

ADDRESS AND BOUNDARY VALIDATION GUIDE



Chancery SMS 7.2 and higher

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Use Address Validation to ensure the addresses of the students in your district are correct. There are two methods available in Chancery SMS for validating addresses: *Google Maps™ validation* and *Automatic Address Validation*. Which address validation method you use depends on your district's *year-end transfer method*. A year-end transfer method determines how students are transferred from one school to another at the end of the school year.

If your district uses the *Projected School Map* year-end transfer method – where the school that a student should attend is based on their current school and grade level – use Google Maps to validate student addresses and to set up district and school boundaries.

If your district uses the *Geocode Map* year-end transfer method – where the school that a student should attend is based on the student's physical address – you can use Google Maps or Automatic Address Validation, or a combination of both, to check student addresses. If you opt to use a combination of Google Maps and Automatic Address Validation, how you use Google Maps depends on your Automatic Address Validation setup. For further information, see *Setting up Automatic Address Validation* (p. 25).

Validating addresses with Google Maps

Google Maps mapping service is integrated with Chancery SMS. Google Maps provides street maps that enable you to check that a student's address is correct while you are working in the student's demographic record. In addition, you can check student addresses in groups; this is called *batch address validation*.

Note: For customers at large districts, we recommend you contact Google Maps to obtain a "key" that you enter into Chancery SMS before you begin using Google Maps for batch address validation. For further information, see *Setting up Chancery SMS for Google Maps address validation* (p. 11).

It is also possible to set up district and school boundaries in Google Maps, and then have Chancery SMS check student addresses against those boundaries.

Validating a single student address

If you are adding a new student or changing the address of an existing student, when you validate the address, you are provided with a map that you can use to view and verify the student's address. You can also change the student's address if necessary.

FIGURE 1

- A Click the **Validate** button on the **Address/Phone** tab of the Student Demographics page and the Student Address Validation dialog opens.
- B Click this dropdown to find out which school and district boundary this address is in.
- C The Google message indicates whether the address is valid.
- D If there are one or more addresses similar to the student's address, you are prompted to select the correct address.

To validate a student's address:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
- 3 On the Student Demographics page, click the **Address/Phone** tab.
- 4 Do one of the following [Table 1]:

TABLE 1

If	Then
If your district does not use Automatic Address Validation	<ol style="list-style-type: none"> 1 Enter the student’s physical address. 2 Click Validate. <p>If the mailing address is different than the physical address, enter the mailing address and click Validate.</p>
If your district uses Automatic Address Validation and you have the option of entering or selecting addresses	<ol style="list-style-type: none"> 1 Enter the student’s physical address. 2 Click Validate. <p>If the mailing address is different than the physical address, enter the mailing address and click Validate.</p> <p>OR</p> <ol style="list-style-type: none"> 1 Click Select Address and, in the Address Ranges dialog, select a district calendar. 2 Select a school (or choose All to see district-wide address ranges) and enter a street name. 3 Click Search and select the street with the correct address range, and then enter the street number. 4 Click OK, and then click Validate. <p>If the mailing address is different than the physical address, enter the mailing address and click Validate.</p>
If your district uses Automatic Address Validation and you must enter addresses by selection only	<ol style="list-style-type: none"> 1 Click Select Address and, in the Address Ranges dialog, select a district calendar. 2 Select a school (or choose All to see district-wide address ranges) and enter a street name. 3 Click Search and select the street with the correct address range, and then enter the street number. 4 Click OK, click Validate, and skip the remaining steps. <p>If the mailing address is different than the physical address, enter the mailing address and click Validate.</p> <p>Google Maps does one of the following:</p> <ul style="list-style-type: none"> • Displays the address and “Address found” . • Displays “Partial street level accuracy. Cannot find street number” . Click Cancel and contact your system administrator. Skip the remaining steps. • Displays “Unknown location. Cannot find address” . Click OK on the prompt and contact your system administrator.

Google Maps attempts to validate the address. The Student Address Validation dialog appears, and displays:

- Displays the address and “Address found” . This means Google Maps found the address. Click **OK**.
- Provides options to keep the address you entered or select another address. Google Maps found one or more addresses that are similar to the one you entered. Make your selection and click **OK**.
- Displays “Partial street level accuracy. Cannot find street number” . Google Maps cannot find the street number you entered. Click **Cancel**, enter a different street number and click **Validate** again.
- Displays “Unknown location. Cannot find address” . Google Maps cannot match the address you entered with any in the Google Maps database. Click **OK** on the

prompt, and then click **Cancel** in the Student Address Validation dialog and enter a different address.

Validating a group of student addresses

You can validate groups of student addresses using Google Maps; this is known as *batch address validation*. Batch address validation can be performed by the district for selected schools, and by individual schools.

To use Google Maps for batch address validation, we recommend you contact Google Maps to obtain a “key” that you enter into Chancery SMS. For further information, see [Setting up Chancery SMS for Google Maps address validation \(p. 11\)](#).

You have several options for batch address validation. You can choose to validate:

- All addresses or only addresses that have not been validated previously and,
- Only physical addresses, or
- Only mailing addresses, or
- Both physical and mailing addresses.

To validate a group of student addresses:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup**, under **District**, click **Batch Google Maps Address Validation**.
- 4 On the Batch Google Maps Address Validation page, from the **Actions** menu, click **Validate Addresses and/or Boundaries**.
- 5 On the Validate Addresses and/or Boundaries page, select the appropriate options [\[Table 2\]](#):

TABLE 2

Field	Description
Schools Selection [district only]	District users only: Only students who are enrolled in the schools you select will have their addresses validated. To be considered enrolled in a school, the student must meet one of the following criteria: To be considered enrolled in the school’s active calendar, the student must be enrolled in the school as of today. If today’s date is outside the active calendar date range, then the student is considered enrolled if their enrollment date is on or between the start and end dates of the calendar. OR To be considered enrolled in the school’s planning calendar, the student must be enrolled in the school as of the start date of the planning calendar.
Calendar Option: Active, Planning	Student addresses are validated in one calendar at a time. Indicate whether you want to validate addresses for students in the active or planning calendar.
Perform validation of addresses using the following options	Select this option to validate student addresses, then make your selections from the options below. If you select both this option and the option Perform validation of boundaries using the following options , student addresses are validated against Google Maps first, and then boundary validation is performed against the addresses that are valid.

Field	Description
Addresses to validate	<p>Choices are:</p> <p>“Not Validated Addresses”: When you select this option, only non-validated student street addresses are validated during this batch process. Any address that has been previously validated for the school is not included.</p> <p>“All Addresses”: When you select this option, all street addresses are validated, regardless of whether they have been validated previously for the school.</p>
Address types to validate	<p>Choices are:</p> <p>“Physical Address”: When you select this option, only students’ physical street addresses are validated.</p> <p>“Mailing Address”: If a mailing address has been entered, when you select this option, only students’ mailing street addresses are validated. If a mailing address does not exist, the address is not validated.</p> <p>“Both Physical and Mailing Addresses”: When you select this option, both the physical and mailing addresses are validated.</p>
Update the City, State, Country and Zip/Postal Code	Select this option if you want the city, state, country, and ZIP or postal code updated.

- 6 Click **OK**. The address validation runs and the results appear on the Batch Google Maps Address Validation page. For further information, see “Working with address and boundary validation results” on page 6.

OR

Select boundary validation options. See “Checking student addresses against boundaries” on page 5.

Checking student addresses against boundaries

When boundaries have been defined at the district or for a school, you can run a process in Chancery SMS to validate groups of student addresses against district boundaries, home school boundaries, or school of enrollment boundaries. For information about setting up boundaries, see *Defining district and school boundaries with Google Maps* (p. 13).

To validate student addresses against boundaries:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup**, under **District**, click **Batch Google Maps Address Validation**.
- 4 On the Batch Google Maps Address Validation page, from the **Actions** menu, click **Validate Addresses and/or Boundaries**.
- 5 On the Validate Addresses and/or Boundaries page, make the appropriate selections [Table 3]:

TABLE 3

Option	Description
Perform validation of boundaries using the following options	Select this option to validate boundaries, then make your selections from the options below. If you select both this option and Perform validation of addresses using the following options , student addresses are validated against Google Maps first, and then boundary validation is performed against the addresses that are valid.
Check for students who live outside the boundary for the district	If you select this option, student addresses are checked against the district boundary.
Check for students who live outside the boundary for their home school	If you select this option, student addresses are checked against the boundary for their home schools.
Check for students who live outside the boundary for their current enrolled school	If you select this option, student addresses are checked against the boundaries for schools in which they are currently enrolled (which may or may not be their home school). To be considered currently enrolled in a school, the student must meet one of the following criteria: <ul style="list-style-type: none"> • To be considered enrolled in the school’s active calendar, the student must be enrolled in the school as of today. If today’s date is outside the active calendar date range, then the student is considered enrolled if their enrollment date is on or between the start and end dates of the calendar. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • To be considered enrolled in the school’s planning calendar, the student must be enrolled in the school as of the start date of the planning calendar.

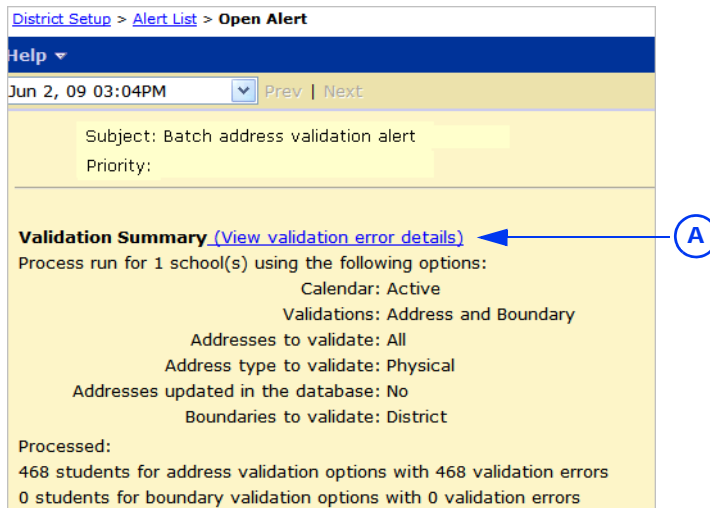
- 6 Click OK. The boundary validation runs and the results appear on the Batch Google Maps Address Validation page. For further information, see “Working with address and boundary validation results” on page 6.

Working with address and boundary validation results

Chancery SMS alerts you when a batch address validation you have run is complete. The batch address validation alert displays information about address and boundary validations for your school or for the district.

When a validation is complete, the Alert envelope (📧) appears in the task bar. Click the envelope to open the alert. If errors have occurred during the validation, you can navigate to information about the errors from the Alert message.

FIGURE 2



- A Click here to open a page that provides details of the batch address validation errors.

After a batch address validation runs, the results appear on the Batch Google Maps Address Validation page. This page enables you to view a summary of the validation results and provides access to a batch address validation error log. The error log contains validation details, such as the name of the student, the address used for the validation, and a description of any errors.

Viewing the results of a batch address validation

You can view the progress of a batch address validation while it's running, and then view the final results.

To view batch address validation results:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup**, under **District**, click **Batch Google Maps Address Validation**.
- 4 Run the batch address validation. For instructions, see "Validating a group of student addresses" on page 4 and "Checking student addresses against boundaries" on page 5.
 - ⓘ To see up-to-date validation results, click **Refresh**. Be sure to click **Refresh**, rather than F5. Clicking F5 will result in a rerun of the last batch address validation process, rather than a refresh.
- 5 On the Batch Google Maps Address Validation page, review the following information [Table 4]:

TABLE 4

Column	Description
Log ID	Displays the log ID as a link. Click the link to view the details of the validation.
Validation Process Time	Displays the date and the time the validation started and ended.

Column	Description
Status	<p>Possible statuses are:</p> <ul style="list-style-type: none"> • Pending: The validation has not started. • Started: The validation has started, but has not completed. • Completed: The validation has completed successfully. • Failed: The validation was unable to complete. Contact Pearson technical support for help resolving the error. <p>Note: You may have to click Refresh to view updated statuses.</p>
Calendar To Use	Displays the calendar in which student addresses were validated.
Validations	Indicates whether the validation was an address or boundary validation.
Address To Validate	<p>Indicates which addresses were validated:</p> <p>All: Indicates the user selected the option to validate all addresses, including those that have previously been validated and to which latitudes and longitudes have been assigned by Google Maps.</p> <p>Not Validated: Indicates the user selected the option to validate addresses that have never been validated. These are addresses to which Google Maps has not assigned a latitude and longitude.</p>
Address Type To Validate	Indicates whether physical or mailing addresses, or both, were validated.
Update Addresses	Indicates whether the city, state, country, and zip code were updated during the validation.
Boundaries To Validate	Indicates whether the addresses were checked against the boundaries for the students' home schools or schools of enrollment.
Records Processed	Displays the number of schools against which student addresses were validated, indicates the number of addresses and boundaries validated, and indicates the number of errors that occurred during the validation.

Viewing address and boundary errors

Errors that occur during an address or boundary batch address validation are recorded in a batch address validation error log. In this error log, you can view:

- The names of the schools in which the students are enrolled.
- The names of the students whose addresses were validated.
- Whether a boundary validation was performed.
- The address that was validated.
- The type of error that occurred during the validation.

To view the validation log:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup**, under **District**, click **Batch Google Maps Address Validation**.
- 4 On the Batch Google Maps Address Validation page, in the **Log ID** column, click the link for the batch address validation you want to review.
- 5 On the Validation Details page, review the error log entries for the batch address validation and make the necessary corrections, as follows [Table 5]:

TABLE 5

If this error occurs	Do this
Physical address not entered.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and enter the physical address. 3 Click Apply. 4 Click Validate.
Addresses found but no exact match.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the physical address. 3 Make any required corrections and click Apply. 4 Click Validate.
Partial street level accuracy. Cannot find street number.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the street number and name. 3 Make any required corrections and click Apply. 4 Click Validate.
Intersection level accuracy. Cannot find street number.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the street number and name. 3 Make any required corrections and click Apply. 4 Click Validate.
City level accuracy. Cannot find street.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the street number and name. 3 Make any required corrections and click Apply. 4 Click Validate.
County level accuracy. Cannot find street.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the street number and name, and city. 3 Make any required corrections and click Apply. 4 Click Validate.
Postal code level accuracy. Cannot find street.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the street number, street name, city, and county. 3 Make any required corrections and click Apply. 4 Click Validate.
State/Province level accuracy. Cannot find city.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the city, and state or province. 3 Make any required corrections and click Apply. 4 Click Validate.

If this error occurs	Do this
Country level accuracy. Cannot find state.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the physical address. 3 Make any required corrections and click Apply. 4 Click Validate.
Unknown location. Cannot find address.	<ol style="list-style-type: none"> 1 Click the student's name. 2 On the Student Demographics page, click the Address/Phone tab and review the physical address. 3 Make any required corrections and click Apply. 4 Click Validate.

Managing the list of validation errors

If you want to see which batch address validation errors you have corrected and which still require a resolution, you can change the status of the error log entry.

To change status:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup**, under **District**, click **Batch Google Maps Address Validation**.
- 4 On the Batch Google Maps Address Validation page, in the **Log ID** column, click the link for the batch address validation you want to review.
- 5 On the Validation Details page, select the log entry you resolved.
- 6 From the **Edit** menu, click **Mark as Resolved**.
 - ① If you unintentionally mark an error log entry as resolved, you can change the status back to **Error**. Select the log entry and, from the **Edit** menu, click **Mark as Error**.

Deleting a Validation Error Log entry

After you have reviewed and resolved the issue recorded in the error log, you can delete the log entry.

To delete an error log entry:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup**, under **District**, click **Batch Google Maps Address Validation**.
- 4 On the Batch Google Maps Address Validation page, in the **Log ID** column, click the link for the batch address validation you want to delete.
- 5 On the Validation Details page, select the log entry you want to delete.
- 6 From the **Actions** menu, click **Delete**.

Deleting validation results

After you have reviewed the errors in a batch address validation, you can delete the results for that validation.

To delete batch address validation results:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.

- 3 On the **District Setup**, under **District**, click **Batch Google Maps Address Validation**.
- 4 On the **Batch Google Maps Address Validation** page, select a batch address validation.
- 5 From the **Actions** menu, click **Delete**.

Setting up Chancery SMS for Google Maps address validation

Google Maps geocoding requests (i.e., address validation requests) are counted against a Google Maps geocode request quota that is associated with each user's IP address. Each Chancery SMS user has a quota of 15,000 geocode requests per day at a maximum rate of 5 geocodes per second. No matter how many users you add to Chancery SMS, typically you will not run into quota limits (which can produce incorrect error messages) because each new user brings their own quota.

However, if you have a large number of staff using Google Maps behind a proxy server, it is possible to exceed quota limits. This is because, when using a proxy server, all users share the same quota of 15,000 geocode requests per day and all of the users' requests appear to Google Maps to originate from the same IP address.

If you require a high volume geocoding service, you can purchase a Google Maps API Premier license, which will accommodate 864,000 geocoding requests per day at a maximum rate of 10 geocodes per second.

To request a Google Maps key:

- 1 In your browser, go to <http://code.google.com/apis/maps/signup.html>.
- 2 Follow the on-screen instructions.

To enter the Google key into Chancery SMS:

- 1 Navigate to C:\wwwroot\Chancery SMS.
- 2 Make a copy of the Web.config file.
- 3 Open the original Web.config file.
- 4 Navigate to the section that defines the Google API connection information.
- 5 In the line `<add key="GoogleMapsKey" value="" />`, between the quotation marks, enter the word *Client*, then the equals sign (=), and then the Google key, for example, `<add key="GoogleMapsKey" value="client=12345" />`.
- 6 Save and close the Web.config file.
- 7 Restart IIS:
 - a Go to Start > Administrative Tools > Services.
 - b Right click IIS Admin Service and select **Restart**.

Permission to run and manage address and boundary validation

To run and manage address and boundary validation, you need the following permissions:

To	You need this permission	Set to
Validate multiple addresses and boundaries	District > Address Validation - Run Batch Process	Yes
Manage the log of validated addresses and boundaries	District > Address Validation - Manage Log	Yes

Setup data required to use Google Maps Address Validation

To ensure Google Maps can find an address, there are several Chancery SMS setup list items that must be entered in a specific format:

- **Address Type** setup list: enter the **Short Code** in all upper case (for example, the short code for street must be entered as "ST", not "st" or "St").
- **Country** setup list: ensure the **Description** for United States is "USA" and for Canada it is "Canada".
- **State or Province** setup list: ensure the **State Short Code** is in upper case (e.g., TX, TN, BC).

In addition, Chancery SMS comes with many street types (e.g., Street, Avenue, Crescent, etc.) already set up in the **Address Type** setup list; however, because every city is unique, you may need to add some street types for your district.

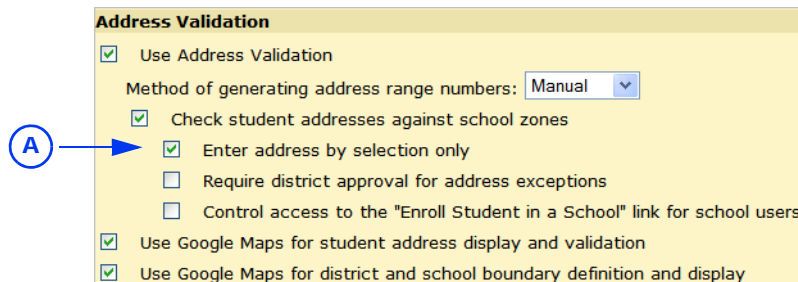
For detailed information about setup lists, see the *Chancery SMS District Administration Guide*.

Enabling Google Maps

If your district uses the Geocode Map year-end transfer method, you can use a combination of Google Maps and Automatic Address Validation to check student addresses, as follows:

- If your district allows the manual entry of addresses, use Google Maps to confirm that a manually entered address exists and select a different address if it does not.
- If your district does not allow manual entry of addresses, use Google Maps to confirm that an address is valid. Contact the system administrator if the address is invalid.

FIGURE 3



A The **Enter address by selection only** option controls users' ability to use

Google Maps to replace invalid addresses with valid addresses.

For further information about how Google Maps and Automatic Address Validation work together, see Step 6: Activate Automatic Address Validation (p. 34)

To enable Google Maps:

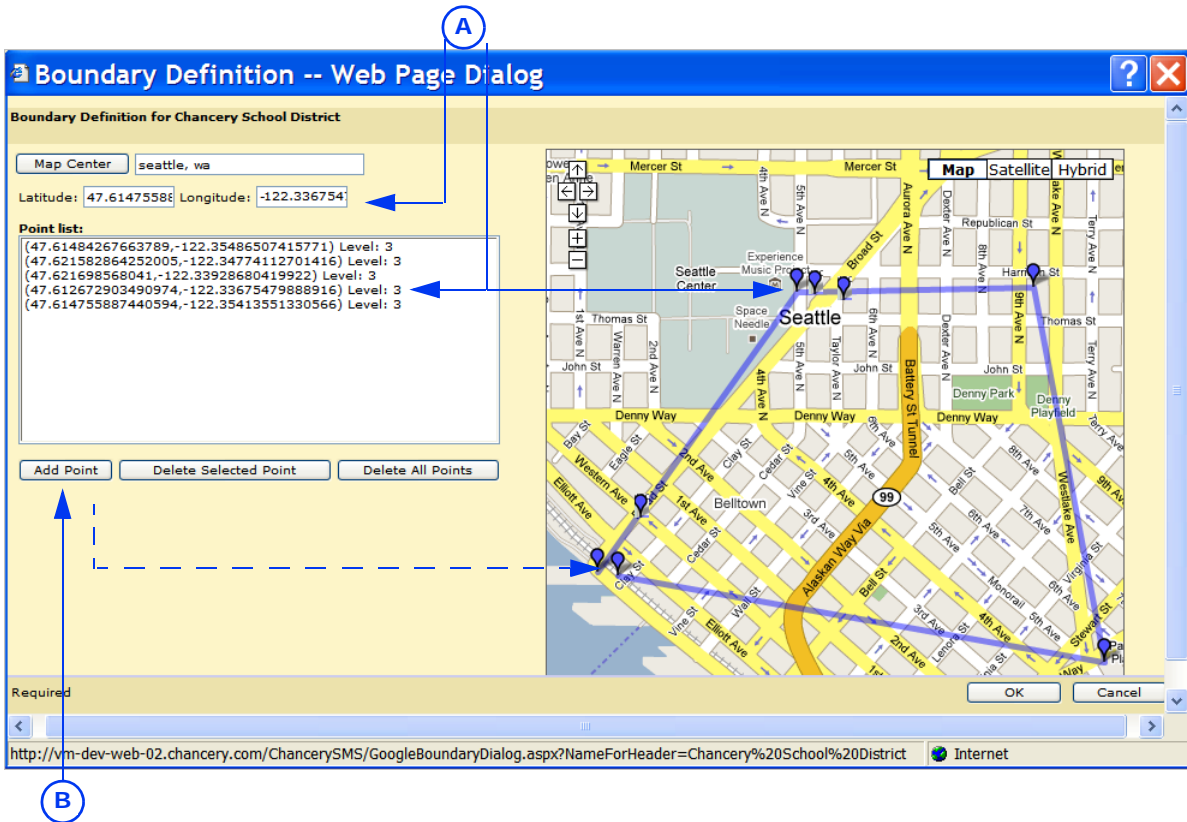
- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the District Setup page, under **District**, click **Preferences**.
- 4 On the District Preferences page, in the **Address Validation** section, choose the applicable options:
 - ① To activate address validation using Google Maps, select **Use Google Maps for student address display and validation**.

- ④ To set up boundaries using Google Maps, select Use Google Maps for district and school boundary definition and display. A new section appears on the District Profile page, called District Boundary Definition and a new panel appears on the School Details Info page, called School Boundary Definition.
- 5 Click Save and close the District Preferences page.

Defining district and school boundaries with Google Maps

To define boundaries, district users set up school and district boundaries in Chancery SMS using Google Maps. After boundaries are set up, district and school users can run the Chancery SMS boundary validation process, which identifies student addresses as being inside or outside the defined district or school boundary.

FIGURE 4




- A Displays the latitude and longitude for the location of the point marker.
- B Click this button to add a point marker.

Use the following buttons to navigate within the map [Table 6]:

TABLE 6

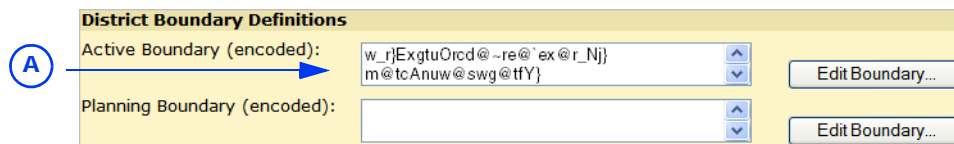
To	Do this
Zoom in	Click
Zoom out	Click
Move the map north	Click or click the map and drag it up.
Move the map east	Click or click the map and drag it to the right.
Move the map west	Click or click the map and drag it to the left.

To	Do this
Move the map south	Click  or click the map and drag it down.
View a street-level image of the map	Click Map .
View a satellite image of the map	Click Satellite .
View a combination of street-level and satellite	Click Hybrid .

For further information about navigating in Google Maps, see the Google Maps User Guide at <http://maps.google.com/support/>.

When you define boundaries, a geographical boundary is captured within Google Maps, called an *encoded polyline*. The encoded polyline is made up of sets of latitude and longitude pairs that mark the boundary. When you define a boundary, the encoded polyline is created and displayed on the District Setup > District Profile page (for districts) and the District Setup > School Info > School Info Detail page (for schools).

FIGURE 5




A Geographical boundary, called an “encoded polyline”.

To define district and school boundaries:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 To define the district boundary, on the District Setup page, under **District**, click **Profile** and scroll down to the **District Boundary Definitions** section.

OR

To define school boundaries, on the District Setup page, under **Schools**, click **Schools**. On the School Info page, click a school name. On the School Info Detail page, scroll down to the **School Boundary Definitions** panel.

- 4 Click **Edit Boundary** next to the **Active Boundary (encoded)** or **Planning Boundary (encoded)** field.
 - a If you have a Google Maps encoded polyline from another system, enter it in the **Active Boundary (encoded)** or **Planning Boundary (encoded)** field and go to Step 9.
- 5 In the Boundary Definition dialog in the **Map Center** field, enter the name of the city and state or province for the district or school (e.g., Seattle, WA), and then click **Map Center**.
- 6 In the map in the right-hand window, click the area where you want the district or school boundary to begin. A point marker appears .
- 7 Click in the middle of the point marker and drag it to the beginning of the district or school boundary.
- 8 Click **Add Point**.
 - a The latitude and longitude for the point appear in the **Point List**.
- 9 Repeat Steps 5 to 7 until you have defined the district or school boundary.

- ① You do not need to enter the last point for your boundary. When you click OK, the last segment of the boundary that closes the loop back to the first point of the boundary is automatically inserted.
- 10 Click OK.

Using Automatic Address Validation

Chancery SMS Automatic Address Validation is a process in which the addresses of incoming students, or students whose addresses are changing, are checked against a pre-defined map to determine which school the students should be enrolled in. To use Automatic Address Validation, your district must use the Geocode Map year-end transfer method.

The Geocode Map in Chancery SMS is a system of geocodes, which are geographical identifier codes. The district defines a list of geocodes and then assigns specific address ranges to each geocode to identify geographical areas. The geocodes are then assigned to the entry grades for schools to define the Geocode Map. The Geocode Map specifies which school students should attend based on their physical address. Students who live in the address ranges assigned to the geocode for a particular school and grade level are considered to be in the school's zone. Students who do not live within the address ranges for the geocodes assigned to a school are considered out of zone for the school. Depending on district preferences, students who are out of zone for a school may not be able to enroll in the school without district approval.

When Automatic Address Validation is set up, whenever you open a student record, the system automatically checks the student's address against the defined address ranges, and then updates the student's zoned school.

When you enroll students in schools, change their address, or change their grade level, Chancery SMS checks that the student address is within the zone for their school of enrollment. If the student's address is out of zone, an address exception is automatically created. If district approval is required for out-of-zone enrollments, the district must approve the exception before school users can enroll the student. School users cannot enroll students if the student's address is invalid or if they are requesting enrollment out of zone and a pre-approved address exception has not been entered for the enrollment.

Only the student's physical address is validated; the mailing address does not affect Automatic Address Validation.

For Tennessee districts, address validation applies only to the student's primary school. The student's address is only validated if, on the Enrollment or Add Status Code page, the Instr Service Period of Service field is set to Primary school assigned for the student.

You can use Automatic Address Validation and Google Maps address validation together, by setting up Automatic Address Validation and then activating Google Maps. When a user checks an address, the address appears in a Google Maps window [[see *Setting up Chancery SMS for Google Maps address validation*, p. 11](#)].

Identifying Students' Zoned Schools

With Automatic Address Validation, a student's zoned school is calculated based on their physical address, home school grade level, and the Geocode Map for the calendar. Since student grade levels and the Geocode Map can change each year, a student's zoned school may be different in the active and planning calendars.

The student's zoned school is displayed on the following pages:

- The Student Demographics page (**Overview** and **Personal Info** tabs)
- Add/Edit Status Code page

Once Automatic Address Validation is activated, the student's zoned school is recalculated whenever you:

- Open the Student Demographics page
- Change the student's address
- Change the student's home school
- Enter a home school grade level
- Click **Update** on the Add/Edit Status Code page
- Click **Validate** on the Student Demographics page (**Address/Phone** tab)

If Chancery SMS cannot determine the Zoned School for the student, the reason is displayed in the **Zoned School** field [Table 7]:

TABLE 7

Reason	Description
No home school selected	A home school has not been selected for the student and the student is not enrolled in only one school.
Not enrolled in home school	The student has been assigned a home school, but there is no enrollment record for the student in that school.
Not enrolled in home school on district calendar end date (planning calendar only)	The student has been assigned a home school and there is an enrollment record for the student in that school, but not as of the end date for the active district calendar.
No home school grade level assigned	The student has not been assigned a home school grade level.
No graduation grade defined for home school	The school definition has not been fully defined to specify the graduation grade for the home school.
Address not valid	The student's physical address is blank or is not included in the calendar's address ranges.
Address not mapped	The student's physical address is not mapped to a school for that particular home school grade level or the entered grade level is set to a value with no school for the student's Geocode.
Retained at <school> (planning calendar only)	The student has been retained during the Next-Year Preparation process and will not be advancing to the next grade/school.

If the student is not assigned to a home school and is either not enrolled in a school or is enrolled in multiple schools in the district, you can enter a home school grade level on the Student Demographics page (**Overview** tab) and Chancery SMS can determine the student's zoned school for the active calendar based on the entered grade level. If you enroll the student in a school, the next time nightly processing is run, Chancery SMS sets the **Home School Grade Level (active)** to the grade level at the enrolled school.

Entering a home school grade level does not affect the calculation for the planning calendar zoned school because Next-Year Preparation projections for the planning calendar are based on enrollment records.

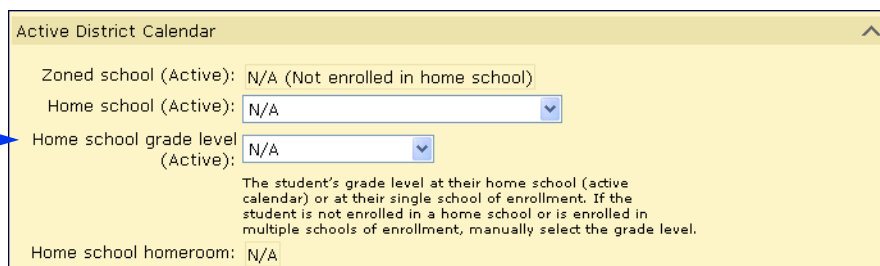
To calculate the student's zoned school based on an entered home school grade level:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
- 3 On the Student Demographics page, click the **Personal Info** tab.
- 4 On the **Personal Info** tab, scroll down to the **Active District Calendar** panel.

The fields in the **Active District Calendar** panel can be in one of two states, as follows:

- If the student is enrolled in a home school or is enrolled in one school in the district, the **Home School Grade Level (active)** field displays the grade level they are enrolled in.
- If the student is not enrolled in a home school or is enrolled in multiple schools in the district, the **Home School (active)** dropdown displays "N/A" and **Home School Grade Level (active)** is a dropdown.

FIGURE 6

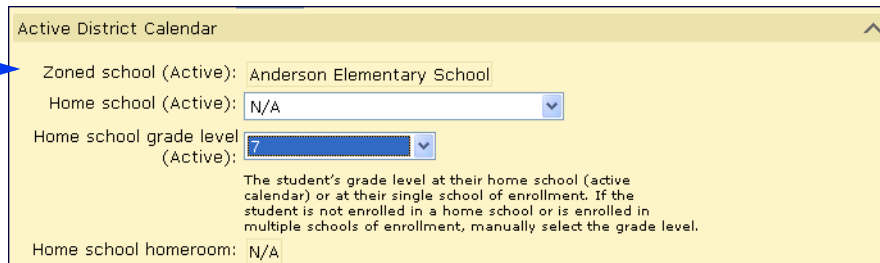


The screenshot shows the 'Active District Calendar' panel with the following fields: 'Zoned school (Active): N/A (Not enrolled in home school)', 'Home school (Active): N/A' (dropdown), 'Home school grade level (Active): N/A' (dropdown), and 'Home school homeroom: N/A'. A blue circle with the letter 'A' and an arrow points to the 'Home school (Active): N/A' dropdown.

- A If **Home school (Active)** is "N/A" and the student is not enrolled in a school, **Home school grade level (Active)** is a dropdown.

- 5 From the **Home school grade level (Active)** dropdown, select the student's grade level. The **Zoned School** field displays the student's zoned school for the active calendar.

FIGURE 7



The screenshot shows the 'Active District Calendar' panel with the following fields: 'Zoned school (Active): Anderson Elementary School', 'Home school (Active): N/A' (dropdown), 'Home school grade level (Active): 7' (dropdown), and 'Home school homeroom: N/A'. A blue circle with the letter 'A' and an arrow points to the 'Home school (Active): N/A' dropdown.

- A If you select a **Home school grade level (Active)**, Chancery SMS calculates the student's zoned school based on the entered grade.

Validating addresses when registering/enrolling students

During the registration and enrollment process, the student's address is validated against the address ranges defined at the district. If Google Maps is activated in Chancery SMS, you can validate addresses against the Google Maps database. For further information about Google Maps validation, see [Validating addresses with Google Maps \(p. 1\)](#).

If the district requires approval for enrolling out-of-zone students, you cannot enroll students in a school other than their zoned school until an address exception is created for their enrollment. If a pre-approved address exception has not been

created for the enrollment, when you attempt to enroll the student out of zone, you are prompted to send an approval request and information entered for the enrollment is *not* saved. When the district approves the request, to enroll the student, you must re-enter their enrollment information.

If the school the student wants to enroll in uses controlled enrollment, when the student is offered a position in the program, they can enroll in the school.

Depending on the program setup, when the student is offered a position in the program, Chancery SMS may create a pre-approved address exception for the student's enrollment. For more information about controlled enrollment, see the *Chancery SMS Program Management Guide*.

For information about setting address validation preferences, see *Setting up Automatic Address Validation* (p. 25).

For detailed information about how to register and enroll students, see the *Chancery SMS Registration and Enrollment Quick Guide*.

To validate addresses when registering and enrolling students:

- 1 Log on as a district or school administrator.
- 2 On any Student Search page, from the **Actions** menu, click **Register/Enroll Student**.
- 3 On the Registration/Enrollment Search page, do one of the following [Table 8]:

TABLE 8

To	Do this
Register and enroll a new student	<ol style="list-style-type: none"> 1 Click New. 2 On the Registration page, enter the necessary information. 3 Click Continue.
Enroll a student already registered in the district.	<ol style="list-style-type: none"> 1 Search for the student. 2 From the search results, click the student's name.

- 4 On the Registration/Enrollment Steps page, under **Step 1**, click **Enter Address Information and Other Student Data**.
- 5 On the Student Demographics page, follow your school's policy for registering and enrolling students, until you reach the **Physical Address** section (on the **Address/Phone** tab).
 - ④ **Note:** If the address fields are disabled, use predefined address ranges to enter the student's address [see *Use predefined address ranges*, p. 23].
- 6 On the **Address/Phone** tab, under **Physical Address**, do one of the following [Table 9]:

TABLE 9

To	Do this
Manually enter the address	<ol style="list-style-type: none"> 1 Enter the student’s address information into the applicable fields. 2 Click Validate. If the address passes validation, the active and planning calendar geocodes are updated for the student. <ul style="list-style-type: none"> • If the address does not pass validation, the system displays an error message. Click OK and then check that the street number is correct and that you have selected a street with the correct number range, Type, City, and Zip Code. • If the address is correct, but the address range does not exist, the district may need to update address ranges. Contact your district administrator. If district approval is required for out-of-zone enrollments, you cannot enroll a student if their address is invalid. • If Google Map address validation is set up, the Student Address Validation dialog appears. If the address is correct, the address is displayed. If the address is invalid or there is more than one instance of the address, Google Maps presents you with options to replace the address you entered or keep it. For further information about Google Maps validation, see Validating addresses with Google Maps (p. 1).
Use predefined address ranges	<ol style="list-style-type: none"> 1 Click Select Address. 2 On the Address Ranges page, search for address ranges. 3 In the Street Number field, enter the student’s street number. Make sure the number falls within the address range. 4 From the list of address ranges, select the appropriate address range. 5 Click OK. 6 If applicable, enter the student’s apartment number. 7 Click Validate. <p>If Google Map address validation is set up, the Student Validation dialog appears and, if the address is correct, the address is displayed.</p> <ul style="list-style-type: none"> • If the address is invalid or there is more than one instance of the address, and your district allows manual entry of addresses, you are presented with options to replace the address you entered or keep it. • If your district does not allow manual address entry, the address is displayed. If an address is invalid, you are not presented with other address options. If the address is invalid, this could mean the predefined address range is incorrect. Contact your system administrator.

- 7 Enter the remaining information on the Student Demographics page. Click **Save** and close the window.
- 8 If the school the student wants to enroll in uses controlled enrollment, on the Registration/Enrollment Steps page, click **Apply to Program** and apply to a controlled enrollment program at the school.
- 9 On the Registration/Enrollment Steps page, under **Step 2**, click **Enroll Student in a School**.
 - ① Depending on district preferences, if you are logged on as a school administrator, the Enroll Student link may not be available. If the student is already enrolled in a different school, you cannot enroll

them in your school unless a pre-approved address exception has already been entered.

10 If you are logged on as school administrator, the Enrollment page opens.

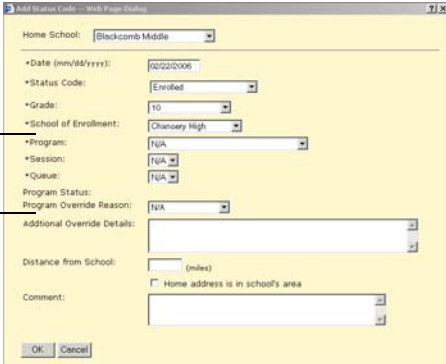
OR

If you are logged on as a district administrator, on the Enrollment page, click **Enroll**.

11 On the Add Status Code page, enter the following information [Table 10]:

TABLE 10

Field	Description
Home School	Select the school to which the student is assigned for reporting. Depending on your permissions, this field may be read only. Depending on district preferences, school users may only be able to select their own school or N/A. In addition, if the student is actively enrolled in a different school than is set as their home school, school users at other schools cannot change the student's home school. To ensure student cumulative GPAs roll over to the historical database during Next-Year Processing and print on transcripts, all students must be assigned a home school.
Date	Enter the date you want the enrollment to begin. The enrollment date determines whether the student is enrolled in the current school year or the next school year. If you enter a future date that falls within the date ranges of a school's planning calendar, then the student is available only for Next-Year Preparation scheduling.
Status Code	Select the appropriate Entry enrollment status code.
Grade	<ol style="list-style-type: none"> 1 Select the student's grade level. 2 Click Update. The Zoned School field displays the student's zoned school for the specified date and grade level.
Zoned School	The school in the student's zone. The student's zoned school is based on their geocode and grade. After you enter the date and student's grade, click Update to display the student's zoned school.

Field	Description
<p>School of Enrollment</p>	<p>Select the school the student will be attending. The School of Enrollment is usually the same as the Zoned School. If these two fields are different, the student is considered “out of zone”. If an address exception has been entered for this school, the status of the exception appears beside this dropdown. If the status is “Approved”, you can continue with the student’s enrollment.</p> <p>When you select a school that uses controlled enrollment, additional fields appear on the page and you must specify the controlled enrollment program the student has been offered a position in.</p> <p style="text-align: center;">FIGURE 8</p>  <p>Additional fields for controlled enrollment schools</p>
<p>Exception Reason</p>	<p>If the Zoned School is different from the School of Enrollment, select the reason the student is requesting enrollment in an out-of-zone school.</p> <p>If the district requires approval for enrolling out-of-zone students, you cannot enroll the student until the district approves the request. If a pre-approved address exception has already been created for this enrollment, when you click OK, Chancery SMS processes the student’s enrollment. If a pre-approved address exception has not been created, when you click OK, you are prompted to send an approval request and the information entered for this enrollment is not saved. When the district approves the request, to enroll the student, you must re-enter their enrollment information.</p>
<p>Distance from school</p>	<p>Enter the distance from the school to the student’s home address.</p>
<p>Home address is in school’s area</p>	<p>If the student’s home address meets boundary conditions for the school, such as physical area borders, select this checkbox.</p>
<p>Comment</p>	<p>If necessary, enter a comment associated with the status code.</p>
<p>Tennessee districts only -Instr Service Period of Service</p>	<p>Tennessee districts only - If this enrollment is the student’s primary enrollment, select “Primary School assigned for the student”. Addresses are only validated if this option is selected.</p>

Field	Description
Tennessee districts only - English Language Background	Tennessee districts only - When adding an Enrollment status code, indicate the student's English language background. Select one of the following options: <ul style="list-style-type: none"> • L - English Language Learner (ELL) • N - Non-English Language Background (NELB) • E - English Native
Physical Address	If Address Validation is activated, when you select an Entry-type status code, the Physical Address section appears. To select and validate the student's address, click Select Address . If the student is not yet enrolled in a school in the district, this section does not appear on the Add Status Code page. Instead, select and validate the address on the Student Demographics page (Address/Phone tab).

12 Click **OK**.

One of two things can happen:

- If the district requires approval for enrolling out-of-zone students, you cannot enroll students out of zone until the district approves the request. If a pre-approved address exception has not been created for the enrollment, click **OK** to create an address exception request. The information entered for the enrollment is not saved. When the district approves the request, to enroll the student, you must re-enter their enrollment information.
- OR
- If district approval is not required, or a pre-approved address exception has been entered for the enrollment, Chancery SMS processes the enrollment.

Validating addresses when changing a student's address

Once Automatic Address Validation has been activated, changes to student addresses are validated to ensure that students have not moved out of zone. If the student's current enrolled school is out of zone for their new address, an address exception is created for the student's current enrollment, but the student is not withdrawn from the school.

The student's zoned school is based on the geocode displayed on the Student Demographics page (**Address/Phone** tab). If you manually edit the student's address, you must click **Validate** to update the geocodes and the zoned school. Otherwise, the zoned school will be incorrect until the address has been validated or the Student Demographics page is saved and re-opened.

For more information about changing student addresses, see the *Chancery SMS School User Guide* or the *Chancery SMS District User Guide*.

To change a student's address:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
- 3 On the Student Demographics page, click the **Address/Phone** tab.
 - ④ **Note:** If the address fields are disabled, use predefined address ranges to enter the student's address [see *Use predefined address ranges*, p. 23].
- 4 On the **Address/Phone** tab, under **Physical Address**, do one of the following [Table 11]:

TABLE 11

To	Do this
Manually enter the address	<ol style="list-style-type: none"> 1 Enter the student’s address information into the applicable fields. 2 Click Validate. If the address passes validation, the active and planning calendar geocodes are updated for the student. <ul style="list-style-type: none"> • If the address does not pass validation, the system displays an error message. Click OK and then check that the street number is correct and that you have selected a street with the correct number range, Type, City, and Zip Code. • If the address is correct, but the address range does not exist, the district may need to update address ranges. Contact your district administrator. If district approval is required for out-of-zone enrollments, you cannot enroll a student if their address is invalid. • If Google Maps address validation is set up, the Student Address Validation dialog appears. If the address is correct, the address is displayed. If the address is invalid or there is more than one instance of the address, you are presented with options to replace the address you entered or keep it. For further information about Google Maps validation, see Validating addresses with Google Maps (p. 1).
Use predefined address ranges	<ol style="list-style-type: none"> 1 Click Select Addresses. 2 On the Address Ranges page, search for address ranges. 3 In the Street Number field, enter the student’s street number. Make sure the number falls within the address range. 4 From the list of address ranges, select the appropriate address range. Click OK. If applicable, enter the student’s apartment number. 5 Click Validate. If Google Maps address validation is set up, the Student Validation dialog appears. If the address is correct, the address is displayed. <ul style="list-style-type: none"> • If the address is invalid or there is more than one instance of the address, and your district allows manual entry of addresses, you are presented with options to replace the address you entered or keep it. • If your district does not allow manual address entry, the address is displayed. If an address is invalid, you are not presented with other address options. If the address is invalid, this could mean the predefined address range is incorrect. Contact your system administrator. <p>For further information about Google Maps validation, see Validating addresses with Google Maps (p. 1).</p>

- 5 Click the **Personal Info** tab and make sure the student’s home school and requested school are correct.
- 6 Click **Save**. One of the following message dialogs open [\[Table 12\]](#):

TABLE 12

If	Then
<ul style="list-style-type: none"> • The district requires approval for out-of-zone students • The address change puts the student out-of-zone for their current enrolled school • A pre-approved address exception has not been created for the student at their current enrolled school • The “Address Exceptions - override on address change” permission is set to “No” for your user account 	<p>The message informs you that the student will be out-of-zone for their school enrollment.</p> <p>From the Exception Reason dropdown, select an exception reason to be included in the created address exception.</p>
<ul style="list-style-type: none"> • The district requires approval for out-of-zone students • The address change puts the student out-of-zone for their current enrolled school • A pre-approved address exception has not been created for the student at their current enrolled school • The “Address Exceptions - override on address change” permission is set to “Yes” for your role 	<p>The message informs you that the student will be out-of-zone for their school enrollment.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> • To create an address exception for the student’s current enrolled school, select Create address exception record and, from the Exception Reason dropdown, select an exception reason. <p>If the student plans to continue in the out-of-zone school, select this option.</p> <p>OR</p> <ul style="list-style-type: none"> • To change the student’s address without creating an address exception for their current school, select Do not create address exception record. <p>If the student is planning to withdraw from the out-of-zone school and enroll in a school in their new zone, select this option.</p>
<p>District approval is not required for out-of-zone enrollments</p>	<p>The message informs you that the student will be out-of-zone and a read-only address exception is created.</p>

7 Click **OK**.

Validating addresses when changing a student’s grade level

Since the Geocode Map is based on school entry grades, changing a student’s grade level may put them out of zone for their current enrolled school. For example, a student is attending School A, which is their zoned school for grade 5. Partway through the school year, they are advanced to grade 6. If the student’s address is mapped to School B for grade 6, they would be out of zone for their current enrolled school.

If the student’s current enrolled school is out of zone for their new grade level, the student’s Geocode and zoned school are updated, but an address exception is not created for the student’s current enrollment.

To change the student’s grade level:

- 1 Log on as a school administrator.
- 2 Search for and open a student record.
- 3 On the Student Demographics page, click the **School Specific** tab.

- 4 From the **Current Grade Level** dropdown, select a grade.
- 5 Click **Apply**.
- 6 If prompted, on the Change Options dialog, indicate when you want this change to take effect. Choose today's date or the first day of school.
- 7 From the **Change Reason** dropdown, select a reason.
- 8 Click **OK**.
- 9 Click the **Personal Info** tab.
- 10 Scroll down to the **Active District Calendar** panel. The student's zoned school (active) and home school grade level (active) are updated for their new current grade.

Setting up Automatic Address Validation

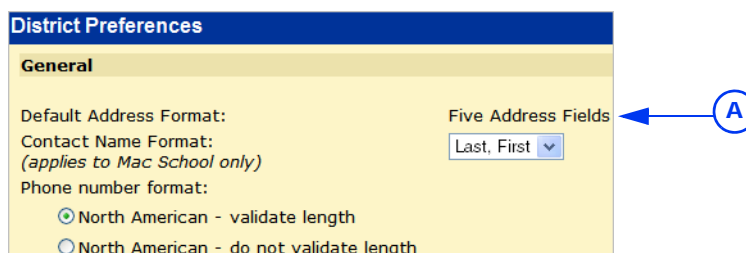
If you use the Geocode Map year-end transfer method, you can use Automatic Address Validation, Google Maps validation, or a combination of both. If you do not require that users enter an address by selection only (that is, you allow users to manually enter addresses), users can use Google Maps to confirm that a manually entered address exists and select a different address if it does not. However, if you have selected the option that prohibits users from entering student addresses manually, users cannot select a different address if the predefined address is invalid.

To set up the Geocode Map year-end transfer method and Automatic Address Validation, Chancery SMS must be set up to use the 5-field address format. You set the address format when you install Chancery SMS. Before you set the Geocode Map year-end transfer method, check the address format setting to ensure it is 5-field address format.

To check the address format setting:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the District setup page, under **District**, click **Preferences**.
- 4 Scroll down to the **General** section.
- 5 The **Default Address Format** should be **Five Address Fields**.
 - ⓐ If the address format is not 5-field format, contact your system administrator.

FIGURE 9



A Indicates 5-field address format.

To set up Automatic Address Validation, complete the following steps:

- Step 1: Set District Preferences (p. 27)
- Step 2: Assign each school's graduation and entry grade levels (p. 28)
- Step 3: Define Setup Lists for Automatic Address Validation (p. 29)

- Step 4: Define the Geocode Map (p. 31)
- Step 5: Set up address ranges (p. 32)
- Step 6: Activate Automatic Address Validation (p. 34)
- Step 7: Configure NYP projections for returning students (p. 36)

Caution: You must set up all geocodes and address ranges BEFORE you activate address validation. When you select **Check student addresses against school zones** to activate address validation, Chancery SMS recalculates all students' geocodes. When Next-Year Preparation is run, students with unmapped geocodes who were enrolled in a projected school through the Next-Year Preparation process are deleted from those projected schools; students who have been manually enrolled are not affected.

Permission to set up Automatic Address Validation

To set up Geocode Mapping, you need the following permissions:

To	You need this permission	Set to
Set district preferences to support address validation	District > District Preferences	Edit
Assign school graduation and entry grades	Schools > School Basics, Contact and Comments	Edit
View, change, delete, and merge the Address Exception Reason Setup List	Setup Lists > Address Exception Reason	Merge
View, change, delete, and merge the Geocode Setup List	Setup Lists > Geocode	Merge
View, change, and delete the Geocode Map	District > Geocode Maps	Edit
Import address ranges from an external source	Import > Import Address Ranges	Yes
View, change, and delete address ranges	District > Edit Address Ranges	Yes
Specify whether address exception approvals for returning students are copied to the planning calendar	District > Address Validation NYP Projections	Edit or Delete

Permission to perform Automatic Address Validation

To perform address validation, you need the following permissions:

To	You need this permission	Set to
View, change, and delete address exceptions	District > Address Exception	Delete
Override the creation of an address exception record when a student moves out of zone for their enrolled school.	District > Address Exceptions - chg addr override	Yes

To	You need this permission	Set to
Enroll students	Students > Enroll Student in School	Yes
	Students > Student Status Codes	Edit or Delete
Change student addresses	Students > Demographic Data	Edit
	Students > Student Address Phone	Edit
Perform a mid-year transfer	Students > Mid Year Student Transfers	Edit
Select an address validation exception reason	Students > Edit address validation override reason	Yes
Access other schools in the School dropdown on the Add Status Code page	Students > Multiple School Status Access	Yes
Change the student's Home School	Students > Modify Home School	Yes

Step 1: Set District Preferences

Before you can set up automatic address validation, you must set the year-end transfer method to “Geocode Map” and turn on address validation. Once address validation is on, you can set up address ranges and the Geocode Map. For information about the Geocode Map year-end transfer method, see the *Chancery SMS Next Year Preparation and Year-End Processing Guide*.

Caution: Do not activate address validation until it is completely set up. For more information about activating address validation, see “Step 6: Activate Automatic Address Validation” on page 34.

To select the Year-End Transfer Method and turn on Automatic Address Validation:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the District Setup page, under **District**, click **Preferences**.
- 4 Scroll down to the **Required Enrollment Fields** section and make sure **Geocode** is NOT in the **Assigned Items** list.
- 5 Scroll down to the **Year-End Transfer** section. From the **Year End Transfer Method** dropdown, select **Geocode Map**.
- 6 In the **Address Validation** section, select **Use Address Validation**.
 - ⓘ **Caution:** At this point, do NOT select **Check student addresses against school zones**. After you set up Geocode Maps and address ranges, you select this option to activate address validation. For more information, see “Step 6: Activate Automatic Address Validation” on page 34. If you want to set up Chancery SMS to use Google Maps for address validation, see [Validating addresses with Google Maps \(p. 1\)](#).
- 7 In the **Student Number** section, from the **Generation Method** dropdown, select one of the following options [\[Table 13\]](#):

TABLE 13

Option	Description
Automatic	Chancery SMS automatically generates address range numbers, starting at 1 and incrementing by 1. You cannot change these numbers.
Manual	You manually enter address range numbers when you define address ranges. For more information, see “Step 5: Set up address ranges” on page 32.

Note: This setting does not affect imported address range numbers. It applies only to new address ranges created in Chancery SMS.

- 8 Click **Save**.
 - ① If you changed the year-end transfer method, a warning dialog opens. Click **OK**.

Step 2: Assign each school’s graduation and entry grade levels

Since geocodes are associated with specific grade levels at schools, you must identify the grade at which students graduate from the school and the entry grade or grades at which students can enter the school. When you set up the Geocode Map, you can only assign geocodes to the grades identified as entry grades for the school. For more information about setting up the Geocode Map, see “Step 4: Define the Geocode Map” on page 31.

While most schools have only one entry grade, some schools may have more than one. For example, the elementary school for Geocode A may offer Grades 1 to 5, while the elementary school for Geocode B offers Grades 1 to 6. The middle school that these students go to would have two entry grades: Grade 6 for students in Geocode A; and Grade 7 for students in Geocode B.

Graduation and entry grades are the same in the active calendar and the planning calendar; therefore you only need to be set up once for both calendars.

To specify graduation and entry grades for schools:

- 1 Log on as a district administrator.
- 2 In the control bar, click **District Setup**.
- 3 On the District Setup page, under **District**, click **Address Validation Setup**.
- 4 If the **Address Validation** link is not available, make sure that, on the District Preferences page, **Use Address Validation** is selected.
- 5 On the Address Validation Setup page, under **Step 1**, click **School Entry Grade Levels**.
- 6 On the Schools page, click a school name.
- 7 On the School page, in the **Basics** section, from the **Graduation Grade** dropdown, select the highest grade students can attend at this school.
- 8 In the **School Entry Grades** section, select at least one grade from the **Available Items** list and move it to the **Assigned Items** list.

FIGURE 10

A Grade levels that have been assigned geocodes on the Geocode Map are shown below the Available Items and Assigned Items lists.

Notes:

- ① If the **School Entry Grades** section is not available, make sure the year-end transfer method is set to **Geocode Map**. For more information, see “Step 1: Set District Preferences” on page 27.
 - ① When you assign a geocode to a school’s entry grade on the Geocode Map, that entry grade no longer appears in the **Available Items** and **Assigned Items** lists. Entry grades in the Geocode Map are listed below the **Available Items** list. For more information, see “Step 4: Define the Geocode Map” on page 31.
- 9 Click **Save** and close the window.
- 10 Repeat steps 4 to 8 for each school in the district.

Step 3: Define Setup Lists for Automatic Address Validation

To prepare for Automatic Address Validation, define the possible reasons for enrolling out-of-zone students, and then set up your district’s geocodes.

Setup lists are the same in the active calendar and the planning calendar, so you only need to be set them up once for both calendars.

Defining possible exception reasons

In general, students enroll in the school that serves the geographical area where they live — their zoned school. If a student wants to enroll in a school outside their geographical area, users can select a reason the student is enrolling in an out-of-zone school.

If the **Require district approval for address exceptions** option is selected in district preferences, then an exception reason must be specified for all out-of-zone enrollment requests.

The exception reasons are defined in the Exception Reason setup list.

You can manually set up address exception reasons or import them. The following procedure describes the process for manually defining exception reasons. For information about importing setup list items, see the *Chancery SMS Import/Export Guide*.

To define address exception reasons manually:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the District Setup page, under **District**, click **Address Validation Setup**.
- 4 On the Address Validation Setup page, under **Step 2**, click **Address Exception Reasons**.
- 5 On the Address Exception Reason - Setup List page, do any of the following:

To	Do this
Add an address exception reason	<ol style="list-style-type: none">1 Click Add.2 In the Add List Item dialog, enter the required information.3 Click OK.
Edit an address exception reason	<ol style="list-style-type: none">1 Click the address exception reason.2 On the Edit List Item page, change the information as required.3 Click OK.
Delete an address exception reason	<ol style="list-style-type: none">1 Click Delete.2 On the Delete List Items page, select the item you want to delete.3 Click OK.

- 6 Repeat Step 5 until all address exception reasons are set up.

Setting up Geocodes

In Chancery SMS, geocodes are geographical identifier codes that are used to define geographical areas. When you set up address ranges for Automatic Address Validation, you associate each geocode with specific address ranges. Then, when you set up the Geocode Map, you assign geocodes to entry grade levels at specific schools. Students whose addresses are within the range associated with a specific geocode are considered in zone for the school that is assigned that geocode.

Geocodes are defined in the Geocode setup list. Before you can assign geocodes to address ranges and schools, you must ensure that all the geocodes in your district have been added to the Geocode setup list.

Since geocodes can include letters, as well as numbers, they are sorted by digit. For example, 1, 2, and 12 are sorted 1, 12, 2. To ensure geocodes sort in a logical order, pad geocodes with leading zeros to make them the same length. For example, if geocodes can have up to four digits, enter 1 and 2 as 0001 and 0002.

You can enter geocodes manually or import them. The following procedure describes the process for manually defining geocodes. For information about importing setup list items, see the *Chancery SMS Import/Export Guide*.

To manually enter geocodes:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the District Setup page, under **District**, click **Address Validation Setup**.
- 4 On the Address Validation Setup page, under **Step 2**, click **Geocodes**.

5 On the Geocode - Setup List page, do any of the following:

To	Do this
Add a geocode	<ol style="list-style-type: none"> 1 Click Add. 2 In the Add List Item dialog, enter the required information. 3 Click OK.
Edit a geocode	<ol style="list-style-type: none"> 1 Click the geocode. 2 On the Edit List Item page, change the information as required. 3 Click OK.
Delete a geocode	<ol style="list-style-type: none"> 1 Click Delete. 2 On the Delete List Items page, select the item you want to delete. 3 Click OK.

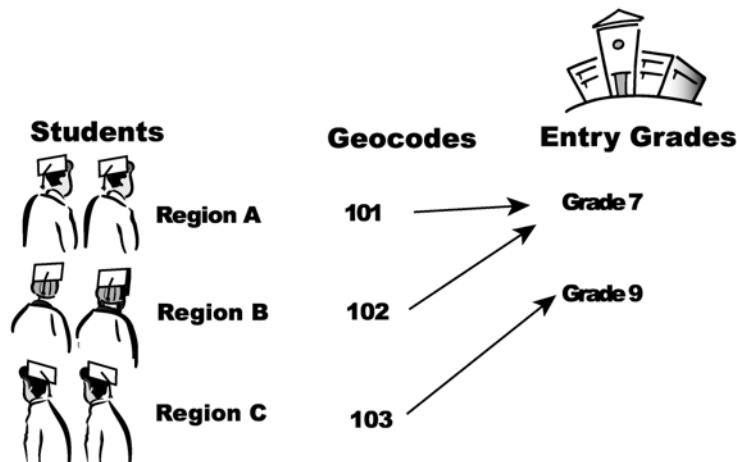
6 Repeat Step 5 until all geocodes are set up.

Step 4: Define the Geocode Map

To use Automatic Address Validation, you must define a Geocode Map to associate geocodes with entry grades at each school. Students who live within the address range associated with the geocode are considered to be in the school's zone.

Since schools can serve multiple geographic areas, each school entry grade can be assigned multiple geocodes.

FIGURE 11



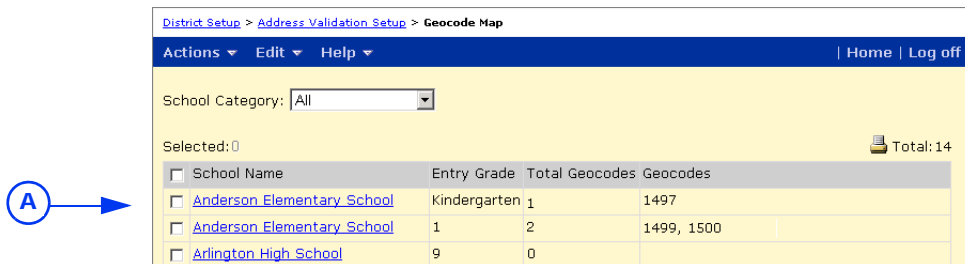
To ensure students in each geocode are sent to one specific school for each grade level, each geocode can only be assigned to one school for each grade level. Thus, on the Geocode Map page, you select a specific entry grade at a school and assign one or more geocodes to that entry grade. Only geocodes that have not been assigned to any other school for the same grade level are available to be assigned. For example, if grade 7 at Miller Park school is assigned geocodes 101 and 102, geocodes 101 and 102 are not available to grade 7 for any other school in the district.

To allow for changes to the Geocode Map from year to year, the planning and active calendars can have different Geocode Maps. When you create a planning calendar, the Geocode Map defined in the active calendar is copied to the planning calendar. You can then make changes to the Geocode Map in the planning calendar without affecting the Geocode Map in the active calendar.

To set up the Geocode Map:

- 1 Log on as a district administrator.
- 2 Make sure you are working in the correct calendar.
- 3 In the control bar, under **Admin**, click **District Setup**.
- 4 On the District Setup page, under **District**, click **Address Validation Setup**.
- 5 On the Address Validation Setup page, click **Geocode Map**.

FIGURE 12



A The Geocode Map page only displays schools that have been assigned entry grades. For information about setting up entry grades, see “Step 2: Assign each school’s graduation and entry grade levels” on page 28.

- 6 In the **School Name** column, click the name of the school you want to set up.
- 7 In the **Available Geocodes** list, select at least one geocode and move it to the **Selected Geocodes** list.
- 8 Click **OK**.
- 9 Repeat steps 6 to 8 for every entry grade listed for every school in your district.

Step 5: Set up address ranges

Automatic address validation uses address ranges to determine the boundaries for a specific school. An address range is a group of house numbers on a particular street. The address range is associated with a geocode and all students who reside within the address range are assigned that geocode. A school grade level will also be associated with the geocode, and students in that grade level must enroll in the school with the same geocode or they are considered to be out of zone.

When setting up address ranges, you can have:

- A different address range for each side of the street, identified by odd or even house numbers
- A single address range for the entire street
- Multiple address ranges for a single geocode
- One set of address ranges for the active calendar and another set for the planning calendar

However, you cannot have one address range that falls within two geocodes; if a street spans two geocodes, create a separate address range for each.

To allow for changes to address ranges from year to year, the planning and active calendars can have different address ranges. When you create a planning calendar, address ranges set up in the active calendar are copied to the planning calendar. You can then make changes to the address ranges in the planning calendar without affecting the address ranges in the active calendar.

You can enter address ranges manually or import them. The following procedure describes the process of manually entering address ranges. For information about importing address ranges, see the *Chancery SMS Import/Export Guide*.

To manually enter address ranges:

- 1 Log on as a district administrator.
- 2 Make sure you are working in the correct calendar.
- 3 In the control bar, click **District Setup**.
- 4 On the District Setup page, under **District**, click **Address Validation Setup**.
- 5 On the Address Validation Setup page, click **Address Ranges**.
- 6 On the Address Ranges page, to display existing address ranges, do one of the following:

From the List dropdown, select a previous search criteria.

OR

Expand the **Address Range Search** panel. Click **Display All Records** or specify the search criteria and click **Search**.

- 7 Do any of the following:

To	Do this
Add an address range	<ul style="list-style-type: none"> • From the Actions menu, click Add Address Range.
Edit an address range	<p>Caution: If you change an existing address range, existing student addresses may become invalid.</p> <ul style="list-style-type: none"> • Click the address range.
Delete an address range	<p>Caution: If you delete an address range, any student address in that range will be invalid.</p> <ol style="list-style-type: none"> 1 Select the address range. From the Actions menu, click Delete Address Range. 2 Click OK, and then skip the remaining steps.

- 8 On the Add or Edit Address Range page, enter the following information, as required [Table 14]:

TABLE 14

Field	Description
Range No.	Enter a unique number that identifies this address range. <p>Note: If District Preferences have been set to automatically generate address range numbers, you cannot modify this field. For more information about setting district preferences, see “Step 1: Set District Preferences” on page 27.</p>
Geocode	Select a geocode for this address range. If there are existing address ranges for a geocode, when you select that geocode, the rest of the page refreshes to display the details of the geocode.
Address No. Range From / To	Enter the starting and ending house numbers for this address range.

Field	Description
Odd/Even	Do one of the following: <ul style="list-style-type: none"> to include both sides of the street, select All. to include only odd house numbers, select Odd. to include only even house numbers, select Even. If you select odd or even, the values entered in the Address no. range fields must also be odd or even numbers.
Street Name	Enter the name of the street.
Type	If appropriate, select the type of street, such as Street or Road.
Dir.	If the street has a direction after the street name, such as South, select the direction.
City	Select the city name.
State	Select the state name.
Zip Code	Enter the zip or postal code.
Description	Enter a description of up to 100 characters (optional)

9 Click **Save**.

10 If a warning message appears, click **OK**.

Step 6: Activate Automatic Address Validation

After you define the Geocode Map and address ranges, you can activate Automatic Address Validation. Activating address validation involves selecting **Check student addresses against school zones** on the District Preferences page. When address validation is activated, it automatically checks addresses when a student is enrolled or their address is changed.

Caution: You must set up all geocodes and address ranges **BEFORE** you activate Automatic Address Validation. When you activate address validation, Chancery SMS recalculates all students' geocodes. When Next-Year Preparation is run, students with unmapped geocodes are deleted from their projected schools if Next-Year Preparation enrolled them in that school; students who have been manually enrolled are not affected.

When you activate Automatic Address Validation, you can select several options that control how it affects the enrollment process. The key decisions you must make are:

- **Can users enter an address or do they have to select an address range?**

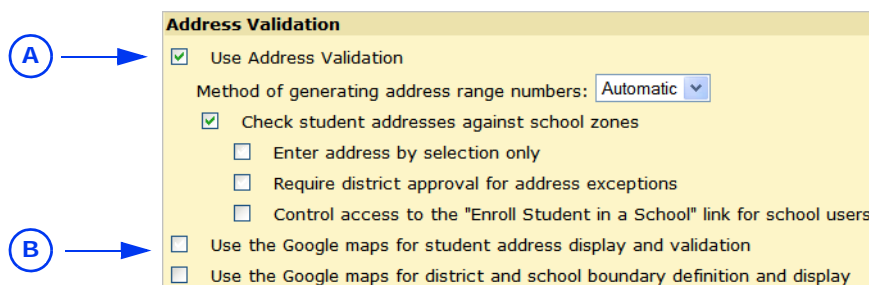
The advantage of selecting address ranges is that users will not receive error messages about addresses that do not match the district's address format or existing address ranges. The disadvantage is that every address in your district, including all new streets, must be set up in an address range before users can select those addresses during enrollment. If district approval is required for out-of-zone enrollments, users cannot enroll students if their address is invalid. To require users to select an address, select the **Enter address by selection only** option. If you decide that users must always select a predefined address range, do not set up Google Maps for boundary validation. You can, however, set up Google Maps for address validation so that users can confirm that an address exists. For further information, see [Validating addresses with Google Maps \(p. 1\)](#).

- **Can schools enroll out-of-zone students or is district approval required?**
The advantage of requiring district approval is that it centralizes decision making about out-of-zone students. The disadvantage is that district users must approve all out-of-zone students before they can be enrolled. Schools can register the students, but cannot enroll them in out-of-zone schools until a pre-approved address exception has been entered for the enrollment. If district approval is required, select the "Require district approval for address exceptions" option.
If district approvals are required, you can also set up Chancery SMS to copy address exception approvals from the active calendar to the planning calendar for students returning to the same out-of-zone school. If address exception approvals are not copied to the planning calendar, students returning to the same out-of-zone school are enrolled in their zoned school until an approved address exception is entered in the planning calendar. For more information about copying address exceptions to the planning calendar, see "Step 7: Configure NYP projections for returning students" on page 36.
- **Can school users enroll students who are already enrolled in a different school?**
The advantage of allowing school users to enroll students who are already enrolled in another school is that it creates a more streamlined process when students are changing schools. The new school can enroll the student even if the old school has not yet processed a withdrawal. The disadvantage is that schools can "steal" students from other schools. Depending on the size and policies of your district, the process of requiring a student to be unenrolled from their previous school before a new school can enroll them might be necessary to ensure that school funding rules are not violated. To prevent schools from "stealing" students, select the "Control access to the 'Enroll Student in a School' link for school users" option.

To activate Automatic Address Validation:

- 1 Log on as a district administrator.
- 2 Make sure you are working in the active calendar.
- 3 In the control bar, under **Admin**, click **District Setup**.
- 4 On the District Setup page, under **District**, click **Preferences**.
- 5 In the **Address Validation** section, select **Check student addresses against school zones**.

FIGURE 13



- A Select to activate Automatic Address Validation.
- B For information about using Google Maps for address validation, see Setting up Chancery SMS for Google Maps address validation (p. 11).
- 6 Select any of the following options, as required [Table 15]:

TABLE 15

Option	Description
<p>Enter address by selection only</p>	<p>If this option is selected, when users enroll students, they cannot enter student addresses manually. Instead, the user must click Select Address and then select the address range that matches the student’s address.</p> <p>Once an address range is selected, users can enter the student’s apartment number and select their area, county, and country, if necessary.</p> <p>This option ensures consistency in address format and reduces the chance of entering an address incorrectly.</p> <p>If this option is not selected, users can enter student addresses either manually or by selecting from pre-entered address ranges.</p>
<p>Require district approval for address exceptions</p>	<p>If this option is selected, the district must approve out-of-zone enrollments. School users cannot enroll students in out-of-zone schools unless a pre-approved address exception has been entered at the district. If a pre-approved address exception has not been created, users can send an approval request. The information entered for the enrollment is not saved. When the district approves the request, to enroll the student, the user must re-enter their enrollment information.</p> <p>If this option is not selected, users can enroll students in out-of-zone schools. District users can view a list of out-of-zone students on the Address Exceptions page but, since approval is not required, the fields on this page are view only.</p> <p>If you select this option, also determine if existing approvals for students returning to the same out-of-zone school should be copied to the planning calendar during Next-Year Preparation. For more information, see “Step 7: Configure NYP projections for returning students” on page 36.</p>
<p>Control access to the “Enroll Student in a School” link for school users</p>	<p>If this option is selected, for school users, the Enroll Student in a School link on the Registration/Enrollment Steps page is disabled if the student is currently enrolled at another school and the student does not have an approved address exception for the school users’ school. Use this option to prevent schools from “stealing” students who are already enrolled in a different school.</p> <p>If this option is not selected, the link is available for school users to enroll students in another school from the Registration/Enrollment Steps page even if the student is already enrolled in a different school.</p>

7 Click **Save** and close the District Preferences page.

Step 7: Configure NYP projections for returning students

When the Next-Year Preparation nightly process runs, Chancery SMS can copy the approved address exception records in the active calendar to the planning calendar for students who are set to return to the same out-of-zone school in the next year. To set up Chancery SMS to copy address exception approvals from the active calendar to the planning calendar, you specify which schools will copy approvals. Once address exception approvals are copied to the planning calendar, you can modify the approvals in the planning calendar without affecting the active calendar.

If address exception approvals are not copied to the planning calendar, students returning to the same out-of-zone school are enrolled in their zoned school in the planning calendar. When an address exception approval is created in the planning calendar, the next time the Next-Year Preparation nightly process runs, the student is withdrawn from their zoned school and enrolled in their requested school.

If students are currently enrolled in an out-of-zone school, but do not have an approved address exception in the active calendar, an address exception approval is not created in the planning calendar. For example, if a student's address put them out of zone for a school after they were enrolled in the school, Chancery SMS does not create an address exception approval for that student in the active calendar. Since the approval doesn't exist in the active calendar, it cannot be copied to the planning calendar.

If you remove a school from the **Selected Schools** list after the planning calendar is created, the next time the Next-Year Preparation nightly process runs, address exception approvals that were copied from the active calendar are removed from the planning calendar for that school. Address exception approvals that were created or modified in the planning calendar are not affected. Any out-of-zone students returning to that school who no longer have an address exception approval are withdrawn from that school and enrolled in their zoned school until an approved address exception approval is entered in the planning calendar.

To set up address exception approvals for the planning calendar:

- 1 Log on as a district administrator.
- 2 In the control bar, click **District Setup**.
- 3 On the District Setup page, under **District**, click **Address Validation Setup**.
- 4 On the Address Validation Setup page, under **Step 5**, click **School-by-School Setup**.
- 5 On the School-by-School Setup page, from the **Available Schools** list, select the schools that will copy address exception approvals to the planning calendar and move them to the **Selected Schools** list.

OR

To select all schools, click to move all the schools to the **Selected Schools** list.

- 6 Click **OK**.

Setting Up Address validation for Next-Year Preparation

Before you run Year-End Processing, make sure Automatic Address Validation is set up correctly for the planning calendar. Geocode Maps, address ranges, and address exceptions can be different in the active and planning calendars. When you create a planning calendar, the setup for Geocode Maps and address ranges is copied from the active calendar to the planning calendar. Once the address validation setup is copied, you can update these settings in the planning calendar without affecting the setup in the active calendar.

For more information about setting up these items, see Step 3: Define Setup Lists for Automatic Address Validation (p. 29), Step 4: Define the Geocode Map (p. 31), and Step 5: Set up address ranges (p. 32).

If you make changes to the Geocode Map or address ranges that affect the schools that students are projected into in the planning calendar, the students' zoned schools are updated immediately. Students are enrolled in the appropriate school the next day, after the Next-Year Preparation nightly process runs.

Note: If, for the planning calendar, a student is not assigned a geocode, the assigned Geocode is not mapped to a school in the district, or the student’s address is invalid, the student is withdrawn or graduated from their current school as of the end of the current school year, but not enrolled in another school during the Next-Year Preparation nightly process.

Depending on how address validation is set up, an approved address exception record may be required before students can be enrolled in their requested schools. If students are returning to an out-of-zone school and have an approved address exception in the active calendar, the Next-Year Preparation nightly process can copy those address exception approvals to the planning calendar. For more information about setting up Chancery SMS to copy address approvals to the planning calendar, see Step 7: Configure NYP projections for returning students (p. 36).

If a student requests enrollment in an out-of-zone school and district approval is required for address exceptions, the status of the address exception record in the planning calendar determines which school the student is enrolled in for the planning calendar [Table 16].

TABLE 16

Address Exception Status	In the planning calendar...
Approved	The student is enrolled in their requested school.
Rejected	The student is enrolled in their zoned school.
Pending	The student is enrolled in their zoned school. If the pending status is changed to approved, the next time the Next-Year Preparation nightly process runs, the student is withdrawn from their zoned school and enrolled in their requested school.

For information about running Next-Year Preparation, see your *Chancery SMS Next-Year Preparation and Year-End Processing Guide*.

To verify the student’s planning calendar zoned school and set their requested school:

- 1 Log on as a school or district administrator.
- 2 Search for and open a student record.
- 3 On the Student Demographics page, click the **Personal Info** tab.
- 4 On the **Personal Info** tab, scroll down to the **Planning District Calendar (For Home School)** panel.
- 5 Verify or enter the following information [Table 17], as required:

TABLE 17

Field	Description
Zoned School (Planning)	Displays the student’s zoned school, which is based on the student’s physical address, their projected grade level, and the Geocode Map and address range settings defined for the planning calendar.
Requested School	To enroll the student in a school other than their zoned school, select the school. Students cannot be projected to controlled-enrollment schools. Schools that control enrollment are not included in the list of requested schools. To enroll students in a controlled-enrollment school, you must manually enroll them once they are offered a position in a controlled-enrollment program at the school. For more information, see the <i>Chancery SMS Program Management Guide</i> .

Field	Description
Exception Reason	If the student's requested school is different than their zoned school, select the reason the student is requesting enrollment in an out-of-zone school.
Next Year Projected Grade	Shows the grade the student will be enrolled in for the planning calendar.

- 6 Click **OK**.
- 7 If the requested school is out of zone for the student, the Address Exception dialog opens. Select an address exception and click **OK**.

Reviewing and approving requests for out-of-zone students

If, on the District Preferences page, the **Require district approval for address exceptions** option is selected, a district administrator can use the Address Exceptions page to review out-of-zone requests, accept or reject those requests, and determine how many students are enrolled in out-of-zone schools.

Address exceptions can be different in the active and planning calendars. You can set up Chancery SMS to copy address exception approvals from the active to planning calendar for students returning to the same out-of-zone school. For more information, see [Step 7: Configure NYP projections for returning students \(p. 36\)](#).

Each time the Next-Year Preparation nightly process runs, it updates the address exception approvals that it created in the planning calendar. However, if you modify or create address exception approvals in the planning calendar, the Next-Year Preparation nightly process does not change those records.

If the zoned school matches the requested school, a nightly process automatically removes pending exception records.

To process student address exceptions:

- 1 Log on as a district administrator.
- 2 Make sure you are working in the correct calendar.
- 3 In the control bar, under **Admin**, click **District Setup**.
- 4 On the District Setup page, under **District**, click **Address Exceptions**.
- 5 On the Address Exceptions page, in the **Address Exception Search** panel, specify the search criteria and click **Search**.

OR

Click **Display All Records** to show all address exceptions.

- 6 On the **Student Address Exceptions** panel, review the following information [\[Table 18\]](#):

TABLE 18

Field	Description								
Status	<p>The student status can be one of the following statuses:</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Pending</td> <td>The student is waiting for a decision to be made regarding their request. They cannot be enrolled in this requested school unless the status is changed to Approved.</td> </tr> <tr> <td>Approved</td> <td>The student can be enrolled in their requested, out-of-zone school.</td> </tr> <tr> <td>Rejected</td> <td>The student cannot be enrolled in this requested school.</td> </tr> </tbody> </table>	Status	Description	Pending	The student is waiting for a decision to be made regarding their request. They cannot be enrolled in this requested school unless the status is changed to Approved .	Approved	The student can be enrolled in their requested, out-of-zone school.	Rejected	The student cannot be enrolled in this requested school.
Status	Description								
Pending	The student is waiting for a decision to be made regarding their request. They cannot be enrolled in this requested school unless the status is changed to Approved .								
Approved	The student can be enrolled in their requested, out-of-zone school.								
Rejected	The student cannot be enrolled in this requested school.								
Student Name	Click the student's name to display the student's demographic information.								
Exception	<p>The possible exceptions are:</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Address Mismatch</td> <td>The student's address does not match any address in the address range tables.</td> </tr> <tr> <td>Out of Zone</td> <td>The student's zoned school is different from their requested school.</td> </tr> </tbody> </table>	Status	Description	Address Mismatch	The student's address does not match any address in the address range tables.	Out of Zone	The student's zoned school is different from their requested school.		
Status	Description								
Address Mismatch	The student's address does not match any address in the address range tables.								
Out of Zone	The student's zoned school is different from their requested school.								
Zoned School	Displays the student's zoned school, which is based on the student's geocode and grade level.								
Requested School	Displays the school the student wants to attend.								
Exception Reason	<p>Exception reasons default from other pages, such as the student's Enrollment page. If required, select the override reason. When you change a student's Status, any change to the exception reason is saved.</p> <p>The exception reasons are defined in District Setup > Address Validation Setup.</p>								

7 Do any of the following [\[Table 19\]](#):

TABLE 19

To	Do this
Approve the student's enrollment in the requested school	<ol style="list-style-type: none"> 1 Select one or more students. 2 From the Actions menu, click Approve Exception. 3 When a student is approved, the student can enroll in the requested school.
Reject the student's enrollment in the out-of-zone school	<ol style="list-style-type: none"> 1 Select one or more students. 2 From the Actions menu, click Reject Exception. 3 When a student is rejected, the student cannot enroll in the requested school and must enroll in the zoned school.
Change the status back to Pending	<ol style="list-style-type: none"> 1 Select at least one student. 2 From the Actions menu, click Pending Exception. <p>If, in the planning calendar, a student is enrolled in an out-of-zone school and then the status of the address exception record for that enrollment is changed back to Pending, the next time the Next-Year Preparation nightly process runs, the student is withdrawn from their requested school and enrolled in their zoned school. If the status of an address exception approval is changed in the active calendar, the student is not withdrawn from the out-of-zone school.</p>

8 When all changes are complete, click **OK**.

Note: If you change a student's status, any change to the student's exception reason is saved. If you change an exception reason without changing the Status, click **OK** to save the changes or click **Cancel** to discard changes to the exception reason.

Creating manual address exceptions for out-of-zone students

If a district knows ahead of time that a student is requesting enrollment at an out-of-zone school, the district can create and approve address exceptions prior to the student enrolling in the school. For example, if the district has a list of students who are to be enrolled in a magnet school, the district can create and approve address exceptions for those students so their enrollments can be processed when the school enrolls them.

Note: In addition to having appropriate permissions, on the District Preferences page, make sure **Require district approval for address exceptions** is selected.

Adding address exceptions

- 1 Log on as a district administrator.
- 2 In the control bar, click **District Setup**.
- 3 In the District Setup page, under **District**, click **Address Exceptions**.

4 Do one of the following:

To	Do this
Add an Address Exception	<ul style="list-style-type: none"> From the Actions menu, click Add Exception. If the Actions menu is not available, make sure Require district approval for address exceptions is selected on the District Preferences page.
Delete an Address Exception	<ol style="list-style-type: none"> In the Student Address Exceptions panel, select one or more exceptions. From the Actions menu, click Delete Exceptions. Skip the remaining steps. <p>Note: If you delete an address exception approval from the active calendar and a student is enrolled in the out-of-zone school, the student is not withdrawn from the school. If you delete an address exception approval from the planning calendar after the Next-Year Preparation nightly process has enrolled the student in the out-of-zone school, the next time the nightly process runs, the student is withdrawn from the out-of-zone school and enrolled in their zoned school.</p>

- If you are adding an address exception, search for the students you want to add an exception for.
- In the **Search Results** panel, select one or more students.
- In the **Address Exception** panel, enter the following information [Table 20]:

TABLE 20

Field	Description
Status	Indicate the status of the student's address exception. Choose from: <ul style="list-style-type: none"> Pending Approved Rejected The student can only be enrolled in this requested school if their address exception is set to Approved .
Requested school	Select the school the student wants to enroll in.
Exception reason	Select an exception reason.

- Click **OK**.