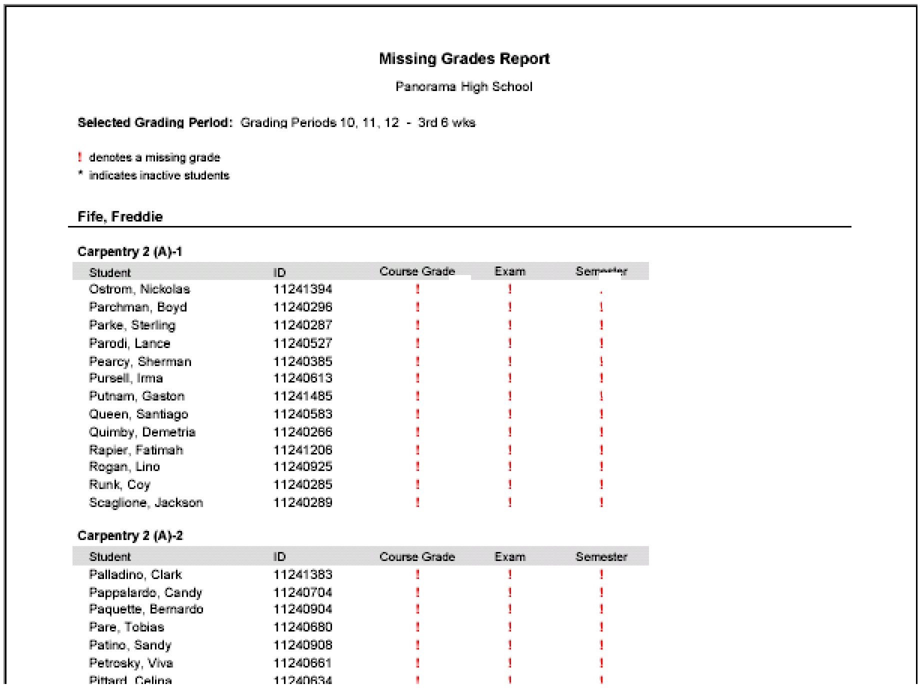
- **Grading period**:
  Current Report Card
  Current Progress Report
  Last Report Card
  Last Progress Report
- **Sort By**:
  Homeroom, student last name: This option is most useful to a School Administrator.

Student last name

Missing Grades Report (Secondary)

For secondary schools, this report identified students who are missing grading information for a specified grading period [Figure 126]. Typically, a Teacher or School Administrator runs this report is before report cards are generated at the end of a grading period.

FIGURE 126: Missing Grades Report sample results



Missing Grades Report

Panorama High School

Selected Grading Period: Grading Periods 10, 11, 12 - 3rd 6 wks

! denotes a missing grade
* indicates inactive students

Fife, Freddie

Carpentry 2 (A)-1

Student	ID	Course Grade	Exam	Semester
Ostrom, Nickolas	11241394	!	!	.
Parchman, Boyd	11240296	!	!	!
Parke, Sterling	11240287	!	!	!
Parodi, Lance	11240527	!	!	!
Pearcy, Sherman	11240385	!	!	!
Pursell, Irma	11240613	!	!	!
Putnam, Gaston	11241485	!	!	!
Queen, Santiago	11240583	!	!	!
Quimby, Demetria	11240266	!	!	!
Rapier, Fatimah	11241206	!	!	!
Rogan, Lino	11240925	!	!	!
Runk, Coy	11240285	!	!	!
Scaglione, Jackson	11240289	!	!	!

Carpentry 2 (A)-2

Student	ID	Course Grade	Exam	Semester
Palladino, Clark	11241383	!	!	!
Pappalardo, Candy	11240704	!	!	!
Paquette, Bernardo	11240904	!	!	!
Pare, Tobias	11240680	!	!	!
Patino, Sandy	11240908	!	!	!
Petrosky, Viva	11240661	!	!	!
Pittard, Celina	11240634	!	!	!

Indicators on the report include:

*****: Identifies a student who has withdrawn from or dropped the class before the last day of the class. (Where the student transferred to another class, the student's name is included for both classes and the dropped class.)

!: Indicates a missing grade.

Report options include:

- **Grading period**:

  Current Report Card

  Current Progress Report

  Last Report Card

  Last Progress Report

- **Sort By**:

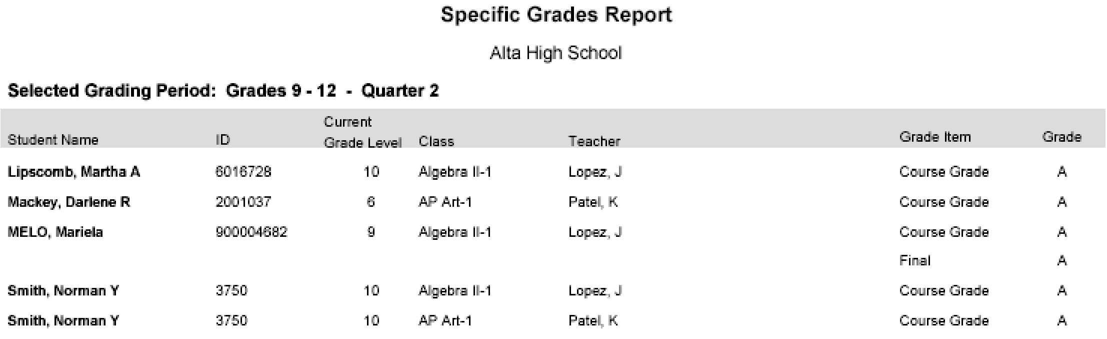
  Homeroom, student last name: This option is most useful to a School Administrator.

  Student last name: The only option available to a Teacher.

Specific Grades Report

This report identifies students with specific types of grades, including special grades such as E (Exempt) [Figure 127]. Typically, a School Administrator or Teacher runs this report during and at the end of a grading period, just before report cards are generated.

FIGURE 127: Specific Grades Report sample results



Specific Grades Report

Alta High School

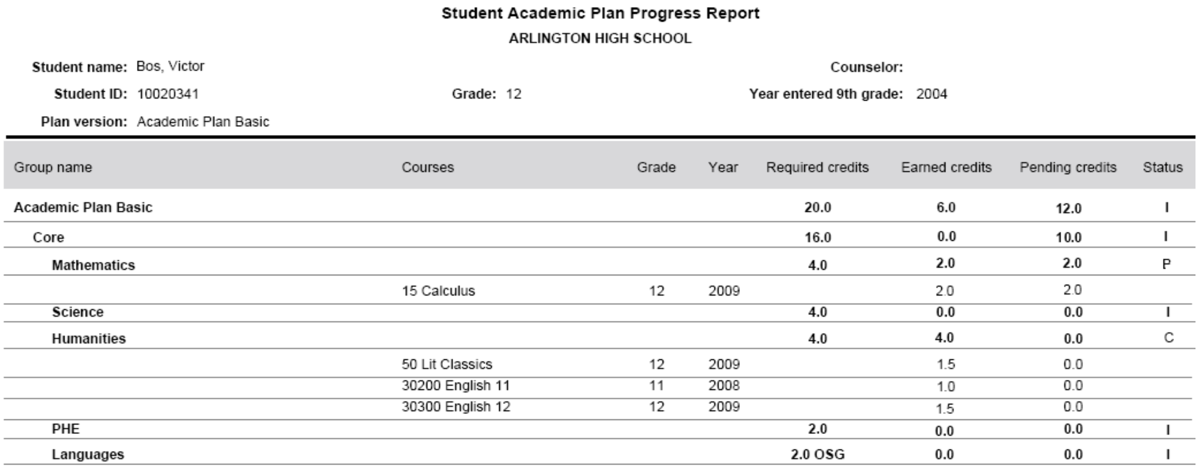
Selected Grading Period: Grades 9 - 12 - Quarter 2

Student Name	ID	Current Grade Level	Class	Teacher	Grade Item	Grade
Lipscomb, Martha A	6016728	10	Algebra II-1	Lopez, J	Course Grade	A
Mackey, Darlene R	2001037	6	AP Art-1	Patel, K	Course Grade	A
MELO, Mariela	900004682	9	Algebra II-1	Lopez, J	Course Grade	A
					Final	A
Smith, Norman Y	3750	10	Algebra II-1	Lopez, J	Course Grade	A
Smith, Norman Y	3750	10	AP Art-1	Patel, K	Course Grade	A

Student Academic Plan Progress Report

The report provides information about a student’s assigned academic plan [p. 86]. The report shows the name of the student’s counselor and the year or date the student entered 9th grade, along with the courses and required credits in the academic plan version, the student’s earned and pending credits for those courses, and the student’s completion status for each group of assigned courses. The report also provides a list of courses the student has taken for which the course credits will not contribute to this academic plan. Chancery SMS sorts this report by group and then by course priority.

FIGURE 128: Student Academic Plan Progress Report



Student Academic Plan Progress Report

ARLINGTON HIGH SCHOOL

Student name: Bos, Victor
Counselor:
Student ID: 10020341
Grade: 12
Year entered 9th grade: 2004
Plan version: Academic Plan Basic

Group name	Courses	Grade	Year	Required credits	Earned credits	Pending credits	Status
Academic Plan Basic				**20.0**	**6.0**	**12.0**	**I**
Core				**16.0**	**0.0**	**10.0**	**I**
Mathematics				**4.0**	**2.0**	**2.0**	P
	15 Calculus	12	2009		2.0	2.0	
Science				**4.0**	**0.0**	**0.0**	**I**
Humanities				**4.0**	**4.0**	**0.0**	C
	50 Lit Classics	12	2009		1.5	0.0	
	30200 English 11	11	2008		1.0	0.0	
	30300 English 12	12	2009		1.5	0.0	
PHE				**2.0**	**0.0**	**0.0**	**I**
Languages				**2.0 OSG**	**0.0**	**0.0**	**I**

A Indicators on the report include:
OSG: Indicates that credits are collected from only one sub-group
C: All courses in the group are completed
P: Some or all of the courses in the group are in progress
I: Some or all of the courses in the group are incomplete

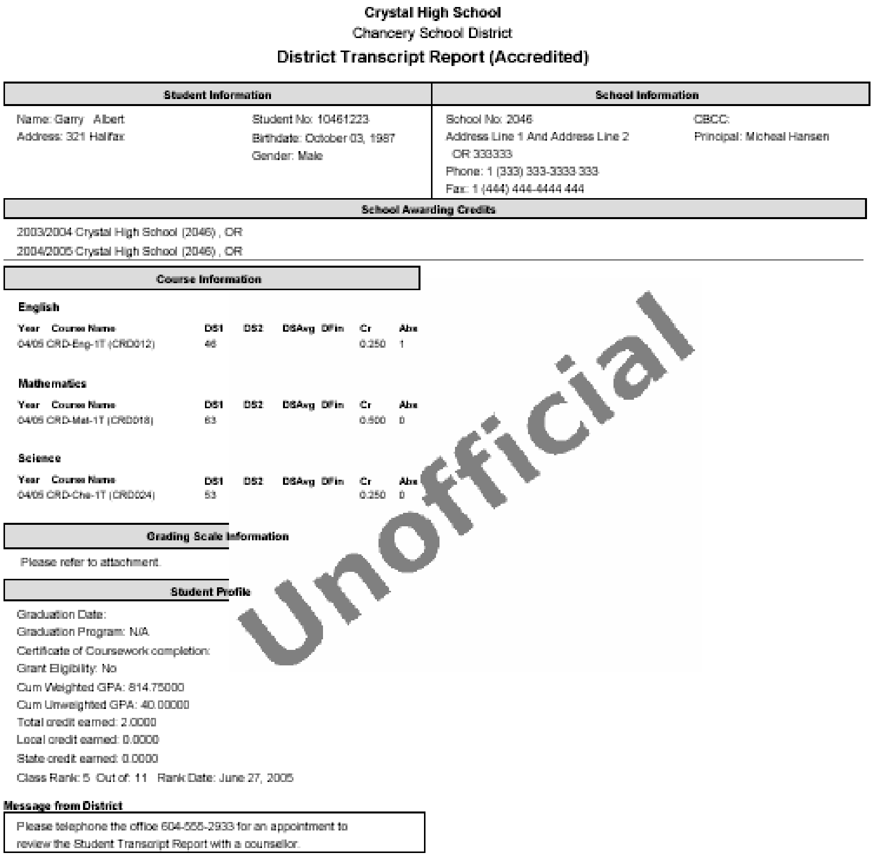
Report options include:

- **Rules**: Select this option to print the rules associated with this academic plan (for example, the test scores that are required to complete the plan).
- **Notes:** Select this option to print the notes entered for the student that relate to this academic plan.

Student Transcript by Subject Area

This report produces a transcript for specific students, grade levels, or homerooms in your school. This report groups transcript information by subject area [Figure 129]. The report includes options to display ethnicity, graduated students, current year information, and official transcripts with watermarks. By default, Chancery SMS sets the report filters to only the selected students. **Note:** This report has two versions: one for Permanent Record (PR) environments and one for other environments. The PR version use data from a combination of existing historical tables and new permanent record tables.

FIGURE 129: Student Transcript by Subject Area sample results


Unofficial

Crystal High School
Chancery School District
District Transcript Report (Accredited)

Student Information		School Information	
Name: Garry Albert Address: 321 Halifax	Student No: 10461223 Birthdate: October 03, 1987 Gender: Male	School No: 2046 Address Line 1 And Address Line 2 OR 333333 Phone: 1 (333) 333-3333 333 Fax: 1 (444) 444-4444 444	CBCC: Principal: Micheal Hansen

School Awarding Credits

2003/2004 Crystal High School (2046) , OR
2004/2005 Crystal High School (2046) , OR

Course Information

English

Year	Course Name	DS1	DS2	DSAvg	DFin	Cr	Abs
04/05	CRD-Eng-1T (CRD012)	46				0.250	1

Mathematics

Year	Course Name	DS1	DS2	DSAvg	DFin	Cr	Abs
04/05	CRD-Mat-1T (CRD018)	63				0.500	0

Science

Year	Course Name	DS1	DS2	DSAvg	DFin	Cr	Abs
04/05	CRD-Che-1T (CRD024)	53				0.250	0

Grading Scale Information

Please refer to attachment.

Student Profile

Graduation Date:
Graduation Program: N/A
Certificate of Coursework completion:
Grant Eligibility: No
Cum Weighted GPA: 814.75000
Cum Unweighted GPA: 40.00000
Total credit earned: 2.0000
Local credit earned: 0.0000
State credit earned: 0.0000
Class Rank: 5 Out of: 11 Rank Date: June 27, 2005

Message from District

Please telephone the office 604-555-2933 for an appointment to review the Student Transcript Report with a counsellor.

Report options include:

- **Display Historical As**: Determines the display format of historical grades, such as numeric, letter grade, or pass/fail. (Grades for the current year are displayed as the school recorded them.)
- **Sort Order**:
  By Course Name
  By Course Number
- **Ethnicity**:
  Print ethnic category
  Print federal ethnic category and federal race categories
- **Include Only Graduated Students**: Includes a student only if an accreditation date is entered on his or her historical page.

- **Include Current Year Info**: Generates all current year information including both the active year and the historical record with the current year date. If you select this option, the report calculates GPAs to include information for the active year.
  Note: Applies to environments other than Permanent Record.

  In a Permanent Record environment, this option is **Print Year GPA for active year if active year is included**. This generates the active-year data if either the **Last-completed report card** or the **Current report card option** is selected in the **Active year data** area of the **Permanent Record Setup** page (to exclude active-year data, select the **Do not include active year data**) check box.

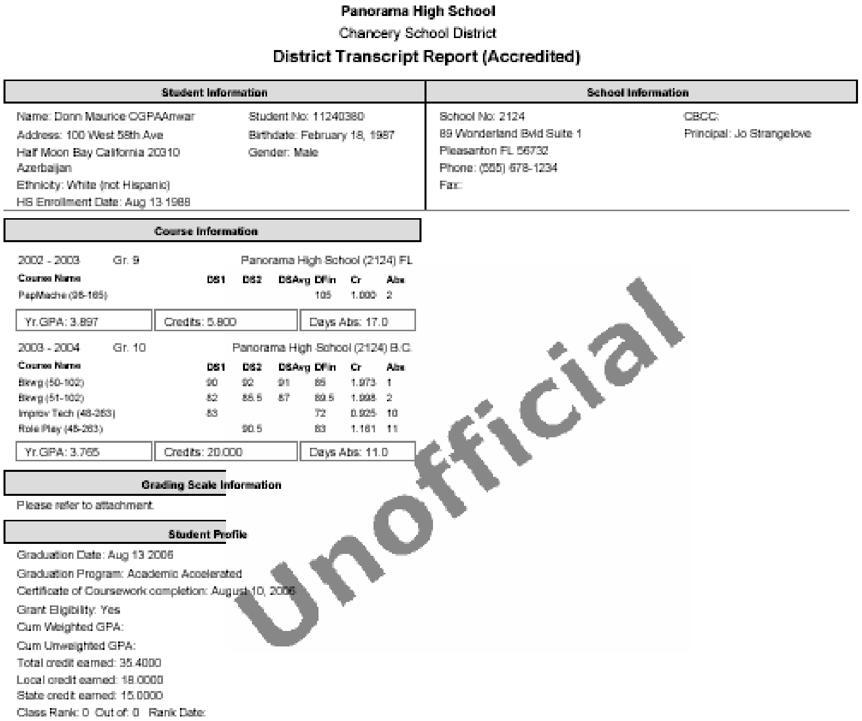
  Caution: This calculation requires additional processing time and may impact system performance.
- **Print Official Transcript**: Places the text “Official” as a watermark on the transcript. Otherwise the watermark is “Unofficial” [Figure 129].
- **School Message**: The report includes on the transcript any message entered here; for example, “School reopens and classes start August 20”.

Student Transcript by Year

This report produces transcripts for specific students, grade levels, or homerooms in your school. It groups transcripts by school year (such as 2007, 2008, and 2009) and then alphabetically by school name [Figure 130]. The report includes options to display ethnicity, graduated students, grades, current year information, and official transcripts with watermarks. By default, Chancery SMS sets the report filters to only the selected students.

Note: This report has two versions: one for Permanent Record (PR) environments and one for other environments. The PR version use data from a combination of existing historical tables and new permanent record tables.

FIGURE 130: Student Transcript by Year report sample results



Panorama High School
Chancery School District
District Transcript Report (Accredited)

Student Information

Name: Donn Maurice OGPAAnwar
Address: 100 West 58th Ave
Half Moon Bay California 20310
Azerbaijan
Ethnicity: White (not Hispanic)
HS Enrollment Date: Aug 13 1988

Student No: 11240380
Birthdate: February 18, 1987
Gender: Male

School Information

School No: 2124
89 Wonderland Bvld Suite 1
Pleasanton FL 56732
Phone: (555) 678-1234
Fax:

CBCC:
Principal: Jo Strangelove

Course Information

2002 - 2003 Gr. 9 Panorama High School (2124) FL

Course Name	DS1	DS2	DSAvg	DFin	Cr	Abs
PapMache (38-165)				105	1.000	2

Yr.GPA: 3.897 | Credits: 5.800 | Days Abs: 17.0

2003 - 2004 Gr. 10 Panorama High School (2124) B.C.

Course Name	DS1	DS2	DSAvg	DFin	Cr	Abs
Blwg (50-102)	90	92	91	85	1.973	1
Blwg (51-102)	82	85.5	87	89.5	1.998	2
Improv Tech (48-283)	83			72	0.925	10
Role Play (48-283)		90.5		83	1.161	11

Yr.GPA: 3.765 | Credits: 20.000 | Days Abs: 11.0

Grading Scale Information

Please refer to attachment.

Student Profile

Graduation Date: Aug 13 2006
Graduation Program: Academic Accelerated
Certificate of Coursework completion: August 10, 2006
Grant Eligibility: Yes
Cum Weighted GPA:
Cum Unweighted GPA:
Total credit earned: 35.4000
Local credit earned: 18.0000
State credit earned: 15.0000
Class Rank: 0 Out of: 0 Rank Date:

Report options include:

- **Display Historical As**: Determines the display format of historical grades, such as numeric, letter grade, or pass/fail. (Grades for the current year are displayed as the school recorded them.)
- **Sort Order**:

  By Course Name

  By Course Number
- **Ethnicity**:

  Print ethnic category

  Print federal ethnic category and federal race categories
- **Include Only Graduated Students**: Includes a student only if an accreditation date is entered on his or her historical page.
- **Include Current Year Info**: Generates all current year information including both the active year and the historical record with the current year date. If you select this option, the report calculates GPAs to include information for the active year. **Note:** Applies to environments other than Permanent Record.

  In a Permanent Record environment, this option is **Print Year GPA for active year if active year is included**. This generates the active-year data if either the **Last-completed report card** or the **Current report card option** is selected in the **Active year data** area of the **Permanent Record Setup** page (to exclude active-year data, select the **Do not include active year data** check box).

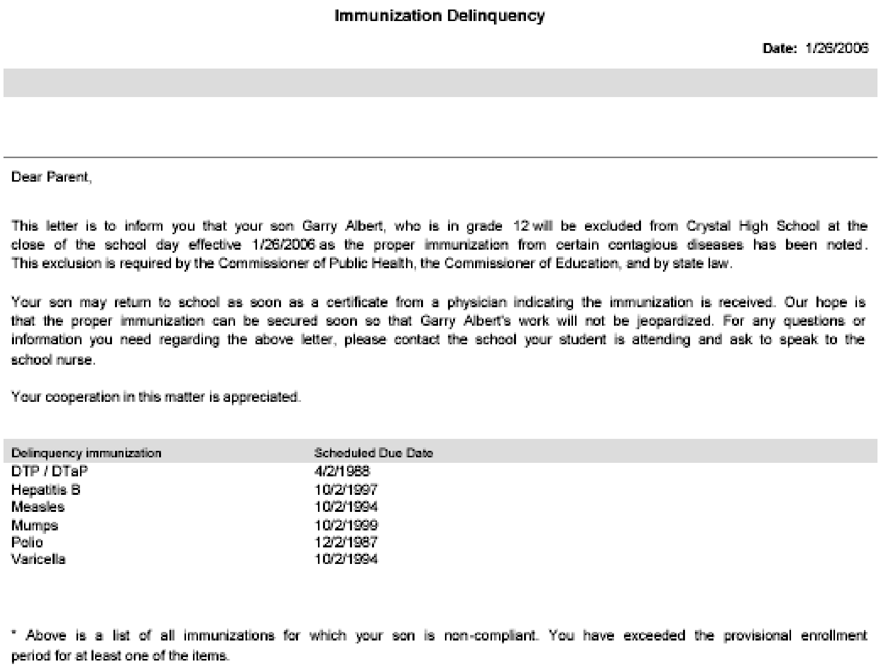
  Caution: This calculation requires additional processing time and may impact system performance.
- **Print Official Transcript**: Places the text “Official” as a watermark on the transcript. Otherwise the watermark is “Unofficial” [Figure 130].
- **School Message**: The report includes on the transcript any message entered here; for example, “School reopens and classes start August 20”.

Health Reports

Immunization Delinquency Letter

This report produces a form letter that notifies the parent that a specific student is to be excluded from school until he or she gets proper immunizations [Figure 131].

FIGURE 131: Immunization Delinquency Letter sample results



Immunization Delinquency

Date: 1/26/2006

Dear Parent,

This letter is to inform you that your son Garry Albert, who is in grade 12 will be excluded from Crystal High School at the close of the school day effective 1/26/2006 as the proper immunization from certain contagious diseases has been noted. This exclusion is required by the Commissioner of Public Health, the Commissioner of Education, and by state law.

Your son may return to school as soon as a certificate from a physician indicating the immunization is received. Our hope is that the proper immunization can be secured soon so that Garry Albert's work will not be jeopardized. For any questions or information you need regarding the above letter, please contact the school your student is attending and ask to speak to the school nurse.

Your cooperation in this matter is appreciated.

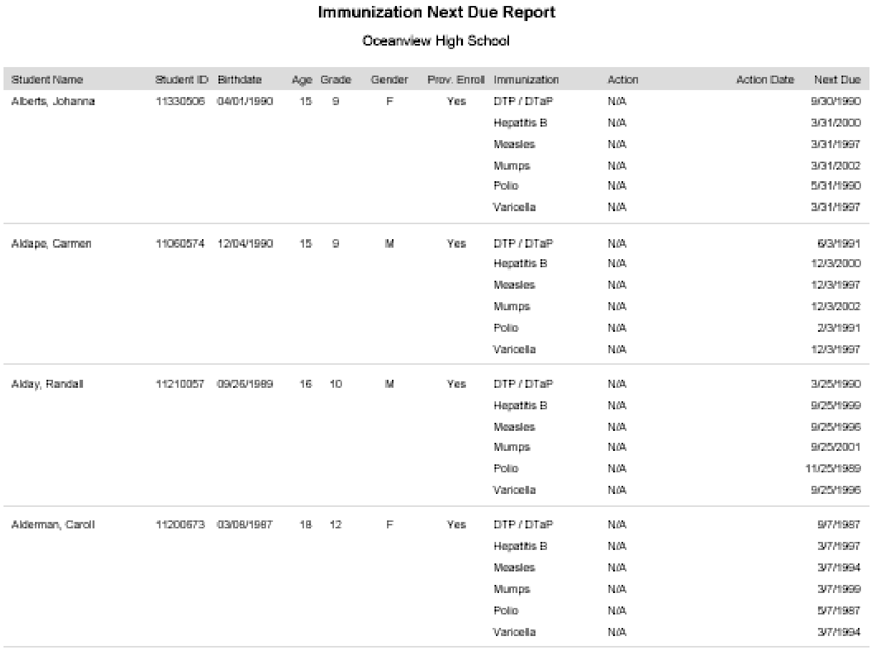
Delinquency immunization	Scheduled Due Date
DTP / DTaP	4/2/1988
Hepatitis B	10/2/1997
Measles	10/2/1994
Mumps	10/2/1999
Polio	12/2/1987
Varicella	10/2/1994

* Above is a list of all immunizations for which your son is non-compliant. You have exceeded the provisional enrollment period for at least one of the items.

Immunization Next Due Report

This report lists when immunization are due by student [Figure 132]. The report includes basic demographic information and indicates if a students is provisionally enrolled.

FIGURE 132: Immunization Next Due Report sample results



Immunization Next Due Report

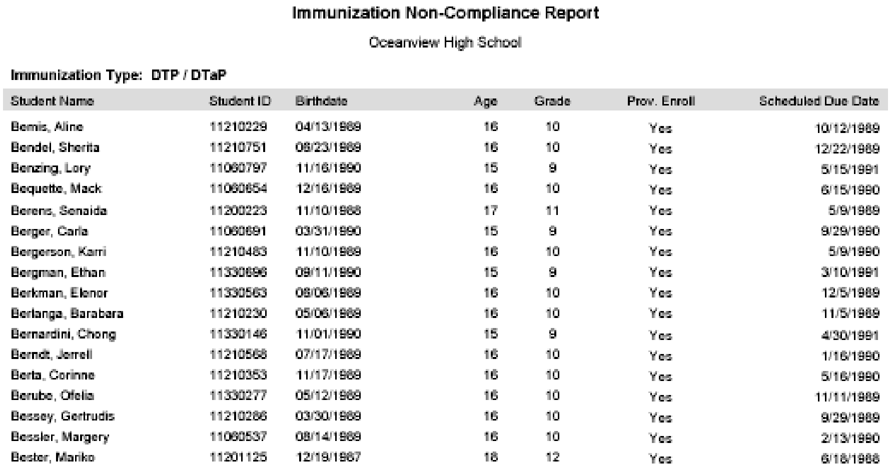
Oceanview High School

Student Name	Student ID	Birthdate	Age	Grade	Gender	Prov. Enroll	Immunization	Action	Action Date	Next Due
Alberts, Johanna	11330506	04/01/1990	15	9	F	Yes	DTP / DTaP	N/A		9/30/1990
							Hepatitis B	N/A		3/31/2000
							Measles	N/A		3/31/1997
							Mumps	N/A		3/31/2002
							Polio	N/A		5/31/1990
							Varicella	N/A		3/31/1997
Aldape, Carmen	11060574	12/04/1990	15	9	M	Yes	DTP / DTaP	N/A		6/3/1991
							Hepatitis B	N/A		12/3/2000
							Measles	N/A		12/3/1997
							Mumps	N/A		12/3/2002
							Polio	N/A		2/3/1991
							Varicella	N/A		12/3/1997
Alday, Randall	11210057	09/26/1989	16	10	M	Yes	DTP / DTaP	N/A		3/25/1990
							Hepatitis B	N/A		9/25/1999
							Measles	N/A		9/25/1996
							Mumps	N/A		9/25/2001
							Polio	N/A		11/25/1989
							Varicella	N/A		9/25/1996
Alderman, Caroll	11200673	03/08/1987	18	12	F	Yes	DTP / DTaP	N/A		9/7/1987
							Hepatitis B	N/A		3/7/1997
							Measles	N/A		3/7/1994
							Mumps	N/A		3/7/1999
							Polio	N/A		5/7/1987
							Varicella	N/A		3/7/1994

Immunization Non-Compliance Report

This report lists the students who have not complied with immunization requirements [Figure 133]. The report shows the due date of the next immunization and indicates if a student is provisionally enrolled.

FIGURE 133: Immunization Non-Compliance Report sample results



Immunization Non-Compliance Report

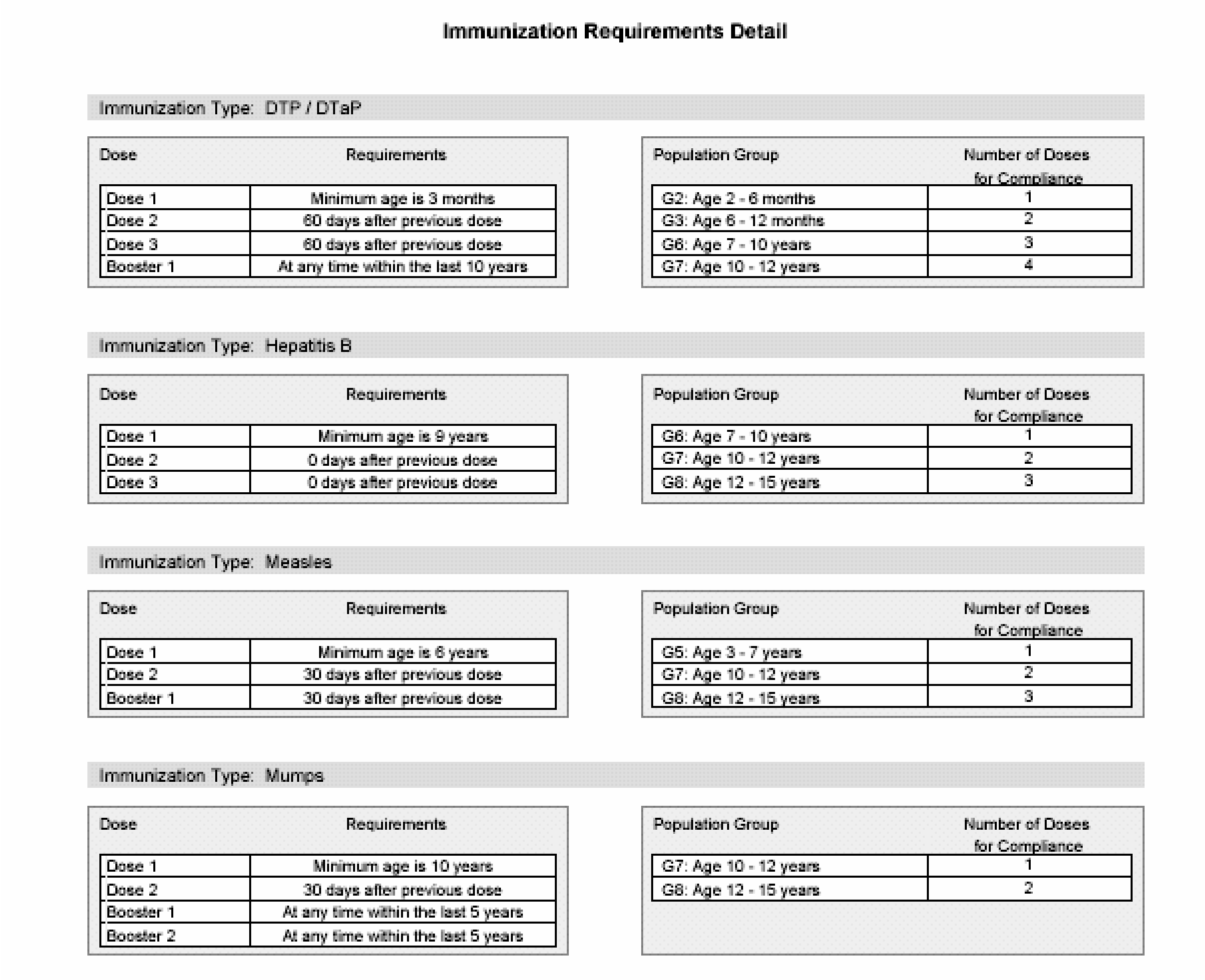
Oceanview High School

Immunization Type: DTP / DTaP

Student Name	Student ID	Birthdate	Age	Grade	Prov. Enroll	Scheduled Due Date
Bemis, Aline	11210229	04/13/1989	16	10	Yes	10/12/1989
Bendel, Sherita	11210751	08/23/1989	16	10	Yes	12/22/1989
Benzing, Lory	11060797	11/16/1990	15	9	Yes	5/15/1991
Bequette, Mack	11060654	12/16/1989	16	10	Yes	6/15/1990
Berens, Senaida	11200223	11/10/1988	17	11	Yes	5/9/1989
Berger, Carla	11060691	03/31/1990	15	9	Yes	9/29/1990
Bergerson, Karri	11210483	11/10/1989	16	10	Yes	5/9/1990
Bergman, Ethan	11330696	09/11/1990	15	9	Yes	3/10/1991
Berkman, Elenor	11330563	08/06/1989	16	10	Yes	12/5/1989
Berlanga, Barabara	11210230	05/06/1989	16	10	Yes	11/5/1989
Bernardini, Chong	11330146	11/01/1990	15	9	Yes	4/30/1991
Berndt, Jerrell	11210568	07/17/1989	16	10	Yes	1/16/1990
Berta, Corinne	11210353	11/17/1989	16	10	Yes	5/16/1990
Berube, Ofelia	11330277	05/12/1989	16	10	Yes	11/11/1989
Bessey, Gertrudis	11210286	03/30/1989	16	10	Yes	9/29/1989
Bessler, Margery	11060537	08/14/1989	16	10	Yes	2/13/1990
Bester, Mariko	11201125	12/19/1987	18	12	Yes	6/18/1988

Immunization Requirements Detail

FIGURE 134: Immunization Requirements Detail report sample results



Immunization Requirements Detail

Immunization Type: DTP / DTaP

Dose	Requirements
Dose 1	Minimum age is 3 months
Dose 2	60 days after previous dose
Dose 3	60 days after previous dose
Booster 1	At any time within the last 10 years

Population Group	Number of Doses for Compliance
G2: Age 2 - 6 months	1
G3: Age 6 - 12 months	2
G6: Age 7 - 10 years	3
G7: Age 10 - 12 years	4

Immunization Type: Hepatitis B

Dose	Requirements
Dose 1	Minimum age is 9 years
Dose 2	0 days after previous dose
Dose 3	0 days after previous dose

Population Group	Number of Doses for Compliance
G6: Age 7 - 10 years	1
G7: Age 10 - 12 years	2
G8: Age 12 - 15 years	3

Immunization Type: Measles

Dose	Requirements
Dose 1	Minimum age is 6 years
Dose 2	30 days after previous dose
Booster 1	30 days after previous dose

Population Group	Number of Doses for Compliance
G5: Age 3 - 7 years	1
G7: Age 10 - 12 years	2
G8: Age 12 - 15 years	3

Immunization Type: Mumps

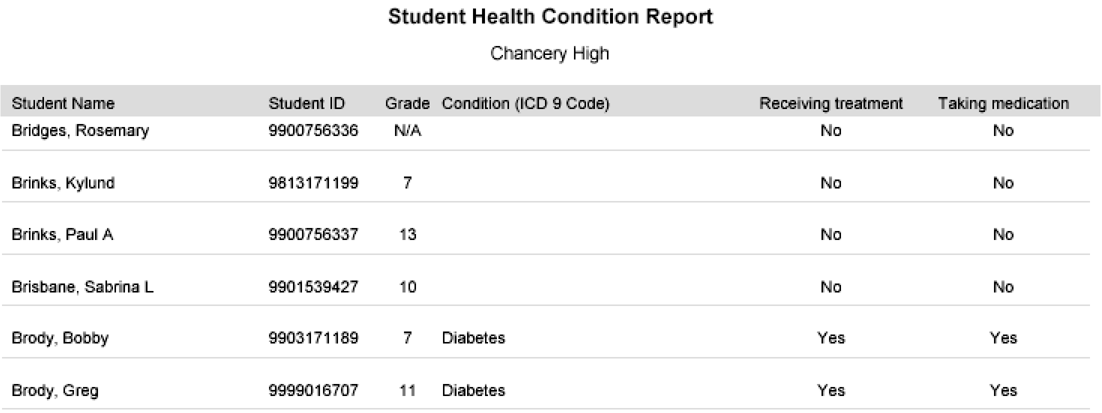
Dose	Requirements
Dose 1	Minimum age is 10 years
Dose 2	30 days after previous dose
Booster 1	At any time within the last 5 years
Booster 2	At any time within the last 5 years

Population Group	Number of Doses for Compliance
G7: Age 10 - 12 years	1
G8: Age 12 - 15 years	2

Student Health Condition Report

This report lists the health condition of each student [Figure 135]. It indicates if a student is receiving treatment or taking medication.

FIGURE 135: Student Health Condition Report sample results



Student Health Condition Report

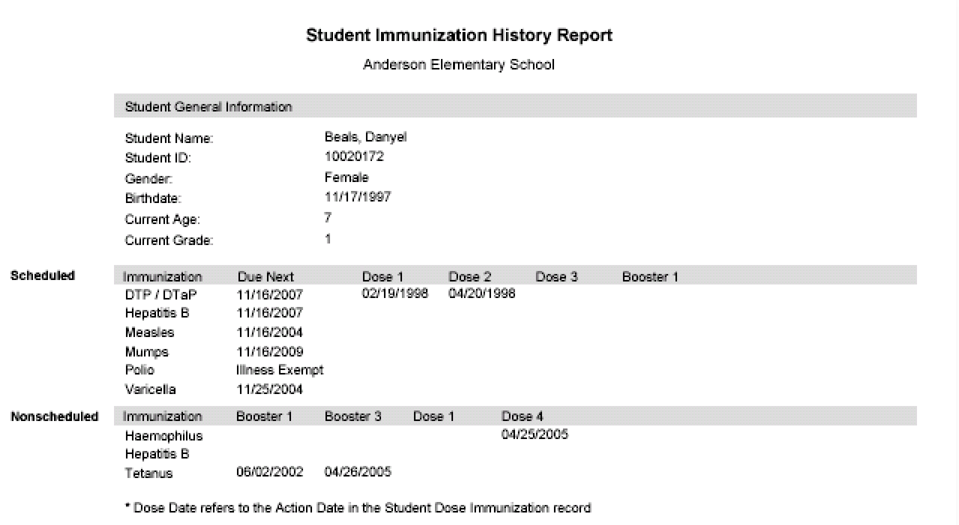
Chancery High

Student Name	Student ID	Grade	Condition (ICD 9 Code)	Receiving treatment	Taking medication
Bridges, Rosemary	9900756336	N/A		No	No
Brinks, Kylund	9813171199	7		No	No
Brinks, Paul A	9900756337	13		No	No
Brisbane, Sabrina L	9901539427	10		No	No
Brody, Bobby	9903171189	7	Diabetes	Yes	Yes
Brody, Greg	9999016707	11	Diabetes	Yes	Yes

Student Immunization History

This report displays a student’s immunization history [Figure 136]. It includes demographic information about the student.

FIGURE 136: Student Immunization History Report sample results



Student Immunization History Report

Anderson Elementary School

Student General Information

Student Name:	Beals, Danyel
Student ID:	10020172
Gender:	Female
Birthdate:	11/17/1997
Current Age:	7
Current Grade:	1

Scheduled

Immunization	Due Next	Dose 1	Dose 2	Dose 3	Booster 1
DTP / DTaP	11/16/2007	02/19/1998	04/20/1998		
Hepatitis B	11/16/2007				
Measles	11/16/2004				
Mumps	11/16/2009				
Polio	Illness Exempt				
Varicella	11/25/2004				

Nonscheduled

Immunization	Booster 1	Booster 3	Dose 1	Dose 4
Haemophilus				04/25/2005
Hepatitis B				
Tetanus	06/02/2002	04/26/2005		

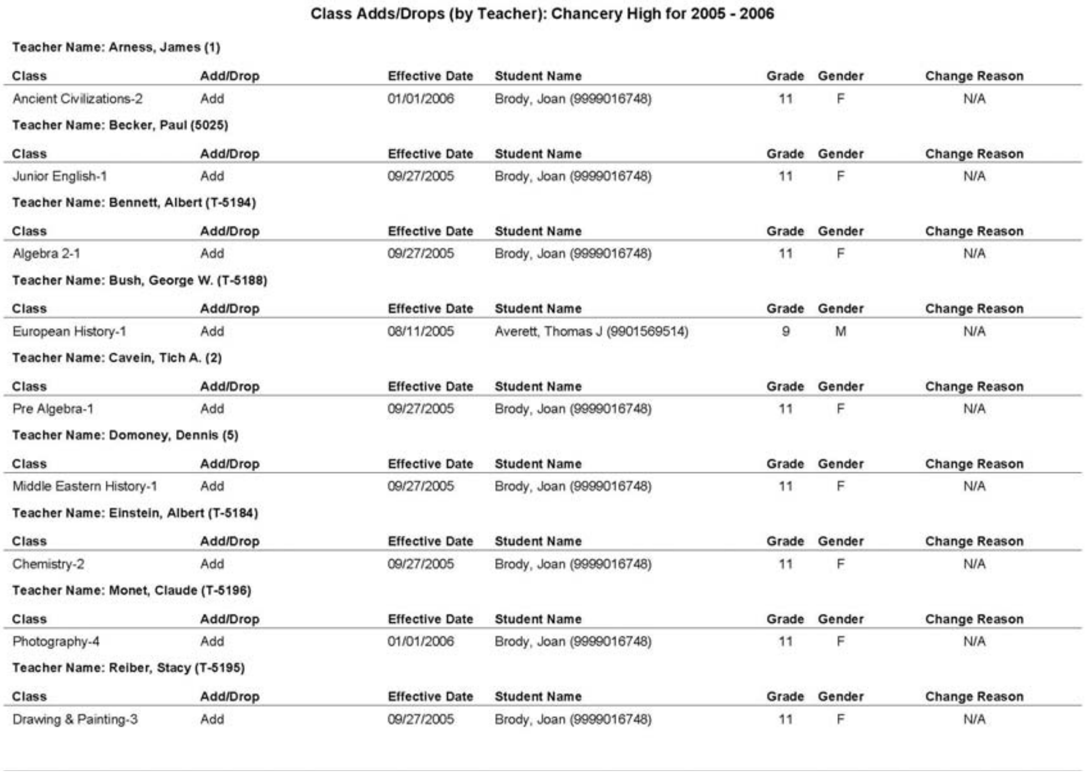
* Dose Date refers to the Action Date in the Student Dose Immunization record

Scheduling Reports

Class Add/Drop

This report lists the classes added or dropped by students on a class roster [Figure 137]. The report identifies the class, the student, and the reason given for the change.

FIGURE 137: Class Add/Drop report sample results



Class Adds/Drops (by Teacher): Chancery High for 2005 - 2006

Teacher Name: Arness, James (1)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Ancient Civilizations-2	Add	01/01/2006	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Becker, Paul (5025)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Junior English-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Bennett, Albert (T-5194)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Algebra 2-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Bush, George W. (T-5188)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
European History-1	Add	08/11/2005	Averett, Thomas J (9901569514)	9	M	N/A

Teacher Name: Cavein, Tich A. (2)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Pre Algebra-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Domoney, Dennis (5)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Middle Eastern History-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Einstein, Albert (T-5184)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Chemistry-2	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Monet, Claude (T-5196)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Photography-4	Add	01/01/2006	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Reiber, Stacy (T-5195)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Drawing & Painting-3	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

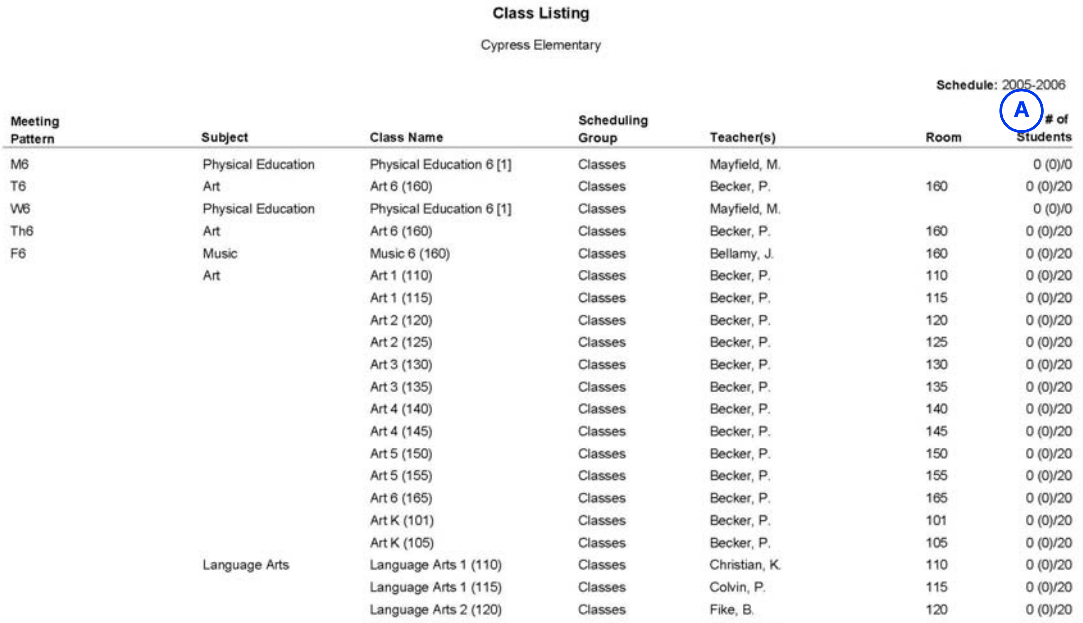
Report options include:

- **Effective Date**: Today, the entire school year, or a date range.
- **Print Change Reason**: By code or prose description.
- **Sort by**: Teacher or student

Class Listing (Elementary)

This report enables an elementary School Administrator to show how classes are scheduled [Figure 138]. It lists each class, the teacher, the room, and the number of students registered versus the capacity. This report is similar to the secondary Master Schedule report [p. 249].

FIGURE 138: Class Listing report sample results



Class Listing

Cypress Elementary

Schedule: 2005-2006

Meeting Pattern	Subject	Class Name	Scheduling Group	Teacher(s)	Room	# of Students
M6	Physical Education	Physical Education 6 [1]	Classes	Mayfield, M.		0 (0)/0
T6	Art	Art 6 (160)	Classes	Becker, P.	160	0 (0)/20
W6	Physical Education	Physical Education 6 [1]	Classes	Mayfield, M.		0 (0)/0
Th6	Art	Art 6 (160)	Classes	Becker, P.	160	0 (0)/20
F6	Music	Music 6 (160)	Classes	Bellamy, J.	160	0 (0)/20
	Art	Art 1 (110)	Classes	Becker, P.	110	0 (0)/20
		Art 1 (115)	Classes	Becker, P.	115	0 (0)/20
		Art 2 (120)	Classes	Becker, P.	120	0 (0)/20
		Art 2 (125)	Classes	Becker, P.	125	0 (0)/20
		Art 3 (130)	Classes	Becker, P.	130	0 (0)/20
		Art 3 (135)	Classes	Becker, P.	135	0 (0)/20
		Art 4 (140)	Classes	Becker, P.	140	0 (0)/20
		Art 4 (145)	Classes	Becker, P.	145	0 (0)/20
		Art 5 (150)	Classes	Becker, P.	150	0 (0)/20
		Art 5 (155)	Classes	Becker, P.	155	0 (0)/20
		Art 6 (165)	Classes	Becker, P.	165	0 (0)/20
		Art K (101)	Classes	Becker, P.	101	0 (0)/20
		Art K (105)	Classes	Becker, P.	105	0 (0)/20
	Language Arts	Language Arts 1 (110)	Classes	Christian, K.	110	0 (0)/20
		Language Arts 1 (115)	Classes	Colvin, P.	115	0 (0)/20
		Language Arts 2 (120)	Classes	Fike, B.	120	0 (0)/20

A **# of Students**: Displays (in order) the number of students scheduled to be in this class, the highest number of students that have been scheduled to be in this class (the "high water mark"), and the capacity of the class.

Report options include:

- **Sort by**:

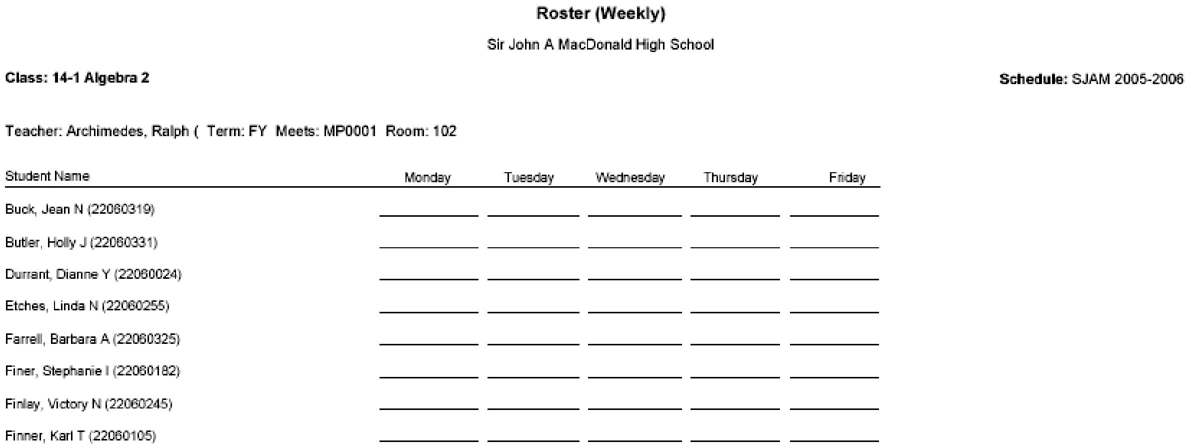
  Meeting Pattern

  Subject

Class Roster

Printing this report enables a teacher or administrator to keep a paper-based attendance record for each class [Figure 139]. It lists all students in the specified class or homeroom and has a blank space for each day of the week or month. The report includes all information necessary to submit the attendance papers, such as the class name, the teacher's name, and class's schedule.

FIGURE 139: Class Roster report sample results



Roster (Weekly)

Sir John A MacDonald High School

Class: 14-1 Algebra 2 **Schedule:** SJAM 2005-2006

Teacher: Archimedes, Ralph (Term: FY Meets: MP0001 Room: 102

Student Name	Monday	Tuesday	Wednesday	Thursday	Friday
Buck, Jean N (22060319)					
Butler, Holly J (22060331)					
Durrant, Dianne Y (22060024)					
Etches, Linda N (22060255)					
Farrell, Barbara A (22060325)					
Finer, Stephanie I (22060182)					
Finlay, Victory N (22060245)					
Finner, Karl T (22060105)					

Report options include:

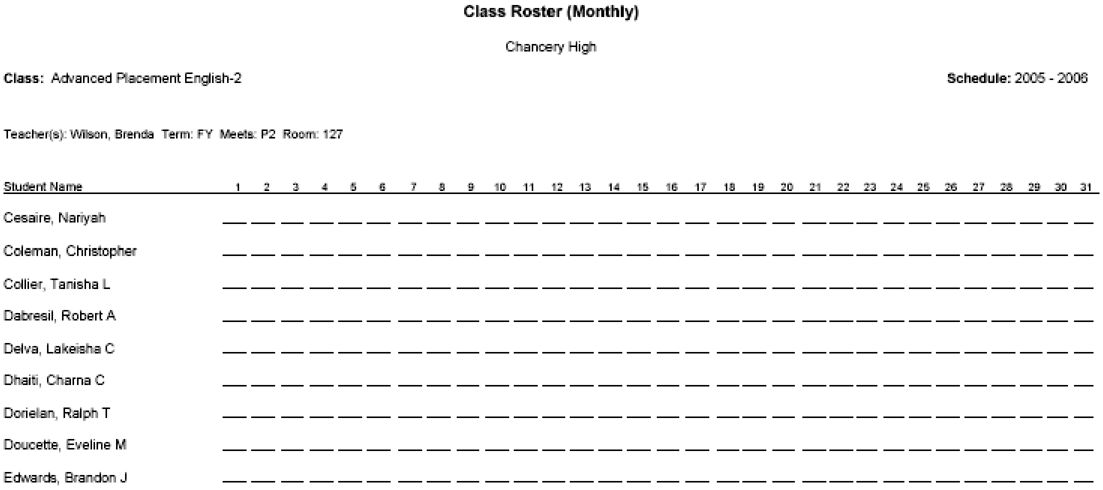
- **Effective Date**: Today, the entire school year, or a date range.

- **Report Type**: Weekly, monthly, or Demographics.
- **Roster**: Class, Homeroom, or both
- **Sort Print Output By**: Teacher then Class/Homeroom or by Class/Homeroom
- **Print Gender Summary**
- **Print Ethnic Category Summary**

Class Roster Monthly

Printing this report enables a teacher or administrator to keep a paper-based attendance record for each class [Figure 140]. It lists all students in the specified class or homeroom and has a blank space for each day of the specified month. The report includes all information necessary to submit the attendance papers, such as the class name, the teacher’s name, and class’s schedule.

FIGURE 140: Class Roster Monthly report sample results



Class Roster (Monthly)

Chancery High

Class: Advanced Placement English-2

Schedule: 2005 - 2006

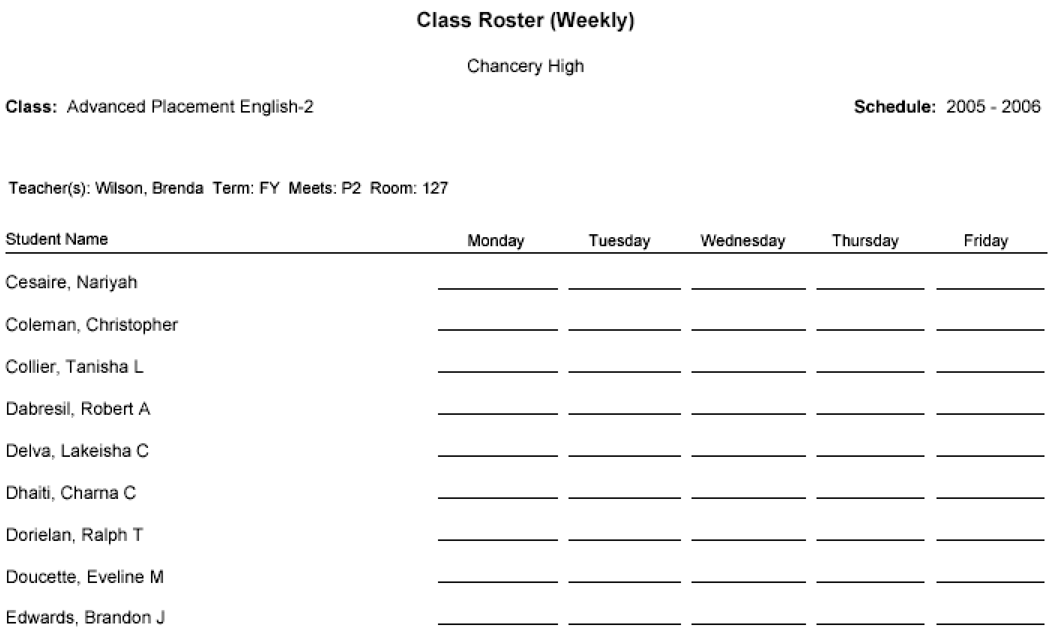
Teacher(s): Wilson, Brenda Term: FY Meets: P2 Room: 127

Student Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Cesaire, Nariyah																															
Coleman, Christopher																															
Collier, Tanisha L																															
Dabresil, Robert A																															
Delva, Lakeisha C																															
Dhaiti, Charna C																															
Dorielan, Ralph T																															
Doucette, Eveline M																															
Edwards, Brandon J																															

Class Roster Weekly

Printing this report enables a teacher or administrator to keep a paper-based attendance record for each class [Figure 141]. It lists all students in the specified class or homeroom and has a blank space for each day of the specified week. The report includes all information necessary to submit the attendance papers, such as the class name, the teacher’s name, and class’s schedule.

FIGURE 141: Class Roster Weekly report sample results



Class Roster (Weekly)

Chancery High

Class: Advanced Placement English-2 **Schedule:** 2005 - 2006

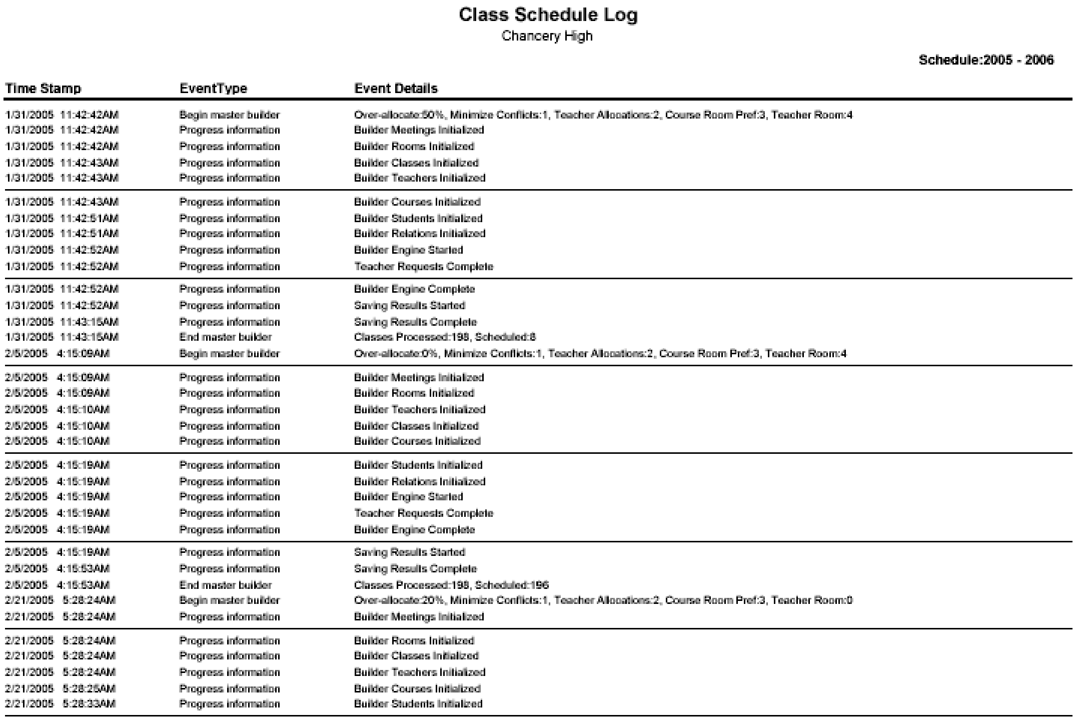
Teacher(s): Wilson, Brenda Term: FY Meets: P2 Room: 127

Student Name	Monday	Tuesday	Wednesday	Thursday	Friday
Cesaire, Nariyah					
Coleman, Christopher					
Collier, Tanisha L					
Dabresil, Robert A					
Delva, Lakeisha C					
Dhaiti, Charna C					
Dorielan, Ralph T					
Doucette, Eveline M					
Edwards, Brandon J					

Class Schedule Log

This report enables an administrator to review the process of building a master schedule. The report displays the contents of the log from the “Schedule Classes” process, which records the date and details of each event in the process [Figure 142].

FIGURE 142: Class Schedule Log report sample results



Class Schedule Log

Chancery High

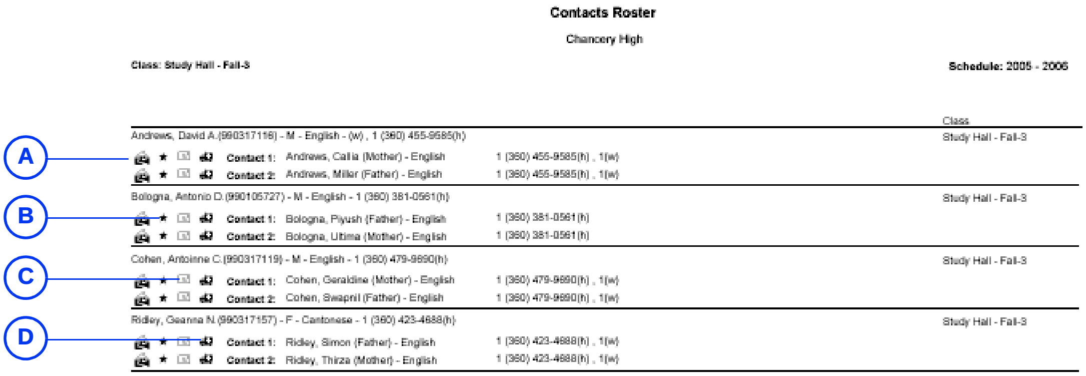
Schedule:2005 - 2006

Time Stamp	EventType	Event Details
1/31/2005 11:42:42AM	Begin master builder	Over-allocate:50%, Minimize Conflicts:1, Teacher Allocations:2, Course Room Pref:3, Teacher Room:4
1/31/2005 11:42:42AM	Progress information	Builder Meetings Initialized
1/31/2005 11:42:42AM	Progress information	Builder Rooms Initialized
1/31/2005 11:42:43AM	Progress information	Builder Classes Initialized
1/31/2005 11:42:43AM	Progress information	Builder Teachers Initialized
1/31/2005 11:42:43AM	Progress information	Builder Courses Initialized
1/31/2005 11:42:51AM	Progress information	Builder Students Initialized
1/31/2005 11:42:51AM	Progress information	Builder Relations Initialized
1/31/2005 11:42:52AM	Progress information	Builder Engine Started
1/31/2005 11:42:52AM	Progress information	Teacher Requests Complete
1/31/2005 11:42:52AM	Progress information	Builder Engine Complete
1/31/2005 11:42:52AM	Progress information	Saving Results Started
1/31/2005 11:43:15AM	Progress information	Saving Results Complete
1/31/2005 11:43:15AM	End master builder	Classes Processed:198, Scheduled:8
2/5/2005 4:15:09AM	Begin master builder	Over-allocate:0%, Minimize Conflicts:1, Teacher Allocations:2, Course Room Pref:3, Teacher Room:4
2/5/2005 4:15:09AM	Progress information	Builder Meetings Initialized
2/5/2005 4:15:09AM	Progress information	Builder Rooms Initialized
2/5/2005 4:15:10AM	Progress information	Builder Teachers Initialized
2/5/2005 4:15:10AM	Progress information	Builder Classes Initialized
2/5/2005 4:15:10AM	Progress information	Builder Courses Initialized
2/5/2005 4:15:19AM	Progress information	Builder Students Initialized
2/5/2005 4:15:19AM	Progress information	Builder Relations Initialized
2/5/2005 4:15:19AM	Progress information	Builder Engine Started
2/5/2005 4:15:19AM	Progress information	Teacher Requests Complete
2/5/2005 4:15:19AM	Progress information	Builder Engine Complete
2/5/2005 4:15:19AM	Progress information	Saving Results Started
2/5/2005 4:15:53AM	Progress information	Saving Results Complete
2/5/2005 4:15:53AM	End master builder	Classes Processed:198, Scheduled:196
2/21/2005 5:28:24AM	Begin master builder	Over-allocate:20%, Minimize Conflicts:1, Teacher Allocations:2, Course Room Pref:3, Teacher Room:0
2/21/2005 5:28:24AM	Progress information	Builder Meetings Initialized
2/21/2005 5:28:24AM	Progress information	Builder Rooms Initialized
2/21/2005 5:28:24AM	Progress information	Builder Classes Initialized
2/21/2005 5:28:24AM	Progress information	Builder Teachers Initialized
2/21/2005 5:28:25AM	Progress information	Builder Courses Initialized
2/21/2005 5:28:33AM	Progress information	Builder Students Initialized

Contacts Roster

This report presents, for every student in a specified class or homeroom, information on how to contact the student's parent, guardians, and emergency contacts [Figure 143]. For each contact, the report indicates whether that contact lives with the student, gets mailings for the student, has custody of the student, or is the emergency contact.

FIGURE 143: Contacts Roster report sample results



Contacts Roster

Chancery High

Class: Study Hall - Fall-3

Schedule: 2005 - 2006

Class

Andrews, David A.(990317116) - M - English - (w) , 1 (360) 455-9585(h)
Study Hall - Fall-3
★ Contact 1: Andrews, Callia (Mother) - English 1 (360) 455-9585(h) , 1(w)
★ Contact 2: Andrews, Miller (Father) - English 1 (360) 455-9585(h) , 1(w)

Bologna, Antonio D.(990105727) - M - English - 1 (360) 381-0561(h)
Study Hall - Fall-3
★ Contact 1: Bologna, Piyush (Father) - English 1 (360) 381-0561(h)
★ Contact 2: Bologna, Ultima (Mother) - English 1 (360) 381-0561(h)

Cohen, Antoinne C.(990317119) - M - English - 1 (360) 479-9890(h)
Study Hall - Fall-3
★ Contact 1: Cohen, Geraldine (Mother) - English 1 (360) 479-9890(h) , 1(w)
★ Contact 2: Cohen, Swapnil (Father) - English 1 (360) 479-9890(h) , 1(w)

Ridley, Geanna N.(990317157) - F - Cantonese - 1 (360) 423-4688(h)
Study Hall - Fall-3
★ Contact 1: Ridley, Simon (Father) - English 1 (360) 423-4688(h) , 1(w)
★ Contact 2: Ridley, Thirza (Mother) - English 1 (360) 423-4688(h) , 1(w)

A Lives with: Indicates that this contact lives with the student

B Custody: Indicates that this contact has custody of the student.

C Mailings: Indicates that this contact receives mailings from the school pertaining to this student.

D Emergency: Indicates that this contact is an emergency contact for the student.

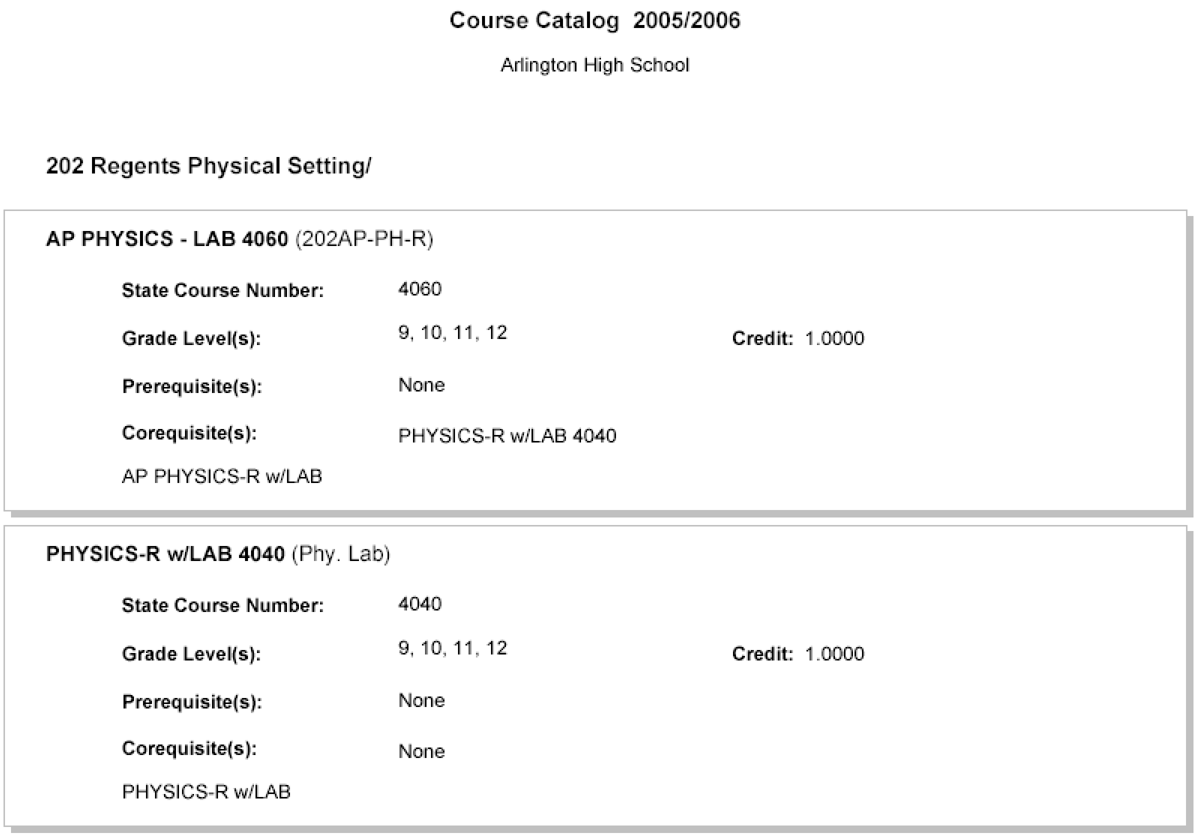
Report options include:

- **Effective Date**: Today, the entire school year, or a date range.
- **Contacts Included**: All contact, or emergency contacts only.
- **Roster**: Class, Homeroom, or both
- **Sort Print Output By**: Teacher then class/homeroom, or class/homeroom

Course Catalog by Name

This report lists the details of all courses available by course name [Figure 144]. This list facilitates registration and scheduling by presenting enough information about each course (such as level, prerequisites, and credits) to enable students and their parents to select courses and counselors to advise students.

FIGURE 144: Course Catalog by Name report sample results



Course Catalog 2005/2006

Arlington High School

202 Regents Physical Setting/

AP PHYSICS - LAB 4060 (202AP-PH-R)

State Course Number: 4060

Grade Level(s): 9, 10, 11, 12 **Credit:** 1.0000

Prerequisite(s): None

Corequisite(s): PHYSICS-R w/LAB 4040

AP PHYSICS-R w/LAB

PHYSICS-R w/LAB 4040 (Phy. Lab)

State Course Number: 4040

Grade Level(s): 9, 10, 11, 12 **Credit:** 1.0000

Prerequisite(s): None

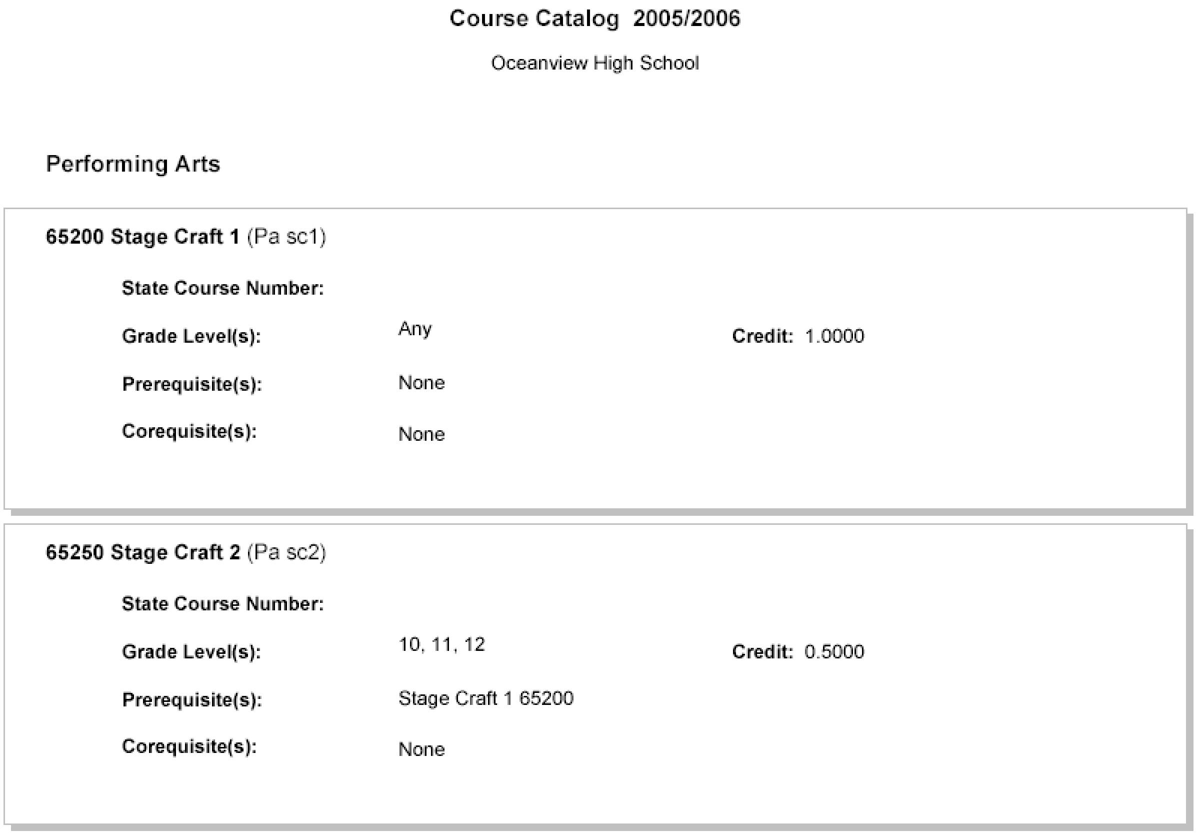
Corequisite(s): None

PHYSICS-R w/LAB

Course Catalog by Number

This report lists the details of all courses available by course number [Figure 145]. This list facilitates registration and scheduling by presenting enough information about each course (such as level, prerequisites, and credits) to enable students and their parents to select courses and counselors to advise students.

FIGURE 145: Course Catalog by Number report sample results



Course Catalog 2005/2006

Oceanview High School

Performing Arts

65200 Stage Craft 1 (Pa sc1)

State Course Number:

Grade Level(s): Any **Credit:** 1.0000

Prerequisite(s): None

Corequisite(s): None

65250 Stage Craft 2 (Pa sc2)

State Course Number:

Grade Level(s): 10, 11, 12 **Credit:** 0.5000

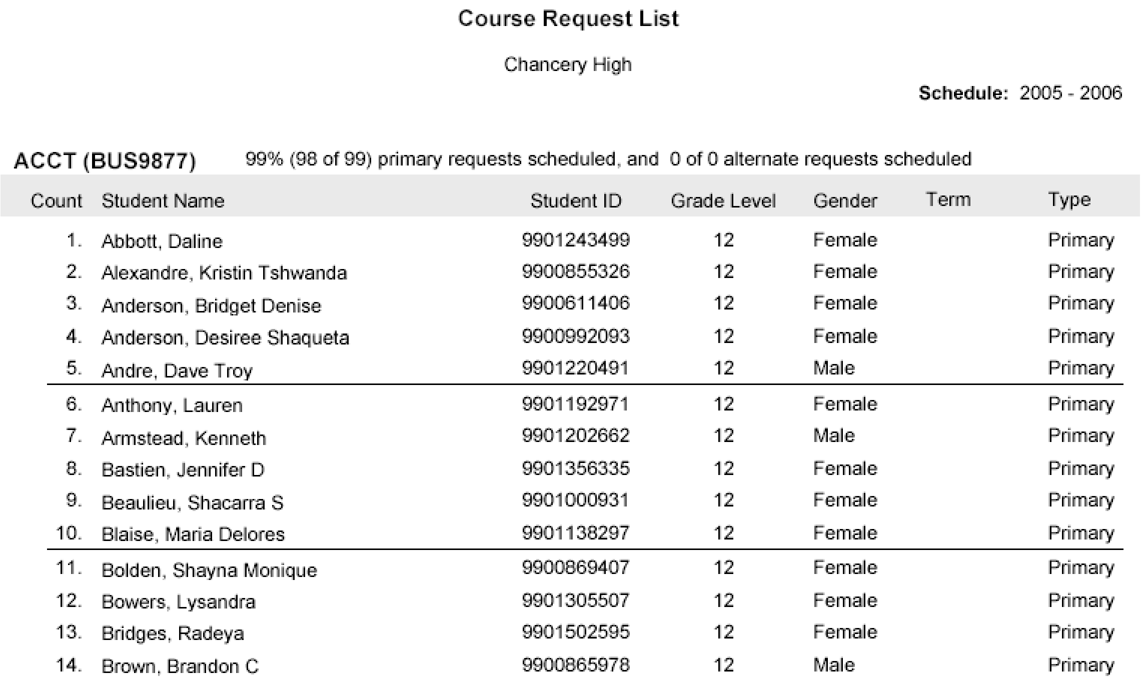
Prerequisite(s): Stage Craft 1 65200

Corequisite(s): None

Course Request List

By course, this report lists students who have requested the course [Figure 146]. The report also tallies the number of primary versus alternate requests. By default, Chancery SMS sets the report filters to only the selected students.

FIGURE 146: Course Request List report sample results



Course Request List

Chancery High

Schedule: 2005 - 2006

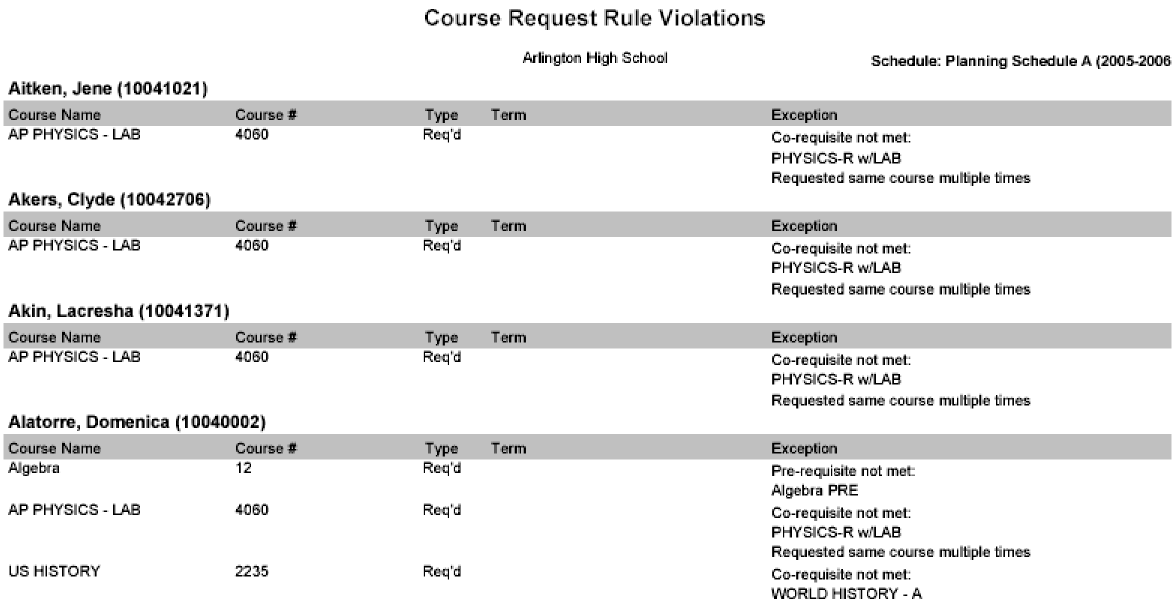
ACCT (BUS9877) 99% (98 of 99) primary requests scheduled, and 0 of 0 alternate requests scheduled

Count	Student Name	Student ID	Grade Level	Gender	Term	Type
1.	Abbott, Daline	9901243499	12	Female		Primary
2.	Alexandre, Kristin Tshwanda	9900855326	12	Female		Primary
3.	Anderson, Bridget Denise	9900611406	12	Female		Primary
4.	Anderson, Desiree Shaqueta	9900992093	12	Female		Primary
5.	Andre, Dave Troy	9901220491	12	Male		Primary
6.	Anthony, Lauren	9901192971	12	Female		Primary
7.	Armstead, Kenneth	9901202662	12	Male		Primary
8.	Bastien, Jennifer D	9901356335	12	Female		Primary
9.	Beaulieu, Shacarra S	9901000931	12	Female		Primary
10.	Blaise, Maria Delores	9901138297	12	Female		Primary
11.	Bolden, Shayna Monique	9900869407	12	Female		Primary
12.	Bowers, Lysandra	9901305507	12	Female		Primary
13.	Bridges, Radeya	9901502595	12	Female		Primary
14.	Brown, Brandon C	9900865978	12	Male		Primary

Course Request Rule Violation

This report lists violations of course request rules grouped by student [Figure 147]. This report enables an administrator to identify and resolve course request issues. By default, Chancery SMS sets the report filters to only the selected students. **Note:** This report is a condensed version of the exceptions information included in the Course Request Verification report [p. 247].

FIGURE 147: Course Request Rule Violation report sample results



Course Request Rule Violations

Arlington High School

Schedule: Planning Schedule A (2005-2006

Aitken, Jene (10041021)

Course Name	Course #	Type	Term	Exception
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times

Akers, Clyde (10042706)

Course Name	Course #	Type	Term	Exception
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times

Akin, Lacresha (10041371)

Course Name	Course #	Type	Term	Exception
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times

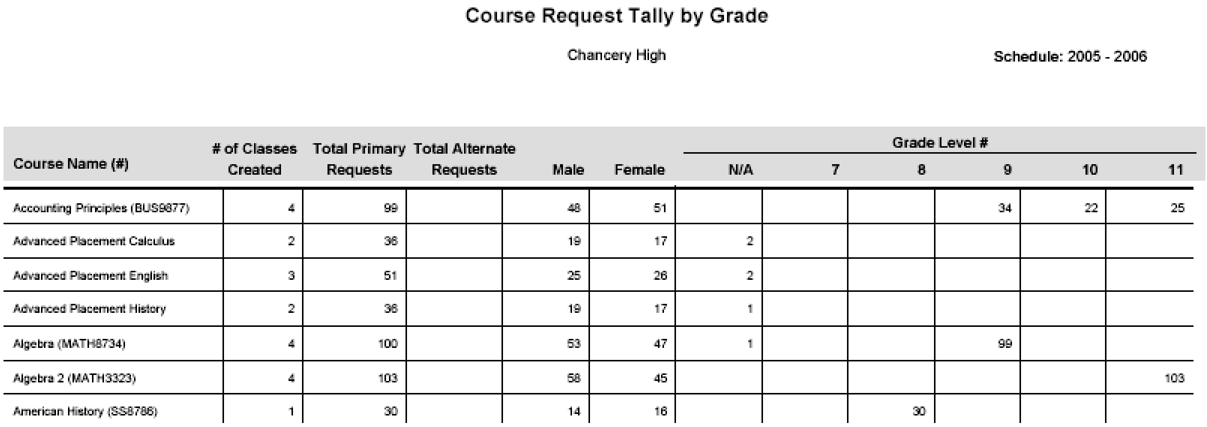
Alatorre, Domenica (10040002)

Course Name	Course #	Type	Term	Exception
Algebra	12	Req'd		Pre-requisite not met: Algebra PRE
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times
US HISTORY	2235	Req'd		Co-requisite not met: WORLD HISTORY - A

Course Request Tally

This report presents the total number of student requests for each course [Figure 148]. It shows both primary and alternate requests and breaks down the primary requests by gender.

FIGURE 148: Course Request Tally report sample results



Course Request Tally by Grade

Chancery High

Schedule: 2005 - 2006

Course Name (#)	# of Classes Created	Total Primary Requests	Total Alternate Requests	Male	Female	Grade Level # N/A	7	8	9	10	11
Accounting Principles (BUS9877)	4	99		48	51				34	22	25
Advanced Placement Calculus	2	36		19	17	2					
Advanced Placement English	3	51		25	26	2					
Advanced Placement History	2	36		19	17	1					
Algebra (MATH8734)	4	100		53	47	1			99		
Algebra 2 (MATH3323)	4	103		58	45						103
American History (SS8786)	1	30		14	16			30			

Report options include:

- **Report Type**:

  “By grade” uses the student’s projected grade level and lists the courses alphabetically [Figure 148].

  “By grade and department” uses the student’s projected grade level and groups the courses by department.

  “By term” uses the coming term and lists the courses alphabetically.

  “By term and department” uses the coming term and groups the courses by department.

  “By gender and ethnic category”
- **Show**:

  Totals Only

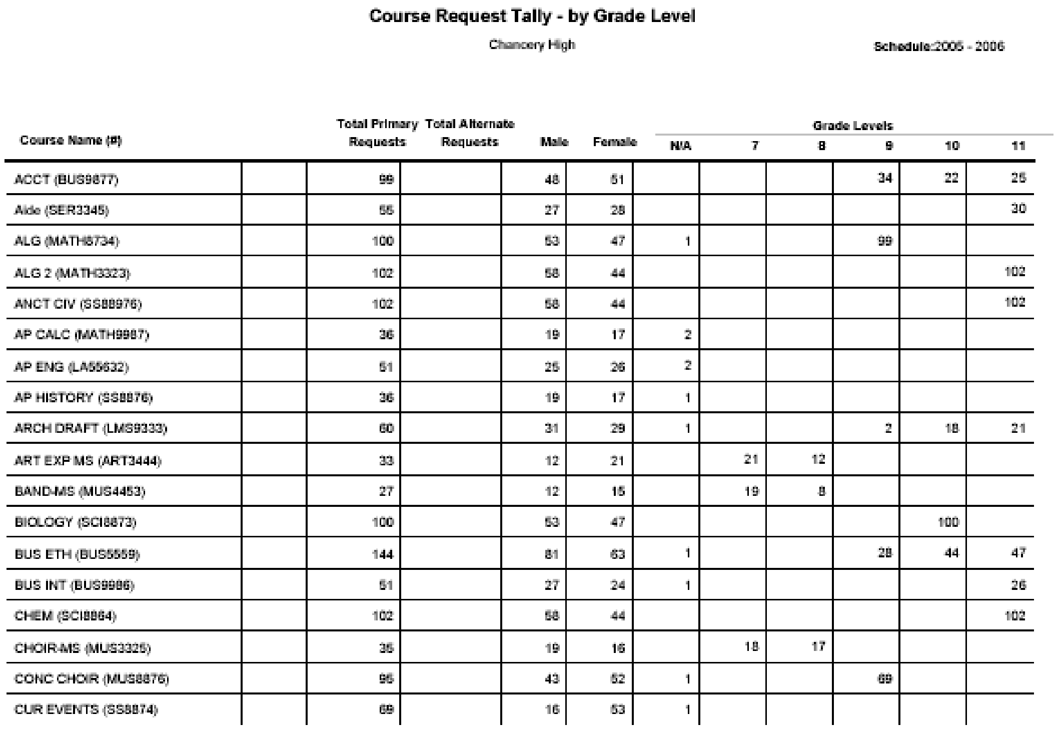
  Percentages Only

  Totals and Percentages
- **Sort Order**: By course name or number

Course Request Tally by Grade

This report presents the total number of student requests for each course [Figure 149]. It shows both primary and alternate requests and breaks down the primary requests by gender and by grade.

FIGURE 149: Course Request Tally by Grade report sample results



Course Request Tally - by Grade Level

Chancery High

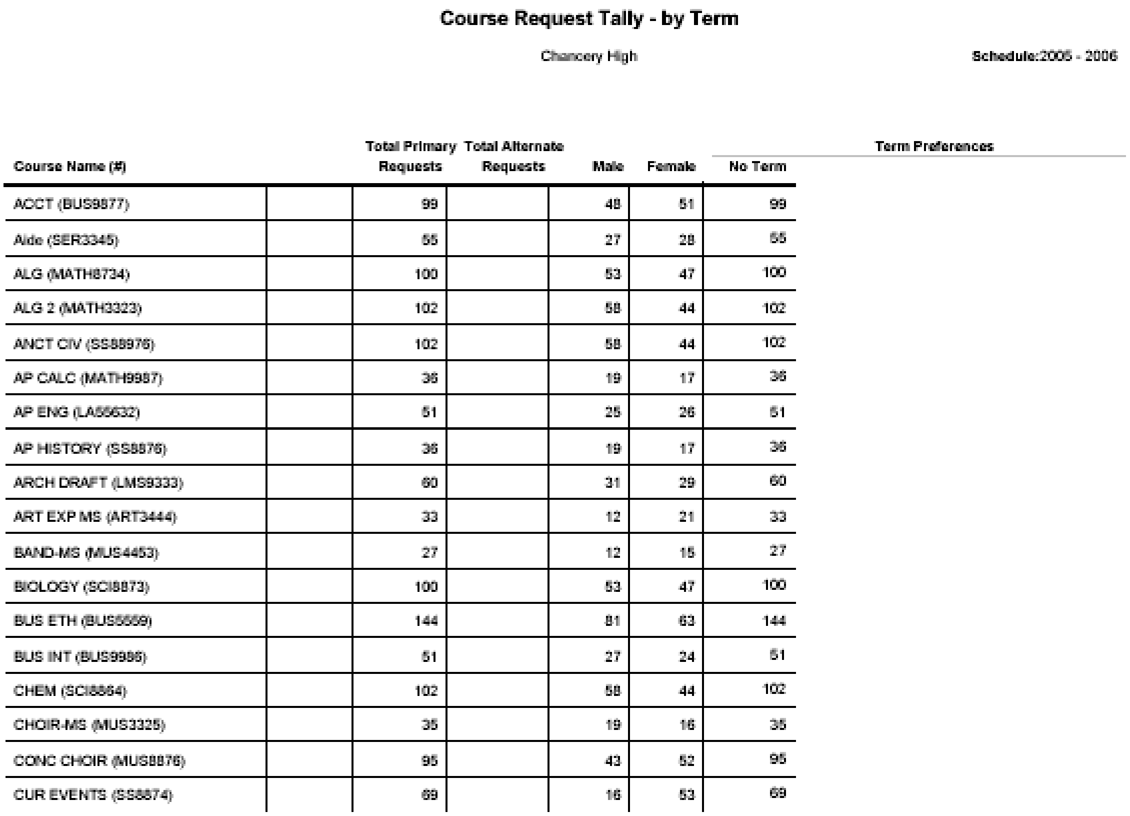
Schedule:2005 - 2006

Course Name (#)		Total Primary Requests	Total Alternate Requests	Male	Female	Grade Levels					
						N/A	7	8	9	10	11
ACCT (BUS9877)		99		48	51				34	22	25
Aide (SER3345)		55		27	28						30
ALG (MATH8734)		100		53	47	1			99		
ALG 2 (MATH3323)		102		58	44						102
ANCT CIV (SS88976)		102		58	44						102
AP CALC (MATH9987)		36		19	17	2					
AP ENG (LA55632)		51		25	26	2					
AP HISTORY (SS8876)		36		19	17	1					
ARCH DRAFT (LMS9333)		60		31	29	1			2	18	21
ART EXP MS (ART3444)		33		12	21		21	12			
BAND-MS (MUS4453)		27		12	15		19	8			
BIOLOGY (SCI8873)		100		53	47					100	
BUS ETH (BUS5559)		144		81	63	1			28	44	47
BUS INT (BUS9986)		51		27	24	1					26
CHEM (SCI8864)		102		58	44						102
CHOIR-MS (MUS3325)		35		19	16		18	17			
CONC CHOIR (MUS8876)		95		43	52	1			69		
CUR EVENTS (SS8874)		69		16	53	1					

Course Request Tally by Term

This report presents the total number of student requests for each course [Figure 150]. It shows both primary and alternate requests and breaks down the primary requests by gender and by the term requested.

FIGURE 150: Course Request Tally by Term report sample results



Course Request Tally - by Term

Chancery High

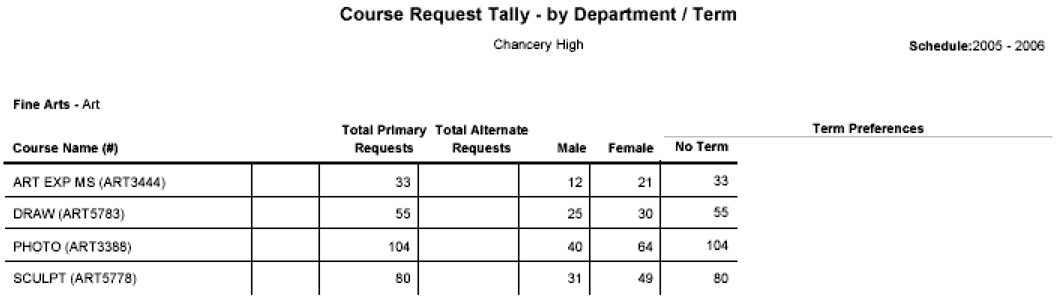
Schedule:2005 - 2006

Course Name (#)		**Total Primary Requests**	**Total Alternate Requests**	**Male**	**Female**	**Term Preferences** **No Term**
ACCT (BUS9877)		99		48	51	99
Aide (SER3345)		55		27	28	55
ALG (MATH8734)		100		53	47	100
ALG 2 (MATH3323)		102		58	44	102
ANCT CIV (SS88976)		102		58	44	102
AP CALC (MATH9987)		36		19	17	36
AP ENG (LA55632)		51		25	26	51
AP HISTORY (SS8876)		36		19	17	36
ARCH DRAFT (LMS9333)		60		31	29	60
ART EXP MS (ART3444)		33		12	21	33
BAND-MS (MUS4453)		27		12	15	27
BIOLOGY (SCI8873)		100		53	47	100
BUS ETH (BUS5559)		144		81	63	144
BUS INT (BUS9986)		51		27	24	51
CHEM (SCI8864)		102		58	44	102
CHOIR-MS (MUS3325)		35		19	16	35
CONC CHOIR (MUS8876)		95		43	52	95
CUR EVENTS (SS8874)		69		16	53	69

Course Request Tally by Term by Dept

This report presents the total number of student requests for each course grouped by department [Figure 151]. It shows both primary and alternate requests and breaks down the primary requests by gender and by the term requested.

FIGURE 151: Course Request Tally by Term by Department report sample results



Course Request Tally - by Department / Term

Chancery High

Schedule:2005 - 2006

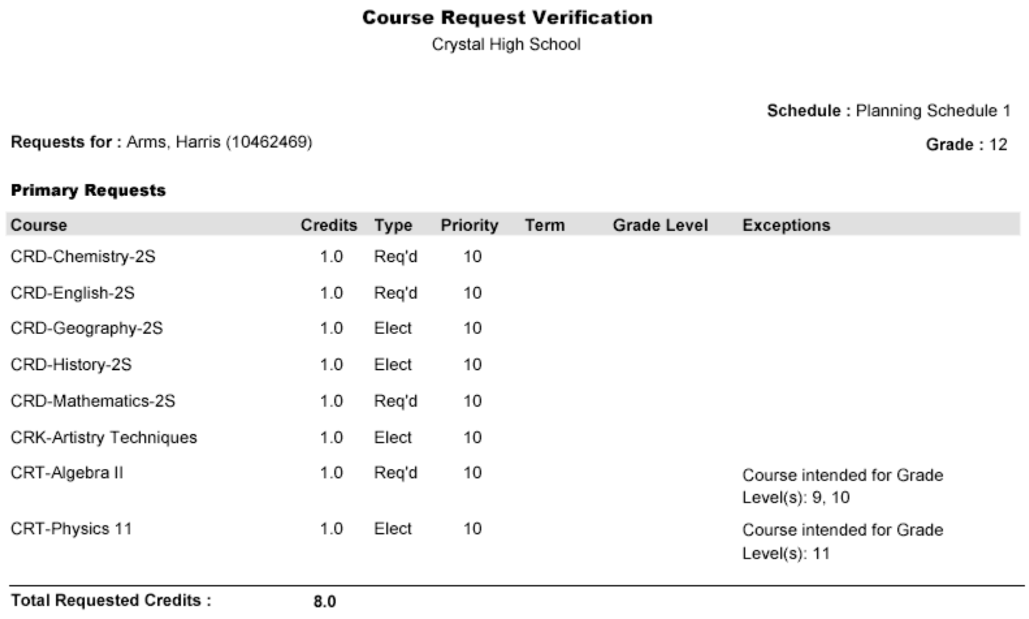
Fine Arts - Art

Course Name (#)		**Total Primary Requests**	**Total Alternate Requests**	**Male**	**Female**	**Term Preferences** **No Term**
ART EXP MS (ART3444)		33		12	21	33
DRAW (ART5783)		55		25	30	55
PHOTO (ART3388)		104		40	64	104
SCULPT (ART5778)		80		31	49	80

Course Request Verification

This report lists a specific student's course requests in a format that enables a student's parent or guardian to review and sign off on the requests [Figure 152]. Primary and alternate requests are listed separately. By default, Chancery SMS sets the report filters to only the selected students.

FIGURE 152: Course Request Verification report sample results



Course Request Verification

Crystal High School

Schedule : Planning Schedule 1

Requests for : Arms, Harris (10462469)

Grade : 12

Primary Requests

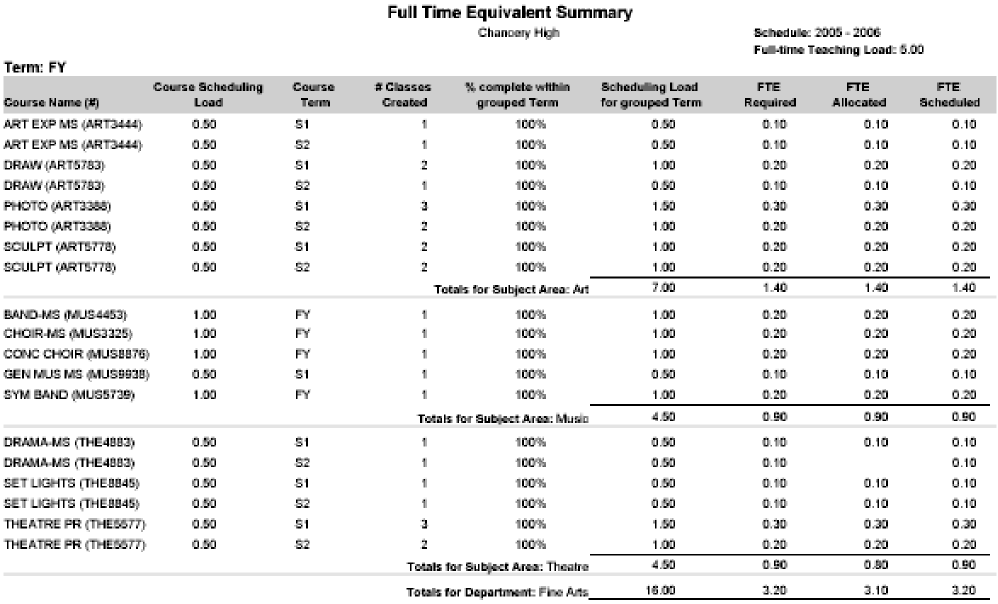
Course	Credits	Type	Priority	Term	Grade Level	Exceptions
CRD-Chemistry-2S	1.0	Req'd	10			
CRD-English-2S	1.0	Req'd	10			
CRD-Geography-2S	1.0	Elect	10			
CRD-History-2S	1.0	Elect	10			
CRD-Mathematics-2S	1.0	Req'd	10			
CRK-Artistry Techniques	1.0	Elect	10			
CRT-Algebra II	1.0	Req'd	10			Course intended for Grade Level(s): 9, 10
CRT-Physics 11	1.0	Elect	10			Course intended for Grade Level(s): 11

Total Requested Credits : **8.0**

Full Time Equivalent Summary

This report lists scheduled classes for a specific term that details full time equivalents (FTEs) for courses [Figure 153]. Details include course scheduling load, term, the number of classes created, the percentage of the course that is completed within the selected term (for example, 100% for a single-term class, 50% for a class that spans two terms), and the scheduling load for the selected term. In addition, it details the FTEs needed to cover all created classes, the FTEs allocated for the classes needed, and the FTEs of teachers scheduled to classes. Totals are also provided, broken down by subject area, department, and term. **Note**: This report does not work with filters.

FIGURE 153: Full Time Equivalent Summary report sample results



Full Time Equivalent Summary

Chancery High

Schedule: 2005 - 2006
Full-time Teaching Load: 5.00

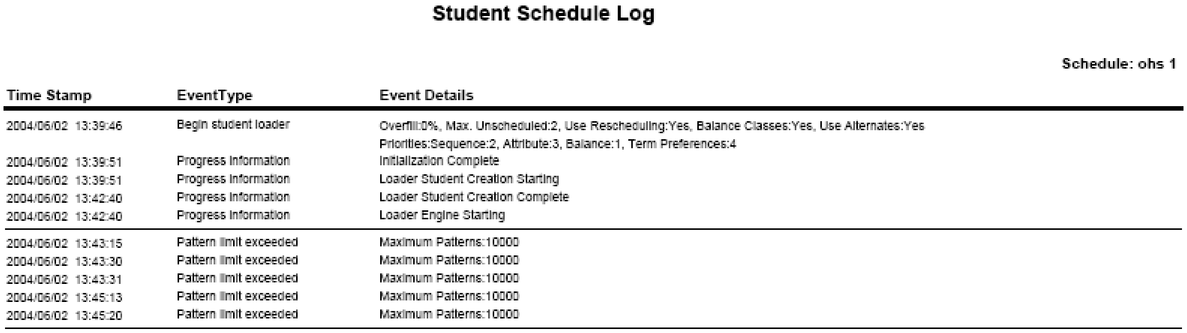
Term: FY

Course Name (#)	Course Scheduling Load	Course Term	# Classes Created	% complete within grouped Term	Scheduling Load for grouped Term	FTE Required	FTE Allocated	FTE Scheduled
ART EXP MS (ART3444)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
ART EXP MS (ART3444)	0.50	S2	1	100%	0.50	0.10	0.10	0.10
DRAW (ART5783)	0.50	S1	2	100%	1.00	0.20	0.20	0.20
DRAW (ART5783)	0.50	S2	1	100%	0.50	0.10	0.10	0.10
PHOTO (ART3388)	0.50	S1	3	100%	1.50	0.30	0.30	0.30
PHOTO (ART3388)	0.50	S2	2	100%	1.00	0.20	0.20	0.20
SCULPT (ART5778)	0.50	S1	2	100%	1.00	0.20	0.20	0.20
SCULPT (ART5778)	0.50	S2	2	100%	1.00	0.20	0.20	0.20
				Totals for Subject Area: Art	7.00	1.40	1.40	1.40
BAND-MS (MUS4453)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
CHOIR-MS (MUS3325)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
CONC CHOIR (MUS8876)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
GEN MUS MS (MUS9938)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
SYM BAND (MUS5739)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
				Totals for Subject Area: Music	4.50	0.90	0.90	0.90
DRAMA-MS (THE4883)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
DRAMA-MS (THE4883)	0.50	S2	1	100%	0.50	0.10		0.10
SET LIGHTS (THE8845)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
SET LIGHTS (THE8845)	0.50	S2	1	100%	0.50	0.10	0.10	0.10
THEATRE PR (THE5577)	0.50	S1	3	100%	1.50	0.30	0.30	0.30
THEATRE PR (THE5577)	0.50	S2	2	100%	1.00	0.20	0.20	0.20
				Totals for Subject Area: Theatre	4.50	0.90	0.80	0.90
				Totals for Department: Fine Arts	16.00	3.20	3.10	3.20

Load Students Log

This report displays the details of scheduling decisions made by the Master Schedule Builder [Figure 154].

FIGURE 154: Load Students Log report sample results



Student Schedule Log

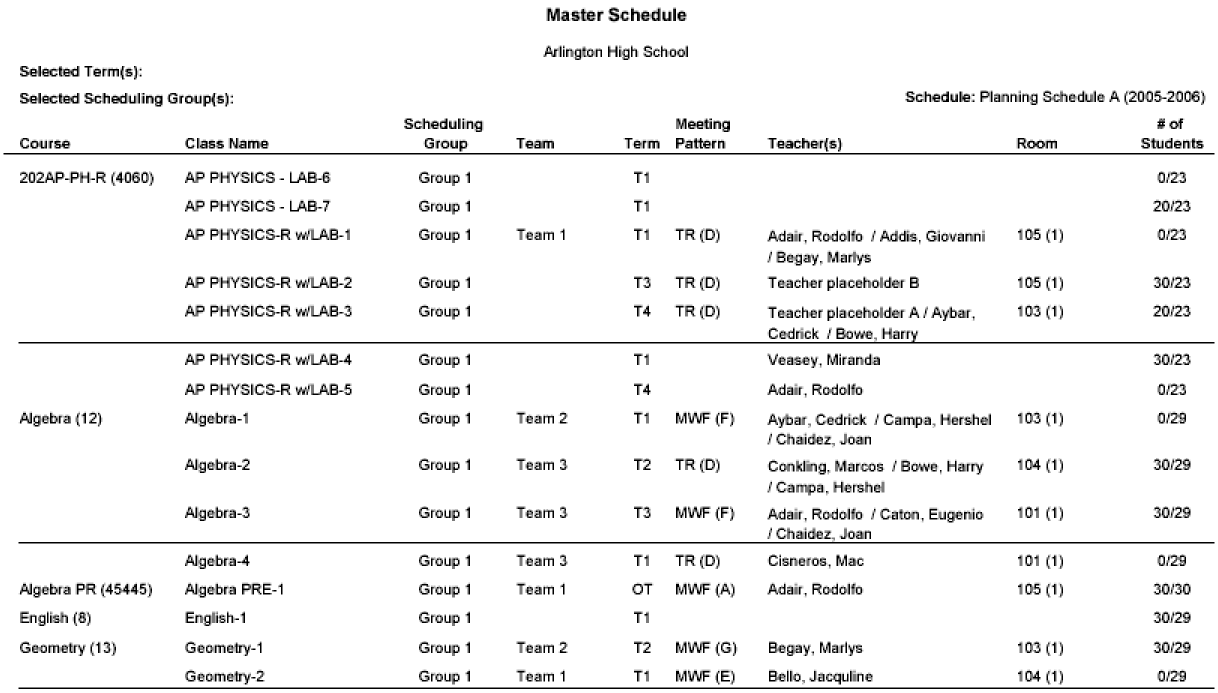
Schedule: ohs 1

Time Stamp	EventType	Event Details
2004/06/02 13:39:46	Begin student loader	Overfill:0%, Max. Unscheduled:2, Use Rescheduling:Yes, Balance Classes:Yes, Use Alternates:Yes Priorities:Sequence:2, Attribute:3, Balance:1, Term Preferences:4
2004/06/02 13:39:51	Progress Information	Initialization Complete
2004/06/02 13:39:51	Progress Information	Loader Student Creation Starting
2004/06/02 13:42:40	Progress Information	Loader Student Creation Complete
2004/06/02 13:42:40	Progress Information	Loader Engine Starting
2004/06/02 13:43:15	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:43:30	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:43:31	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:45:13	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:45:20	Pattern limit exceeded	Maximum Patterns:10000

Master Schedule

This report lists all courses, the classes scheduled for each course, and the details of those classes, including scheduling group, team, term, meeting pattern, teacher, room, and number of students [Figure 155].

FIGURE 155: Master Schedule report sample results



Master Schedule

Arlington High School

Selected Term(s):

Selected Scheduling Group(s):

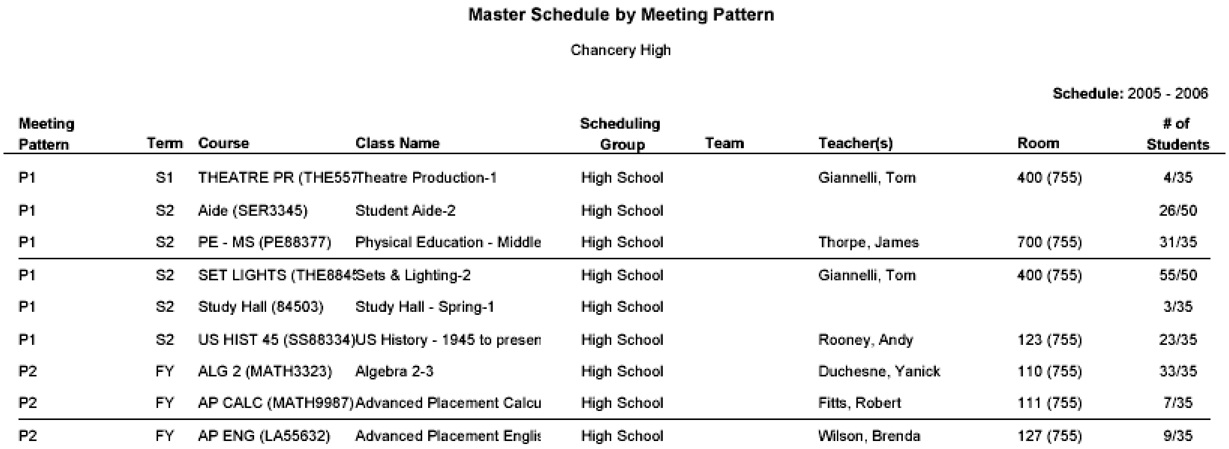
Schedule: Planning Schedule A (2005-2006)

Course	Class Name	Scheduling Group	Team	Term	Meeting Pattern	Teacher(s)	Room	# of Students
202AP-PH-R (4060)	AP PHYSICS - LAB-6	Group 1		T1				0/23
	AP PHYSICS - LAB-7	Group 1		T1				20/23
	AP PHYSICS-R w/LAB-1	Group 1	Team 1	T1	TR (D)	Adair, Rodolfo / Addis, Giovanni / Begay, Marlys	105 (1)	0/23
	AP PHYSICS-R w/LAB-2	Group 1		T3	TR (D)	Teacher placeholder B	105 (1)	30/23
	AP PHYSICS-R w/LAB-3	Group 1		T4	TR (D)	Teacher placeholder A / Aybar, Cedrick / Bowe, Harry	103 (1)	20/23
	AP PHYSICS-R w/LAB-4	Group 1		T1		Veasey, Miranda		30/23
	AP PHYSICS-R w/LAB-5	Group 1		T4		Adair, Rodolfo		0/23
Algebra (12)	Algebra-1	Group 1	Team 2	T1	MWF (F)	Aybar, Cedrick / Campa, Hershel / Chaidez, Joan	103 (1)	0/29
	Algebra-2	Group 1	Team 3	T2	TR (D)	Conkling, Marcos / Bowe, Harry / Campa, Hershel	104 (1)	30/29
	Algebra-3	Group 1	Team 3	T3	MWF (F)	Adair, Rodolfo / Caton, Eugenio / Chaidez, Joan	101 (1)	30/29
	Algebra-4	Group 1	Team 3	T1	TR (D)	Cisneros, Mac	101 (1)	0/29
Algebra PR (45445)	Algebra PRE-1	Group 1	Team 1	OT	MWF (A)	Adair, Rodolfo	105 (1)	30/30
English (8)	English-1	Group 1		T1				30/29
Geometry (13)	Geometry-1	Group 1	Team 2	T2	MWF (G)	Begay, Marlys	103 (1)	30/29
	Geometry-2	Group 1	Team 1	T1	MWF (E)	Bello, Jacquline	104 (1)	0/29

Master Schedule by Meeting Pattern

This report lists all meeting patterns, the classes scheduled for each course, and the details of those classes, including scheduling group, team, term, course, teacher, room, and number of students [Figure 156].

FIGURE 156: Master Schedule by Meeting Pattern report sample results



Master Schedule by Meeting Pattern

Chancery High

Schedule: 2005 - 2006

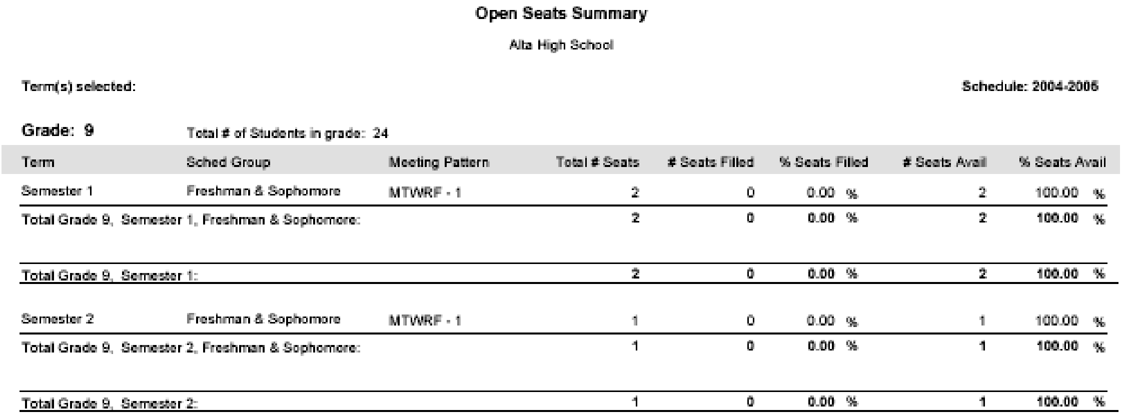
Meeting Pattern	Term	Course	Class Name	Scheduling Group	Team	Teacher(s)	Room	# of Students
P1	S1	THEATRE PR (THE557	Theatre Production-1	High School		Giannelli, Tom	400 (755)	4/35
P1	S2	Aide (SER3345)	Student Aide-2	High School				26/50
P1	S2	PE - MS (PE88377)	Physical Education - Middle	High School		Thorpe, James	700 (755)	31/35
P1	S2	SET LIGHTS (THE884	Sets & Lighting-2	High School		Giannelli, Tom	400 (755)	55/50
P1	S2	Study Hall (84503)	Study Hall - Spring-1	High School				3/35
P1	S2	US HIST 45 (SS88334)	US History - 1945 to presen	High School		Rooney, Andy	123 (755)	23/35
P2	FY	ALG 2 (MATH3323)	Algebra 2-3	High School		Duchesne, Yanick	110 (755)	33/35
P2	FY	AP CALC (MATH9987)	Advanced Placement Calcu	High School		Fitts, Robert	111 (755)	7/35
P2	FY	AP ENG (LA55632)	Advanced Placement Englis	High School		Wilson, Brenda	127 (755)	9/35

Open Seats Summary

This report totals the capacity, seats filled, and seats available for all classes in each meeting pattern, broken down by scheduling group and term [Figure 157]. The numbers are distributed across grade levels according to the grade levels of students with course requests for the associated classes. When there are no students loaded into classes, the distribution across grade levels is evenly balanced for each class. As students are loaded into classes, the grade level distribution adjusts dynamically to reflect actual grade levels in the different classes.

This report is useful for schools using secondary scheduling, but it also runs for schools using elementary scheduling if meeting patterns are defined and assigned to lasses.

FIGURE 157: Open Seats Summary report sample results



Open Seats Summary

Alta High School

Term(s) selected: **Schedule: 2004-2005**

Grade: 9 Total # of Students in grade: 24

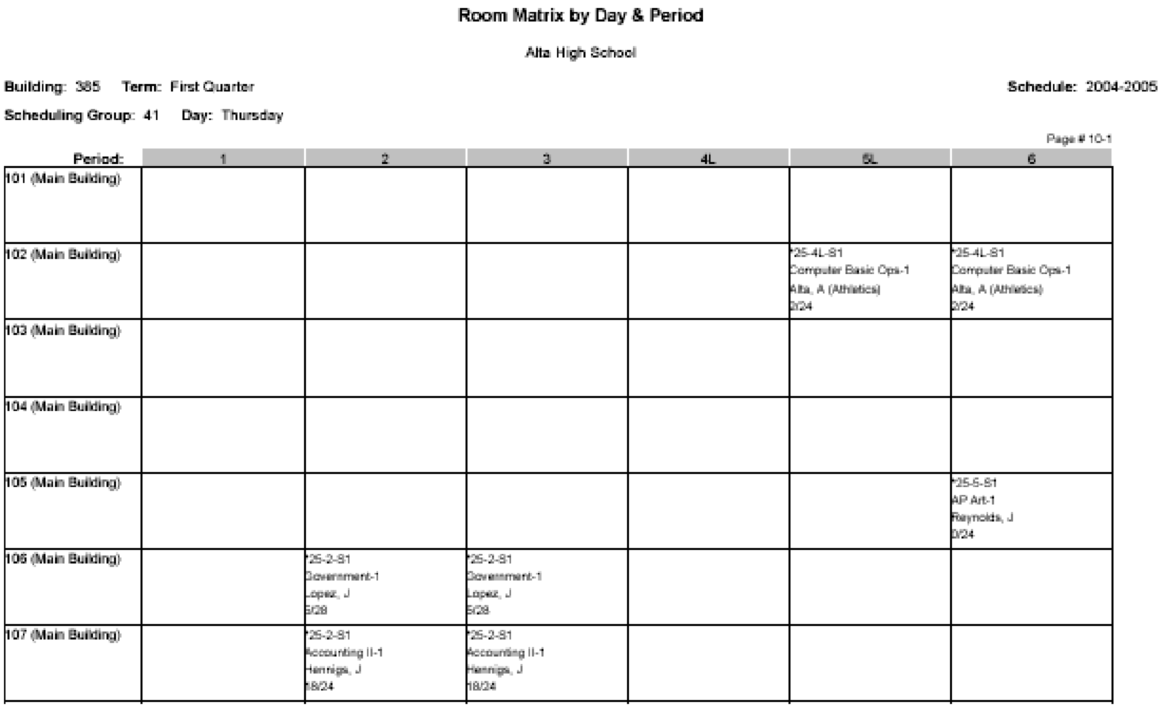
Term	Sched Group	Meeting Pattern	Total # Seats	# Seats Filled	% Seats Filled	# Seats Avail	% Seats Avail
Semester 1	Freshman & Sophomore	MTWRF - 1	2	0	0.00 %	2	100.00 %
Total Grade 9, Semester 1, Freshman & Sophomore:			**2**	**0**	**0.00 %**	**2**	**100.00 %**
Total Grade 9, Semester 1:			**2**	**0**	**0.00 %**	**2**	**100.00 %**
Semester 2	Freshman & Sophomore	MTWRF - 1	1	0	0.00 %	1	100.00 %
Total Grade 9, Semester 2, Freshman & Sophomore:			**1**	**0**	**0.00 %**	**1**	**100.00 %**
Total Grade 9, Semester 2:			**1**	**0**	**0.00 %**	**1**	**100.00 %**

Room Matrix by Day Period

The report displays how a school's rooms are used during each period of each day's schedule [Figure 158]. Where a room is assigned to a course, the reports shows the class, teacher, department, the number of students in the class, and the class capacity. Where there is a conflict (that is, more than one class scheduled into a room in a given period), the first class is displayed and a message indicates the conflict. The report is broken down by scheduling group, but any overlap with classes from other scheduling groups is shown for each period.

This report is useful for schools using secondary scheduling, but it also runs for schools using elementary scheduling if meeting patterns are defined and assigned to lasses.

FIGURE 158: Room Matrix by Day Period report sample results



Room Matrix by Day & Period

Alta High School

Building: 385 **Term:** First Quarter **Schedule:** 2004-2005

Scheduling Group: 41 **Day:** Thursday

Page # 10-1

Period:	1	2	3	4L	5L	6
101 (Main Building)						
102 (Main Building)					*25-4L-S1 Computer Basic Ops-1 Alta, A (Athletics) 2/24	*25-4L-S1 Computer Basic Ops-1 Alta, A (Athletics) 2/24
103 (Main Building)						
104 (Main Building)						
105 (Main Building)						*25-5-S1 AP Art-1 Reynolds, J 0/24
106 (Main Building)		*25-2-S1 Government-1 Lopez, J 5/28	*25-2-S1 Government-1 Lopez, J 5/28			
107 (Main Building)		*25-2-S1 Accounting II-1 Hennigs, J 18/24	*25-2-S1 Accounting II-1 Hennigs, J 18/24			

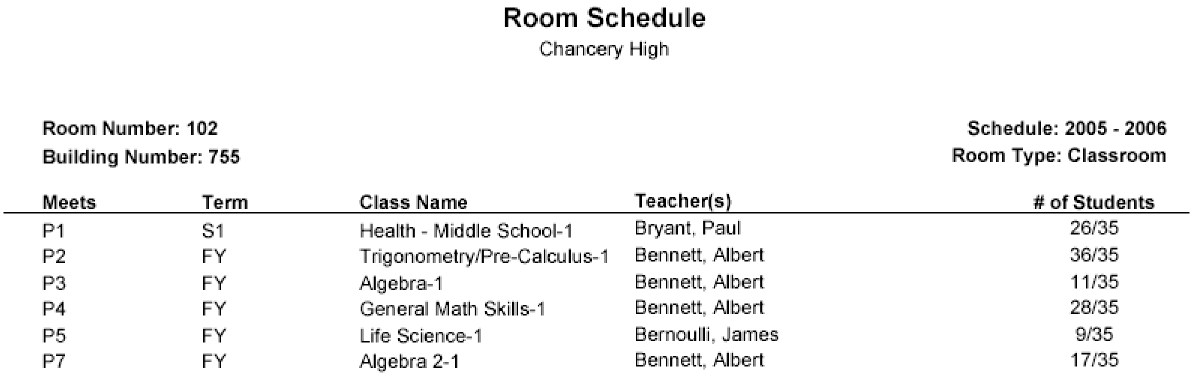
On this report, we recommend using the following default filters:

Filter	Filter Option	Description
Room	Name	Prompts users to filter by room name.
	Number	Prompts users to filter by room number.

Room Schedule

This report lists the details of classes being held in a particular room [Figure 159], including the meeting pattern, term, class name, teacher, and the number of students versus the room capacity.

FIGURE 159: Room Schedule report sample results



Room Schedule

Chancery High

Room Number: 102 **Schedule: 2005 - 2006**

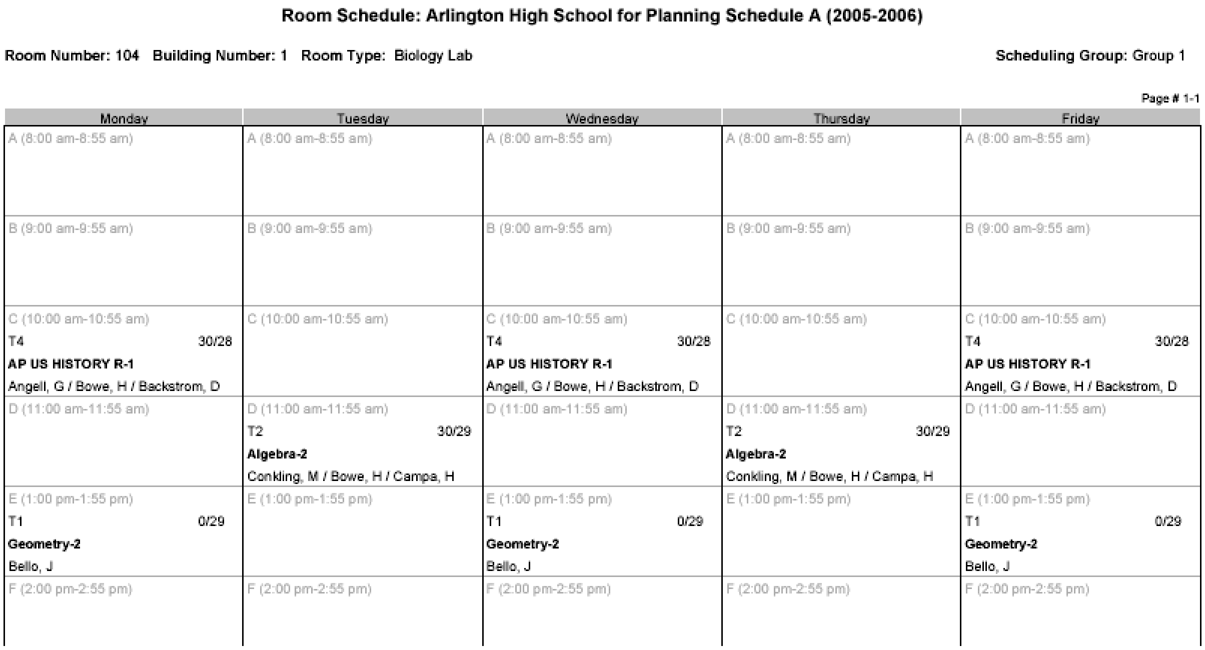
Building Number: 755 **Room Type: Classroom**

Meets	Term	Class Name	Teacher(s)	# of Students
P1	S1	Health - Middle School-1	Bryant, Paul	26/35
P2	FY	Trigonometry/Pre-Calculus-1	Bennett, Albert	36/35
P3	FY	Algebra-1	Bennett, Albert	11/35
P4	FY	General Math Skills-1	Bennett, Albert	28/35
P5	FY	Life Science-1	Bernoulli, James	9/35
P7	FY	Algebra 2-1	Bennett, Albert	17/35

Room Schedule Matrix

The report displays how a school room is used during each period on each day of the week [Figure 160]. For each class, the report includes the term, class name, teacher, and the number of students versus the room capacity

FIGURE 160: Room Schedule Matrix report sample results



Room Schedule: Arlington High School for Planning Schedule A (2005-2006)

Room Number: 104 **Building Number:** 1 **Room Type:** Biology Lab

Scheduling Group: Group 1

Page # 1-1

Monday	Tuesday	Wednesday	Thursday	Friday
A (8:00 am-8:55 am)	A (8:00 am-8:55 am)	A (8:00 am-8:55 am)	A (8:00 am-8:55 am)	A (8:00 am-8:55 am)
B (9:00 am-9:55 am)	B (9:00 am-9:55 am)	B (9:00 am-9:55 am)	B (9:00 am-9:55 am)	B (9:00 am-9:55 am)
C (10:00 am-10:55 am) T4 30/28 **AP US HISTORY R-1** Angell, G / Bowe, H / Backstrom, D	C (10:00 am-10:55 am)	C (10:00 am-10:55 am) T4 30/28 **AP US HISTORY R-1** Angell, G / Bowe, H / Backstrom, D	C (10:00 am-10:55 am)	C (10:00 am-10:55 am) T4 30/28 **AP US HISTORY R-1** Angell, G / Bowe, H / Backstrom, D
D (11:00 am-11:55 am)	D (11:00 am-11:55 am) T2 30/29 **Algebra-2** Conkling, M / Bowe, H / Campa, H	D (11:00 am-11:55 am)	D (11:00 am-11:55 am) T2 30/29 **Algebra-2** Conkling, M / Bowe, H / Campa, H	D (11:00 am-11:55 am)
E (1:00 pm-1:55 pm) T1 0/29 **Geometry-2** Bello, J	E (1:00 pm-1:55 pm)	E (1:00 pm-1:55 pm) T1 0/29 **Geometry-2** Bello, J	E (1:00 pm-1:55 pm)	E (1:00 pm-1:55 pm) T1 0/29 **Geometry-2** Bello, J
F (2:00 pm-2:55 pm)	F (2:00 pm-2:55 pm)	F (2:00 pm-2:55 pm)	F (2:00 pm-2:55 pm)	F (2:00 pm-2:55 pm)

On this report, we recommend using the following default filters:

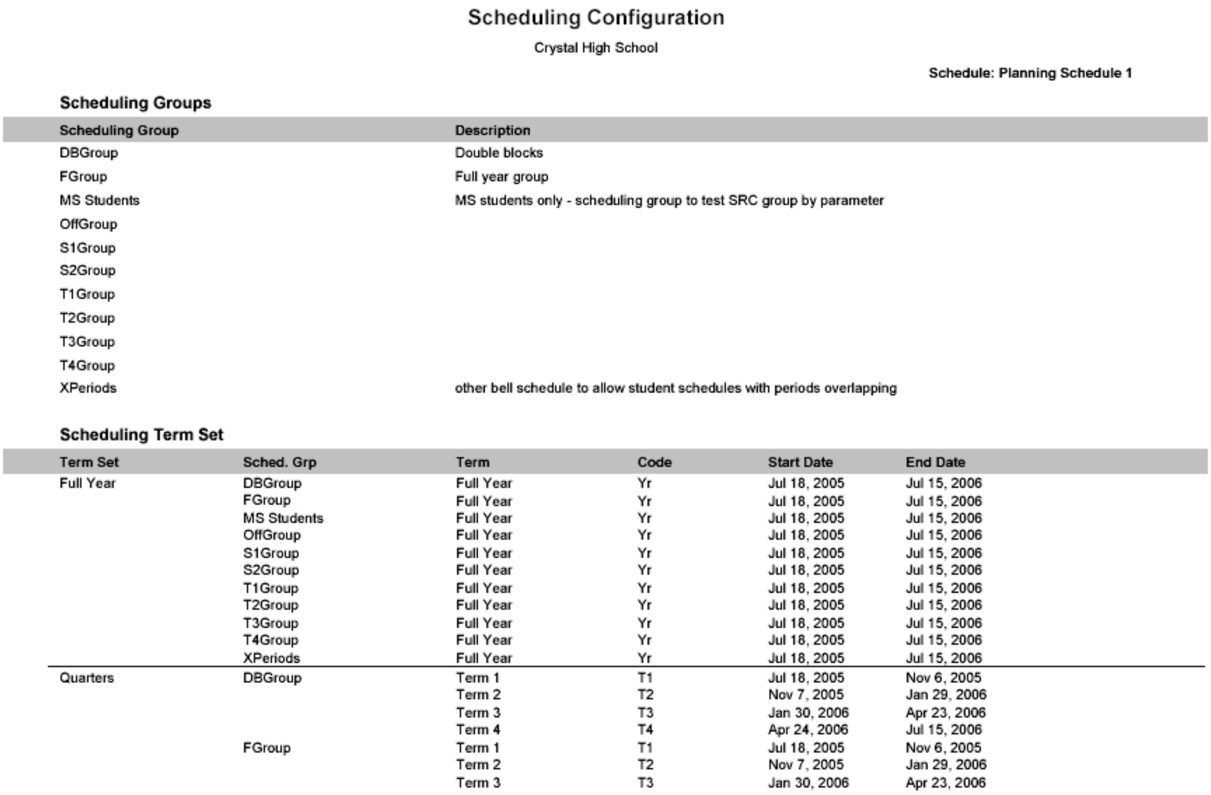
Filter	Option	Description
Building	Name	Prompts users to filter by building name.
Room	Name	Prompts users to filter by room name.
	Number	Prompts users to filter by room number.
Term	Name	Prompts users to filter by term name.

Scheduling Configuration

This report provides a summary [Figure 161] of the following settings configured on the Scheduling Steps page:

- Under Step 2, Scheduling Structure
- Under Step 3, Class Loading Rules
- Under Step 5, Class Scheduling Options
- Under Step 6, Student Loader Options

FIGURE 161: Scheduling Configuration report sample results



Scheduling Configuration

Crystal High School

Schedule: Planning Schedule 1

Scheduling Groups

Scheduling Group	Description
DBGroup	Double blocks
FGroup	Full year group
MS Students	MS students only - scheduling group to test SRC group by parameter
OffGroup	
S1Group	
S2Group	
T1Group	
T2Group	
T3Group	
T4Group	
XPeriods	other bell schedule to allow student schedules with periods overlapping

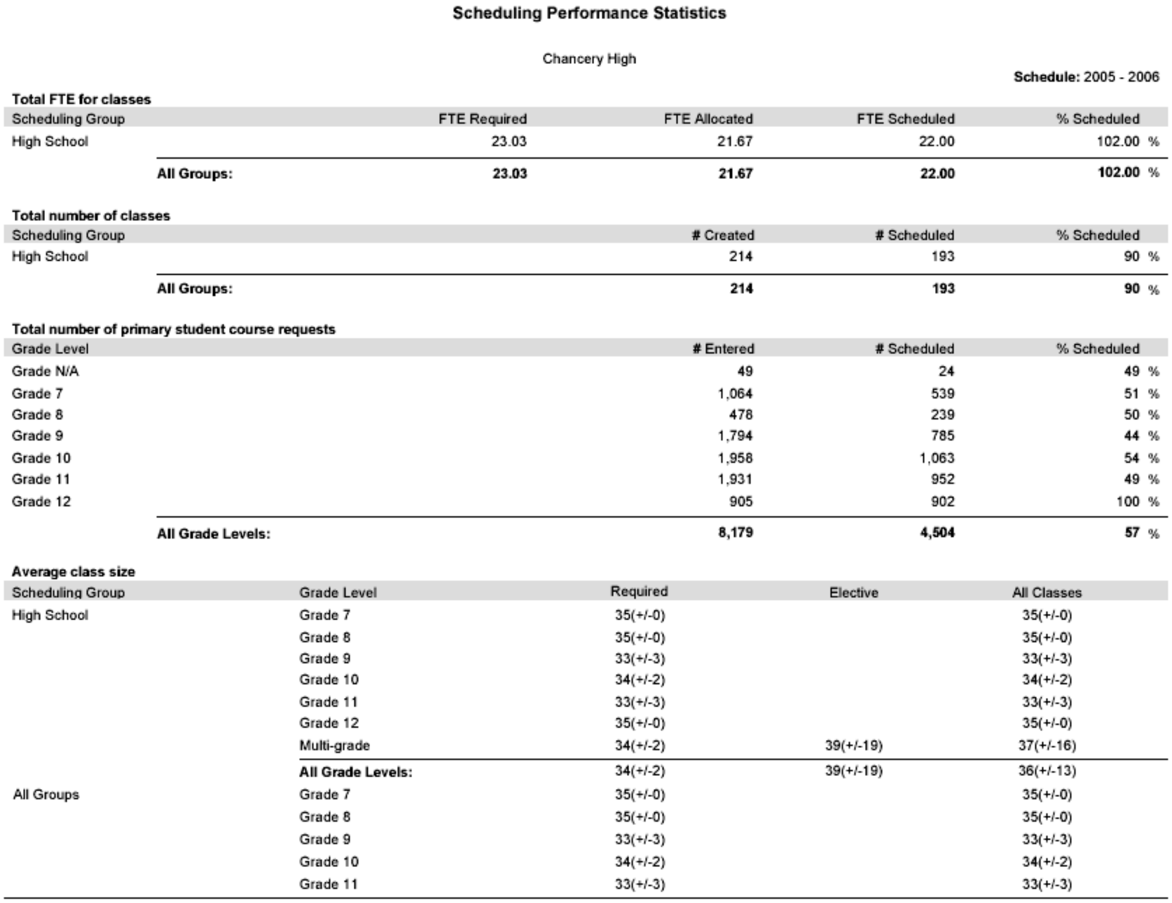
Scheduling Term Set

Term Set	Sched. Grp	Term	Code	Start Date	End Date
Full Year	DBGroup	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	FGroup	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	MS Students	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	OffGroup	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	S1Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	S2Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T1Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T2Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T3Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T4Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	XPeriods	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
Quarters	DBGroup	Term 1	T1	Jul 18, 2005	Nov 6, 2005
		Term 2	T2	Nov 7, 2005	Jan 29, 2006
		Term 3	T3	Jan 30, 2006	Apr 23, 2006
		Term 4	T4	Apr 24, 2006	Jul 15, 2006
	FGroup	Term 1	T1	Jul 18, 2005	Nov 6, 2005
		Term 2	T2	Nov 7, 2005	Jan 29, 2006
		Term 3	T3	Jan 30, 2006	Apr 23, 2006

Scheduling Performance Statistics

This report provides statistics related to the effectiveness of the master schedule as it relates to student requests scheduled, with detail by scheduling group and grade level [Figure 162].

FIGURE 162: Scheduling Performance Statistics report sample results



Scheduling Performance Statistics

Chancery High

Schedule: 2005 - 2006

Total FTE for classes

Scheduling Group		FTE Required	FTE Allocated	FTE Scheduled	% Scheduled
High School		23.03	21.67	22.00	102.00 %
	All Groups:	**23.03**	**21.67**	**22.00**	**102.00** %

Total number of classes

Scheduling Group		# Created	# Scheduled	% Scheduled
High School		214	193	90 %
	All Groups:	**214**	**193**	**90** %

Total number of primary student course requests

Grade Level		# Entered	# Scheduled	% Scheduled
Grade N/A		49	24	49 %
Grade 7		1,064	539	51 %
Grade 8		478	239	50 %
Grade 9		1,794	785	44 %
Grade 10		1,958	1,063	54 %
Grade 11		1,931	952	49 %
Grade 12		905	902	100 %
	All Grade Levels:	**8,179**	**4,504**	**57** %

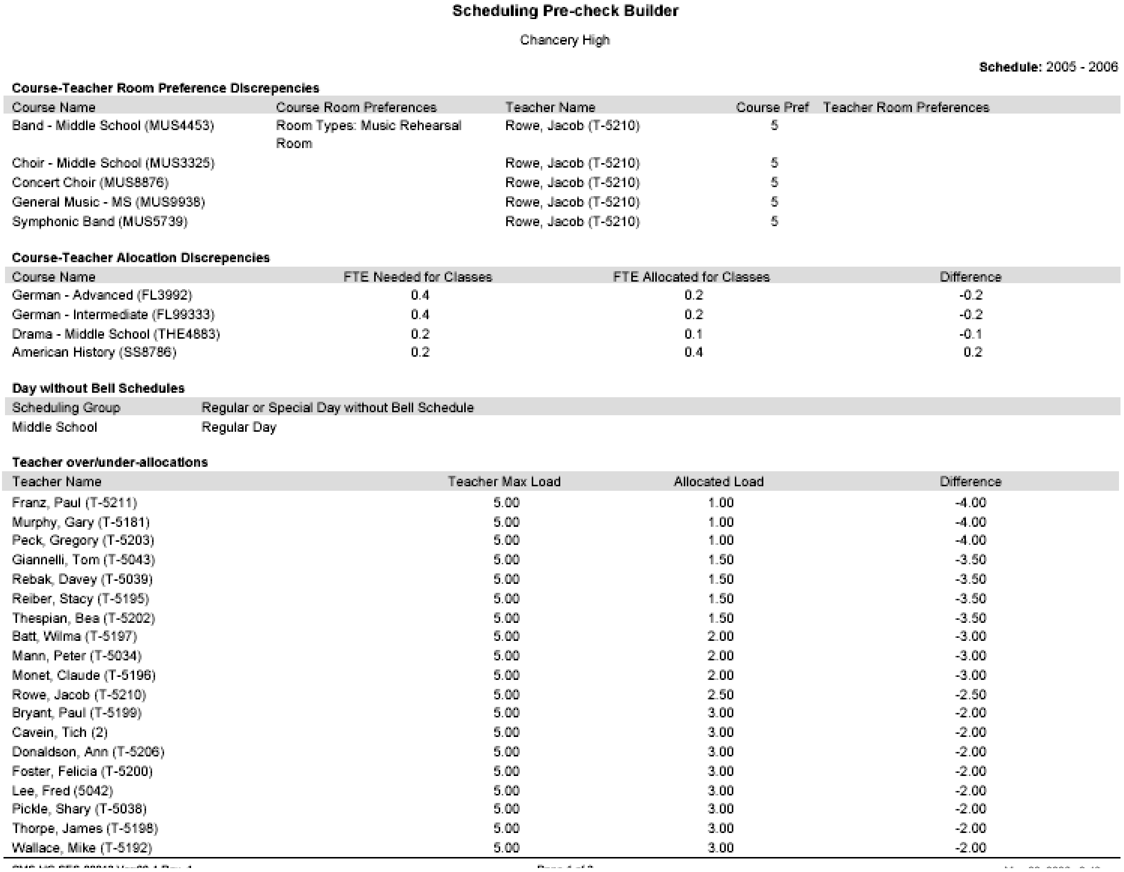
Average class size

Scheduling Group	Grade Level	Required	Elective	All Classes
High School	Grade 7	35(+/-0)		35(+/-0)
	Grade 8	35(+/-0)		35(+/-0)
	Grade 9	33(+/-3)		33(+/-3)
	Grade 10	34(+/-2)		34(+/-2)
	Grade 11	33(+/-3)		33(+/-3)
	Grade 12	35(+/-0)		35(+/-0)
	Multi-grade	34(+/-2)	39(+/-19)	37(+/-16)
	All Grade Levels:	34(+/-2)	39(+/-19)	36(+/-13)
All Groups	Grade 7	35(+/-0)		35(+/-0)
	Grade 8	35(+/-0)		35(+/-0)
	Grade 9	33(+/-3)		33(+/-3)
	Grade 10	34(+/-2)		34(+/-2)
	Grade 11	33(+/-3)		33(+/-3)

Scheduling Pre-check Builder

This report lists potential problem areas with the scheduling setup before a run of the Master Schedule Builder [Figure 163].

FIGURE 163: Scheduling Pre-check Builder report sample results



Scheduling Pre-check Builder

Chancery High

Schedule: 2005 - 2006

Course-Teacher Room Preference Discrepencies

Course Name	Course Room Preferences	Teacher Name	Course Pref	Teacher Room Preferences
Band - Middle School (MUS4453)	Room Types: Music Rehearsal Room	Rowe, Jacob (T-5210)	5	
Choir - Middle School (MUS3325)		Rowe, Jacob (T-5210)	5	
Concert Choir (MUS8876)		Rowe, Jacob (T-5210)	5	
General Music - MS (MUS9938)		Rowe, Jacob (T-5210)	5	
Symphonic Band (MUS5739)		Rowe, Jacob (T-5210)	5	

Course-Teacher Alocation Discrepencies

Course Name	FTE Needed for Classes	FTE Allocated for Classes	Difference
German - Advanced (FL3992)	0.4	0.2	-0.2
German - Intermediate (FL99333)	0.4	0.2	-0.2
Drama - Middle School (THE4883)	0.2	0.1	-0.1
American History (SS8786)	0.2	0.4	0.2

Day without Bell Schedules

Scheduling Group	Regular or Special Day without Bell Schedule
Middle School	Regular Day

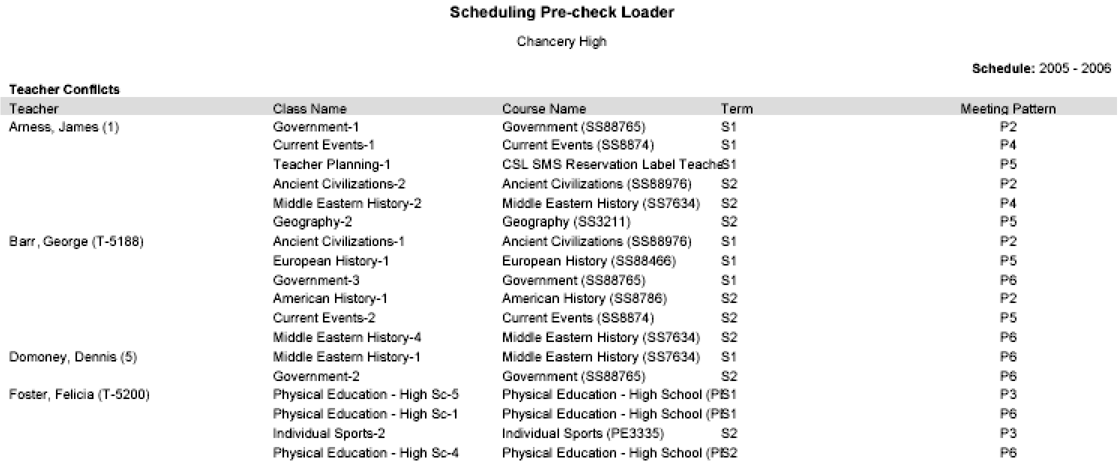
Teacher over/under-allocations

Teacher Name	Teacher Max Load	Allocated Load	Difference
Franz, Paul (T-5211)	5.00	1.00	-4.00
Murphy, Gary (T-5181)	5.00	1.00	-4.00
Peck, Gregory (T-5203)	5.00	1.00	-4.00
Giannelli, Tom (T-5043)	5.00	1.50	-3.50
Rebak, Davey (T-5039)	5.00	1.50	-3.50
Reiber, Stacy (T-5195)	5.00	1.50	-3.50
Thespian, Bea (T-5202)	5.00	1.50	-3.50
Batt, Wilma (T-5197)	5.00	2.00	-3.00
Mann, Peter (T-5034)	5.00	2.00	-3.00
Monet, Claude (T-5196)	5.00	2.00	-3.00
Rowe, Jacob (T-5210)	5.00	2.50	-2.50
Bryant, Paul (T-5199)	5.00	3.00	-2.00
Cavein, Tich (2)	5.00	3.00	-2.00
Donaldson, Ann (T-5206)	5.00	3.00	-2.00
Foster, Felicia (T-5200)	5.00	3.00	-2.00
Lee, Fred (5042)	5.00	3.00	-2.00
Pickle, Shary (T-5038)	5.00	3.00	-2.00
Thorpe, James (T-5198)	5.00	3.00	-2.00
Wallace, Mike (T-5192)	5.00	3.00	-2.00

Scheduling Pre-check Loader

This report provides a summary of all of the scheduling setup information that influences the "Load Students" process [Figure 164]. It includes sections for: Teacher Conflicts, Room Conflicts, Classes missing Teachers, Classes missing Rooms, and Classes missing Meeting Patterns.

FIGURE 164: Scheduling Pre-check Loader report sample results



Scheduling Pre-check Loader

Chancery High

Schedule: 2005 - 2006

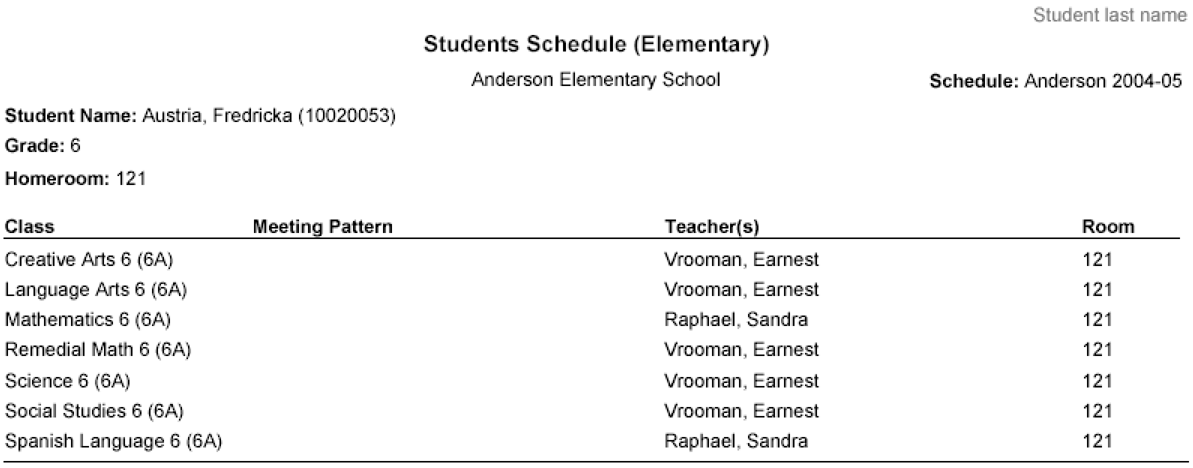
Teacher Conflicts

Teacher	Class Name	Course Name	Term	Meeting Pattern
Arness, James (1)	Government-1	Government (SS88765)	S1	P2
	Current Events-1	Current Events (SS8874)	S1	P4
	Teacher Planning-1	CSL SMS Reservation Label Teache	S1	P5
	Ancient Civilizations-2	Ancient Civilizations (SS88976)	S2	P2
	Middle Eastern History-2	Middle Eastern History (SS7634)	S2	P4
	Geography-2	Geography (SS3211)	S2	P5
Barr, George (T-5188)	Ancient Civilizations-1	Ancient Civilizations (SS88976)	S1	P2
	European History-1	European History (SS88466)	S1	P5
	Government-3	Government (SS88765)	S1	P6
	American History-1	American History (SS8786)	S2	P2
	Current Events-2	Current Events (SS8874)	S2	P5
	Middle Eastern History-4	Middle Eastern History (SS7634)	S2	P6
Domoney, Dennis (5)	Middle Eastern History-1	Middle Eastern History (SS7634)	S1	P6
	Government-2	Government (SS88765)	S2	P6
Foster, Felicia (T-5200)	Physical Education - High Sc-5	Physical Education - High School (P	S1	P3
	Physical Education - High Sc-1	Physical Education - High School (P	S1	P6
	Individual Sports-2	Individual Sports (PE3335)	S2	P3
	Physical Education - High Sc-4	Physical Education - High School (P	S2	P6

Student Schedule (Elementary)

For elementary schools, this report produces a schedule of classes for each student [Figure 165].

FIGURE 165: Student Schedule (Elementary) report sample results



Student last name

Students Schedule (Elementary)

Anderson Elementary School

Schedule: Anderson 2004-05

Student Name: Austria, Fredricka (10020053)

Grade: 6

Homeroom: 121

Class	Meeting Pattern	Teacher(s)	Room
Creative Arts 6 (6A)		Vrooman, Earnest	121
Language Arts 6 (6A)		Vrooman, Earnest	121
Mathematics 6 (6A)		Raphael, Sandra	121
Remedial Math 6 (6A)		Vrooman, Earnest	121
Science 6 (6A)		Vrooman, Earnest	121
Social Studies 6 (6A)		Vrooman, Earnest	121
Spanish Language 6 (6A)		Raphael, Sandra	121

Report options include:

- **Effective Date**: The current date, the entire school year, or a specified date range
- **Sort Print Output By**:

  Student last name

  Active Calendar homeroom

  Planning calendar homeroom

  Active Calendar homeroom teacher

  Planning calendar homeroom teacher

  Active Calendar grade level

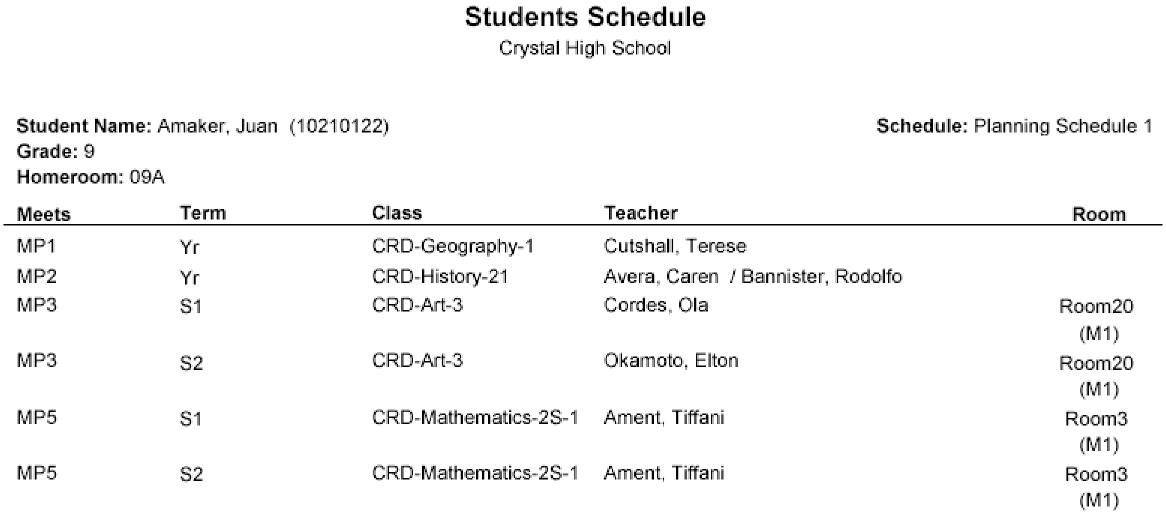
  Planning calendar grade level

  Teacher for a specific Active Calendar
- **Scheduling Group**
- **Meeting Pattern**

Student Schedule

For secondary schools, this report produces a schedule of classes for each student [Figure 166]. By default, Chancery SMS sets the report filters to only the selected students. For a secondary school, this report is available on the Student Search Results page.

FIGURE 166: Student Schedule report sample results



Students Schedule

Crystal High School

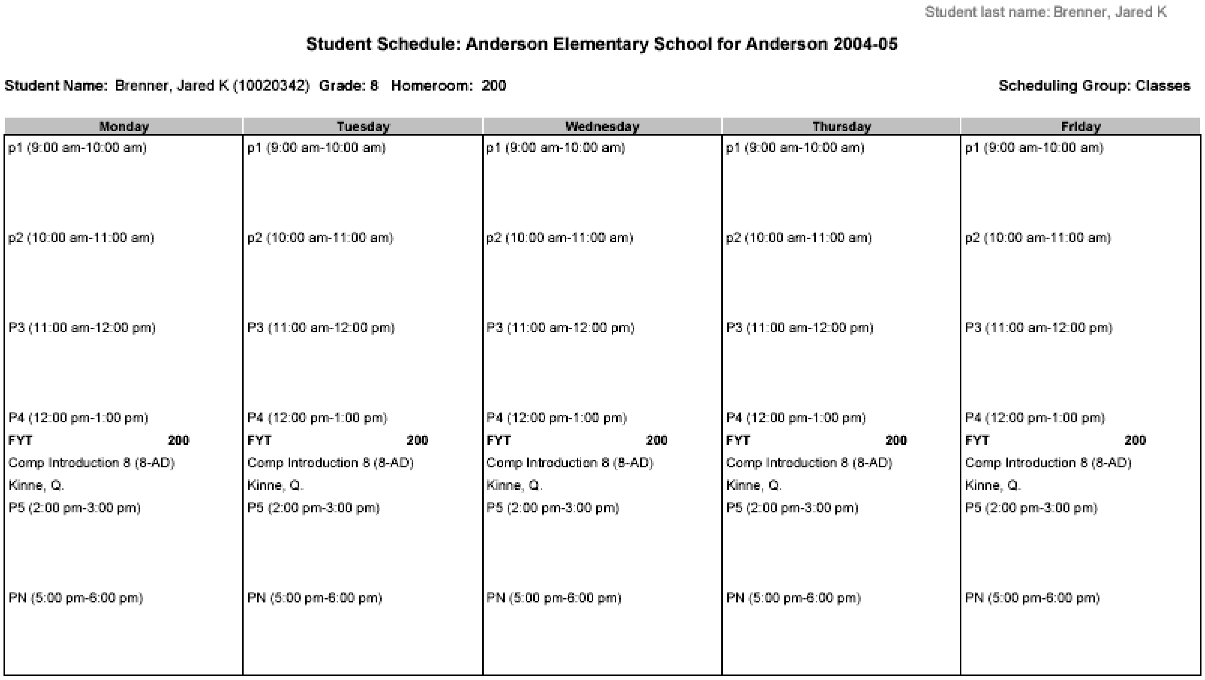
Student Name: Amaker, Juan (10210122)
Schedule: Planning Schedule 1
Grade: 9
Homeroom: 09A

Meets	Term	Class	Teacher	Room
MP1	Yr	CRD-Geography-1	Cutshall, Terese	
MP2	Yr	CRD-History-21	Avera, Caren / Bannister, Rodolfo	
MP3	S1	CRD-Art-3	Cordes, Ola	Room20 (M1)
MP3	S2	CRD-Art-3	Okamoto, Elton	Room20 (M1)
MP5	S1	CRD-Mathematics-2S-1	Ament, Tiffani	Room3 (M1)
MP5	S2	CRD-Mathematics-2S-1	Ament, Tiffani	Room3 (M1)

Student Schedule Matrix (Elementary)

For elementary schools, this report displays a week's schedule of classes for each student [Figure 167]. By default, Chancery SMS sets the report filters to only the selected students. **Note**: A School Administrator can run this report from the Student Search Results page *[Searching for students, p. 36]*.

FIGURE 167: Student Schedule Matrix (Elementary) report sample results



Student last name: Brenner, Jared K

Student Schedule: Anderson Elementary School for Anderson 2004-05

Student Name: Brenner, Jared K (10020342) **Grade:** 8 **Homeroom:** 200
Scheduling Group: Classes

Monday	Tuesday	Wednesday	Thursday	Friday
p1 (9:00 am-10:00 am)	p1 (9:00 am-10:00 am)	p1 (9:00 am-10:00 am)	p1 (9:00 am-10:00 am)	p1 (9:00 am-10:00 am)
p2 (10:00 am-11:00 am)	p2 (10:00 am-11:00 am)	p2 (10:00 am-11:00 am)	p2 (10:00 am-11:00 am)	p2 (10:00 am-11:00 am)
P3 (11:00 am-12:00 pm)	P3 (11:00 am-12:00 pm)	P3 (11:00 am-12:00 pm)	P3 (11:00 am-12:00 pm)	P3 (11:00 am-12:00 pm)
P4 (12:00 pm-1:00 pm) **FYT** **200** Comp Introduction 8 (8-AD) Kinne, Q.	P4 (12:00 pm-1:00 pm) **FYT** **200** Comp Introduction 8 (8-AD) Kinne, Q.	P4 (12:00 pm-1:00 pm) **FYT** **200** Comp Introduction 8 (8-AD) Kinne, Q.	P4 (12:00 pm-1:00 pm) **FYT** **200** Comp Introduction 8 (8-AD) Kinne, Q.	P4 (12:00 pm-1:00 pm) **FYT** **200** Comp Introduction 8 (8-AD) Kinne, Q.
P5 (2:00 pm-3:00 pm)	P5 (2:00 pm-3:00 pm)	P5 (2:00 pm-3:00 pm)	P5 (2:00 pm-3:00 pm)	P5 (2:00 pm-3:00 pm)
PN (5:00 pm-6:00 pm)	PN (5:00 pm-6:00 pm)	PN (5:00 pm-6:00 pm)	PN (5:00 pm-6:00 pm)	PN (5:00 pm-6:00 pm)

Report options include:

- **Effective Date**: The current date, the entire school year, or a specified date range
- **Sort Print Output By**:
  Student last name

Active Calendar homeroom

Planning Calendar homeroom

Active Calendar homeroom teacher

Planning Calendar homeroom teacher

Active Calendar grade level

Planning Calendar grade level

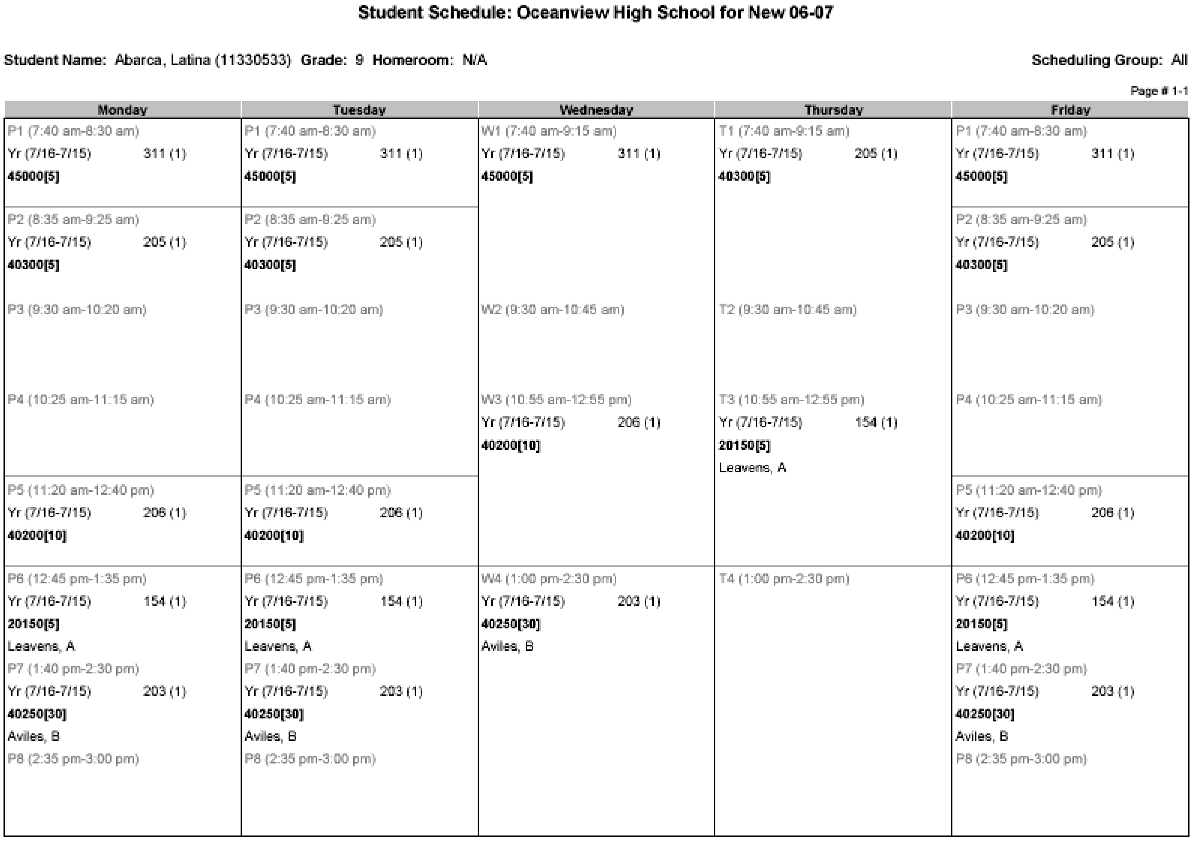
Teacher for a specific Active Calendar

- **Scheduling Group**
- **Meeting Pattern**

Student Schedule Matrix

For secondary schools, this report displays a week's schedule of classes for each student [Figure 168]. By default, Chancery SMS sets the report filters to only the selected students. **Note**: A School Administrator can run this report from Student Search Results page *[Searching for students, p. 36]*.

FIGURE 168: Student Schedule Matrix report sample results



Student Schedule: Oceanview High School for New 06-07

Student Name: Abarca, Latina (11330533) **Grade:** 9 **Homeroom:** N/A

Scheduling Group: All

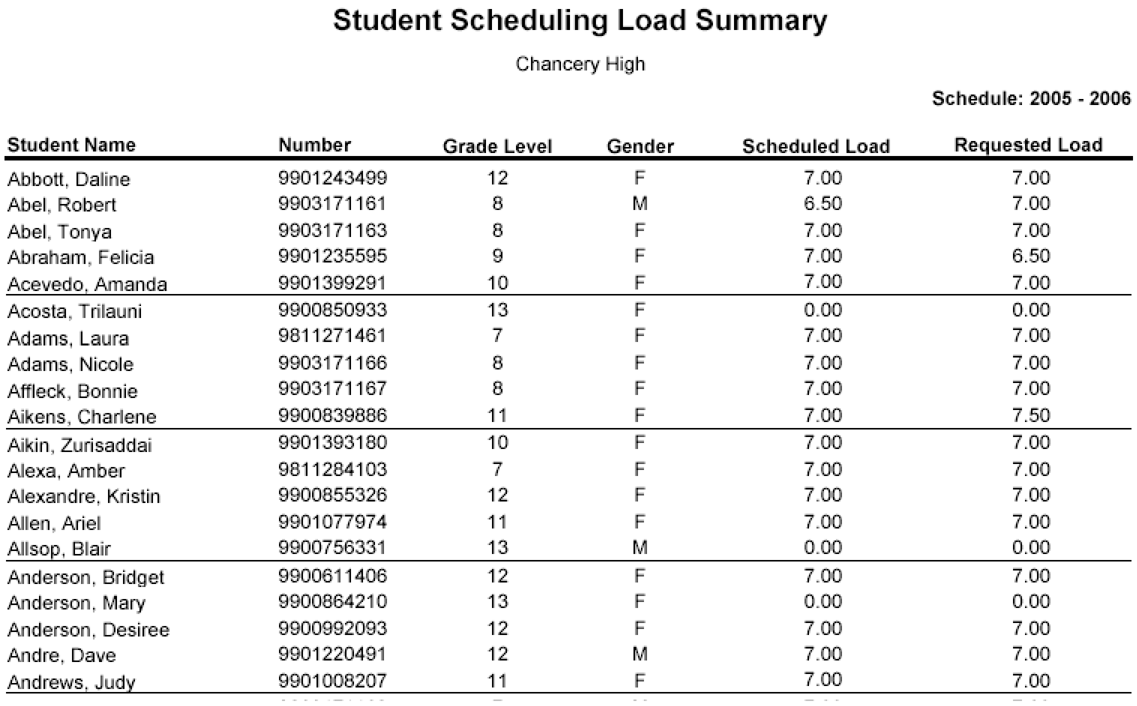
Page # 1-1

Monday	Tuesday	Wednesday	Thursday	Friday
P1 (7:40 am-8:30 am) Yr (7/16-7/15) 311 (1) **45000[5]**	P1 (7:40 am-8:30 am) Yr (7/16-7/15) 311 (1) **45000[5]**	W1 (7:40 am-9:15 am) Yr (7/16-7/15) 311 (1) **45000[5]**	T1 (7:40 am-9:15 am) Yr (7/16-7/15) 205 (1) **40300[5]**	P1 (7:40 am-8:30 am) Yr (7/16-7/15) 311 (1) **45000[5]**
P2 (8:35 am-9:25 am) Yr (7/16-7/15) 205 (1) **40300[5]**	P2 (8:35 am-9:25 am) Yr (7/16-7/15) 205 (1) **40300[5]**			P2 (8:35 am-9:25 am) Yr (7/16-7/15) 205 (1) **40300[5]**
P3 (9:30 am-10:20 am)	P3 (9:30 am-10:20 am)	W2 (9:30 am-10:45 am)	T2 (9:30 am-10:45 am)	P3 (9:30 am-10:20 am)
P4 (10:25 am-11:15 am)	P4 (10:25 am-11:15 am)	W3 (10:55 am-12:55 pm) Yr (7/16-7/15) 206 (1) **40200[10]**	T3 (10:55 am-12:55 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A	P4 (10:25 am-11:15 am)
P5 (11:20 am-12:40 pm) Yr (7/16-7/15) 206 (1) **40200[10]**	P5 (11:20 am-12:40 pm) Yr (7/16-7/15) 206 (1) **40200[10]**			P5 (11:20 am-12:40 pm) Yr (7/16-7/15) 206 (1) **40200[10]**
P6 (12:45 pm-1:35 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A P7 (1:40 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B P8 (2:35 pm-3:00 pm)	P6 (12:45 pm-1:35 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A P7 (1:40 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B P8 (2:35 pm-3:00 pm)	W4 (1:00 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B	T4 (1:00 pm-2:30 pm)	P6 (12:45 pm-1:35 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A P7 (1:40 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B P8 (2:35 pm-3:00 pm)

Student Schedule Load Summary

This report compares each student's scheduled course load with his or her requested load [Figure 169].

FIGURE 169: Student Schedule Load Summary report sample results



Student Scheduling Load Summary

Chancery High

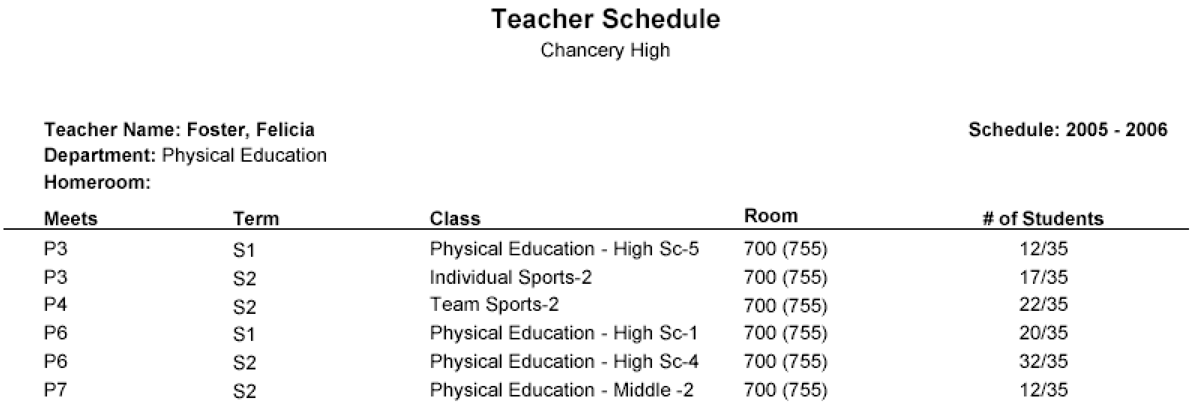
Schedule: 2005 - 2006

Student Name	Number	Grade Level	Gender	Scheduled Load	Requested Load
Abbott, Daline	9901243499	12	F	7.00	7.00
Abel, Robert	9903171161	8	M	6.50	7.00
Abel, Tonya	9903171163	8	F	7.00	7.00
Abraham, Felicia	9901235595	9	F	7.00	6.50
Acevedo, Amanda	9901399291	10	F	7.00	7.00
Acosta, Trilauni	9900850933	13	F	0.00	0.00
Adams, Laura	9811271461	7	F	7.00	7.00
Adams, Nicole	9903171166	8	F	7.00	7.00
Affleck, Bonnie	9903171167	8	F	7.00	7.00
Aikens, Charlene	9900839886	11	F	7.00	7.50
Aikin, Zurisaddai	9901393180	10	F	7.00	7.00
Alexa, Amber	9811284103	7	F	7.00	7.00
Alexandre, Kristin	9900855326	12	F	7.00	7.00
Allen, Ariel	9901077974	11	F	7.00	7.00
Allsop, Blair	9900756331	13	M	0.00	0.00
Anderson, Bridget	9900611406	12	F	7.00	7.00
Anderson, Mary	9900864210	13	F	0.00	0.00
Anderson, Desiree	9900992093	12	F	7.00	7.00
Andre, Dave	9901220491	12	M	7.00	7.00
Andrews, Judy	9901008207	11	F	7.00	7.00

Teacher Schedule

This report lists each teacher's schedule of classes [Figure 170].

FIGURE 170: Teacher Schedule report sample results



Teacher Schedule

Chancery High

Teacher Name: Foster, Felicia
Department: Physical Education
Homeroom:

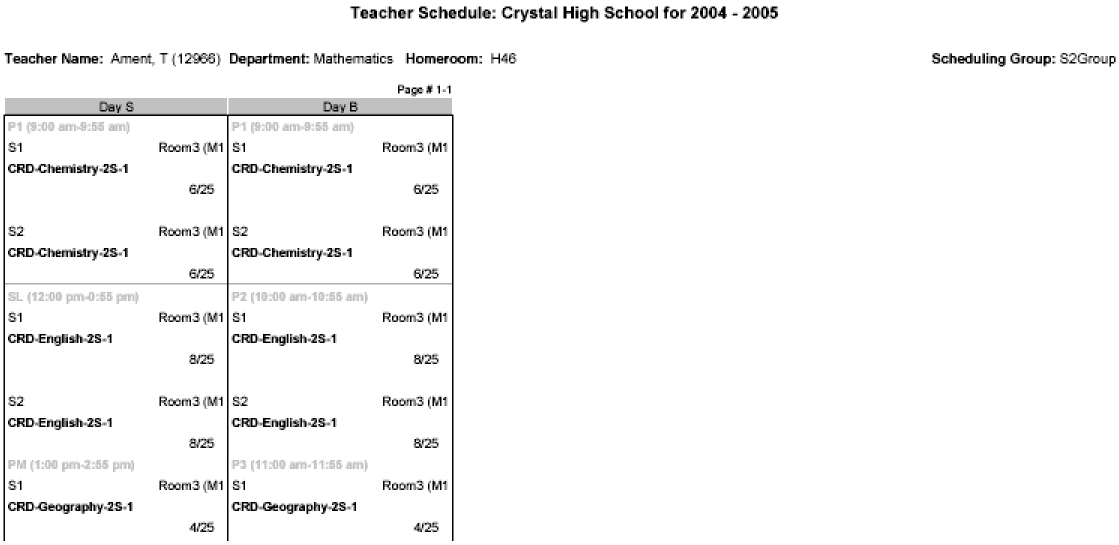
Schedule: 2005 - 2006

Meets	Term	Class	Room	# of Students
P3	S1	Physical Education - High Sc-5	700 (755)	12/35
P3	S2	Individual Sports-2	700 (755)	17/35
P4	S2	Team Sports-2	700 (755)	22/35
P6	S1	Physical Education - High Sc-1	700 (755)	20/35
P6	S2	Physical Education - High Sc-4	700 (755)	32/35
P7	S2	Physical Education - Middle -2	700 (755)	12/35

Teacher Schedule Matrix

This report displays a week's schedule of classes for each teacher [Figure 171]. **Note**: This report does not display information for staff not assigned to a Staff Department.

FIGURE 171: Teacher Schedule Matrix report sample results



Teacher Schedule: Crystal High School for 2004 - 2005

Teacher Name: Ament, T (12966) **Department:** Mathematics **Homeroom:** H46

Scheduling Group: S2Group

Page # 1-1

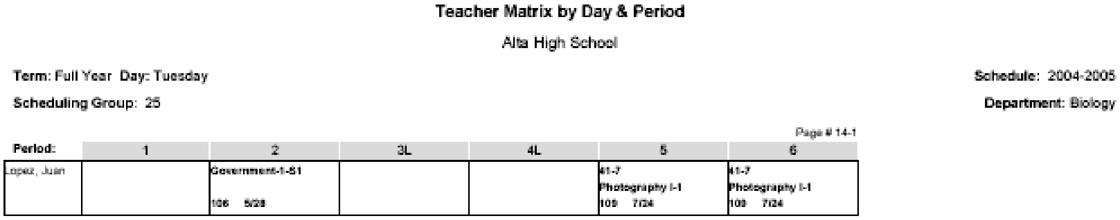
Day S	Day B
P1 (9:00 am-9:55 am) S1 Room3 (M1 **CRD-Chemistry-2S-1** 6/25 S2 Room3 (M1 **CRD-Chemistry-2S-1** 6/25	P1 (9:00 am-9:55 am) S1 Room3 (M1 **CRD-Chemistry-2S-1** 6/25 S2 Room3 (M1 **CRD-Chemistry-2S-1** 6/25
SL (12:00 pm-0:55 pm) S1 Room3 (M1 **CRD-English-2S-1** 8/25 S2 Room3 (M1 **CRD-English-2S-1** 8/25 PM (1:00 pm-2:55 pm) S1 Room3 (M1 **CRD-Geography-2S-1** 4/25	P2 (10:00 am-10:55 am) S1 Room3 (M1 **CRD-English-2S-1** 8/25 S2 Room3 (M1 **CRD-English-2S-1** 8/25 P3 (11:00 am-11:55 am) S1 Room3 (M1 **CRD-Geography-2S-1** 4/25

Teacher Matrix by Day and Period

The report displays where each teacher is assigned during each period of each day's schedule [Figure 172]. For a teacher assignment, the report shows the class, room number, the number of students in the class, and the class capacity. Where there is a conflict (that is, more than one assignment in a given period), the first class is displayed and a message indicates the conflict. The report is broken down by scheduling group, but any overlap with classes from other scheduling groups is shown for each period.

This report is useful for schools using secondary scheduling, but it also runs for schools using elementary scheduling if meeting patterns are defined and assigned to lasses.

FIGURE 172: Teacher Matrix by Day Period report sample results



Teacher Matrix by Day & Period

Alta High School

Term: Full Year **Day:** Tuesday

Scheduling Group: 25

Schedule: 2004-2005

Department: Biology

Page # 14-1

Period:	1	2	3L	4L	5	6
Lopez, Juan		Government-1-S1 106 5/28			41-7 Photography I-1 109 7/24	41-7 Photography I-1 109 7/24

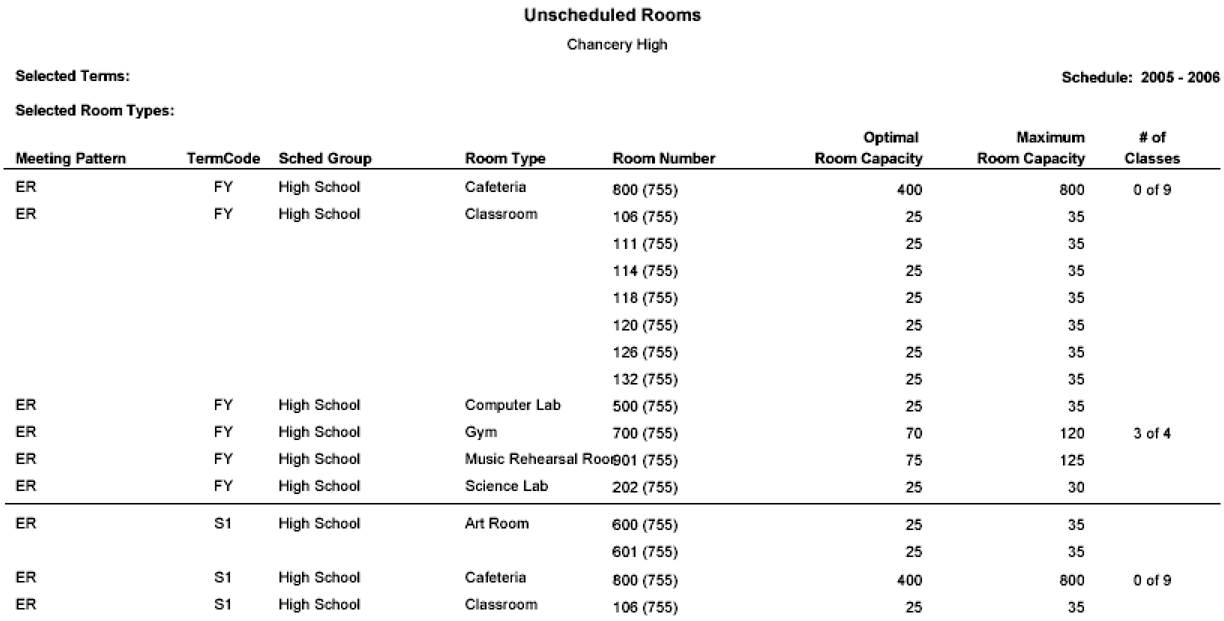
On this report, we recommend using the following default filters:

Filter	Option	Description
Teacher	Last Name	Prompts users to filter by teacher last name.
	First Name	Prompts users to filter by teacher first name.
Term	Name	Prompts users to filter by term name.
Staff Department	Code	Prompts users to filter by staff department short name.
	Description	Prompts users to filter by staff department description.

Unscheduled Rooms

This report lists rooms that have not yet been used in scheduling classes [Figure 173]. The report can cover specific room types or terms. The report displays only those rooms that do not have a conflicting schedule item for a particular combination of meeting pattern, term, and scheduling group. It also provides additional key information, such as optimal and maximum room capacity and the number of classes already scheduled for that combination.

FIGURE 173: Unscheduled Rooms report sample results



Unscheduled Rooms

Chancery High

Selected Terms: **Schedule: 2005 - 2006**

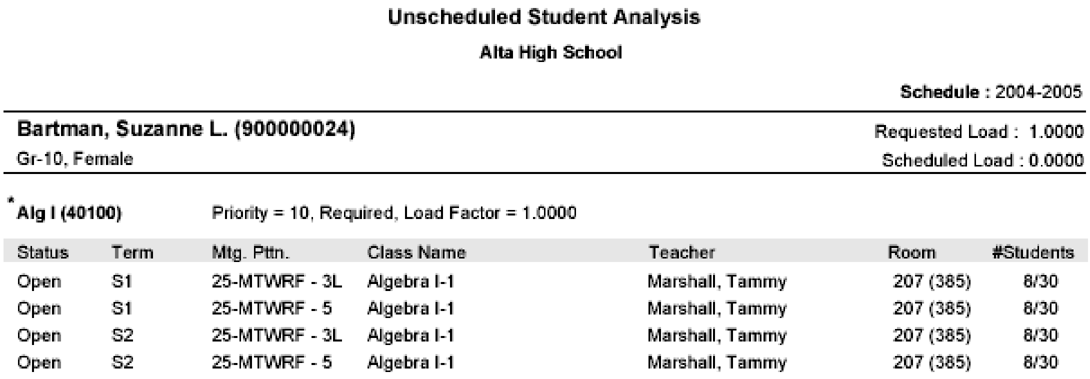
Selected Room Types:

Meeting Pattern	TermCode	Sched Group	Room Type	Room Number	Optimal Room Capacity	Maximum Room Capacity	# of Classes
ER	FY	High School	Cafeteria	800 (755)	400	800	0 of 9
ER	FY	High School	Classroom	106 (755)	25	35	
				111 (755)	25	35	
				114 (755)	25	35	
				118 (755)	25	35	
				120 (755)	25	35	
				126 (755)	25	35	
				132 (755)	25	35	
ER	FY	High School	Computer Lab	500 (755)	25	35	
ER	FY	High School	Gym	700 (755)	70	120	3 of 4
ER	FY	High School	Music Rehearsal Roo	901 (755)	75	125	
ER	FY	High School	Science Lab	202 (755)	25	30	
ER	S1	High School	Art Room	600 (755)	25	35	
				601 (755)	25	35	
ER	S1	High School	Cafeteria	800 (755)	400	800	0 of 9
ER	S1	High School	Classroom	106 (755)	25	35	

Unscheduled Student Analysis

Only for schools using secondary scheduling, this report displays each student's requested but unscheduled classes [Figure 174]. By default, Chancery SMS sets the report filters to only the selected students. **Note:** If the school has a large number of unscheduled students, this report may take a long time to generate results.

FIGURE 174: Unscheduled Student Analysis report sample results



Unscheduled Student Analysis

Alta High School

Schedule : 2004-2005

Bartman, Suzanne L. (900000024) Requested Load : 1.0000

Gr-10, Female Scheduled Load : 0.0000

***Alg I (40100)** Priority = 10, Required, Load Factor = 1.0000

Status	Term	Mtg. Pttn.	Class Name	Teacher	Room	#Students
Open	S1	25-MTWRF - 3L	Algebra I-1	Marshall, Tammy	207 (385)	8/30
Open	S1	25-MTWRF - 5	Algebra I-1	Marshall, Tammy	207 (385)	8/30
Open	S2	25-MTWRF - 3L	Algebra I-1	Marshall, Tammy	207 (385)	8/30
Open	S2	25-MTWRF - 5	Algebra I-1	Marshall, Tammy	207 (385)	8/30

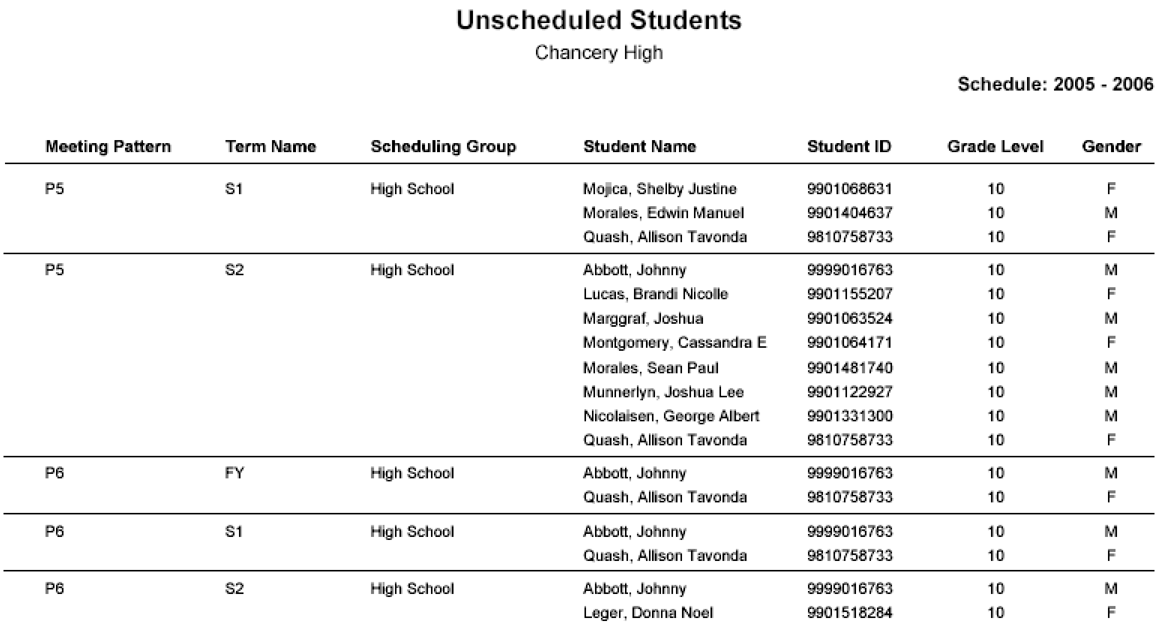
On this report, we recommend using the following default filters:

Filter	Option	Description
School Student	Surname	Prompts users to filter by student surname.
	First Name	Prompts users to filter by student first name.

Unscheduled Students

This report lists students who are not scheduled for a class in a particular combination of scheduling group, term, and meeting pattern [Figure 175].

FIGURE 175: Unscheduled Students report sample results



Unscheduled Students

Chancery High

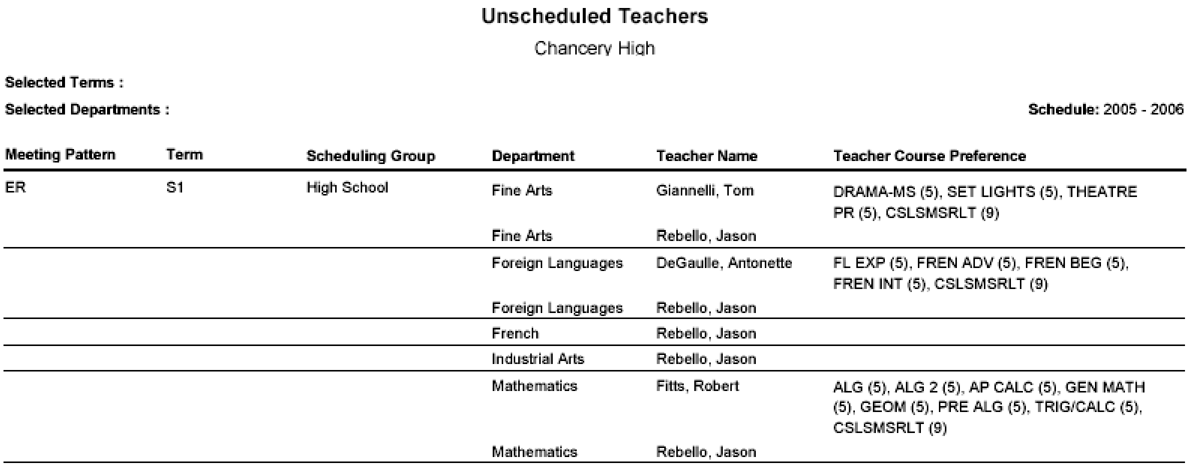
Schedule: 2005 - 2006

Meeting Pattern	Term Name	Scheduling Group	Student Name	Student ID	Grade Level	Gender
P5	S1	High School	Mojica, Shelby Justine	9901068631	10	F
			Morales, Edwin Manuel	9901404637	10	M
			Quash, Allison Tavonda	9810758733	10	F
P5	S2	High School	Abbott, Johnny	9999016763	10	M
			Lucas, Brandi Nicolle	9901155207	10	F
			Marggraf, Joshua	9901063524	10	M
			Montgomery, Cassandra E	9901064171	10	F
			Morales, Sean Paul	9901481740	10	M
			Munnerlyn, Joshua Lee	9901122927	10	M
			Nicolaisen, George Albert	9901331300	10	M
			Quash, Allison Tavonda	9810758733	10	F
P6	FY	High School	Abbott, Johnny	9999016763	10	M
			Quash, Allison Tavonda	9810758733	10	F
P6	S1	High School	Abbott, Johnny	9999016763	10	M
			Quash, Allison Tavonda	9810758733	10	F
P6	S2	High School	Abbott, Johnny	9999016763	10	M
			Leger, Donna Noel	9901518284	10	F

Unscheduled Teachers

This report lists teachers who have not yet been scheduled to teach a class [Figure 176].

FIGURE 176: Unscheduled Teachers report sample results



Unscheduled Teachers

Chancery High

Selected Terms :

Selected Departments :

Schedule: 2005 - 2006

Meeting Pattern	Term	Scheduling Group	Department	Teacher Name	Teacher Course Preference
ER	S1	High School	Fine Arts	Giannelli, Tom	DRAMA-MS (5), SET LIGHTS (5), THEATRE PR (5), CSLSMSRLT (9)
			Fine Arts	Rebello, Jason	
			Foreign Languages	DeGaulle, Antonette	FL EXP (5), FREN ADV (5), FREN BEG (5), FREN INT (5), CSLSMSRLT (9)
			Foreign Languages	Rebello, Jason	
			French	Rebello, Jason	
			Industrial Arts	Rebello, Jason	
			Mathematics	Fitts, Robert	ALG (5), ALG 2 (5), AP CALC (5), GEN MATH (5), GEOM (5), PRE ALG (5), TRIG/CALC (5), CSLSMSRLT (9)
			Mathematics	Rebello, Jason	

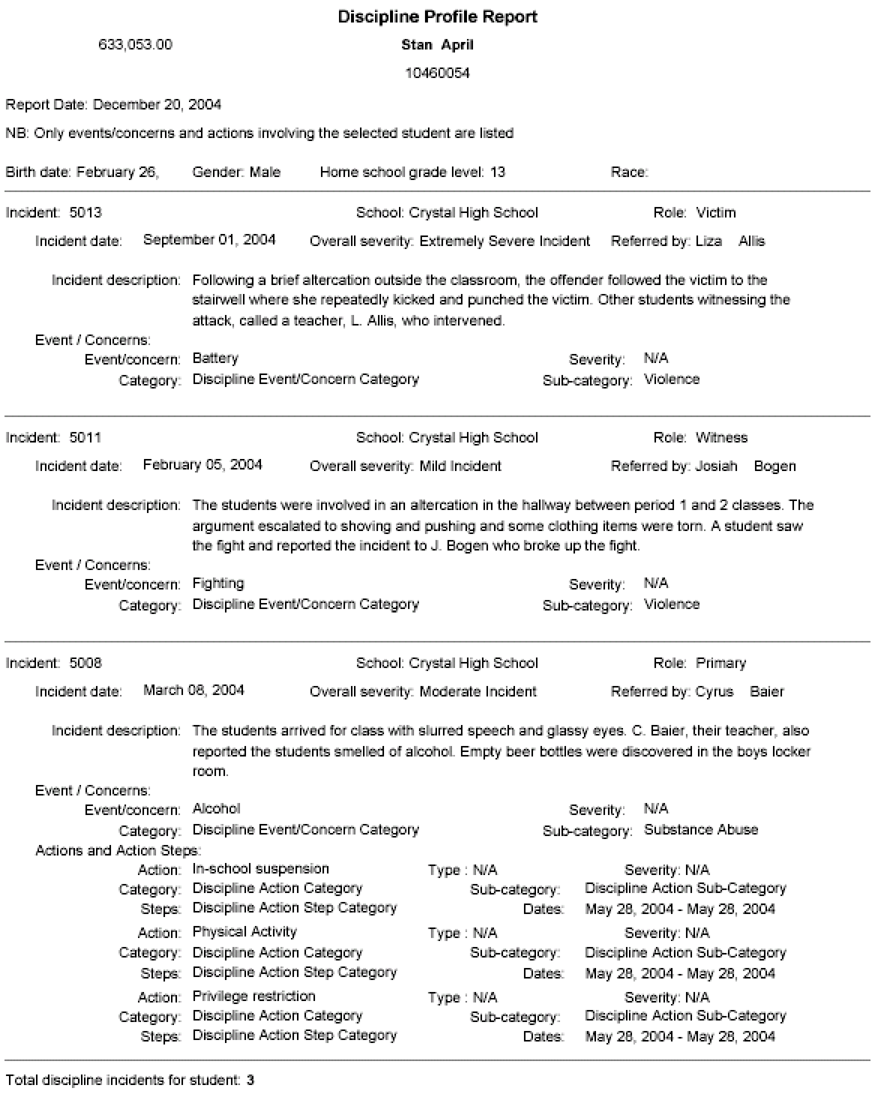
Student Behavior reports

Discipline Profile

This report provides each student's complete discipline history, organized by incident [Figure 177]. An administrator at any school can generate results for any student in the district, which include incidents recorded at other schools. By default, Chancery SMS sets the report filters to only the selected students.

The report includes only those incidents in which the student is associated with the Event/Concern and that have an Event/Concern whose "Discipline Event/Concern" flag is selected. The student can be a primary involved person, a witness, or a victim.

FIGURE 177: Discipline Profile Report sample results



Discipline Profile Report

633,053.00

Stan April

10460054

Report Date: December 20, 2004

NB: Only events/concerns and actions involving the selected student are listed

Birth date: February 26, Gender: Male Home school grade level: 13 Race:

Incident: 5013 School: Crystal High School Role: Victim

Incident date: September 01, 2004 Overall severity: Extremely Severe Incident Referred by: Liza Allis

Incident description: Following a brief altercation outside the classroom, the offender followed the victim to the stairwell where she repeatedly kicked and punched the victim. Other students witnessing the attack, called a teacher, L. Allis, who intervened.

Event / Concerns:
Event/concern: Battery Severity: N/A
Category: Discipline Event/Concern Category Sub-category: Violence

Incident: 5011 School: Crystal High School Role: Witness

Incident date: February 05, 2004 Overall severity: Mild Incident Referred by: Josiah Bogen

Incident description: The students were involved in an altercation in the hallway between period 1 and 2 classes. The argument escalated to shoving and pushing and some clothing items were torn. A student saw the fight and reported the incident to J. Bogen who broke up the fight.

Event / Concerns:
Event/concern: Fighting Severity: N/A
Category: Discipline Event/Concern Category Sub-category: Violence

Incident: 5008 School: Crystal High School Role: Primary

Incident date: March 08, 2004 Overall severity: Moderate Incident Referred by: Cyrus Baier

Incident description: The students arrived for class with slurred speech and glassy eyes. C. Baier, their teacher, also reported the students smelled of alcohol. Empty beer bottles were discovered in the boys locker room.

Event / Concerns:
Event/concern: Alcohol Severity: N/A
Category: Discipline Event/Concern Category Sub-category: Substance Abuse

Actions and Action Steps:
Action: In-school suspension Type : N/A Severity: N/A
Category: Discipline Action Category Sub-category: Discipline Action Sub-Category
Steps: Discipline Action Step Category Dates: May 28, 2004 - May 28, 2004
Action: Physical Activity Type : N/A Severity: N/A
Category: Discipline Action Category Sub-category: Discipline Action Sub-Category
Steps: Discipline Action Step Category Dates: May 28, 2004 - May 28, 2004
Action: Privilege restriction Type : N/A Severity: N/A
Category: Discipline Action Category Sub-category: Discipline Action Sub-Category
Steps: Discipline Action Step Category Dates: May 28, 2004 - May 28, 2004

Total discipline incidents for student: **3**

Summary reports

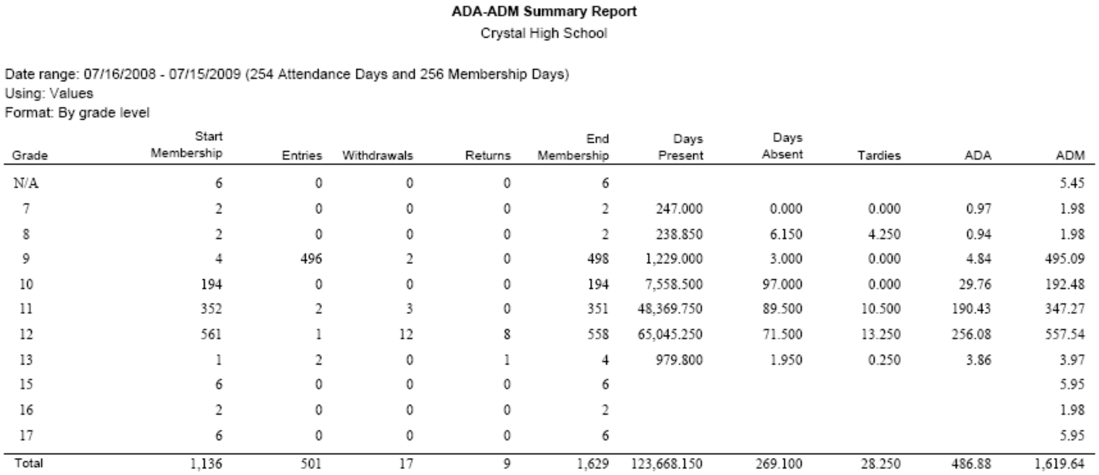
ADA/ADM Summary Report

This report enables a School Administrator to tally and compare ADA (Average Daily Attendance, that is, the average number of students per day recorded as “present”) and ADM (Average Daily Membership, that is, the average number of students per day enrolled) for a specified date range or attendance period.

This report relies on how the school or district designates the various kinds of days it has set up: a day counted for membership is any day with a value other than 0; a day counted for attendance is any day designated for the taking of attendance.

Membership is calculated according to the Day Value. For example, for a half-day, where no classes are scheduled at all, the Day Value is set to 0.5 and the Take Att value is set to Yes, but the Instructional Day is set to No. If a student was scheduled to attend school for such a day, the student’s ADM reflects only the portion of day enrolled in school, therefore the student's ADM would be 0.5.

FIGURE 178: ADA/ADM Report sample results



ADA-ADM Summary Report

Crystal High School

Date range: 07/16/2008 - 07/15/2009 (254 Attendance Days and 256 Membership Days)
Using: Values
Format: By grade level

Grade	Start Membership	Entries	Withdrawals	Returns	End Membership	Days Present	Days Absent	Tardies	ADA	ADM
N/A	6	0	0	0	6					5.45
7	2	0	0	0	2	247.000	0.000	0.000	0.97	1.98
8	2	0	0	0	2	238.850	6.150	4.250	0.94	1.98
9	4	496	2	0	498	1,229.000	3.000	0.000	4.84	495.09
10	194	0	0	0	194	7,558.500	97.000	0.000	29.76	192.48
11	352	2	3	0	351	48,369.750	89.500	10.500	190.43	347.27
12	561	1	12	8	558	65,045.250	71.500	13.250	256.08	557.54
13	1	2	0	1	4	979.800	1.950	0.250	3.86	3.97
15	6	0	0	0	6					5.95
16	2	0	0	0	2					1.98
17	6	0	0	0	6					5.95
Total	1,136	501	17	9	1,629	123,668.150	269.100	28.250	486.88	1,619.64

Report options include:

- **Reporting Date**: Sets the date range. **Note:** For **Reporting Date**, if you specify a **Start** or **End** date that falls outside the school calendar, Chancery SMS automatically adjusts the date of the report to match that of the school calendar. If both the start and end dates you specify both fall before or both after the school calendar, Chancery SMS does not adjust the dates, however the report generates a blank page.
- **Calculate attendance statistics using:**

  Values: For a report based on values, the report draws on attendance code types (that is, Present, Absent, Tardy) and the values associated with different kinds of days (such as Teaching, Professional Development, Holiday). **Note:** If, for an enrolled student, no attendance is recorded, the report uses a null value.

  Occurrences (number of times the student was given a code): **Note:** If, for an enrolled student, no attendance is recorded, the report considers it as 0 occurrences.
- **Format:**

  By Grade

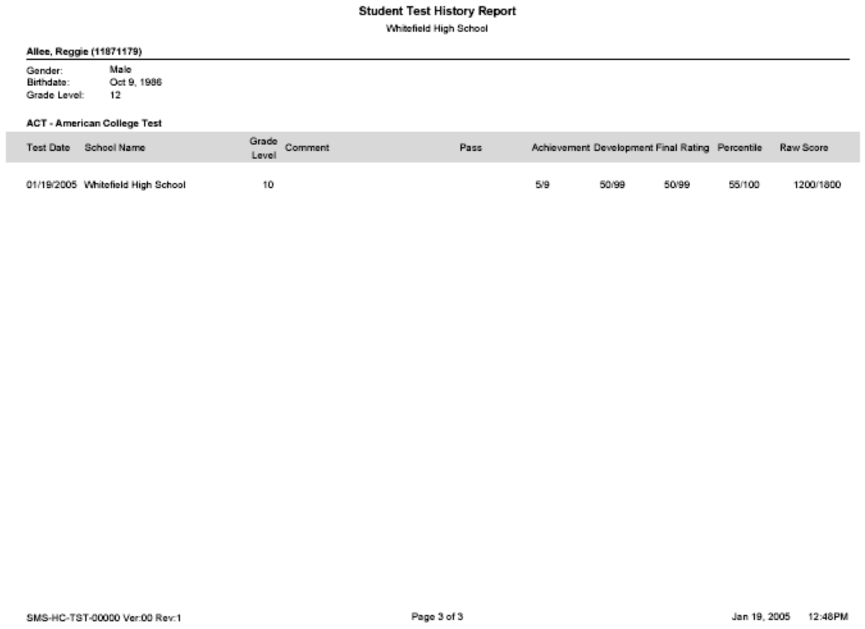
  By Grade and Gender

Test Management reports

Student Test History

This report lists all the tests each student has taken in the district. This report displays test sessions grouped by test and sorted by test date [Figure 179]. A School Administrator or counselor could use this report to determine appropriate programs and courses for the student.

FIGURE 179: Student Test History report sample results



Student Test History Report

Whitefield High School

Allee, Reggie (11871179)

Gender:	Male
Birthdate:	Oct 9, 1986
Grade Level:	12

ACT - American College Test

Test Date	School Name	Grade Level	Comment	Pass	Achievement	Development	Final Rating	Percentile	Raw Score
01/19/2005	Whitefield High School	10			5/9	50/99	50/99	55/100	1200/1800

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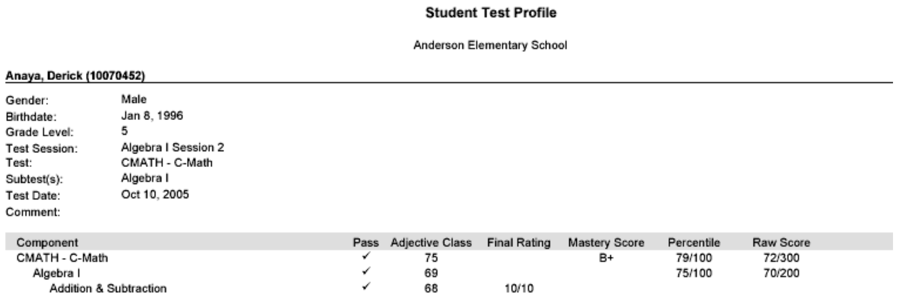
Student Test Profile

This report shows all of the details of a specific test for each student, including subtests and skills [Figure 180]. A School Administrator, counselor, or Teacher could use this report to identify a student's weakness in particular areas of study.

FIGURE 180: Student Test Profile report sample results



Student Test Profile

Anderson Elementary School

Anaya, Derick (10070452)

Gender:	Male
Birthdate:	Jan 8, 1996
Grade Level:	5
Test Session:	Algebra I Session 2
Test:	CMATH - C-Math
Subtest(s):	Algebra I
Test Date:	Oct 10, 2005
Comment:	

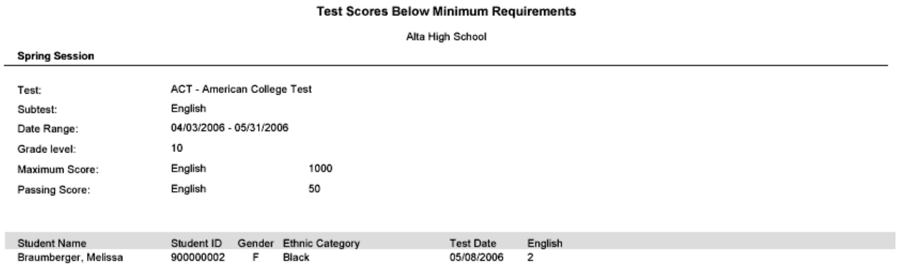
Component	Pass	Adjective Class	Final Rating	Mastery Score	Percentile	Raw Score
CMATH - C-Math	✓	75		B+	79/100	72/300
Algebra I	✓	69			75/100	70/200
Addition & Subtraction	✓	68	10/10			

Test Scores Below Minimum Requirements

This report lists all students who did not meet minimum requirements for a test session, within a single school or across the entire district [Figure 181]. Information on the students includes ethnicity and gender.

Note: This report is only available if a numeric score type (for example, raw score) has been used for the test, and maximum and passing scores have been entered for that score type. If more than one numeric score type with maximum and passing scores have been defined, the report defaults to the first.

FIGURE 181: Test Scores Below Minimum Requirements report sample results



Test Scores Below Minimum Requirements

Alta High School

Spring Session

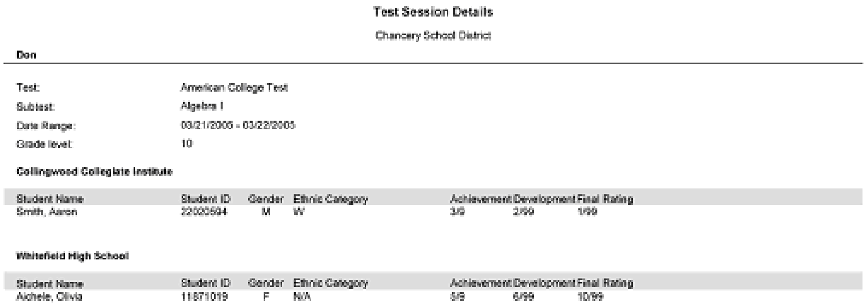
Test:	ACT - American College Test	
Subtest:	English	
Date Range:	04/03/2006 - 05/31/2006	
Grade level:	10	
Maximum Score:	English	1000
Passing Score:	English	50

Student Name	Student ID	Gender	Ethnic Category	Test Date	English
Braumberger, Melissa	900000002	F	Black	05/08/2006	2

Test Session Details

This report lists all students who participated in a particular test session, within a single school or across the entire district [Figure 182]. Information on the students includes ethnicity and gender.

FIGURE 182: Test Session Details report sample results



Test Session Details

Chancery School District

Don

Test:	American College Test
Subtest:	Algebra I
Date Range:	03/21/2005 - 03/22/2005
Grade level:	10

Collingwood Collegiate Institute

Student Name	Student ID	Gender	Ethnic Category	Achievement	Development	Final Rating
Smith, Aaron	22020594	M	W	3/9	2/99	1/99

Whitefield High School

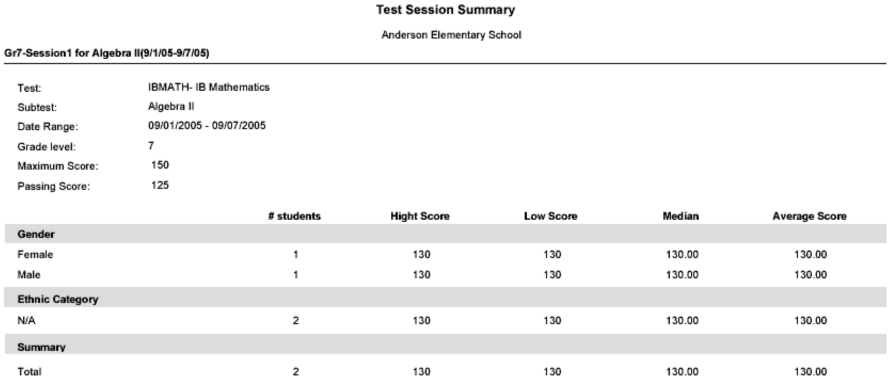
Student Name	Student ID	Gender	Ethnic Category	Achievement	Development	Final Rating
Aichele, Olivia	11871019	F	N/A	5/9	6/99	10/99

Test Session Summary

This report compares student results in a test session by gender and ethnicity within a single school or across the entire district [Figure 183].

Note: This report is only available if a numeric score type (for example, raw score) has been used for the test, and maximum and passing scores have been entered for that score type. If more than one numeric score type with maximum and passing scores have been defined, the report defaults to the first.

FIGURE 183: Test Session Summary report sample results



Test Session Summary

Anderson Elementary School

Gr7-Session1 for Algebra II(9/1/05-9/7/05)

Test:	IBMATH- IB Mathematics
Subtest:	Algebra II
Date Range:	09/01/2005 - 09/07/2005
Grade level:	7
Maximum Score:	150
Passing Score:	125

	# students	Hight Score	Low Score	Median	Average Score
Gender					
Female	1	130	130	130.00	130.00
Male	1	130	130	130.00	130.00
Ethnic Category					
N/A	2	130	130	130.00	130.00
Summary					
Total	2	130	130	130.00	130.00

Other reports

PowerTeacher Grades Entry Error Report

For a district using PowerTeacher Gradebook, this report captures synchronization issues that may occur between PowerTeacher Gradebook and Chancery SMS. The report shows the number of errors per error type category, along with the total number of errors. The report also provides a detailed breakdown of each grade entry error by reporting period, by school, by teacher, by class, and by student.

Report options include:

- **Error Type Category:**

  Schedule Setup: Select this check box to include Invalid classes and terms.

  Grading Setup: Select this check box to include invalid secondary course grade items, elementary report card items, and grading periods.

  Enrollment (school or class): Select this check box to include Invalid school and class enrollment.

  Invalid grades/comments

  Late grades

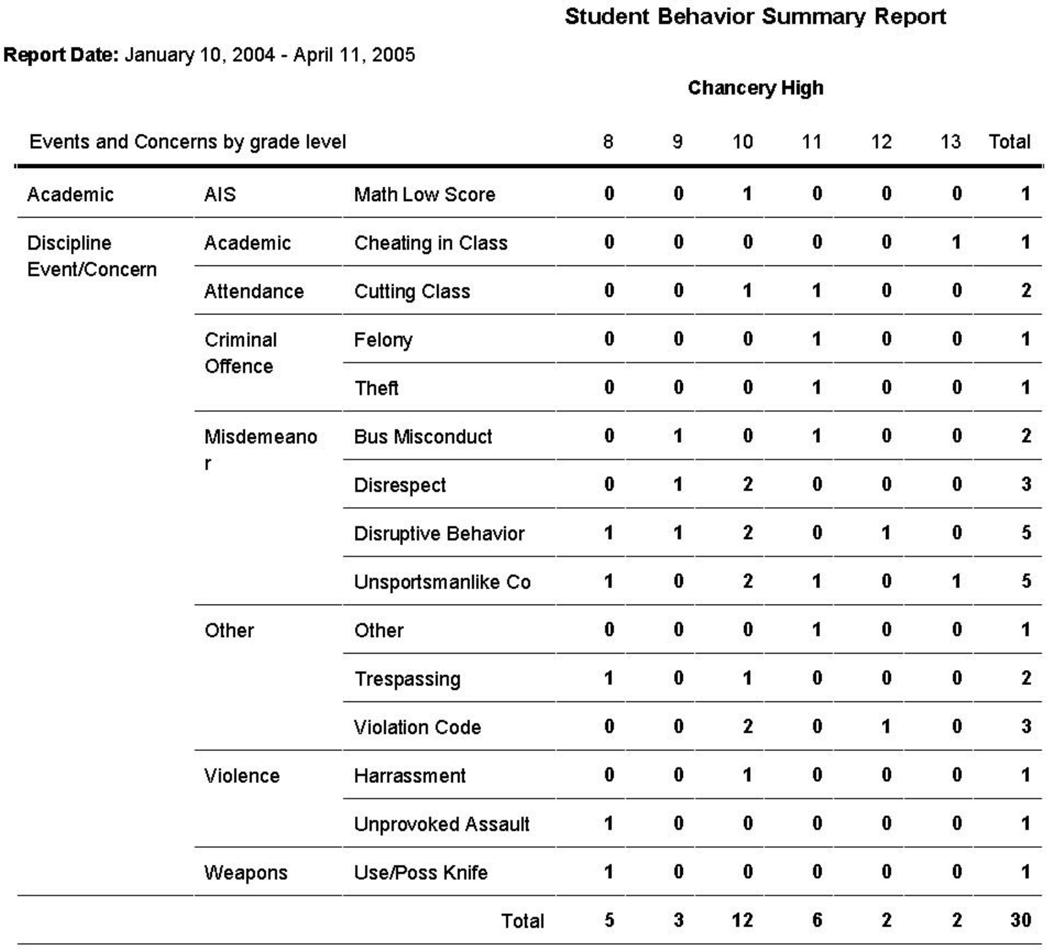
Chancery SMS built-in reports

Administration reports (built-in)

Student Behavior Summary

This report summarizes the number of disciplinary actions taken in a school by grade and action type [Figure 184].

FIGURE 184: Student Behavior Summary report sample results



Student Behavior Summary Report

Report Date: January 10, 2004 - April 11, 2005

Chancery High

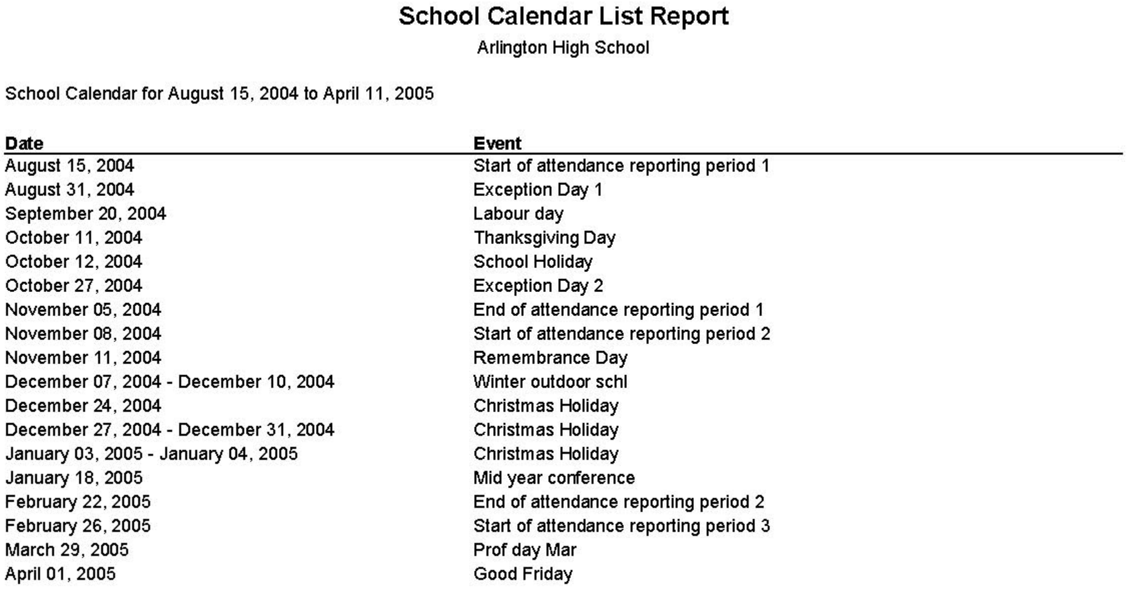
Events and Concerns by grade level			8	9	10	11	12	13	Total
Academic	AIS	Math Low Score	0	0	1	0	0	0	1
Discipline Event/Concern	Academic	Cheating in Class	0	0	0	0	0	1	1
	Attendance	Cutting Class	0	0	1	1	0	0	2
	Criminal Offence	Felony	0	0	0	1	0	0	1
		Theft	0	0	0	1	0	0	1
	Misdemeanor	Bus Misconduct	0	1	0	1	0	0	2
		Disrespect	0	1	2	0	0	0	3
		Disruptive Behavior	1	1	2	0	1	0	5
		Unsportsmanlike Co	1	0	2	1	0	1	5
	Other	Other	0	0	0	1	0	0	1
		Trespassing	1	0	1	0	0	0	2
		Violation Code	0	0	2	0	1	0	3
	Violence	Harrassment	0	0	1	0	0	0	1
		Unprovoked Assault	1	0	0	0	0	0	1
	Weapons	Use/Poss Knife	1	0	0	0	0	0	1
		Total	5	3	12	6	2	2	30

Report options include:

- **Report Date From/Report Date To**: Sets the date range. The default is Today.
- **Report Version**: Specifies whether the report should include Events/Concerns or Actions, and how the information is to be sorted (by grade level, gender, age, or ethnicity).

School Calendar List

FIGURE 185: School Calendar List report sample results



School Calendar List Report

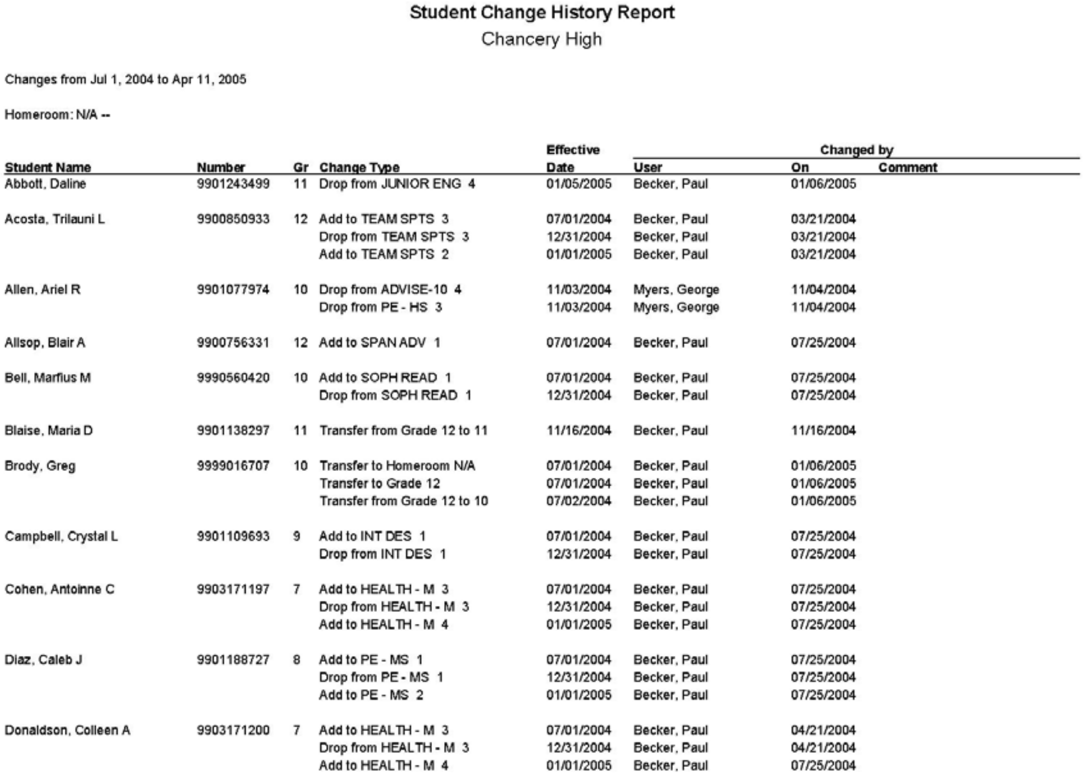
Arlington High School

School Calendar for August 15, 2004 to April 11, 2005

Date	Event
August 15, 2004	Start of attendance reporting period 1
August 31, 2004	Exception Day 1
September 20, 2004	Labour day
October 11, 2004	Thanksgiving Day
October 12, 2004	School Holiday
October 27, 2004	Exception Day 2
November 05, 2004	End of attendance reporting period 1
November 08, 2004	Start of attendance reporting period 2
November 11, 2004	Remembrance Day
December 07, 2004 - December 10, 2004	Winter outdoor schl
December 24, 2004	Christmas Holiday
December 27, 2004 - December 31, 2004	Christmas Holiday
January 03, 2005 - January 04, 2005	Christmas Holiday
January 18, 2005	Mid year conference
February 22, 2005	End of attendance reporting period 2
February 26, 2005	Start of attendance reporting period 3
March 29, 2005	Prof day Mar
April 01, 2005	Good Friday

Student Change History

FIGURE 186: Student Change History report sample results



Student Change History Report

Chancery High

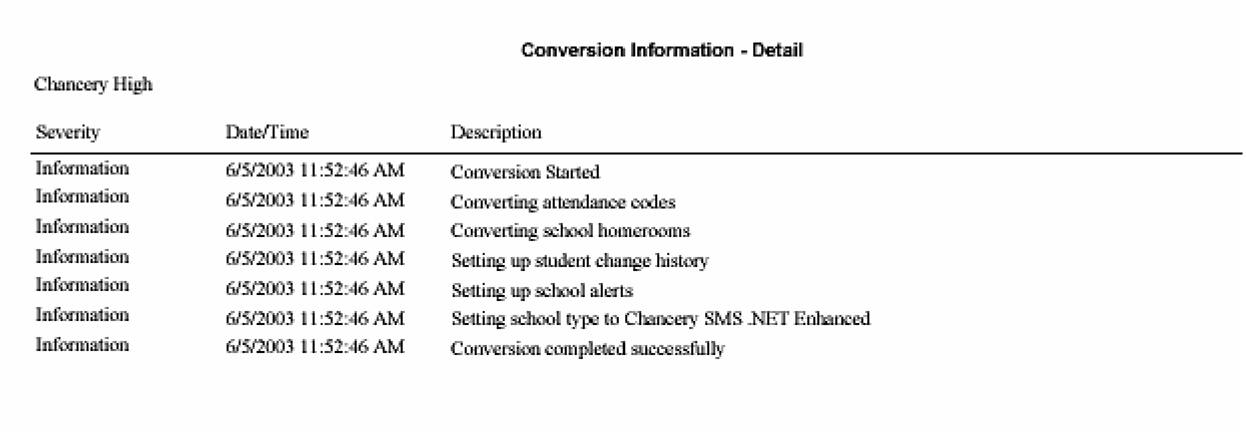
Changes from Jul 1, 2004 to Apr 11, 2005

Homeroom: N/A --

				Effective	Changed by		
Student Name	**Number**	**Gr**	**Change Type**	**Date**	**User**	**On**	**Comment**
Abbott, Daline	9901243499	11	Drop from JUNIOR ENG 4	01/05/2005	Becker, Paul	01/06/2005	
Acosta, Trilauni L	9900850933	12	Add to TEAM SPTS 3	07/01/2004	Becker, Paul	03/21/2004	
			Drop from TEAM SPTS 3	12/31/2004	Becker, Paul	03/21/2004	
			Add to TEAM SPTS 2	01/01/2005	Becker, Paul	03/21/2004	
Allen, Ariel R	9901077974	10	Drop from ADVISE-10 4	11/03/2004	Myers, George	11/04/2004	
			Drop from PE - HS 3	11/03/2004	Myers, George	11/04/2004	
Allsop, Blair A	9900756331	12	Add to SPAN ADV 1	07/01/2004	Becker, Paul	07/25/2004	
Bell, Marflus M	9990560420	10	Add to SOPH READ 1	07/01/2004	Becker, Paul	07/25/2004	
			Drop from SOPH READ 1	12/31/2004	Becker, Paul	07/25/2004	
Blaise, Maria D	9901138297	11	Transfer from Grade 12 to 11	11/16/2004	Becker, Paul	11/16/2004	
Brody, Greg	9999016707	10	Transfer to Homeroom N/A	07/01/2004	Becker, Paul	01/06/2005	
			Transfer to Grade 12	07/01/2004	Becker, Paul	01/06/2005	
			Transfer from Grade 12 to 10	07/02/2004	Becker, Paul	01/06/2005	
Campbell, Crystal L	9901109693	9	Add to INT DES 1	07/01/2004	Becker, Paul	07/25/2004	
			Drop from INT DES 1	12/31/2004	Becker, Paul	07/25/2004	
Cohen, Antoinne C	9903171197	7	Add to HEALTH - M 3	07/01/2004	Becker, Paul	07/25/2004	
			Drop from HEALTH - M 3	12/31/2004	Becker, Paul	07/25/2004	
			Add to HEALTH - M 4	01/01/2005	Becker, Paul	07/25/2004	
Diaz, Caleb J	9901188727	8	Add to PE - MS 1	07/01/2004	Becker, Paul	07/25/2004	
			Drop from PE - MS 1	12/31/2004	Becker, Paul	07/25/2004	
			Add to PE - MS 2	01/01/2005	Becker, Paul	07/25/2004	
Donaldson, Colleen A	9903171200	7	Add to HEALTH - M 3	07/01/2004	Becker, Paul	04/21/2004	
			Drop from HEALTH - M 3	12/31/2004	Becker, Paul	04/21/2004	
			Add to HEALTH - M 4	01/01/2005	Becker, Paul	07/25/2004	

School Conversion Log

FIGURE 187: School Conversion Log report sample results



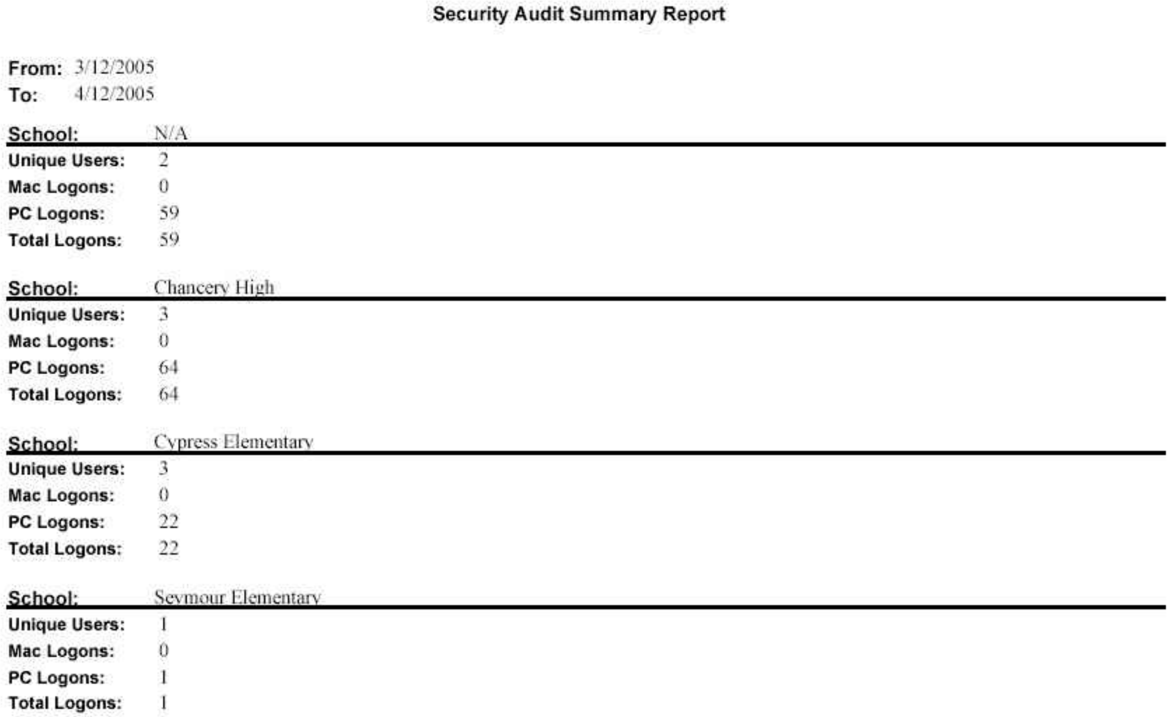
Conversion Information - Detail

Chancery High

Severity	Date/Time	Description
Information	6/5/2003 11:52:46 AM	Conversion Started
Information	6/5/2003 11:52:46 AM	Converting attendance codes
Information	6/5/2003 11:52:46 AM	Converting school homerooms
Information	6/5/2003 11:52:46 AM	Setting up student change history
Information	6/5/2003 11:52:46 AM	Setting up school alerts
Information	6/5/2003 11:52:46 AM	Setting school type to Chancery SMS .NET Enhanced
Information	6/5/2003 11:52:46 AM	Conversion completed successfully

Security Audit Summary

FIGURE 188: Security Audit Summary report sample results



Security Audit Summary Report

From: 3/12/2005
To: 4/12/2005

School: N/A
Unique Users: 2
Mac Logons: 0
PC Logons: 59
Total Logons: 59

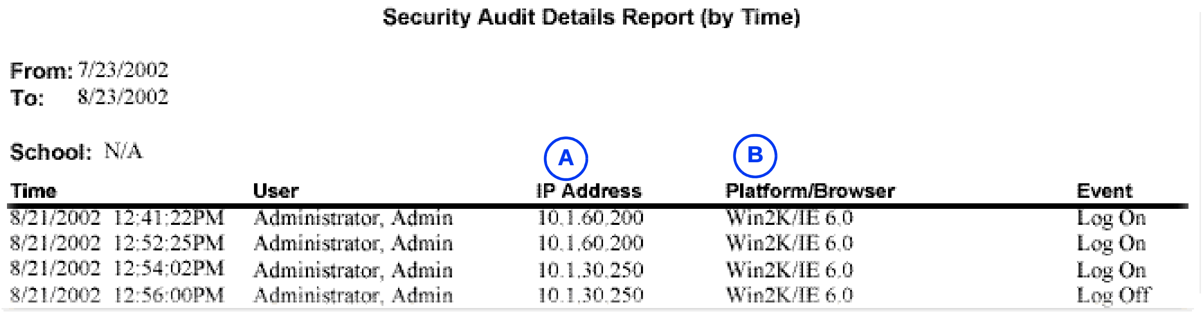
School: Chancery High
Unique Users: 3
Mac Logons: 0
PC Logons: 64
Total Logons: 64

School: Cypress Elementary
Unique Users: 3
Mac Logons: 0
PC Logons: 22
Total Logons: 22

School: Seymour Elementary
Unique Users: 1
Mac Logons: 0
PC Logons: 1
Total Logons: 1

Security Audit Details (by Time)

FIGURE 189: Security Audit Details report sample results



Security Audit Details Report (by Time)

From: 7/23/2002
To: 8/23/2002

School: N/A

Time	User	IP Address	Platform/Browser	Event
8/21/2002 12:41:22PM	Administrator, Admin	10.1.60.200	Win2K/IE 6.0	Log On
8/21/2002 12:52:25PM	Administrator, Admin	10.1.60.200	Win2K/IE 6.0	Log On
8/21/2002 12:54:02PM	Administrator, Admin	10.1.30.250	Win2K/IE 6.0	Log On
8/21/2002 12:56:00PM	Administrator, Admin	10.1.30.250	Win2K/IE 6.0	Log Off

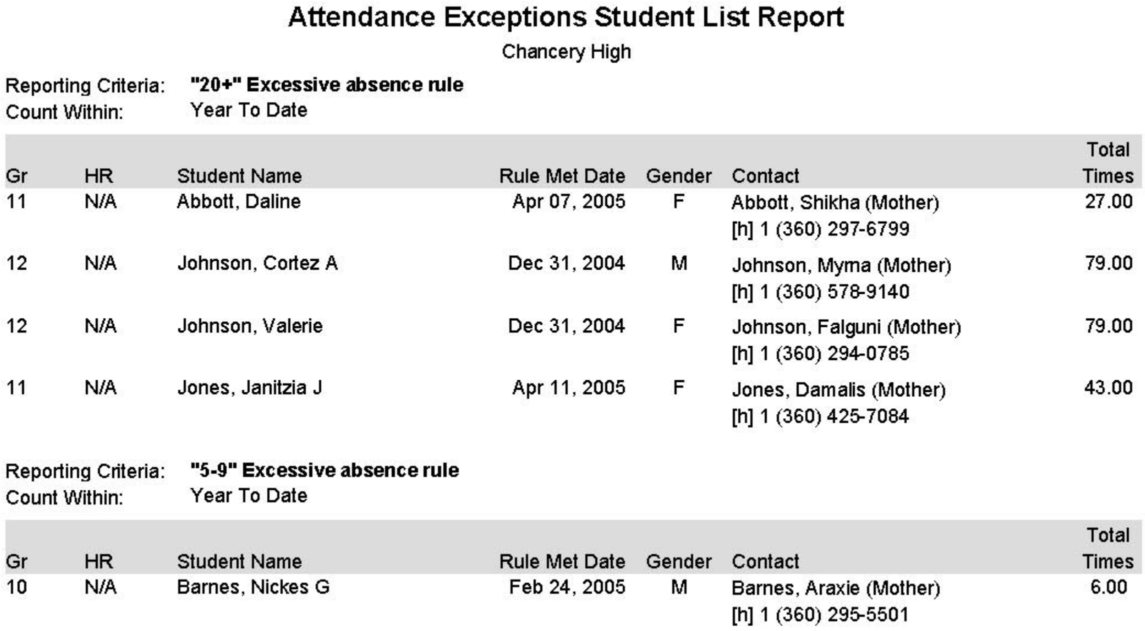
A **IP Address**: The IP address of the user's computer at the time of the Event.

B **Platform/Browser**: The computer operating system on the user's computer and the browser [p. 29] he or she used at the time of the event.

Attendance reports (built-in)

Attendance Exceptions Student List

FIGURE 190: Attendance Exceptions Student List report sample results



Attendance Exceptions Student List Report

Chancery High

Reporting Criteria: **"20+" Excessive absence rule**
Count Within: Year To Date

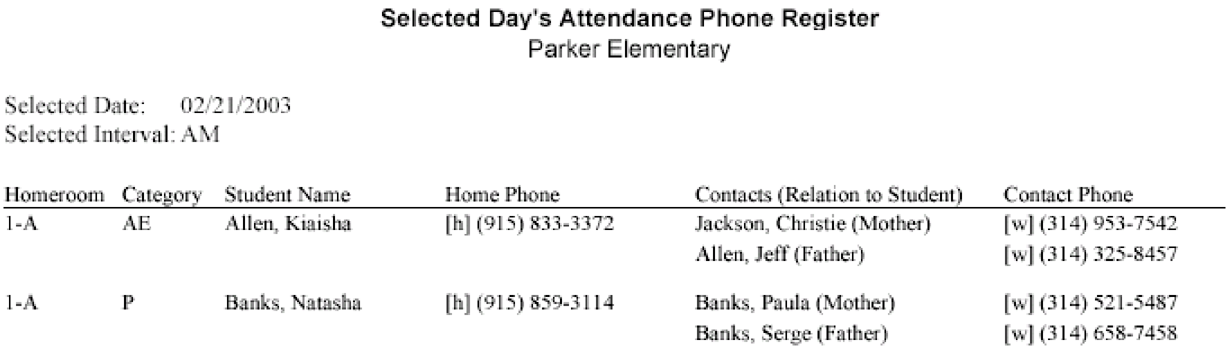
Gr	HR	Student Name	Rule Met Date	Gender	Contact	Total Times
11	N/A	Abbott, Daline	Apr 07, 2005	F	Abbott, Shikha (Mother) [h] 1 (360) 297-6799	27.00
12	N/A	Johnson, Cortez A	Dec 31, 2004	M	Johnson, Myrna (Mother) [h] 1 (360) 578-9140	79.00
12	N/A	Johnson, Valerie	Dec 31, 2004	F	Johnson, Falguni (Mother) [h] 1 (360) 294-0785	79.00
11	N/A	Jones, Janitzia J	Apr 11, 2005	F	Jones, Damalis (Mother) [h] 1 (360) 425-7084	43.00

Reporting Criteria: **"5-9" Excessive absence rule**
Count Within: Year To Date

Gr	HR	Student Name	Rule Met Date	Gender	Contact	Total Times
10	N/A	Barnes, Nickes G	Feb 24, 2005	M	Barnes, Araxie (Mother) [h] 1 (360) 295-5501	6.00

Daily Attendance Phone Register

FIGURE 191: Daily Attendance Phone Register report sample results



Selected Day's Attendance Phone Register
Parker Elementary

Selected Date: 02/21/2003
Selected Interval: AM

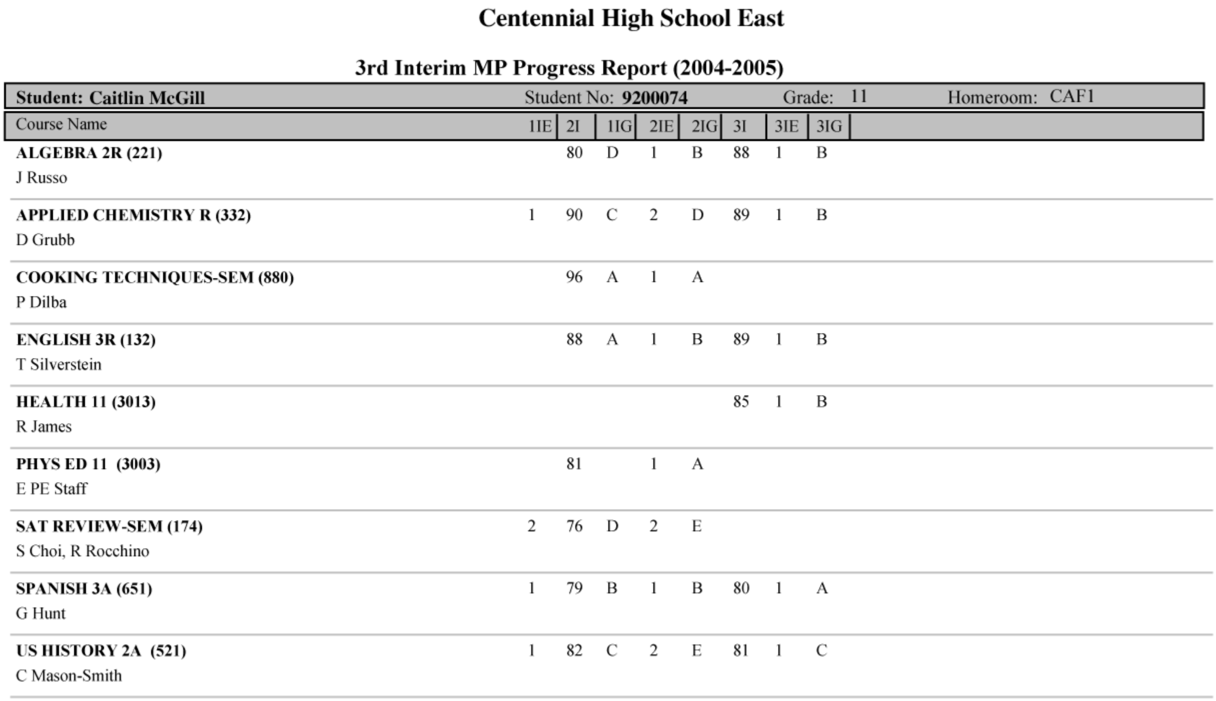
Homeroom	Category	Student Name	Home Phone	Contacts (Relation to Student)	Contact Phone
1-A	AE	Allen, Kiaisha	[h] (915) 833-3372	Jackson, Christie (Mother) Allen, Jeff (Father)	[w] (314) 953-7542 [w] (314) 325-8457
1-A	P	Banks, Natasha	[h] (915) 859-3114	Banks, Paula (Mother) Banks, Serge (Father)	[w] (314) 521-5487 [w] (314) 658-7458

Grading reports (built-in)

Elementary Progress

Appears in the Reports menu on a student search results page [p. 46].

FIGURE 192: Progress report sample results



Centennial High School East

3rd Interim MP Progress Report (2004-2005)

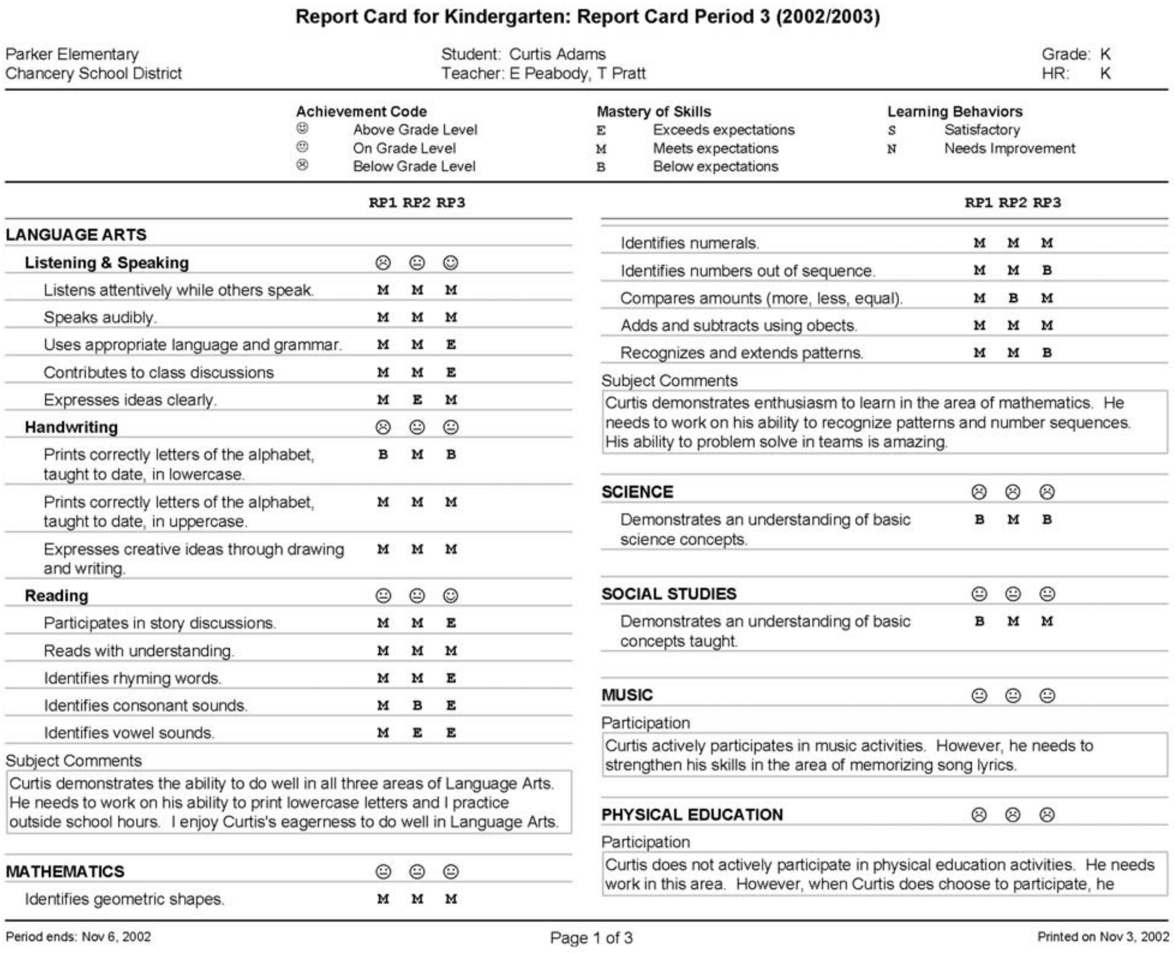
Student: Caitlin McGill Student No: **9200074** Grade: 11 Homeroom: CAF1

Course Name	1IE	2I	1IG	2IE	2IG	3I	3IE	3IG
ALGEBRA 2R (221) J Russo		80	D	1	B	88	1	B
APPLIED CHEMISTRY R (332) D Grubb	1	90	C	2	D	89	1	B
COOKING TECHNIQUES-SEM (880) P Dilba		96	A	1	A			
ENGLISH 3R (132) T Silverstein		88	A	1	B	89	1	B
HEALTH 11 (3013) R James						85	1	B
PHYS ED 11 (3003) E PE Staff		81		1	A			
SAT REVIEW-SEM (174) S Choi, R Rocchino	2	76	D	2	E			
SPANISH 3A (651) G Hunt	1	79	B	1	B	80	1	A
US HISTORY 2A (521) C Mason-Smith	1	82	C	2	E	81	1	C

Elementary Report Card

Appears in the Reports menu on a student search results page [p. 46].

FIGURE 193: Report Card - Elementary report sample results



Report Card for Kindergarten: Report Card Period 3 (2002/2003)

Parker Elementary
Chancery School District

Student: Curtis Adams
Teacher: E Peabody, T Pratt

Grade: K
HR: K

Achievement Code
☺ Above Grade Level
😐 On Grade Level
☹ Below Grade Level

Mastery of Skills
E Exceeds expectations
M Meets expectations
B Below expectations

Learning Behaviors
S Satisfactory
N Needs Improvement

	RP1	RP2	RP3
LANGUAGE ARTS			
Listening & Speaking	☹	😐	☺
Listens attentively while others speak.	M	M	M
Speaks audibly.	M	M	M
Uses appropriate language and grammar.	M	M	E
Contributes to class discussions	M	M	E
Expresses ideas clearly.	M	E	M
Handwriting	☹	😐	😐
Prints correctly letters of the alphabet, taught to date, in lowercase.	B	M	B
Prints correctly letters of the alphabet, taught to date, in uppercase.	M	M	M
Expresses creative ideas through drawing and writing.	M	M	M
Reading	😐	😐	☺
Participates in story discussions.	M	M	E
Reads with understanding.	M	M	M
Identifies rhyming words.	M	M	E
Identifies consonant sounds.	M	B	E
Identifies vowel sounds.	M	E	E

Subject Comments

Curtis demonstrates the ability to do well in all three areas of Language Arts. He needs to work on his ability to print lowercase letters and I practice outside school hours. I enjoy Curtis's eagerness to do well in Language Arts.

	RP1	RP2	RP3
MATHEMATICS	😐	😐	😐
Identifies geometric shapes.	M	M	M
Identifies numerals.	M	M	M
Identifies numbers out of sequence.	M	M	B
Compares amounts (more, less, equal).	M	B	M
Adds and subtracts using obects.	M	M	M
Recognizes and extends patterns.	M	M	B

Subject Comments

Curtis demonstrates enthusiasm to learn in the area of mathematics. He needs to work on his ability to recognize patterns and number sequences. His ability to problem solve in teams is amazing.

	RP1	RP2	RP3
SCIENCE	☹	☹	☹
Demonstrates an understanding of basic science concepts.	B	M	B
SOCIAL STUDIES	😐	😐	☺
Demonstrates an understanding of basic concepts taught.	B	M	M
MUSIC	😐	😐	😐

Participation

Curtis actively participates in music activities. However, he needs to strengthen his skills in the area of memorizing song lyrics.

	RP1	RP2	RP3
PHYSICAL EDUCATION	☹	☹	☹

Participation

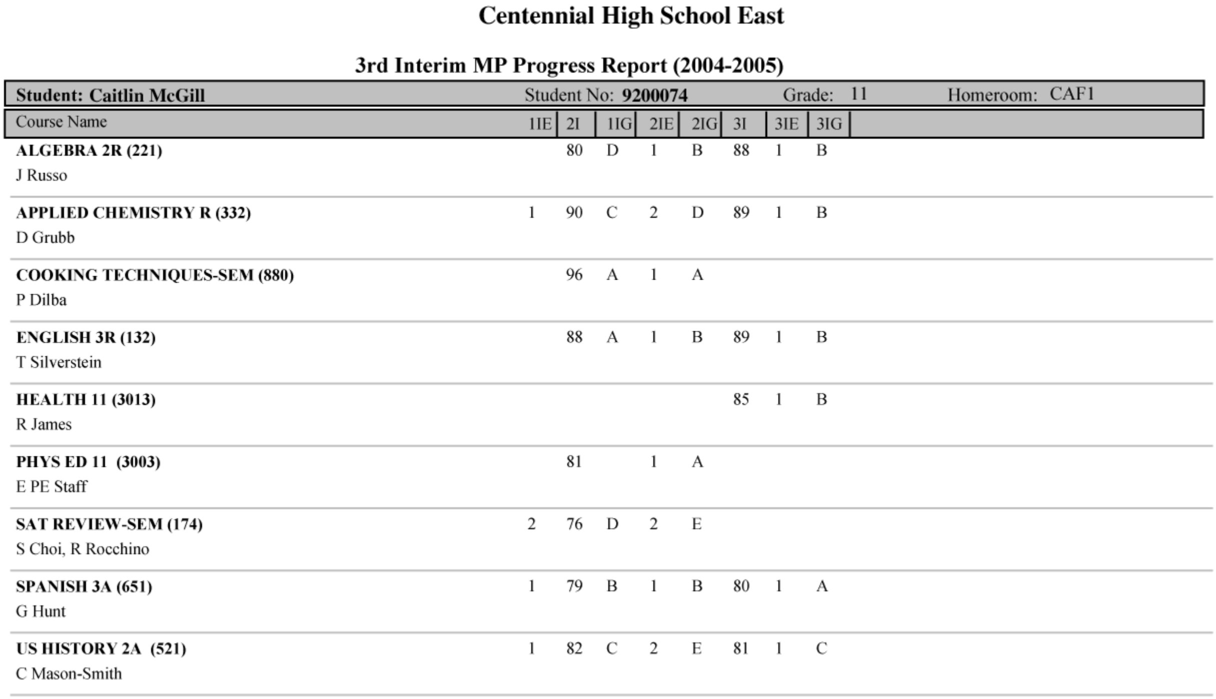
Curtis does not actively participate in physical education activities. He needs work in this area. However, when Curtis does choose to participate, he

Period ends: Nov 6, 2002 Page 1 of 3 Printed on Nov 3, 2002

Secondary Progress

Appears in the Reports menu on a student search results page [p. 46].

FIGURE 194: Secondary Progress report sample results



Centennial High School East

3rd Interim MP Progress Report (2004-2005)

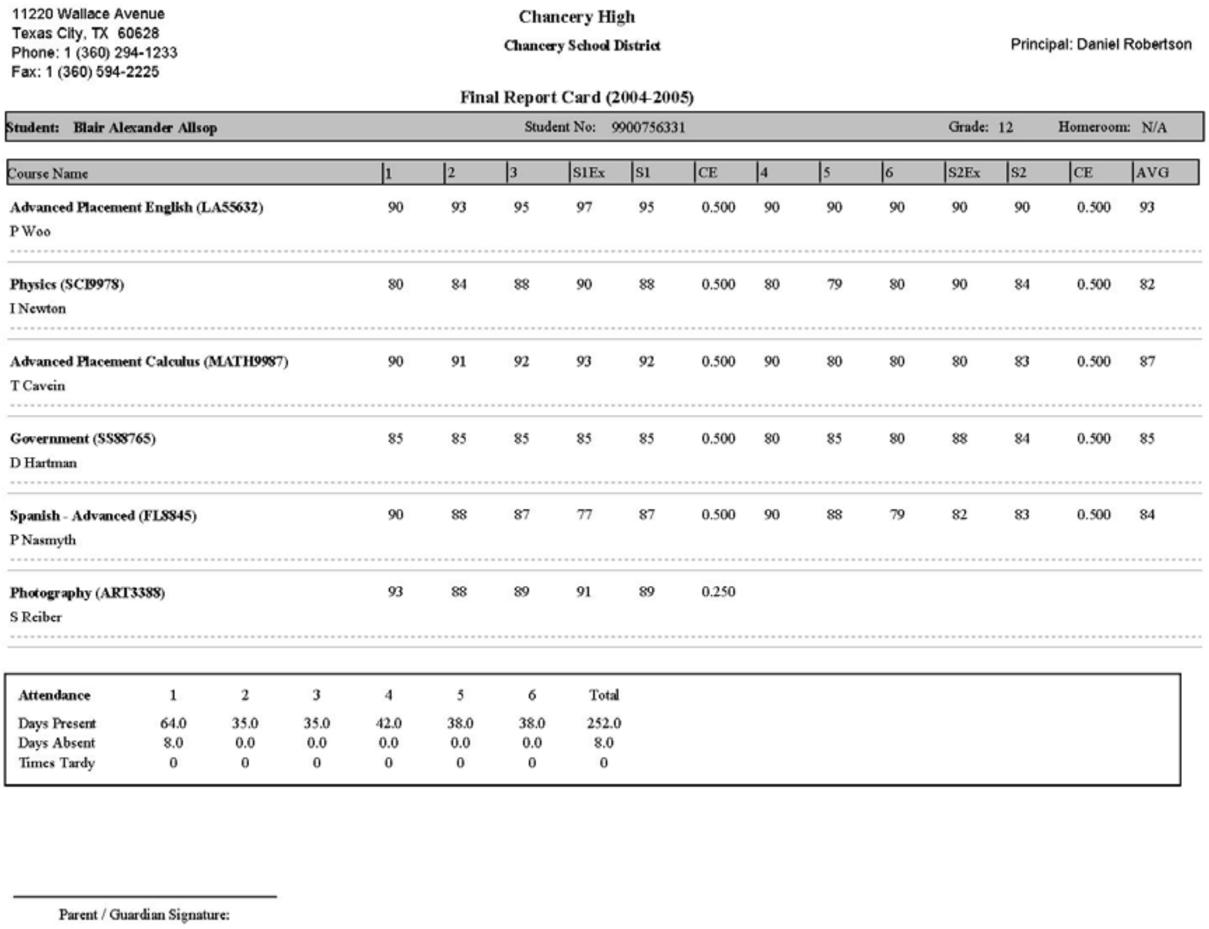
Student: Caitlin McGill Student No: **9200074** Grade: 11 Homeroom: CAF1

Course Name	1IE	2I	1IG	2IE	2IG	3I	3IE	3IG
ALGEBRA 2R (221) J Russo		80	D	1	B	88	1	B
APPLIED CHEMISTRY R (332) D Grubb	1	90	C	2	D	89	1	B
COOKING TECHNIQUES-SEM (880) P Dilba		96	A	1	A			
ENGLISH 3R (132) T Silverstein		88	A	1	B	89	1	B
HEALTH 11 (3013) R James						85	1	B
PHYS ED 11 (3003) E PE Staff		81		1	A			
SAT REVIEW-SEM (174) S Choi, R Rocchino	2	76	D	2	E			
SPANISH 3A (651) G Hunt	1	79	B	1	B	80	1	A
US HISTORY 2A (521) C Mason-Smith	1	82	C	2	E	81	1	C

Secondary Report Card

Appears in the Reports menu on a student search results page [p. 46].

FIGURE 195: Secondary Report Card report sample results



11220 Wallace Avenue
Texas City, TX 60628
Phone: 1 (360) 294-1233
Fax: 1 (360) 594-2225

Chancery High

Chancery School District

Principal: Daniel Robertson

Final Report Card (2004-2005)

Student: Blair Alexander Allsop Student No: 9900756331 Grade: 12 Homeroom: N/A

Course Name	1	2	3	S1Ex	S1	CE	4	5	6	S2Ex	S2	CE	AVG
Advanced Placement English (LA55632) P Woo	90	93	95	97	95	0.500	90	90	90	90	90	0.500	93
Physics (SCI9978) I Newton	80	84	88	90	88	0.500	80	79	80	90	84	0.500	82
Advanced Placement Calculus (MATH9987) T Cavein	90	91	92	93	92	0.500	90	80	80	80	83	0.500	87
Government (SSS8765) D Hartman	85	85	85	85	85	0.500	80	85	80	88	84	0.500	85
Spanish - Advanced (FLS845) P Nasmyth	90	88	87	77	87	0.500	90	88	79	82	83	0.500	84
Photography (ART3388) S Reiber	93	88	89	91	89	0.250							

Attendance	1	2	3	4	5	6	Total
Days Present	64.0	35.0	35.0	42.0	38.0	38.0	252.0
Days Absent	8.0	0.0	0.0	0.0	0.0	0.0	8.0
Times Tardy	0	0	0	0	0	0	0

Parent / Guardian Signature:

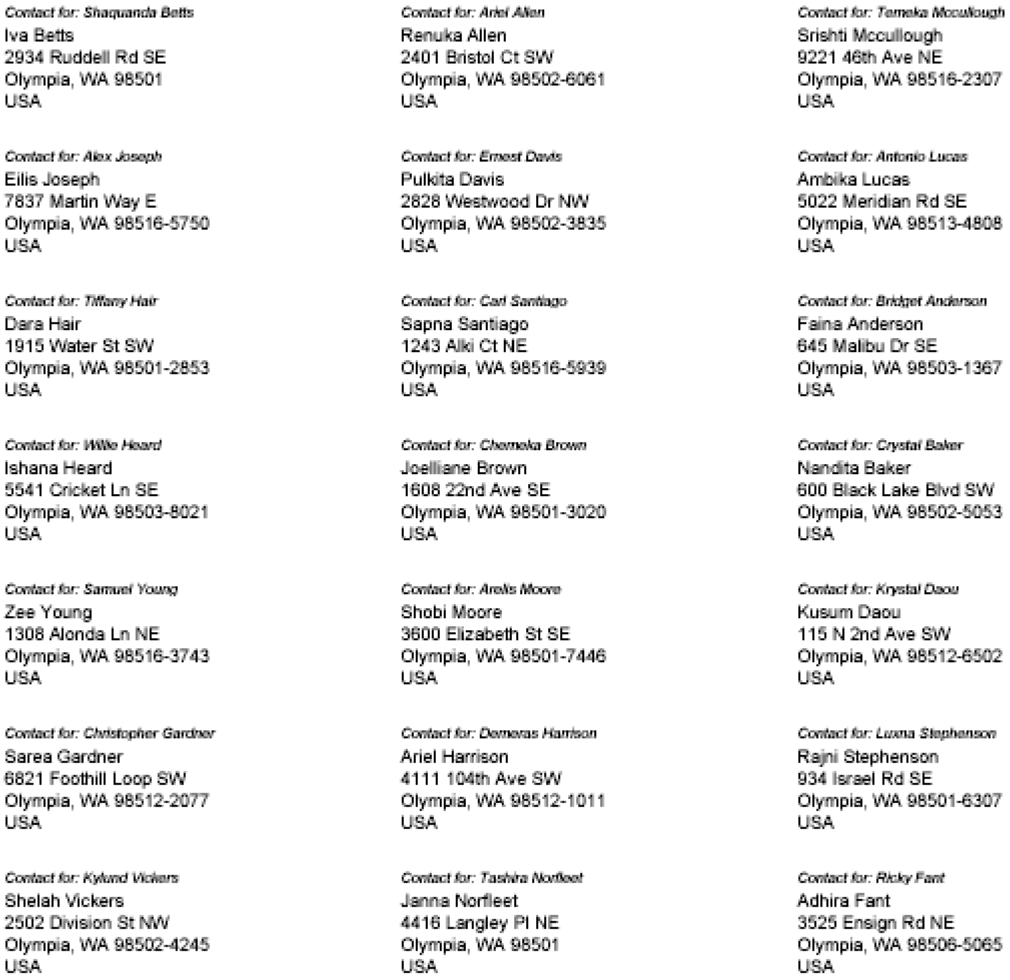
Student List reports (built-in)

Award Certificate

Refer to Awards setup [p. 171].

Contact Mailing Labels

FIGURE 196: Contact Mailing Labels report sample results



Contact for: Shaquanda Betts
Iva Betts
2934 Ruddell Rd SE
Olympia, WA 98501
USA

Contact for: Ariel Allen
Renuka Allen
2401 Bristol Ct SW
Olympia, WA 98502-6061
USA

Contact for: Tameka Mccullough
Srishti Mccullough
9221 46th Ave NE
Olympia, WA 98516-2307
USA

Contact for: Alex Joseph
Eilis Joseph
7837 Martin Way E
Olympia, WA 98516-5750
USA

Contact for: Ernest Davis
Pulkita Davis
2828 Westwood Dr NW
Olympia, WA 98502-3835
USA

Contact for: Antonio Lucas
Ambika Lucas
5022 Meridian Rd SE
Olympia, WA 98513-4808
USA

Contact for: Tiffany Hair
Dara Hair
1915 Water St SW
Olympia, WA 98501-2853
USA

Contact for: Carl Santiago
Sapna Santiago
1243 Alki Ct NE
Olympia, WA 98516-5939
USA

Contact for: Bridget Anderson
Faina Anderson
645 Malibu Dr SE
Olympia, WA 98503-1367
USA

Contact for: Willie Heard
Ishana Heard
5541 Cricket Ln SE
Olympia, WA 98503-8021
USA

Contact for: Chemeka Brown
Joelliane Brown
1608 22nd Ave SE
Olympia, WA 98501-3020
USA

Contact for: Crystal Baker
Nandita Baker
600 Black Lake Blvd SW
Olympia, WA 98502-5053
USA

Contact for: Samuel Young
Zee Young
1308 Alonda Ln NE
Olympia, WA 98516-3743
USA

Contact for: Arelis Moore
Shobi Moore
3600 Elizabeth St SE
Olympia, WA 98501-7446
USA

Contact for: Krystal Daou
Kusum Daou
115 N 2nd Ave SW
Olympia, WA 98512-6502
USA

Contact for: Christopher Gardner
Sarea Gardner
6821 Foothill Loop SW
Olympia, WA 98512-2077
USA

Contact for: Demeras Harrison
Ariel Harrison
4111 104th Ave SW
Olympia, WA 98512-1011
USA

Contact for: Luxna Stephenson
Rajni Stephenson
934 Israel Rd SE
Olympia, WA 98501-6307
USA

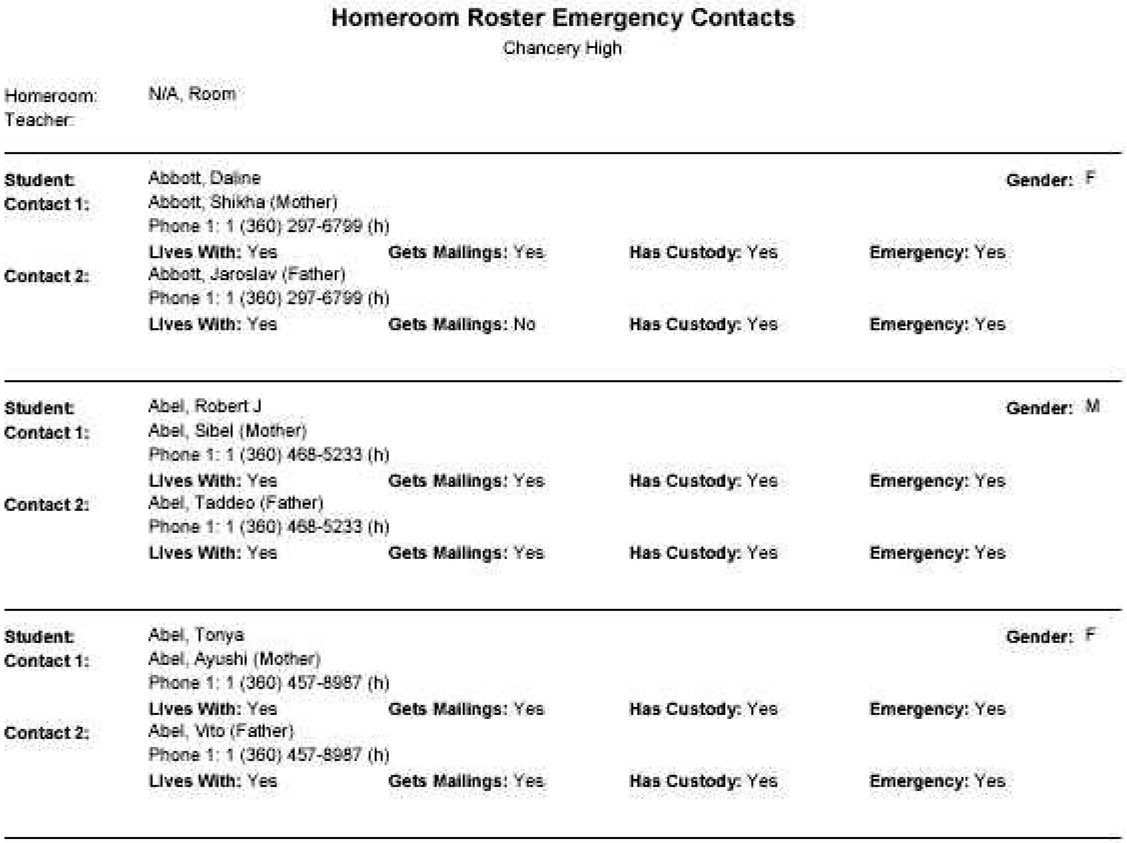
Contact for: Kylund Vickers
Shelah Vickers
2502 Division St NW
Olympia, WA 98502-4245
USA

Contact for: Tashira Norfleet
Janna Norfleet
4416 Langley Pl NE
Olympia, WA 98501
USA

Contact for: Ricky Fant
Adhira Fant
3525 Ensign Rd NE
Olympia, WA 98506-5065
USA

Homeroom Roster Emergency Contacts

FIGURE 197: Homeroom Roster Emergency Contacts report sample results



Homeroom Roster Emergency Contacts

Chancery High

Homeroom: N/A, Room
Teacher:

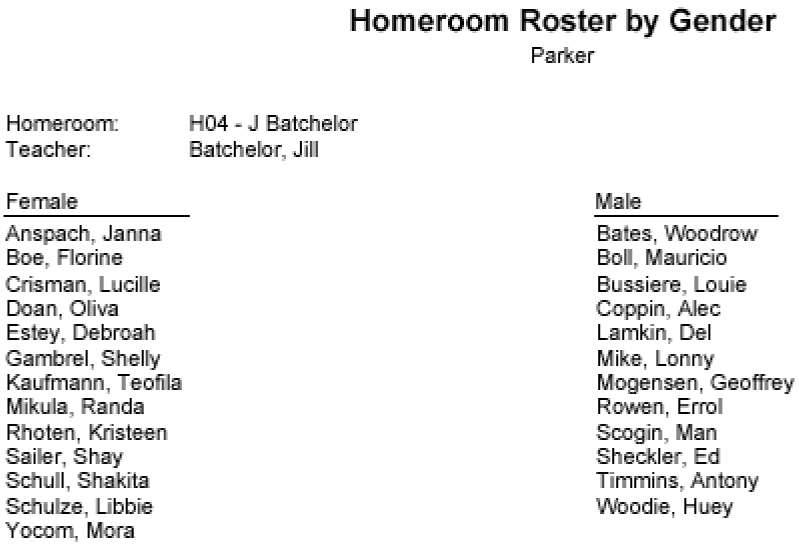
Student: Abbott, Daline **Gender:** F
Contact 1: Abbott, Shikha (Mother)
Phone 1: 1 (360) 297-6799 (h)
Lives With: Yes **Gets Mailings:** Yes **Has Custody:** Yes **Emergency:** Yes
Contact 2: Abbott, Jaroslav (Father)
Phone 1: 1 (360) 297-6799 (h)
Lives With: Yes **Gets Mailings:** No **Has Custody:** Yes **Emergency:** Yes

Student: Abel, Robert J **Gender:** M
Contact 1: Abel, Sibel (Mother)
Phone 1: 1 (360) 468-5233 (h)
Lives With: Yes **Gets Mailings:** Yes **Has Custody:** Yes **Emergency:** Yes
Contact 2: Abel, Taddeo (Father)
Phone 1: 1 (360) 468-5233 (h)
Lives With: Yes **Gets Mailings:** Yes **Has Custody:** Yes **Emergency:** Yes

Student: Abel, Tonya **Gender:** F
Contact 1: Abel, Ayushi (Mother)
Phone 1: 1 (360) 457-8987 (h)
Lives With: Yes **Gets Mailings:** Yes **Has Custody:** Yes **Emergency:** Yes
Contact 2: Abel, Vito (Father)
Phone 1: 1 (360) 457-8987 (h)
Lives With: Yes **Gets Mailings:** Yes **Has Custody:** Yes **Emergency:** Yes

Homeroom Roster by Gender

FIGURE 198: Homeroom Roster by Gender report sample results



Homeroom Roster by Gender

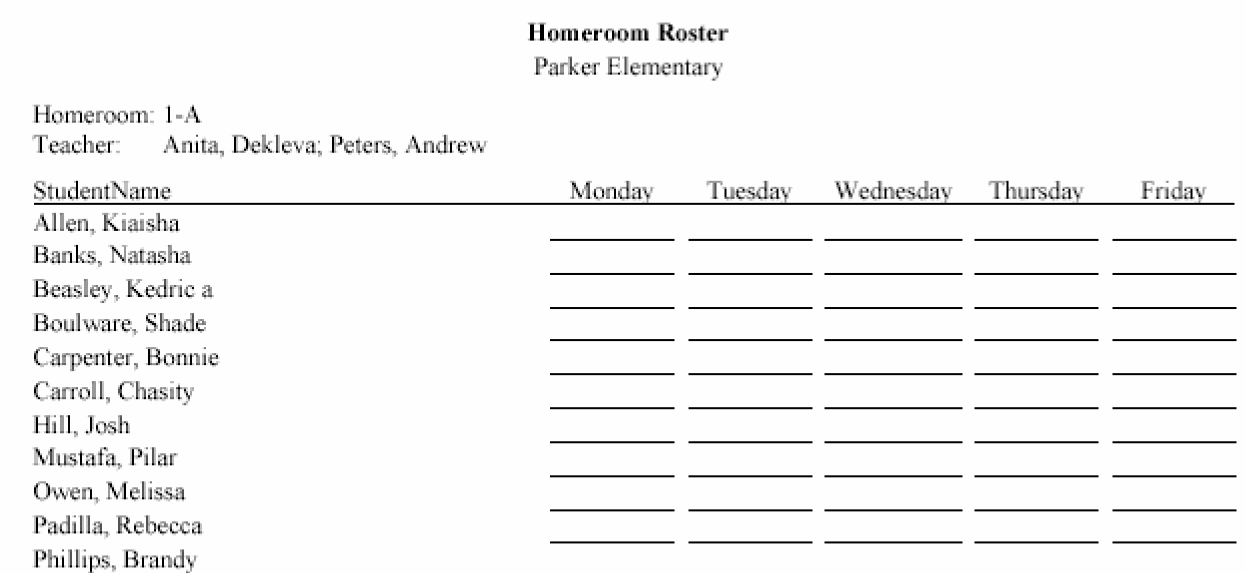
Parker

Homeroom: H04 - J Batchelor
Teacher: Batchelor, Jill

Female	Male
Anspach, Janna	Bates, Woodrow
Boe, Florine	Boll, Mauricio
Crisman, Lucille	Bussiere, Louie
Doan, Oliva	Coppin, Alec
Estey, Debroah	Lamkin, Del
Gambrel, Shelly	Mike, Lonny
Kaufmann, Teofila	Mogensen, Geoffrey
Mikula, Randa	Rowen, Errol
Rhoten, Kristeen	Scogin, Man
Sailer, Shay	Sheckler, Ed
Schull, Shakita	Timmins, Antony
Schulze, Libbie	Woodie, Huey
Yocom, Mora	

Homeroom Roster report

FIGURE 199: Homeroom Roster report sample results



Homeroom Roster

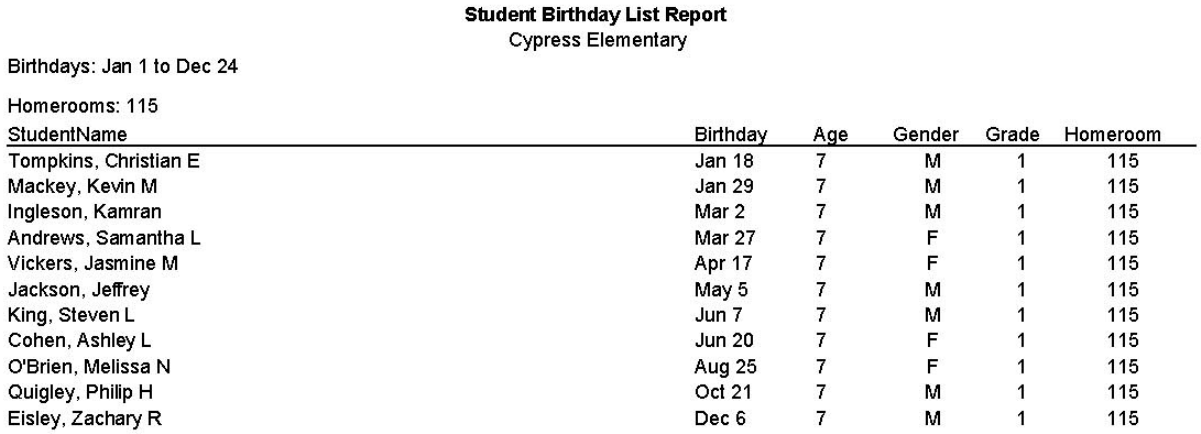
Parker Elementary

Homeroom: 1-A
Teacher: Anita, Dekleva; Peters, Andrew

StudentName	Monday	Tuesday	Wednesday	Thursday	Friday
Allen, Kiaisha					
Banks, Natasha					
Beasley, Kedric a					
Boulware, Shade					
Carpenter, Bonnie					
Carroll, Chasity					
Hill, Josh					
Mustafa, Pilar					
Owen, Melissa					
Padilla, Rebecca					
Phillips, Brandy					

Student Birthday List

FIGURE 200: Student Birthday List report sample results



Student Birthday List Report

Cypress Elementary

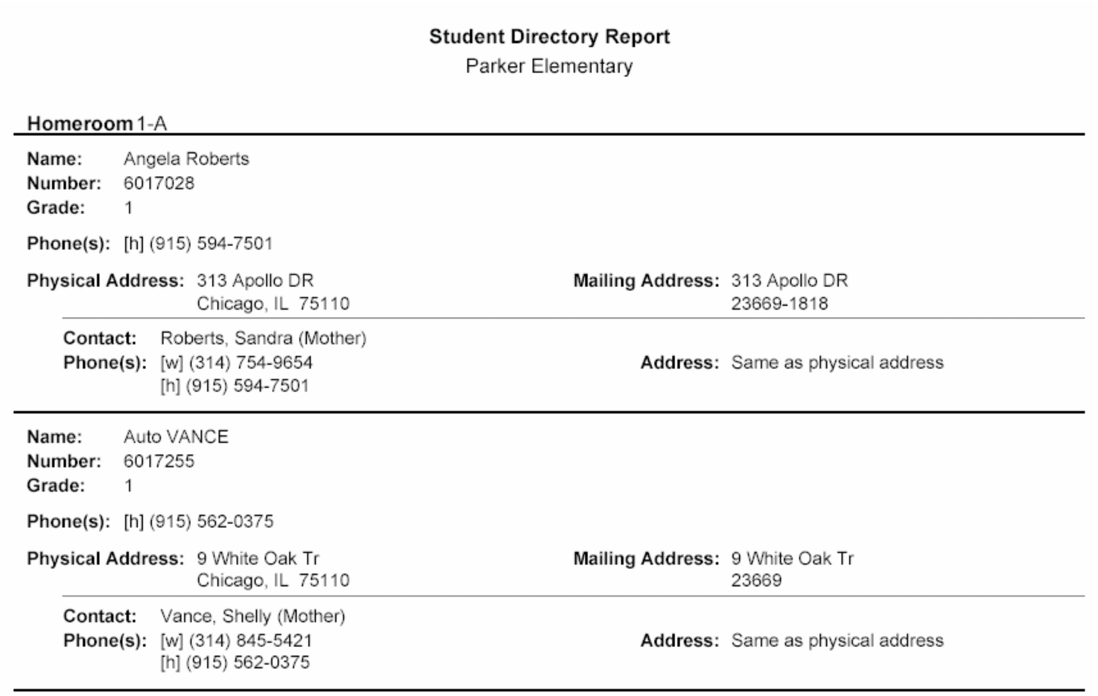
Birthdays: Jan 1 to Dec 24

Homerooms: 115

StudentName	Birthday	Age	Gender	Grade	Homeroom
Tompkins, Christian E	Jan 18	7	M	1	115
Mackey, Kevin M	Jan 29	7	M	1	115
Ingleson, Kamran	Mar 2	7	M	1	115
Andrews, Samantha L	Mar 27	7	F	1	115
Vickers, Jasmine M	Apr 17	7	F	1	115
Jackson, Jeffrey	May 5	7	M	1	115
King, Steven L	Jun 7	7	M	1	115
Cohen, Ashley L	Jun 20	7	F	1	115
O'Brien, Melissa N	Aug 25	7	F	1	115
Quigley, Philip H	Oct 21	7	M	1	115
Eisley, Zachary R	Dec 6	7	M	1	115

Student Directory

FIGURE 201: Student Directory report sample results



Student Directory Report
Parker Elementary

Homeroom 1-A

Name: Angela Roberts
Number: 6017028
Grade: 1

Phone(s): [h] (915) 594-7501

Physical Address: 313 Apollo DR
Chicago, IL 75110

Mailing Address: 313 Apollo DR
23669-1818

Contact: Roberts, Sandra (Mother)
Phone(s): [w] (314) 754-9654
[h] (915) 594-7501
Address: Same as physical address

Name: Auto VANCE
Number: 6017255
Grade: 1

Phone(s): [h] (915) 562-0375

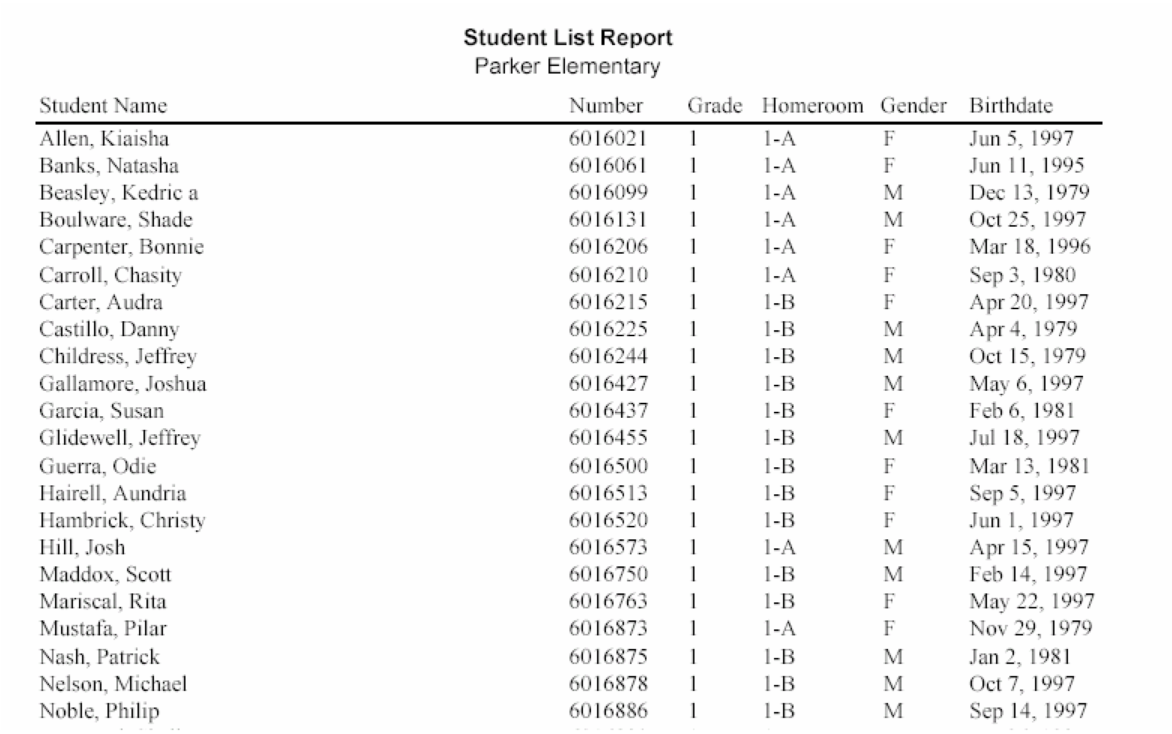
Physical Address: 9 White Oak Tr
Chicago, IL 75110

Mailing Address: 9 White Oak Tr
23669

Contact: Vance, Shelly (Mother)
Phone(s): [w] (314) 845-5421
[h] (915) 562-0375
Address: Same as physical address

Student List

FIGURE 202: Student List report sample results

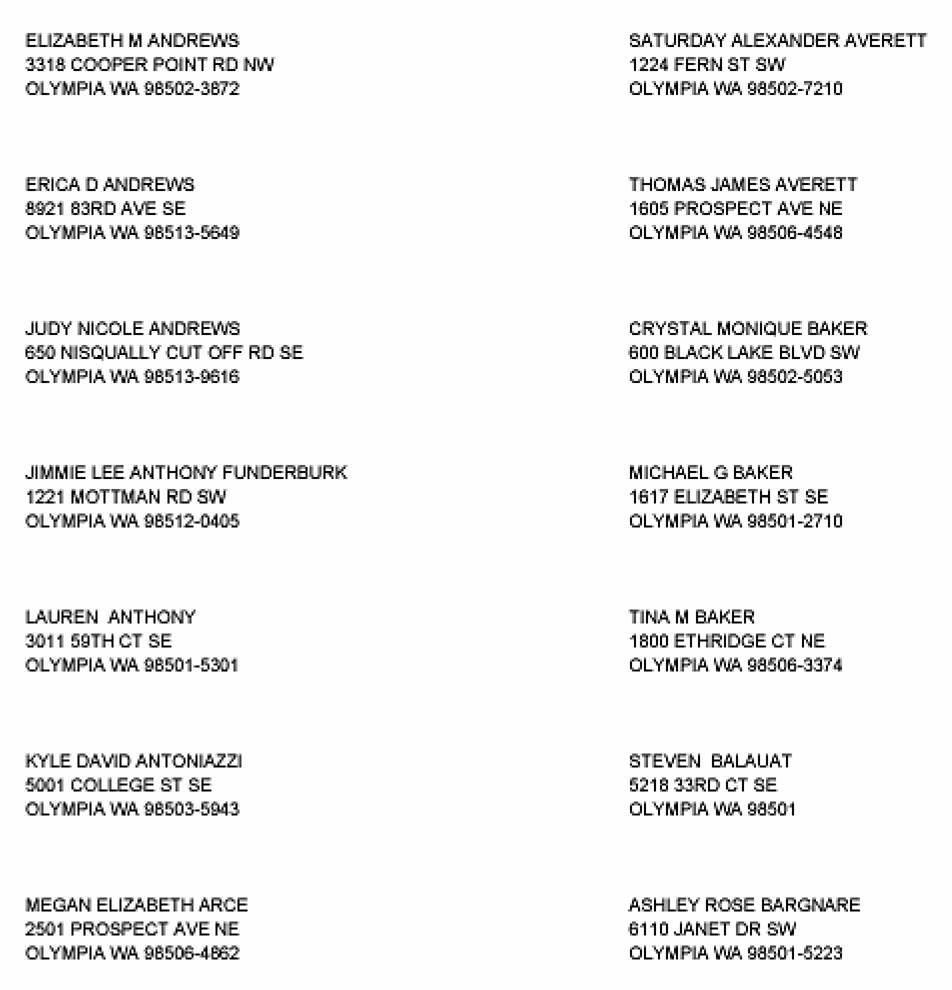


Student List Report
Parker Elementary

Student Name	Number	Grade	Homeroom	Gender	Birthdate
Allen, Kiaisha	6016021	1	1-A	F	Jun 5, 1997
Banks, Natasha	6016061	1	1-A	F	Jun 11, 1995
Beasley, Kedric a	6016099	1	1-A	M	Dec 13, 1979
Boulware, Shade	6016131	1	1-A	M	Oct 25, 1997
Carpenter, Bonnie	6016206	1	1-A	F	Mar 18, 1996
Carroll, Chasity	6016210	1	1-A	F	Sep 3, 1980
Carter, Audra	6016215	1	1-B	F	Apr 20, 1997
Castillo, Danny	6016225	1	1-B	M	Apr 4, 1979
Childress, Jeffrey	6016244	1	1-B	M	Oct 15, 1979
Gallamore, Joshua	6016427	1	1-B	M	May 6, 1997
Garcia, Susan	6016437	1	1-B	F	Feb 6, 1981
Glidewell, Jeffrey	6016455	1	1-B	M	Jul 18, 1997
Guerra, Odie	6016500	1	1-B	F	Mar 13, 1981
Hairell, Aundria	6016513	1	1-B	F	Sep 5, 1997
Hambrick, Christy	6016520	1	1-B	F	Jun 1, 1997
Hill, Josh	6016573	1	1-A	M	Apr 15, 1997
Maddox, Scott	6016750	1	1-B	M	Feb 14, 1997
Mariscal, Rita	6016763	1	1-B	F	May 22, 1997
Mustafa, Pilar	6016873	1	1-A	F	Nov 29, 1979
Nash, Patrick	6016875	1	1-B	M	Jan 2, 1981
Nelson, Michael	6016878	1	1-B	M	Oct 7, 1997
Noble, Philip	6016886	1	1-B	M	Sep 14, 1997

Student Mailing Labels

FIGURE 203: Student Mailing Labels report sample results



ELIZABETH M ANDREWS
3318 COOPER POINT RD NW
OLYMPIA WA 98502-3872

ERICA D ANDREWS
8921 83RD AVE SE
OLYMPIA WA 98513-5649

JUDY NICOLE ANDREWS
650 NISQUALLY CUT OFF RD SE
OLYMPIA WA 98513-9616

JIMMIE LEE ANTHONY FUNDERBURK
1221 MOTTMAN RD SW
OLYMPIA WA 98512-0405

LAUREN ANTHONY
3011 59TH CT SE
OLYMPIA WA 98501-5301

KYLE DAVID ANTONIAZZI
5001 COLLEGE ST SE
OLYMPIA WA 98503-5943

MEGAN ELIZABETH ARCE
2501 PROSPECT AVE NE
OLYMPIA WA 98506-4862

SATURDAY ALEXANDER AVERETT
1224 FERN ST SW
OLYMPIA WA 98502-7210

THOMAS JAMES AVERETT
1605 PROSPECT AVE NE
OLYMPIA WA 98506-4548

CRYSTAL MONIQUE BAKER
600 BLACK LAKE BLVD SW
OLYMPIA WA 98502-5053

MICHAEL G BAKER
1617 ELIZABETH ST SE
OLYMPIA WA 98501-2710

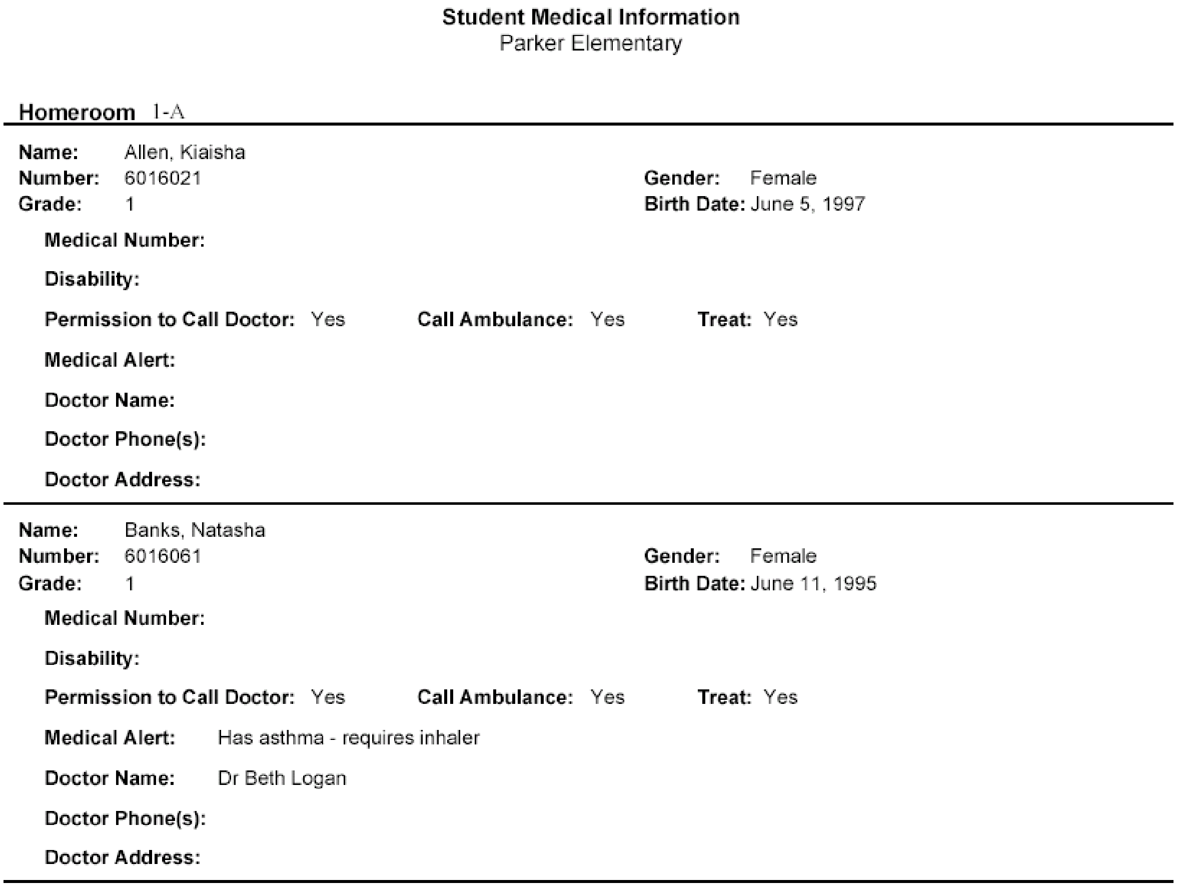
TINA M BAKER
1800 ETHRIDGE CT NE
OLYMPIA WA 98506-3374

STEVEN BALAUAT
5218 33RD CT SE
OLYMPIA WA 98501

ASHLEY ROSE BARGNARE
6110 JANET DR SW
OLYMPIA WA 98501-5223

Student Medical

FIGURE 204: Student Medical report sample results



Student Medical Information
Parker Elementary

Homeroom 1-A

Name: Allen, Kiaisha
Number: 6016021 **Gender:** Female
Grade: 1 **Birth Date:** June 5, 1997

Medical Number:

Disability:

Permission to Call Doctor: Yes **Call Ambulance:** Yes **Treat:** Yes

Medical Alert:

Doctor Name:

Doctor Phone(s):

Doctor Address:

Name: Banks, Natasha
Number: 6016061 **Gender:** Female
Grade: 1 **Birth Date:** June 11, 1995

Medical Number:

Disability:

Permission to Call Doctor: Yes **Call Ambulance:** Yes **Treat:** Yes

Medical Alert: Has asthma - requires inhaler

Doctor Name: Dr Beth Logan

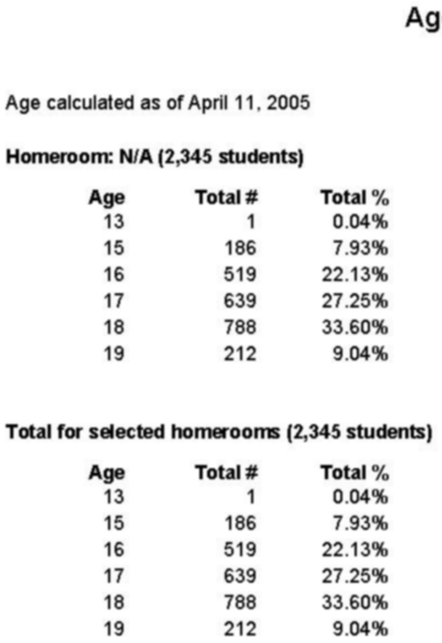
Doctor Phone(s):

Doctor Address:

Summary reports (built-in)

Age Breakdown Summary

FIGURE 205: Age Breakdown Summary report sample results



Age Breakdown Summary Report

Arlington High School

Age calculated as of April 11, 2005

Homeroom: N/A (2,345 students)

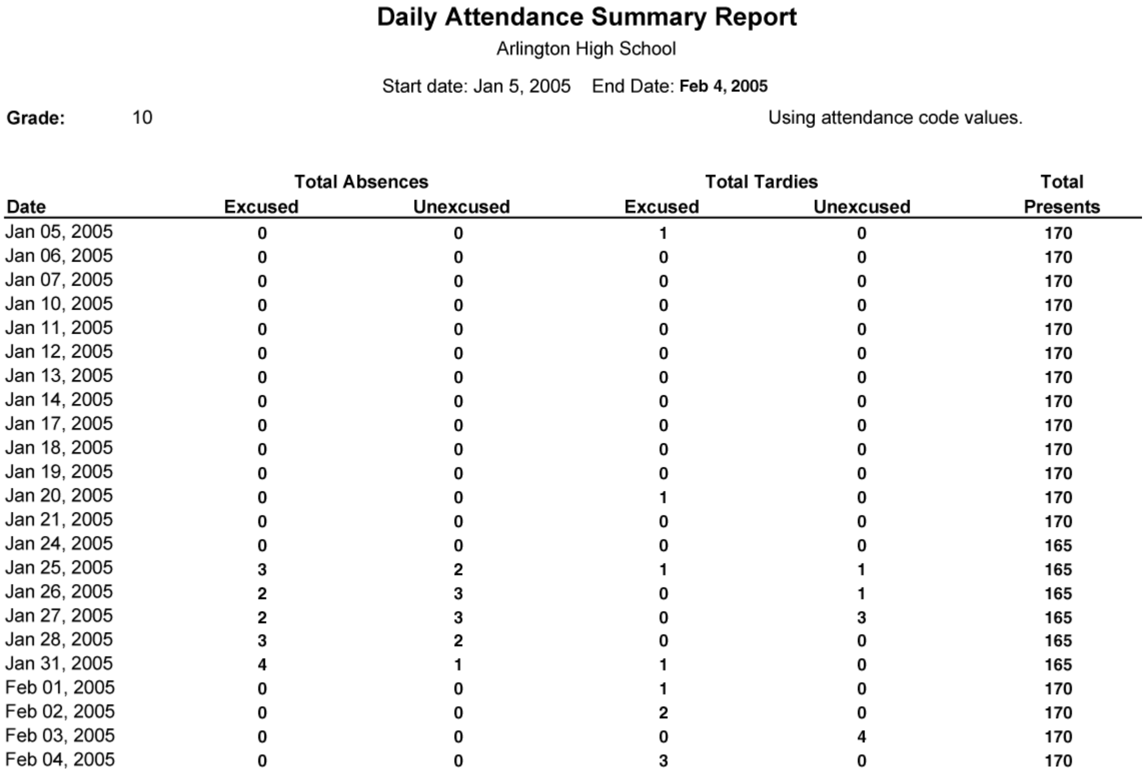
Age	Total #	Total %
13	1	0.04%
15	186	7.93%
16	519	22.13%
17	639	27.25%
18	788	33.60%
19	212	9.04%

Total for selected homerooms (2,345 students)

Age	Total #	Total %
13	1	0.04%
15	186	7.93%
16	519	22.13%
17	639	27.25%
18	788	33.60%
19	212	9.04%

Daily Attendance Summary

FIGURE 206: Daily Attendance Summary report sample results



Daily Attendance Summary Report

Arlington High School

Start date: Jan 5, 2005 End Date: Feb 4, 2005

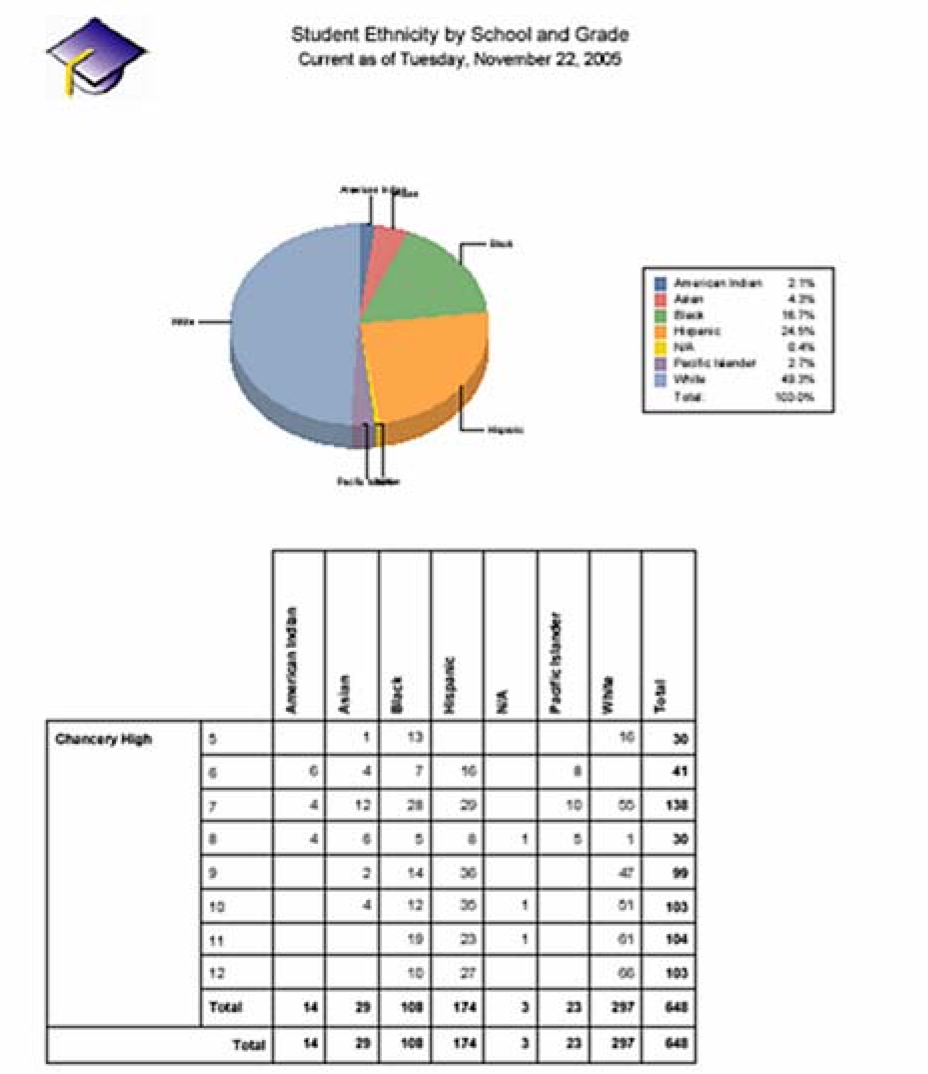
Grade: 10

Using attendance code values.

	Total Absences		Total Tardies		Total
Date	Excused	Unexcused	Excused	Unexcused	Presents
Jan 05, 2005	0	0	1	0	170
Jan 06, 2005	0	0	0	0	170
Jan 07, 2005	0	0	0	0	170
Jan 10, 2005	0	0	0	0	170
Jan 11, 2005	0	0	0	0	170
Jan 12, 2005	0	0	0	0	170
Jan 13, 2005	0	0	0	0	170
Jan 14, 2005	0	0	0	0	170
Jan 17, 2005	0	0	0	0	170
Jan 18, 2005	0	0	0	0	170
Jan 19, 2005	0	0	0	0	170
Jan 20, 2005	0	0	1	0	170
Jan 21, 2005	0	0	0	0	170
Jan 24, 2005	0	0	0	0	165
Jan 25, 2005	3	2	1	1	165
Jan 26, 2005	2	3	0	1	165
Jan 27, 2005	2	3	0	3	165
Jan 28, 2005	3	2	0	0	165
Jan 31, 2005	4	1	1	0	165
Feb 01, 2005	0	0	1	0	170
Feb 02, 2005	0	0	2	0	170
Feb 03, 2005	0	0	0	4	170
Feb 04, 2005	0	0	3	0	170

Ethnicity by School and Grade

FIGURE 207: Ethnicity by School and Grade report sample results

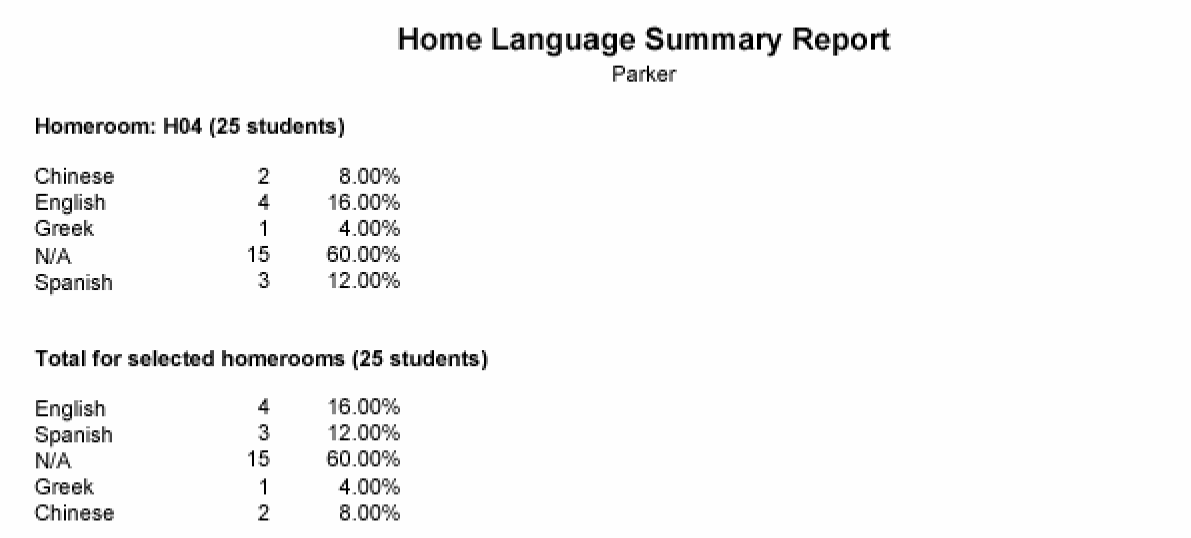


Student Ethnicity by School and Grade
Current as of Tuesday, November 22, 2005

		American Indian	Asian	Black	Hispanic	N/A	Pacific Islander	White	Total
Chancery High	5		1	13				16	**30**
	6	6	4	7	16		8		**41**
	7	4	12	28	29		10	55	**138**
	8	4	6	5	8	1	5	1	**30**
	9		2	14	36			47	**99**
	10		4	12	35	1		51	**103**
	11			19	23	1		61	**104**
	12			10	27			66	**103**
	Total	**14**	**29**	**108**	**174**	**3**	**23**	**297**	**648**
Total		**14**	**29**	**108**	**174**	**3**	**23**	**297**	**648**

Home Language Summary

FIGURE 208: Home Language Summary report sample results



Home Language Summary Report

Parker

Homeroom: H04 (25 students)

Chinese	2	8.00%
English	4	16.00%
Greek	1	4.00%
N/A	15	60.00%
Spanish	3	12.00%

Total for selected homerooms (25 students)

English	4	16.00%
Spanish	3	12.00%
N/A	15	60.00%
Greek	1	4.00%
Chinese	2	8.00%

Student Graduation Status

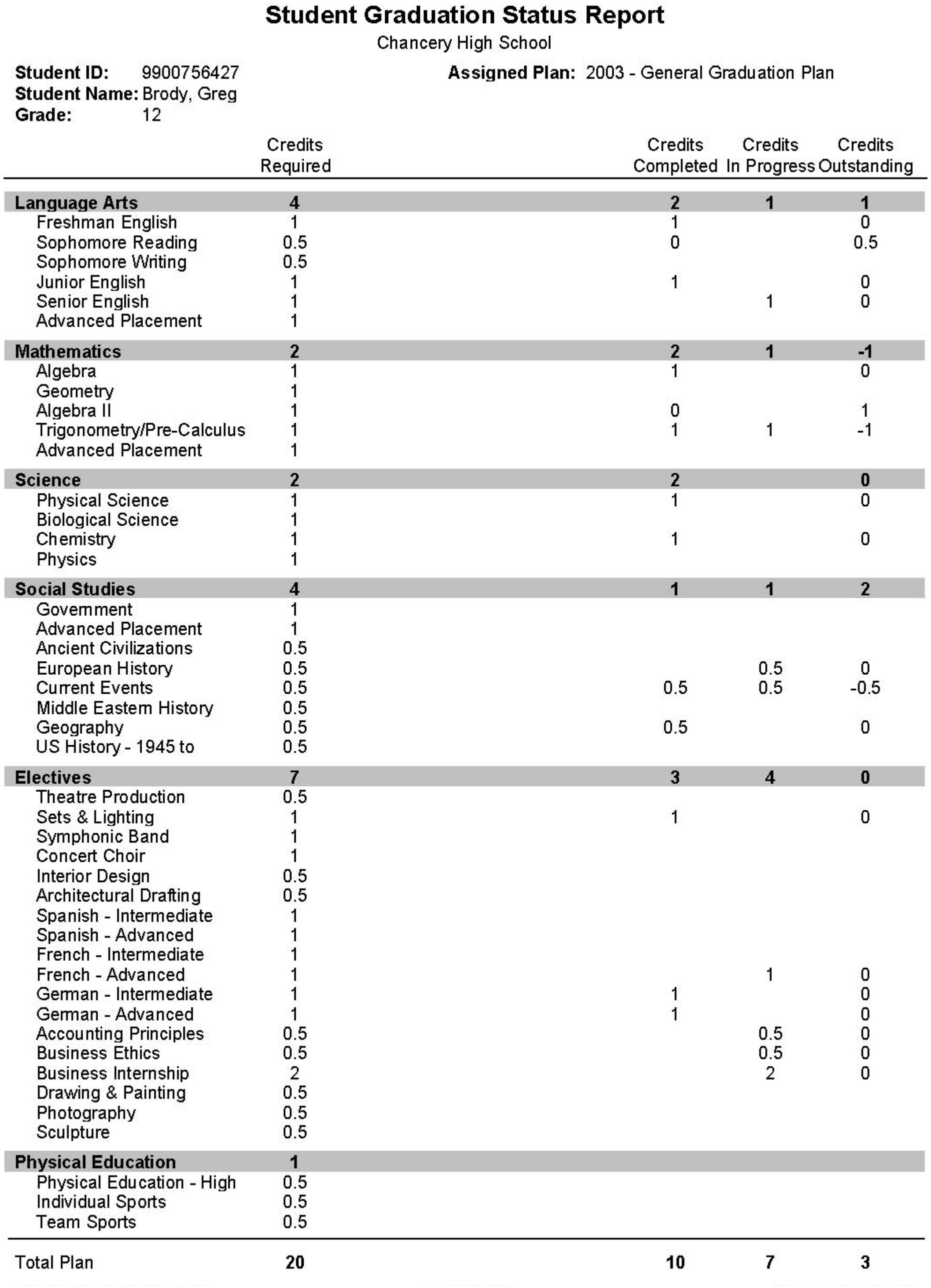


FIGURE 209: Student Graduation Status report sample results

Student Graduation Status Report

Chancery High School

Student ID: 9900756427

Student Name: Brody, Greg

Grade: 12

Assigned Plan: 2003 - General Graduation Plan

	Credits Required	Credits Completed	Credits In Progress	Credits Outstanding
Language Arts	**4**	**2**	**1**	**1**
Freshman English	1	1		0
Sophomore Reading	0.5	0		0.5
Sophomore Writing	0.5			
Junior English	1	1		0
Senior English	1		1	0
Advanced Placement	1			
Mathematics	**2**	**2**	**1**	**-1**
Algebra	1	1		0
Geometry	1			
Algebra II	1	0		1
Trigonometry/Pre-Calculus	1	1	1	-1
Advanced Placement	1			
Science	**2**	**2**		**0**
Physical Science	1	1		0
Biological Science	1			
Chemistry	1	1		0
Physics	1			
Social Studies	**4**	**1**	**1**	**2**
Government	1			
Advanced Placement	1			
Ancient Civilizations	0.5			
European History	0.5		0.5	0
Current Events	0.5	0.5	0.5	-0.5
Middle Eastern History	0.5			
Geography	0.5	0.5		0
US History - 1945 to	0.5			
Electives	**7**	**3**	**4**	**0**
Theatre Production	0.5			
Sets & Lighting	1	1		0
Symphonic Band	1			
Concert Choir	1			
Interior Design	0.5			
Architectural Drafting	0.5			
Spanish - Intermediate	1			
Spanish - Advanced	1			
French - Intermediate	1			
French - Advanced	1		1	0
German - Intermediate	1	1		0
German - Advanced	1	1		0
Accounting Principles	0.5		0.5	0
Business Ethics	0.5		0.5	0
Business Internship	2		2	0
Drawing & Painting	0.5			
Photography	0.5			
Sculpture	0.5			
Physical Education	**1**			
Physical Education - High	0.5			
Individual Sports	0.5			
Team Sports	0.5			
Total Plan	**20**	**10**	**7**	**3**

Daily attendance code calculation rules planning worksheets

The following sample worksheets [Table 54] [Table 57] enable you to plan the rules by which Chancery SMS calculates each student's daily attendance code [p. 150].

TABLE 54: Worksheet for a Twice-daily to daily attendance code calculation rules (Table 55 [p. 288] and Table 56 [p. 289] show completed samples)

	Rule Set Name:	
	Date created/revised:	
	Created/revised by:	
	Purpose:	
Rule 1	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Rule 2	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Rule 3	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Rule 4	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Rule 5	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Notes:		

TABLE 55: Completed sample of Table 54 [p. 287]

	Rule Set Name:	Present Daily if Present in AM or PM
	Date created/revised:	June 30, 2003
	Created/revised by:	Sheryl Allen
	Purpose:	District policy states that if a student comes to school at any one point during the day – even for only a minute – that student is counted as present on that date. Therefore, assign a Present daily attendance code to those students that attend school either in the morning, in the afternoon, or all day.
	Scheduling Group	All
	Day	Day 4
Rule 1	**AM Code**	Any Presence
	PM Code	Ignore
	Daily Code	Present
Rule 2	**AM Code**	Ignore
	PM Code	Any Presence
	Daily Code	Present
Rule 3	**AM Code**	Any Absence
	PM Code	Any Absence
	Daily Code	Absent
Notes:		

TABLE 56: Completed sample of Table 54 [p. 287]

	Rule Set Name:	Present Daily if Present in AM or PM
	Date created/revised:	June 30, 2003
	Created/revised by:	Sheryl Allen
	Purpose:	Our school uses custom “Absent/Present” and “Present/Absent” daily codes to track morning and afternoon attendance. Therefore, separate rules calculate morning and afternoon kindergarten classes, as well as for students that attend all day.
	Scheduling Group	Full Day
	Day	Day 3
Rule 1	**AM Code**	Any Absence
	PM Code	Any Presence
	Daily Code	Absent/Present
Rule 2	**AM Code**	Any Presence
	PM Code	Any Absence
	Daily Code	Present/Absent
	Scheduling Group	AM Only
	Day	Day 3
Rule 3	**AM Code**	Any Presence
	PM Code	Any Presence
	Daily Code	Present
	Scheduling Group	PM Only
	Day	Day 3
Rule 3	**AM Code**	Any Absence
	PM Code	Any Absence
	Daily Code	Absent

TABLE 57: Worksheet for a Class (Period) to daily attendance code calculation rules (Table 58 [p. 291] shows a completed sample)

	Rule Set Name:	
	Date created/revised:	
	Created/revised by:	
	Purpose:	
	Scheduling Group	
	Day	
Rule 1	**Code in Period 1**	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Rule 2	**Code in Period 1**	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Rule 3	**Code in Period 1**	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Rule 4	**Code in Period 1**	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Notes:		

TABLE 58: Completed sample of Table 57 [p. 290]

	Rule Set Name:	
	Date created/revised:	June 30, 2003
	Created/revised by:	Sheryl Allen
	Purpose:	District policy states that if a student is present for the second period, that student is counted as present on that date.
	Scheduling Group	All
	Day	Day 5
Rule 1	**Code in Period 1**	Ignore
	Code in Period 2	Present
	Code in Period 3	Ignore
	Code in Period 4	Ignore
	Code in Period 5	Ignore
	Code in Period 6	Ignore
	Daily Code	Present
Rule 2	**Code in Period 1**	Ignore
	Code in Period 2	Absent
	Code in Period 3	Ignore
	Code in Period 4	Ignore
	Code in Period 5	Ignore
	Code in Period 6	Ignore
	Daily Code	Absent

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